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# Episcopal Diocese of Rochester

*Joy in Christ, a way of life*



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## Employee Handbook

*Updated January 2019*



<b>Introduction .....</b>	<b>5</b>
Welcome .....	6
Vision and Mission Statement .....	7
Preface .....	8
At-will Employment Statement.....	9
<b>Employment Policies .....</b>	<b>10</b>
Employment Termination Policy .....	11
Equal Employment Opportunity.....	13
Recruitment and Placement Policy.....	13
I-9 Immigration Reform Policy .....	15
<b>Workplace Conduct .....</b>	<b>16</b>
Code of Ethics Policy.....	17
Individuals with Disabilities .....	17
Complaint Policy .....	20
Drug-free Workplace Policy .....	21
Drug and Alcohol Testing Policy.....	22
Harassment Policy .....	26
Sexual Harassment Policy.....	28
Standards of Conduct Policy .....	35
Violence in the Workplace Policy .....	36
Weapons in the Workplace Policy .....	37
<b>Employee Benefits .....</b>	<b>38</b>
Extension of Benefits .....	39
Health Insurance.....	40
Dental Insurance.....	41
Vision Care Plan .....	42
Pre-Tax Premium Plan .....	43
Health Savings Account .....	44
Life Insurance .....	45
Retirement Income-Church Pension Fund .....	46
Short-Term Disability .....	48
Long-Term Disability Insurance.....	49
Social Security .....	50

## Employment Policies

---

Employee Assistance Program .....	51
Domestic Partner Benefits .....	52
Other Benefits .....	54
<b>Time Away from Work .....</b>	<b>55</b>
Federal Family and Medical Leave Policy .....	56
NYS Paid Family Leave .....	66
Jury Duty Policy .....	67
Military Leave Policy .....	68
Vacation and Paid Time Off Policy .....	70
Sick Time Policy .....	72
Voting Leave .....	73
Bone Marrow & Blood Donation Leave .....	74
Disability Leave .....	75
Sabbatical Leave .....	76
<b>Information &amp; Office Security .....</b>	<b>77</b>
Facility Access & Visitors Policy .....	78
General Computer Usage Policy .....	79
Voicemail, Email & Computer Systems .....	80
<b>General Practices .....</b>	<b>81</b>
Anti-discrimination Policy .....	82
Attendance and Standard Working Hours Policy .....	83
Business Expense Reimbursement Policy .....	84
Diocesan Car Policy .....	87
Dress Code (General) .....	89
Employee Classification Policy .....	90
Employment of Relatives Policy .....	91
Media Relations Policy .....	92
Member & Visitor Relations .....	93
Online Social Networking Policy .....	94
Open Door Policy .....	96
Whistleblower Protection Policy .....	97
Outside Employment .....	98
Overtime Pay Policy .....	99
Pay Periods and Check Distribution Policy .....	100

## Employment Policies

---

Performance Evaluation Policy.....	103
Personnel Records Policy .....	104
Phone Call Policy.....	106
Position Descriptions .....	107
Protected Health Information Privacy .....	108
Safety Policy .....	109
Smoke-free Environment Policy .....	110
Solicitations, Distributions & Use of Bulletin Boards Policy.....	111
Workers' Compensation Policy.....	112
<b>Appendix .....</b>	<b>113</b>
Application for Re-employment Following Military Leave.....	114
Certificate of Entrance into Military Service.....	115
Certificate of Return from Military Service .....	116
Employee's Request to Take Voting Leave .....	117
Report of Jury Duty Pay .....	118
Vacation Request Form .....	119
Receipt of The Episcopal Diocese Employee Handbook.....	120
Receipt of Harassment Policies.....	121

# Introduction

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### Welcome

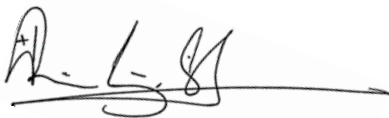
Work is sanctified by Christ as part of restoring all things in God's new creation. Jesus reminds us that all work is ministry or an act of serving some wholesome eternal purpose. The Episcopal Diocese of Rochester has a long and proud history as an employer responding to context by valuing the dignity of every person. As an Episcopal Diocese of Rochester employee, you are an important part of our progressive heritage.

This handbook summarizes many of your privileges, benefits, and responsibilities as an employee of our organization. If you are a new employee, it will be helpful in acquainting you with our organization's philosophies and human resources practices. If you are already a member of the Episcopal Diocese of Rochester team, this handbook should prove to be a useful reference. Above all, I hope it will promote consistency, fairness, and understanding throughout our organization.

To maintain the necessary flexibility in the administration of policies and procedures, the Episcopal Diocese of Rochester reserves the right to change, revise, or terminate any of the policies and/or benefits discussed in this manual with or without notice. After you have read your handbook, please keep it handy for future reference and updating.

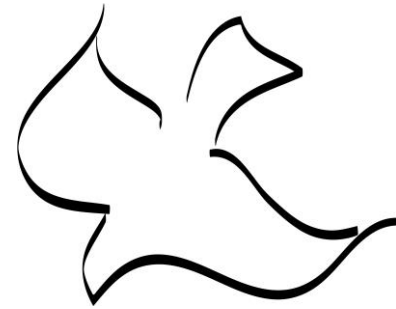
Welcome to the Episcopal Diocese of Rochester! I am glad that you have joined our beloved community and I hope that you will find your work among us to be challenging, innovative and rewarding.

Sincerely,

A handwritten signature in black ink, appearing to read 'P. Singh', with a long horizontal line extending to the right.

Bishop Prince G. Singh  
Eighth Bishop in Rochester

## Vision and Mission Statement



**VISION:** Joy in Christ, a way of life.

Our vision and focus are seen through the lenses of:

- Relationship
- Leadership
- Stewardship

**MISSION:** To grow and develop congregations spiritually, numerically and in missional leadership.

With Christ's help, we seek to fulfill our mission and vision through:

- *Radical hospitality:* Embracing all as equal and beloved members of Christ's body.
- *Passionate spirituality:* Encouraging all members of Christ's church to be on fire with the Gospel.
- *Thoughtful engagement:* Creating safe environments for discussion and works related to justice, peace and equality.

### Preface

This handbook\* outlines the Human Resources policies and Benefit Plans currently in effect for the Episcopal Diocese of Rochester. The handbook is intended for all employees of the Diocesan Office, Diocesan Missions and may be adopted by Parishes. The Episcopal Diocese of Rochester, Member Parishes and Missions are also referred to in the Handbook using terminology such as “The Episcopal Diocese”, “Diocese”, "Company" "Church" or “Organization.”

New or revised policies are issued periodically and are effective as of the date shown at the bottom of the page. The statements regarding our organization’s policies, procedures, and benefits are for information purposes only. They do not constitute a contract for employment, either expressed or implied. Our organization adheres to the principle of employment-at-will which preserves the right of either the employee or the employer to terminate the employment relationship at any time, with or without cause. No manager, supervisor, or employee of the Episcopal Diocese of Rochester has any authority to enter into an agreement for any employment other than at will. Only the Bishop has the authority to make any such agreement and then only if it is reduced to writing.

Important Information about Benefits as our organization evolves, we will continue to review and revise these human resources policies and benefit programs. The organization reserves the right to alter, reduce, or terminate any pay practices, policies, premium contributions, benefits and benefit plans, in whole or in part, without notice. Any such change may affect retirees and beneficiaries, as well as active employees. The benefit information found in this handbook is intended to provide an overview of the benefit plans. The actual benefits are controlled by the terms of the applicable plan documents and insurance policies. Questions regarding the interpretation of these plans will be answered in accordance with the actual plan documents and insurance policies, rather than the summaries contained in this handbook. Employees may obtain copies of these documents from the Benefits Administrator. The organization and/or the plan administrator have the sole discretion to determine the eligibility for benefits and to interpret and administer these benefit plans.

\* This handbook and its policies are effective January 1, 2019 and supersede all other personnel manuals and personnel policies previously distributed by the organization. To avoid confusion, please discard any copies of previously published employee handbooks.



### **At-will Employment Statement**

While we hope to have a long and profitable relationship with you, your employment with The Episcopal Diocese is voluntary and is subject to termination by you or the Organization at will, with or without cause, and with or without notice, at any time.

The Episcopal Diocese may have a disciplinary system in place, this system does not have to be used—the Organization may make the decision to terminate you without first taking these disciplinary steps.

None of the information provided in our policies signifies a contractual agreement or should be interpreted to conflict with, eliminate or modify in any way your employment-at-will status with The Episcopal Diocese.

# Employment Policies

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### Employment Termination Policy

To ensure fairness and consistency throughout our organization, terminations are handled in accordance with the following provisions.

#### **TYPES OF TERMINATIONS**

Termination refers to either voluntary resignations initiated by the employee or involuntary terminations initiated by the organization.

#### **RESIGNATIONS**

Employees resigning voluntarily are expected to give a minimum of two weeks advance notice in writing to their supervisor so that the proper replacement can be found. An employee's consideration in this situation will be viewed favorably by management should the employee reapply for employment with our organization at a later date.

#### **SEVERANCE PAY**

Full-time employees whose position is eliminated due to layoff or reorganization are eligible for severance pay. Severance pay is calculated at the rate of one week's pay for each year of service, with a minimum of two weeks of pay and a maximum of three months of pay. Severance pay includes any applicable housing and or SECA allowance. The Diocese does not provide severance pay in the event an employee voluntarily leaves a position, retires or is terminated for cause.

#### **UNUSED VACATION TIME**

Employees who resign voluntarily giving the required advance notice will be paid for earned but unused vacation time. Earned but unused vacation time will not be paid to employees who resign with less than the required advance notice or to employees who are terminated by the organization.

#### **UNUSED SICK/PERSONAL DAYS**

Earned but unused sick/personal days are not paid upon termination.

#### **HEALTH INSURANCE**

Premiums for health insurance will be paid through the last day of the month in which the termination of employment occurred. Employees who have health insurance with our organization may have the option of continuing these benefits under the Extension of Benefits Program. Refer to the official notice for further information.

#### **DENTAL INSURANCE**

Premiums for dental insurance will be paid through the last day of the month in which the termination of employment occurred. Employees who have dental insurance with our organization may have the option of continuing these benefits under the Extension of Benefits Program. Refer to the official notice for further information.

### **LIFE INSURANCE**

Coverage ceases on the last day of the month in which the termination of employment occurred. Employees may have the option of converting their group insurance policy to an individual policy. Contact the Benefits Administrator for more details.

### **RETIREMENT INCOME-CHURCH PENSION FUND**

Upon termination of employment contact your Benefits Administrator for more details about defined benefit, defined contribution and the 403(b) plans.

### **COMPANY PROPERTY**

Upon termination, employees are expected to return all organization-issued items, including, but not limited to: keys, tools, uniforms, employee handbooks, manuals, computers, cellular phones, computer disks, flash drives, and client information and may not retain any copies of company information in any form.

### Equal Employment Opportunity

It is our policy to provide an equal employment opportunity to all individuals. We are committed to a diverse workforce. We value all employees' talents and support an environment that is inclusive and respectful. We are strongly committed to this policy, and believe in the concept and spirit of the law.

We are committed to assuring that:

- All recruiting, hiring, training, promotion, compensation and other employment-related programs are provided fairly to all persons on an equal opportunity basis;
- Employment decisions are based on the principles of equal opportunity. All personnel actions such as compensation, benefits, transfers, training, and participation in social and recreational programs are administered without regard to any characteristic protected by state, federal or local law;
- Employees and applicants will not be subjected to harassment, intimidation, threats, retaliation, coercion or discrimination because they have exercised any right protected by law; and
- Reasonable accommodations will be made for disabilities and religious beliefs.

We believe in and practice equal opportunity. The organizations leadership serve as our Equal Opportunity Coordinators and have overall responsibility for assuring compliance with this policy. All employees are responsible for supporting the concept of equal opportunity and diversity and assisting our Church in meeting its objectives.

Please contact your supervisor or leadership with questions or concerns.

### Recruitment and Placement

The Diocese recruits and selects individuals for lay staff positions on the basis of merit, qualification and competency without regard to all legally protected classes, including, but not limited to: race, color, age, sex, disability, religion, citizenship, national origin, ancestry, military status or veteran status, marital status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law. All job offers are contingent upon the applicant providing proof of legal authorization to work at the organization.

#### **JOB POSTING**

The hiring process may begin with posting an available open position, which can vary depending on location. The posting will include a current job description and qualifications required. The hiring supervisor will identify qualified applicants, conduct interviews and make a hiring decision.

#### **HIRING PROCESS**

The hiring procedure includes recruitment, interviewing, and reference checks of all applicants considered for the opening.

All offers of employment must be in writing and are contingent upon:

- Signed acceptance of the offer letter;
- Satisfactory completion of background check(s);
- Authorization to work in the United States; and
- Signed acceptance of the employee handbook.

### I-9 Immigration Reform Policy

The Episcopal Diocese complies with the Immigration Reform and Control Act, employing only those persons who are legally eligible to work in the United States.

The Episcopal Diocese complies with the Immigration Reform and Control Act of 1986 by employing only U. S. citizens and non-citizens who are authorized to work in the United States. All employees are asked on their first day of employment to provide original documents verifying their right to work in the United States and to sign a verification form required by federal law (INS Form I-9). If an individual cannot verify his or her right to work within three days of hire, The Episcopal Diocese must terminate his or her employment.

Please contact your Leadership with questions or concerns.

# Workplace Conduct

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### Code of Ethics Policy

The Episcopal Diocese's reputation is dependent upon the good judgment, ethical standards and personal integrity of every individual in our organization. As our organization continues to grow, it is of paramount importance that we always conduct our day-to-day activities in an ethical and responsible manner.

#### **CONFLICT OF INTEREST**

Employees must refrain from participating in any activity or business venture which could conflict with the interests of the Episcopal Diocese. Specifically, employees may not accept personal payment or other benefits from any supplier or member of the organization, nor should they take any action as a representative of the organization for personal gain.

#### **PROPRIETARY INFORMATION**

In working at the Episcopal Diocese, employees will learn things about our organization and our members' organizations which are proprietary or confidential. Every employee of the organization has a professional and ethical responsibility to treat this information as privileged and to ensure such information is not improperly or accidentally disclosed. Except as required in the performance of their duties for the organization, employees may not use or disclose any proprietary information such as operational plans, financial data, management information systems, to anyone who does not work for us or have a need to know the information.

Upon termination of employment, employees must return all company property and all copies of documents, notes, computers, computer disks, flash drives, and other repositories containing pricing lists, invoices, marketing methods, management information systems, financial information, employee lists, and all other information that is not general public knowledge relating to the Episcopal Diocese, and not retain any duplicates.

#### **RECEIVING AND GIVING GIFTS**

Substantial gifts, favors or excessive entertainment from church members or suppliers are strictly prohibited. A gift, favor or entertainment is considered substantial or excessive if it might influence an employee's business relationship with the donor.

#### **EMPLOYEE RESPONSIBILITY**

Employees are responsible for promptly advising supervisors or leadership of any violation or suspected violation of these guidelines on conflicts of interest, proprietary information, or gift giving and receiving, or any violation or suspected violation of any other company policy. Violations of this policy are subject to disciplinary action, up to and including termination of employment and, if applicable, legal action. The organization protects those employees from retaliation who in good faith report possible inappropriate, unprofessional, illegal or unethical actions. Any employee who believes they have been retaliated against in violation of this policy should notify the supervisor immediately. Individuals who engage in any retaliation in contravention of this policy are subject to disciplinary action in accordance with the organization's Standards of Conduct policy.

### **ADDITIONAL INFORMATION**

Employees should meet with their supervisor or leadership if they have questions regarding the application of this policy.

### Individuals with Disabilities

The Episcopal Diocese fully supports the Americans with Disabilities Act (ADA) and New York State Human Rights Laws which make it unlawful to discriminate in employment against a qualified individual with a disability. The company prohibits discrimination against employees and applicants with disabilities in all aspects of employment. Our organization's commitment to this policy includes making reasonable accommodations to persons with disabilities to enable them to perform the essential functions of their jobs, unless to do so poses an undue hardship on the organization or a direct threat to health or safety.

#### **OUR COMMITMENT**

The employee or applicant should make the organization aware of his or her need for an accommodation by notifying the supervisor. The organization will work with each individual to define his or her job-related or application-related needs and to try to accommodate those needs. Employees may not refuse to work alongside co-workers who have disabilities.

#### **QUALIFIED INDIVIDUALS WITH DISABILITIES**

Qualified individuals with disabilities are defined as individuals with disabilities who can perform the essential functions of the job in question with or without reasonable accommodation. The term disability is defined by applicable law.

#### **REASONABLE ACCOMMODATION**

Reasonable accommodation is any change or adjustment to a job, the work environment or the way things usually are done that enables a qualified individual with a disability to perform the essential functions of the job and that does not pose an undue hardship for the organization or create a direct threat to health or safety.

#### **DETERMINING APPROPRIATE ACCOMMODATIONS**

Frequently, when a qualified individual with a disability requests a reasonable accommodation, the appropriate accommodation is easily agreed upon. The individual may recommend an accommodation based on his or her life or work experience. The ultimate decision as to whether a particular accommodation will be made rests with the organization. When the appropriate accommodation is not obvious, the organization may assist the individual in identifying one. If more than one accommodation will enable the individual to perform the job, the Diocese reserves the right to choose which accommodation it will make.

### Complaint Policy

The Episcopal Diocese strives to openly communicate with all employees. Any concerns employees have should be promptly reported to management so that a solution may be devised.

Examples of some complaints employees may have:

- Suggestions for improvement
- Concerns about working conditions
- Issues with co-workers
- Concerns about treatment at work

When a complaint is voiced, management will do its best to remedy the situation. While every employee may not be satisfied with every solution, employee's input is valued, and the organization wants to foster an environment where all employees feel comfortable reporting their concerns.

Please contact your supervisor, leadership or Bishop's Office with all complaints.

### Drug-free Workplace Policy

We recognize alcohol and drug abuse to be potential health, safety and security problems. It is expected that all employees will assist in maintaining a work environment free from the effects of alcohol, drugs or other intoxicating substances. Compliance with this Drug-free Workplace Policy is made a condition of employment.

Employees are prohibited from the following when reporting for work, while on the job, on Company or customer premises or surrounding areas or in any vehicle used for Company business:

- The unlawful use, possession, transportation, manufacture, sale, dispensation or other distribution of an illegal or controlled substance or drug paraphernalia
- The unauthorized use, possession, transportation, manufacture, sale, dispensation or other distribution of alcohol
- Being under the influence of alcohol or having a detectable amount of an illegal or controlled substance in the blood or urine ("controlled substance" means a drug or other substance as defined in applicable federal and state laws on drug abuse prevention)

Any employee violating these prohibitions will be subject to disciplinary action up to and including termination.

Any employee convicted under any criminal drug statute for a violation occurring while on the job, on Company premises or in any vehicle used for Company business must notify the Company no later than five days after such a conviction. A conviction includes any finding of guilt or plea of no contest and/or imposition of a fine, jail sentence or other penalty.

Drug and alcohol testing will be carried out in compliance with any applicable state and federal laws and regulations.

Disciplinary action will be taken for drug-related crimes, regardless of whether they happened during working hours or on an employee's own time.

We recognize that employees suffering from alcohol or drug dependence can be treated. We encourage any employee to seek professional care and counseling prior to any violation of this policy.

#### **EMPLOYEE ASSISTANCE PROGRAM (EAP)**

The Episcopal Diocese provides an EAP for employees and their family members. Employees are encouraged to use the EAP whenever they feel the need to discuss personal issues. For employees who have difficulty handling drugs or alcohol, the EAP can provide information on treatment. The EAP is a confidential service.

### Drug and Alcohol Testing Policy

The Episcopal Diocese values the health and safety of its employees and knows that the use of alcohol and/or drugs can have a negative impact on the workplace and on job performance. Because of this, the organization prohibits the use, sale or possession of alcohol and/or illegal drugs at all times while on company property or time. Employees are subject to drug and alcohol testing at any time, with or without notice.

In accordance with the Federal Drug Free Workplace Act, individuals convicted of any criminal drug statute, including misdemeanors, for violations occurring on company property or company time must notify the organization's leadership within five days of the date of conviction. This includes any findings of guilt, pleas of 'no contest' and impositions of fines, jail sentences or other penalties.

#### Testing Methods

- *Pre-employment Testing:* Every job applicant may be required to take and pass a drug and/or alcohol test before he or she may officially be hired by The Episcopal Diocese. Each applicant will be notified if a drug and/or alcohol test is required as part of the interview process and that any and all job offers are contingent upon successfully passing a drug and/or alcohol test.
- *Periodic Group Testing:* Employees may be periodically required to submit a specimen for an unannounced drug and/or alcohol test. Employees will be given short notice of the test and will be told when the testing will occur.
- *Random Testing:* Every employee has the chance of being selected to provide a specimen for a drug and/or alcohol test. Such random testing will take place annually. Selection for testing will be done to ensure that the selection of individuals is done at random.
- *Reasonable Suspicion Testing:* If there is suspicion that an employee is under the influence of drugs and/or alcohol while on company property or time, the employee will be required to take a drug and/or alcohol test. Reasonable suspicion will be based on observable instances or actions such as, but not limited to, the following:
  - Dangerous conduct
  - Unexplained decrease in job performance
  - Hostile interpersonal relations
  - Possession of drug paraphernalia
  - Noticeably reduced short-term memory
  - Physical symptoms (incl. bloodshot eyes, slurred speech and vomiting)
  - Anxiety
  - Inability to concentrate

- *Post-accident Testing:* Every employee who is directly involved in, or whose actions contributed to, an accident on the job may be required to submit to a drug and/or alcohol test as soon as possible after the incident occurs. Accidents include all Occupational Health and Safety Administration (OSHA) recordable incidents, actions or omissions that result in near-miss accidents and accidents involving injury requiring first aid or off-site medical attention. Accidents also include property damage caused by human error.
- *Follow-up Testing:* Employees who have tested positive for a drug and/or alcohol test, and employees who have attended drug and/or alcohol-related counseling may not return to work until they have been evaluated by a medical professional in a substance abuse treatment facility and have successfully passed a drug and/or alcohol test. Employees who return to work will be subject to follow-up tests, all of which will be unannounced.

Each of the following actions constitutes a refusal to submit to testing:

- Failure to provide an adequate urine, blood, breath or saliva specimen for a drug and/or alcohol test without a valid medical explanation
- Failure to be escorted to a testing facility
- Tampering with, adulterating or diluting a specimen
- Refusing to sign a Chain of Custody form at the testing facility.

Employees do have the option to refuse to submit to drug and/or alcohol tests; however, doing so will constitute a violation of this policy. Refusal to take a drug and/or alcohol test will also be considered a positive test result, which subjects the employee to disciplinary action(s). Job applicants who refuse to submit to drug and/or alcohol testing will be not considered for employment.

### **Disciplinary Actions**

Employees who test positive for drugs and/or alcohol, or who refuse to submit to testing, will be subject to disciplinary action(s), up to and including termination. No employee who tests positive for drugs and/or alcohol will be allowed to return to work until he or she has done the following:

- Signed the Rehabilitation Agreement form
- Successfully completed an assessment and/or treatment for drug and/or alcohol abuse
- Received certification from a qualified medical professional that he or she is free from drug and/or alcohol use
- Taken a drug and/or alcohol test, received negative test results and consented to follow-up testing

### **Collection of Specimens and Testing**

The Episcopal Diocese subscribes to the collection and testing procedures outlined by the Department of Health and Human Services (HHS). This protocol protects the privacy and confidentiality of the employee. Under certain circumstances, HHS requires that specimen donors

provide a fresh specimen in the presence of a witness; however, this only occurs if there is suspicion of any of the following:

- The specimen is not from the donor
- The specimen was altered or tampered with
- The collection is part of a post-treatment monitoring program
- The donor adulterated the previous specimen

All specimens collected for drug and/or alcohol testing will be processed using employees' social security numbers as identification to ensure confidentiality.

### **Necessary Forms**

Specimens will be tracked using a Custody and Control Form from the point of submission through destruction. Employees submitting specimens will be required to sign Chain of Custody Forms. If an employee does not sign these forms, retests will be requested. An employee who refuses to sign after it is requested of him or her will be considered having refused testing and will be subject to disciplinary action.

### **Laboratory Testing**

All drug and/or alcohol testing will be conducted in a laboratory certified by HHS, according to the following procedures: (1) specimens will be screened for amphetamines, benzoylecgonine (cocaine), opiates, phencyclidine (PCP) and tetrahydrocannabinol (THC or marijuana); and (2) test results will be confirmed by gas chromatography/mass spectrometry (GC/MS). The Episcopal Diocese reserves the right to test for other substances as well.

No specimen will be considered positive until it has been confirmed at the level established by HHS. If no established levels have been set by HHS for a tested substance, The Episcopal Diocese will hold the testing facility responsible for establishing an acceptable level.

Test results for alcohol revealing a blood alcohol content of .04 or greater will be considered positive.

### **Results**

Positive test results will be reported to the Medical Review Officer (MRO), who will then contact the employee to discuss the results. Should the MRO be unable to contact the employee, he or she will contact The Episcopal Diocese for assistance. If the MRO cannot make contact with the employee within five days of testing or the results reveal a major safety concern, the MRO may disclose positive test results to The Episcopal Diocese. At that point, The Episcopal Diocese reserves the right to take the employee off active duty until the MRO is able to contact the employee. When the MRO does contact the employee, and only if he or she can provide a viable reason for why the test came back positive, then the positive test result will be reported to The Episcopal Diocese as negative.

### **Use of Prescription Medications**



Nothing in this policy prohibits the appropriate use of prescription medication as legally prescribed by a licensed physician. If an employee is taking prescription medication with potential side effects that may infringe on the safety of the employee or others, he or she must notify The Episcopal Diocese. Failure to do so may result in disciplinary action, up to and including termination.

The Episcopal Diocese may contact the employee's physician to investigate whether it is necessary to impose restrictions on job duties as a result of the employee's use of prescription medication. If The Episcopal Diocese and the physician determine that the employee should be removed from performing his or her job duties, The Episcopal Diocese will notify the employee immediately.

### **Confidentiality**

Results of all drug and/or alcohol testing will be kept separate from employee personnel files and treated as confidential information. All results, whether positive or negative, will not be shared with anyone outside of the employee's direct supervisory chain of command, except when absolutely necessary for treatment or physician confirmation purposes.

NOTE: The Episcopal Diocese may disclose the results of a drug and/or alcohol test to decision-makers in a lawsuit, grievance or other proceeding initiated by or on behalf of the employee.

### **Employee Assistance Program Policy**

The Episcopal Diocese is well aware that substance abuse problems affecting individual employees may also affect their job performance and personal life. Although employees can usually resolve issues on their own, at times, they may benefit from additional assistance. The Episcopal Diocese proudly offers a free and confidential counseling service to employees and their family members (if applicable). This Employee Assistance Program (EAP) includes short-term counseling as well as referral services. This service is staffed by specialists qualified to assist with alcohol, drug, medical, marital, financial, legal, family and emotional problems.

The EAP is available to all employees, but is not required except when job performance, attendance or job responsibilities are negatively affected. All employees are welcome to make use of these services to better their personal lives.

In addition, an employee who voluntarily comes forward before violating this policy will be given the opportunity to seek treatment in accordance with the Voluntary Rehabilitation Agreement. In the event of a positive drug and/or alcohol test result, The Episcopal Diocese will refer the individual to available resources, either at the employee's expense, or that are covered by the company's health plan. Prior to entering treatment, the employee will be required to sign a form consenting to the release of information regarding his or her treatment and return-to-work status. Upon leaving the treatment facility, an evaluation will be required to demonstrate that treatment was completed successfully.

If treatment requires time away from work, the time will be unpaid, unless paid vacation, sick leave or other earned time away is used. Upon return to work, The Episcopal Diocese will remain in contact with the treatment facility to assure ongoing compliance with the recommended treatment. In addition, the employee will be required to submit to drug and/or alcohol testing for up to 60 months, at the discretion of The Episcopal Diocese. Should the individual test positive for any substance at any point during that time, he or she will be immediately terminated.

### Harassment Policy

The Episcopal Diocese is committed to maintaining a work environment free from all forms of unlawful harassment, and where the individual dignity of each employee is respected. Our organization prohibits unlawful harassment against anyone, for any reason, including, but not limited to: race, color, sex, age, disability, religion, citizenship, national origin, ancestry, military status or veteran status, marital status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law. All employees and non- employees conducting business in our workplace must refrain from engaging in unlawful harassment.

#### **DEFINITION**

The creation of an intimidating or hostile working environment, based on one or more of the above categories, constitutes unlawful harassment. Specific types of unlawful harassment include, but are not limited to:

- Physical harassment refers to pushing, hitting, or unwanted physical touching;
- Verbal abuse refers to verbal comments regarding, or made because of, an individual's membership in one of the categories listed above;
- Written harassment refers to derogatory or degrading written comments regarding, or made because of, an individual's membership in one of the categories listed above. Specific examples include, but are not limited to: e-mail, text messages, memos, notes, graffiti, other visual depictions or pictures; and
- Inappropriate, unwelcomed behaviors, such as whistling, not giving someone enough physical space, and blocking behaviors.

Unlawful harassment, whether it is sexual, physical, verbal or written in nature, is a form of employee misconduct which undermines the integrity of the employment relationship within our organization.

#### **REPORTING A CLAIM**

Employees who believe they have been the subject of unlawful harassment should report their complaint immediately to their supervisor or Leadership. The organization will promptly and thoroughly investigate all complaints.

#### **MANAGEMENT RESPONSIBILITIES**

Supervisors who observe an employee violating this policy should take immediate action to stop the harassment. Supervisors who receive a complaint of harassment or obtain knowledge of harassment by other means must immediately notify Leadership, even if no complaint has been made by an employee, or even if the employee complaining has requested that no action be taken. A prompt and appropriate investigation, if necessary, will take place.

Supervisors are also responsible for ensuring that the organization is free from unlawful harassment by individuals outside the organization. This may include, but is not limited to: members, vendors, independent contractors, visitors, or any other individual conducting business in the workplace. Supervisors aware of this harassment are to notify Leadership immediately so the Diocese/Parish can appropriately respond to the situation.

### **CONFIDENTIALITY AND RETALIATION**

It is the policy of the Episcopal Diocese that any reporting employee or employee participating in the investigation of a harassment complaint will not be retaliated against in any way. Complaints will be investigated promptly and confidentiality will be maintained to the greatest degree possible, consistent with our obligation to thoroughly investigate the allegation. Employees who feel that they have been retaliated against for reporting a complaint or participating in the investigation of a complaint should contact the Parish Leadership and/or the Bishop's Office.

### **CORRECTIVE ACTION**

If a harassment complaint is found to be valid, immediate and appropriate corrective action will be taken. Employees who violate this policy, including the provision against retaliation, will be subject to disciplinary action, up to and including termination. This determination will be based on all the facts of the case.

### Sexual Harassment Policy

The Episcopal Diocese is committed to maintaining a workplace free from sexual harassment. Sexual harassment is a form of workplace discrimination. All employees are required to work in a manner that prevents sexual harassment in the workplace. This Policy is one component of The Diocese's commitment to a discrimination-free work environment. Sexual harassment is against the law and all employees have a legal right to a workplace free from sexual harassment and employees are urged to report sexual harassment by filing a complaint internally. Employees can also file a complaint with a government agency or in court under federal, state or local antidiscrimination laws.

#### Policy:

1. The Diocese adopted the NYS Sexual Harassment Prevention policy and it applies to all employees including parishes and missions that have adopted the revised policy for the organization. This policy protects applicants for employment, interns, whether paid or unpaid, contractors and persons conducting business, regardless of immigration status. In the remainder of this document, the term "employees" refers to this collective group.
2. Sexual harassment will not be tolerated. Any employee or individual covered by this policy who engages in sexual harassment or retaliation will be subject to remedial and/or disciplinary action (e.g., counseling, suspension, termination).
3. Retaliation Prohibition: No person covered by this Policy shall be subject to adverse action because the employee reports an incident of sexual harassment, provides information, or otherwise assists in any investigation of a sexual harassment complaint. The Diocese will not tolerate such retaliation against anyone who, in good faith, reports or provides information about suspected sexual harassment. Any employee of the Diocese who retaliates against anyone involved in a sexual harassment investigation will be subjected to disciplinary action, up to and including termination. All employees, paid or unpaid interns, or non-employees working in the workplace who believe they have been subject to such retaliation should inform a supervisor or manager. All employees, paid or unpaid interns or non-employees who believe they have been a target of such retaliation may also seek relief in other available forums, as explained below in the section on Legal Protections.
4. Sexual harassment is offensive, is a violation of our policies, is unlawful, and may subject the organization to liability for harm to targets of sexual harassment. Harassers may also be individually subject to liability. Employees of every level who engage in sexual harassment, including managers and supervisors who engage in sexual harassment or who allow such behavior to continue, will be penalized for such misconduct.
5. The Diocese will conduct a prompt and thorough investigation that ensures due process for all parties, whenever management receives a complaint about sexual harassment, or otherwise knows of possible sexual harassment occurring. The organization will keep the investigation confidential to the extent possible. Effective corrective action will be taken whenever sexual harassment is found to have occurred. All employees, including managers and supervisors, are required to cooperate with any internal investigation of sexual harassment.
6. All employees are encouraged to report any harassment or behaviors that violate this policy. The organization will provide all employees a complaint form for employees to report harassment and file complaints.

7. Managers and supervisors are required to report any complaint that they receive, or any harassment that they observe or become aware of, to the Parish or Mission Leadership/Priest/Bishop's office as appropriate.
8. This policy applies to all employees, paid or unpaid interns, and non-employees and all must follow and uphold this policy. This policy must be provided to all employees and should be posted prominently in all work locations to the extent practicable (for example, in a main office, not an offsite work location) and be provided to employees upon hiring.

### **What Is “Sexual Harassment”?**

Sexual harassment is a form of sex discrimination and is unlawful under federal, state, and (where applicable) local law. Sexual harassment includes harassment on the basis of sex, sexual orientation, self-identified or perceived sex, gender expression, gender identity and the status of being transgender.

Sexual harassment includes unwelcome conduct which is either of a sexual nature, or which is directed at an individual because of that individual's sex when:

- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment, even if the reporting individual is not the intended target of the sexual harassment.
- Such conduct is made either explicitly or implicitly a term or condition of employment; or
- Submission to or rejection of such conduct is used as the basis for employment decisions affecting an individual's employment.

A sexually harassing hostile work environment includes, but is not limited to, words, signs, jokes, pranks, intimidation or physical violence which are of a sexual nature, or which are directed at an individual because of that individual's sex. Sexual harassment also consists of any unwanted verbal or physical advances, sexually explicit derogatory statements or sexually discriminatory remarks made by someone which are offensive or objectionable to the recipient, which cause the recipient discomfort or humiliation, which interfere with the recipient's job performance.

Sexual harassment also occurs when a person in authority tries to trade job benefits for sexual favors. This can include hiring, promotion, continued employment or any other terms, conditions or privileges of employment. This is also called “quid pro quo” harassment.

Any employee who feels harassed should report so that any violation of this policy can be corrected promptly. Any harassing conduct, even a single incident, can be addressed under this policy.

### **Examples of sexual harassment**

The following describes some of the types of acts that may be unlawful sexual harassment and that are strictly prohibited:

- Physical acts of a sexual nature, such as:
  - Touching, pinching, patting, kissing, hugging, grabbing, brushing against another employee's body or poking another employee's body;
  - Rape, sexual battery, molestation or attempts to commit these assaults.
- Unwanted sexual advances or propositions, such as:

- Requests for sexual favors accompanied by implied or overt threats concerning the target's job performance evaluation, a promotion or other job benefits or detriments;
- Subtle or obvious pressure for unwelcome sexual activities.
- Sexually oriented gestures, noises, remarks or jokes, or comments about a person's sexuality or sexual experience, which create a hostile work environment.
- Sex stereotyping occurs when conduct or personality traits are considered inappropriate simply because they may not conform to other people's ideas or perceptions about how individuals of a particular sex should act or look.
- Sexual or discriminatory displays or publications anywhere in the workplace, such as:
  - Displaying pictures, posters, calendars, graffiti, objects, promotional material, reading materials or other materials that are sexually demeaning or pornographic. This includes such sexual displays on workplace computers or cell phones and sharing such displays while in the workplace.
- Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity and the status of being transgender, such as:
  - Interfering with, destroying or damaging a person's workstation, tools or equipment, or otherwise interfering with the individual's ability to perform the job;
  - Sabotaging an individual's work;
  - Bullying, yelling, name-calling.

### **Who can be a target of sexual harassment?**

Sexual harassment can occur between any individuals, regardless of their sex or gender. New York Law protects employees, paid or unpaid interns, and non-employees, including independent contractors, and those employed by companies contracting to provide services in the workplace. Harassers can be a superior, a subordinate, a coworker or anyone in the workplace including an independent contractor, contract worker, vendor, client, customer or visitor.

### **Where can sexual harassment occur?**

Unlawful sexual harassment is not limited to the physical workplace itself. It can occur while employees are traveling for business or at employer sponsored events or parties. Calls, texts, emails, and social media usage by employees can constitute unlawful workplace harassment, even if they occur away from the workplace premises, on personal devices or during non-work hours.

### **Retaliation**

Unlawful retaliation can be any action that could discourage a worker from coming forward to make or support a sexual harassment claim. Adverse action need not be job-related or occur in the workplace to constitute unlawful retaliation (e.g., threats of physical violence outside of work hours).

Such retaliation is unlawful under federal, state, and (where applicable) local law. The New York State Human Rights Law protects any individual who has engaged in “protected activity.”

Protected activity occurs when a person has:

- made a complaint of sexual harassment, either internally or with any anti-discrimination agency;
- testified or assisted in a proceeding involving sexual harassment under the Human Rights Law or other anti-discrimination law;
- opposed sexual harassment by making a verbal or informal complaint to management, or by simply informing a supervisor or manager of harassment;
- reported that another employee has been sexually harassed; or
- encouraged a fellow employee to report harassment.

Even if the alleged harassment does not turn out to rise to the level of a violation of law, the individual is protected from retaliation if the person had a good faith belief that the practices were unlawful. However, the retaliation provision is not intended to protect persons making intentionally false charges of harassment.

### **Reporting Sexual Harassment**

Preventing sexual harassment is everyone’s responsibility. The Episcopal Diocese/Parish/Mission cannot prevent or remedy sexual harassment unless it knows about it. Any employee, paid or unpaid intern or nonemployee who has been subjected to behavior that may constitute sexual harassment is encouraged to report such behavior to a supervisor or manager. Anyone who witnesses or becomes aware of potential instances of sexual harassment should report such behavior to a supervisor or manager.

Reports of sexual harassment may be made verbally or in writing. A form for submission of a written complaint is attached to this Policy, and all employees are encouraged to use this complaint form. Employees who are reporting sexual harassment on behalf of other employees should use the complaint form and note that it is on another employee’s behalf.

Employees, paid or unpaid interns or non-employees who believe they have been a target of sexual harassment may also seek assistance in other available forums, as explained below in the section on Legal Protections.

### **Supervisory Responsibilities**

All supervisors and managers who receive a complaint or information about suspected sexual harassment, observe what may be sexually harassing behavior or for any reason suspect that sexual harassment is occurring, are required to report such suspected sexual harassment to Parish Leadership or Bishop's Office as appropriate.

In addition to being subject to discipline if they engaged in sexually harassing conduct themselves, supervisors and managers will be subject to discipline for failing to report suspected sexual harassment or otherwise knowingly allowing sexual harassment to continue.

Supervisors and managers will also be subject to discipline for engaging in any retaliation.

### **Complaint and Investigation of Sexual Harassment**

**All** complaints or information about sexual harassment will be investigated, whether that information was reported in verbal or written form. Investigations will be conducted in a timely manner, and will be confidential to the extent possible.

An investigation of any complaint, information or knowledge of suspected sexual harassment will be prompt and thorough, commenced immediately and completed as soon as possible. The investigation will be kept confidential to the extent possible. All persons involved, including complainants, witnesses and alleged harassers will be accorded due process, as outlined below, to protect their rights to a fair and impartial investigation.

Any employee may be required to cooperate as needed in an investigation of suspected sexual harassment. The Diocese will not tolerate retaliation against employees who file complaints, support another's complaint or participate in an investigation regarding a violation of this policy.

While the process may vary from case to case, investigations should be done in accordance with the following steps:

- Upon receipt of complaint, The Diocese appointed management will conduct an immediate review of the allegations, and take any interim actions (e.g., instructing the respondent to refrain from communications with the complainant), as appropriate. If complaint is verbal, encourage the individual to complete the "Complaint Form" in writing. If he or she refuses, prepare a Complaint Form based on the verbal reporting.
- If documents, emails or phone records are relevant to the investigation, take steps to obtain and preserve them.
- Request and review all relevant documents, including all electronic communications.
- Interview all parties involved, including any relevant witnesses;
- Create a written documentation of the investigation (such as a letter, memo or email), which contains the following:
  - A list of all documents reviewed, along with a detailed summary of relevant documents;
  - A list of names of those interviewed, along with a detailed summary of their statements;
  - A timeline of events;
  - A summary of prior relevant incidents, reported or unreported; and
  - The basis for the decision and final resolution of the complaint, together with any corrective action(s).
- Keep the written documentation and associated documents in a secure and confidential location.
- Promptly notify the individual who reported and the individual(s) about whom the complaint was made of the final determination and implement any corrective actions identified in the written document.
- Inform the individual who reported of the right to file a complaint or charge externally as outlined in the next section.

### **Legal Protections And External Remedies**



Sexual harassment is not only prohibited by the Diocese, but is also prohibited by state, federal, and, where applicable, local law.

Aside from the internal process at the Diocese, employees may also choose to pursue legal remedies with the following governmental entities. While a private attorney is not required to file a complaint with a governmental agency, you may seek the legal advice of an attorney.

In addition to those outlined below, employees in certain industries may have additional legal protections.

### **State Human Rights Law (HRL)**

The Human Rights Law (HRL), codified as N.Y. Executive Law, art. 15, § 290 et seq., applies to all employers in New York State with regard to sexual harassment, and protects employees, paid or unpaid interns and non-employees, regardless of immigration status. A complaint alleging violation of the Human Rights Law may be filed either with the Division of Human Rights (DHR) or in New York State Supreme Court.

Complaints with DHR may be filed any time within one year of the harassment. If an individual did not file at DHR, they can sue directly in state court under the HRL, within three years of the alleged sexual harassment. An individual may not file with DHR if they have already filed a HRL complaint in state court.

Complaining internally to the Diocese does not extend your time to file with DHR or in court. The one year or three years is counted from date of the most recent incident of harassment.

You do not need an attorney to file a complaint with DHR, and there is no cost to file with DHR.

DHR will investigate your complaint and determine whether there is probable cause to believe that sexual harassment has occurred. Probable cause cases are forwarded to a public hearing before an administrative law judge. If sexual harassment is found after a hearing, DHR has the power to award relief, which varies but may include requiring your employer to take action to stop the harassment, or redress the damage caused, including paying of monetary damages, attorney's fees and civil fines.

DHR's main office contact information is: NYS Division of Human Rights, One Fordham Plaza, Fourth Floor, Bronx, New York 10458. You may call (718) 741-8400 or visit: [www.dhr.ny.gov](http://www.dhr.ny.gov).

Contact DHR at (888) 392-3644 or visit [dhr.ny.gov/complaint](http://dhr.ny.gov/complaint) for more information about filing a complaint. The website has a complaint form that can be downloaded, filled out, notarized and mailed to DHR. The website also contains contact information for DHR's regional offices across New York State.

### **Civil Rights Act of 1964**

The United States Equal Employment Opportunity Commission (EEOC) enforces federal antidiscrimination laws, including Title VII of the 1964 federal Civil Rights Act (codified as 42 U.S.C. §2000e et seq.). An individual can file a complaint with the EEOC anytime within 300 days from the harassment. There is no cost to file a complaint with the EEOC. The EEOC will investigate the complaint, and determine whether there is reasonable cause to believe that discrimination has occurred, at which point the EEOC will issue a Right to Sue letter permitting the individual to file a complaint in federal court.

The EEOC does not hold hearings or award relief, but may take other action including pursuing cases in federal court on behalf of complaining parties. Federal courts may award remedies if

discrimination is found to have occurred. In general, private employers must have at least 15 employees to come within the jurisdiction of the EEOC.

An employee alleging discrimination at work can file a "Charge of Discrimination." The EEOC has district, area, and field offices where complaints can be filed. Contact the EEOC by calling 1-800-669-4000 (TTY: 1-800-669-6820), visiting their website at [www.eeoc.gov](http://www.eeoc.gov) or via email at [info@eeoc.gov](mailto:info@eeoc.gov).

If an individual filed an administrative complaint with DHR, DHR will file the complaint with the EEOC to preserve the right to proceed in federal court.

### **Local Protections**

Many localities enforce laws protecting individuals from sexual harassment and discrimination. An individual should contact the county, city or town in which they live to find out if such a law exists. For example, employees who work in New York City may file complaints of sexual harassment with the New York City Commission on Human Rights. Contact their main office at Law Enforcement Bureau of the NYC Commission on Human Rights, 40 Rector Street, 10th Floor, New York, New York; call 311 or (212) 306-7450; or visit [www.nyc.gov/html/cchr/html/home/home.shtml](http://www.nyc.gov/html/cchr/html/home/home.shtml).

### **Contact the Local Police Department**

If the harassment involves unwanted physical touching, coerced physical confinement or coerced sex acts, the conduct may constitute a crime. Contact the local police department.

### Standards of Conduct Policy

The work rules and standards of conduct for the Diocese are important, and the organization regards them seriously. All employees are urged to become familiar with these rules and standards. In addition, employees are expected to follow the rules and standards faithfully in doing their jobs and conducting business on behalf of The Episcopal Diocese. Please note that any employee who deviates from these rules and standards will be subject to disciplinary action, up to and including termination of employment.

While not intended to list all the forms of behavior that are considered unacceptable in the workplace, the following are examples of rule infractions or misconduct that may result in disciplinary action.

- Theft or inappropriate removal or possession of property
- Falsification of timekeeping records
- Working under the influence of alcohol or illegal drugs
- Possession, manufacture, distribution, sale, transfer, dispensation or use of alcohol or illegal drugs
- Fighting or threatening violence in the workplace
- Immoral actions or intimidating others
- Boisterous or disruptive activity in the workplace
- Negligence or improper conduct leading to damage of Company or customer property
- Insubordination or other disrespectful conduct
- Violation of safety or health rules
- Smoking in the workplace
- Sexual or other unlawful or unwelcome harassment or touching
- Excessive absenteeism or any absence without notice
- Unauthorized use of telephones or other Company equipment
- Using Company equipment for purposes other than business (e.g., playing games on computers or personal Internet usage)
- Unauthorized disclosure of confidential information
- Violation of Diocesan policies
- Unsatisfactory performance or conduct

These rules apply to any and all interactions with visitors, fellow employees or anyone else associated with the workplace.

### Violence in the Workplace Policy

It is The Episcopal Diocese's policy to provide a workplace that is safe and free from all threatening and intimidating conduct. Therefore, The Diocese will not tolerate violence or threats of violence of any form in the workplace, at work-related functions or outside of work if it affects the workplace. This policy applies to Organization employees, clients, customers, guests, vendors and persons doing business with The Diocese.

It is a violation of this policy for any individual to engage in any conduct, verbal or physical, that intimidates, endangers or creates the perception of intent to harm persons or property. Examples include but are not limited to:

- Physical assaults or threats of physical assault, whether made in person or by other means (i.e., in writing, by phone, fax or email)
- Verbal conduct that is intimidating and has the purpose or effect of threatening the health or safety of a co-worker
- Any other conduct or acts that management believes represent an imminent or potential danger to workplace safety or security

Anyone with questions or complaints about workplace behaviors that fall under this policy may discuss them with the Parish Leadership or Office of The Bishop. The organization will promptly and thoroughly investigate any reported occurrences or threats of violence. Violations of this policy will result in disciplinary action, up to and including immediate termination of employees. Where such actions involve non-employees, The organization will take action appropriate for the circumstances. Where appropriate and/or necessary, The organization will also take whatever legal actions are available and necessary to stop the conduct and protect employees and property.

#### **EMPLOYEE ASSISTANCE PROGRAM (EAP)**

The Episcopal Diocese provides an EAP for employees and their family members. Employees are encouraged to use the EAP whenever they feel the need for guidance with personal problems. For employees who have difficulty handling drugs or alcohol, the EAP can provide information on treatment. The EAP is a confidential service.

### Weapons in the Workplace Policy

Unless prohibited by state law, The Episcopal Diocese prohibits the possession of firearms or any other lethal weapon on Diocese property, in a vehicle being used on Diocese business, in any Diocese-owned or leased parking facility or at a work-related function. This applies to all employees, visitors and customers on Diocese property, even those who are licensed to carry weapons. The only exception to this is an employee who is required to possess weapons to fulfill his or her job duties.

Some examples of prohibited weapons include:

- Firearms (pistols, revolvers, shotguns, rifles and bb guns)
- Knives (switchblades, gravity knives or any knife with a blade longer than three inches)
- Metal knuckles
- Bows and arrows
- Tasers

We prohibit weapons to ensure the safety and security of all employees and persons visiting the Diocese. Any employee found in violation of this policy will be subject to disciplinary action, up to and including immediate termination. If you have questions or concerns regarding this policy, please contact your Leadership.

# Employee Benefits

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### Extension of Benefits

**Your Rights to Continue Coverage:** The Plan's Extension of Benefits program is similar, but not identical, to the healthcare continuation coverage provided under Federal law (known as COBRA) for non-church plans. Because the Plan is a church plan as described under Section 3(33) of ERISA, the Plan is exempt from COBRA requirements. Nonetheless, subscribers and/or their enrolled dependents will have the opportunity to continue benefits for a limited time in certain instances when coverage through the health plan would otherwise cease. Individuals who elect to continue coverage must pay for the coverage. Call (800) 480-9967 for more information.

### Health Insurance

To aid employees in covering the cost of medical care, our Diocese offers a health insurance program. Resolution A177, passed at General Convention in 2009, requires Dioceses to establish a cost-sharing policy that is the same for both clergy and lay employees that are scheduled to work 1,500 or more hours annually. Employers must be in compliance by January 1, 2013. In 2012, the 77th General Convention reaffirmed that all parishes and missions are to be enrolled in the Episcopal Church Medical Trust by December 31, 2012. The implementation of this resolution was amended to state: "parity in cost-sharing shall be achieved between clergy and lay employees as soon as possible, but no later than December 31st, 2015.

#### **ELIGIBILITY**

Employees who are scheduled to work 1,000 or more hours annually are eligible to join our group health insurance plan on the first of the month following their date of hire. Employees who enroll in our group health insurance plan will also automatically be enrolled in our pre-tax premium plan.

#### **COST**

To assist with the escalating cost of health insurance, our organization may pay a portion of the premium, the remainder to be paid by the employee through pre-tax dollars via payroll deduction. When you become eligible for coverage, you will receive material which more fully describes your insurance benefits including information on deductibles, co-payments etc.

As a part of our benefits review process, the cost of health insurance is evaluated periodically and the ratio of employer/employee contribution is subject to change.

#### **HEALTH INSURANCE COVERAGE AT TERMINATION**

Premiums for health insurance will be paid through the last day of the month in which the termination of employment occurred. Employees who have health insurance with our organization may have the option of continuing these benefits under the Extension of Benefits Program. Refer to the official notice for further information. If you have not received a notice or cannot locate it, please contact the Benefits Administrator.

*This is intended as a brief introduction to the Health Insurance Plan. A more thorough explanation of the plan is contained in the Summary Plan Descriptions, plan documents, and insurance policies available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply. The Episcopal Diocese and, if applicable, the benefit plan administrators or insurance companies, reserve the maximum discretion and right permitted by law to administer and interpret the health plan, as well as to amend, modify or terminate the plan at any time for any reason.*



### Dental Insurance

Our organization recognizes that regular dental care is essential to good health. With this in mind, we offer eligible employees a dental insurance program designed to provide preventive and remedial dental care.

#### **ELIGIBILITY**

Employees who are scheduled to work 1,000 or more hours annually are eligible to join our group dental insurance plan on the first of the month following their date of hire. Employees who enroll in our group dental insurance plan will also automatically be enrolled in our pre-tax premium plan.

#### **BENEFITS**

This plan is designed to encourage preventive and remedial dental care. Covered services are detailed in the plan booklets provided by the insurance carrier. A copy of this booklet is available from the Benefits Administrator.

#### **COST**

Our organization may assist employees with the cost of this insurance by paying a portion of the premium for employee, two-person, or family coverage.

#### **DENTAL INSURANCE COVERAGE AT TERMINATION**

Premiums for dental insurance will be paid through the last day of the month in which the termination of employment occurred. Employees who have dental insurance with our organization may have the option of continuing these benefits under the Extension of Benefits Program. Refer to the official notice for further information.

*This is intended as a brief introduction to the Dental Insurance Plan. A more thorough explanation of the plan is contained in the Summary Plan Description, plan documents, and insurance policies available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply.*

### Vision Care Plan

To aid employees in covering the cost of vision care, our organization offers a vision plan.

#### **ELIGIBILITY**

Employees who are scheduled to work 1,500 or more hours annually are eligible to join our vision care plan on the first of the month following their date of hire. Employees who enroll in our group vision care plan will also automatically be enrolled in our pre-tax premium plan.

#### **COST**

To assist with the cost of vision care, our organization may pay a portion of the premium for employee, two-person or family.

#### **VISION COVERAGE AT TERMINATION**

Premiums for the vision plan will be paid through the last day of the month in which the termination of employment occurred. Employees who have health insurance with our company may have the option of continuing these benefits under the Extension of Benefits Program. Refer to the official notice for further information.

*This is intended as a brief introduction to the Vision Plan. A more thorough explanation of the plan is contained in the Summary Plan Descriptions, plan documents and insurance policies available from the Benefits Administrator or employees can access it from the Employee Portal. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply.*

### Pre-Tax Premium Plan

Employees of the Episcopal Diocese may participate in our pre-tax premium plan. The advantage of a pre-tax premium plan is that it allows employees to pay for certain insurance benefits on a pre-tax basis.

#### **ELIGIBILITY**

All employees who enroll in the health insurance plan and/or dental insurance plan are eligible to join our pre-tax premium plan.

#### **BENEFITS**

Our pre-tax premium plan allows employees to save taxes on the money they pay toward health and dental insurance. Under this plan employee premiums are deducted from gross pay before taxes are deducted. By reducing gross wages, employees pay fewer taxes on the money that they earn.

#### **ENROLLMENT**

Eligible employees who enroll in our group health or dental insurance programs will automatically be enrolled in the pre-tax premium plan.

#### **CHANGES IN BENEFIT ELECTIONS**

Generally, after signing the pre-tax premium plan enrollment form, employees may not change their benefit plans until the beginning of the next plan year. An eligible employee may make a mid-year election change, however, upon the occurrence of certain qualifying events, provided the change is made because of, and consistent with, such event. The qualifying events for a mid-year election change can include:

- Certain significant changes in health plan coverage or costs;
- Certain changes in family status; or
- Certain changes in the employment status of the employee or his or her spouse.

A complete list of the qualifying events for a mid-year election change can be found in the Summary Plan Description.

*This is intended as a brief introduction to the pre-tax premium plan. A more thorough explanation of the plan is contained in the Summary Plan Description, plan documents, and insurance policies available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply.*

### Health Savings Account

Employees of the Episcopal Diocese participating in our High Deductible Health Plan (HDHP) may participate in a Health Savings Account (HSA). The advantage of an HSA is that money going into the HSA is tax-free, earns interest tax-free, and is not taxed when withdrawn to pay for qualified medical, dental, and vision expenses.

#### **ELIGIBILITY**

Employees participating in our High Deductible Health Plan are eligible to participate in the HSA immediately upon hire. Employees participating in our Flexible Spending Account Plan are not eligible to participate in an HSA.

#### **CONTRIBUTIONS**

Our organization may provide an employer contribution into an HSA for eligible participants. Eligible employees may also contribute to their HSA.

The annual maximum deposit to an HSA is based on the federal tax-deductible limits on HSA contributions.

All HSA contributions become the property of the employee, regardless of the source of contributions. Funds deposited but not withdrawn each year will carry over into the next year. If an employee ends his or her HSA-eligible insurance coverage (e.g. because the employee ends participation in a High Deductible Plan or separates from service), the employee loses eligibility to deposit further funds but funds already in the HSA remain available for use for qualified expenses for the lifetime of the employee and his or her spouse.

#### **ENROLLMENT**

To participate in an HSA, please see your Benefits Administrator for the appropriate forms.

#### **WITHDRAWALS**

Individuals may withdraw all or a portion of their HSA funds at any time. The maximum amount an employee can withdraw is equal to the account balance at that time. Additional amounts can be withdrawn as funds become available to pay for qualified expenses.

Withdrawals for non-medical expenses are subject to income taxes as well as a 20% penalty. This tax treatment will apply to any amount of HSA withdrawals for which there is no proof that the funds were spent on a qualifying expense.

*This is intended as a brief introduction to our Health Savings Account. A more thorough explanation of the HSA is available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and any official plan documents, the official plan documents will apply.*

### Life Insurance

A group life insurance policy is provided for eligible employees. Accidental Death and Dismemberment coverage is included in this group policy.

#### **ELIGIBILITY**

All employees are eligible for this insurance coverage on the first of the month following their date of hire. To enroll, employees must complete the necessary forms and give them to the Benefits Administrator. The insurance policy will become effective after our organization has submitted the forms to the insurance organization and the insurance company has approved the organization.

#### **AMOUNT OF COVERAGE**

An employee's amount of life insurance coverage is equal to the amount of one times their annual salary, with a minimum of \$10,000 and a maximum of \$50,000, unless otherwise indicated in an agreement.

#### **PREMIUM COST**

The premium for this insurance is paid for by the employer.

The cost of any organization paid life insurance coverage in excess of \$50,000 must be reported as income on the employee's IRS W-2 Form each year.

#### **BENEFICIARY DESIGNATION**

Employees enrolled in the life insurance benefit will be required to designate a beneficiary upon enrollment. Designations may be changed by written request at any time. Beneficiaries will be eligible to receive the full amount of the employee's life insurance coverage in the event of the employee's death in accordance with the terms of the plan.

#### **LIFE INSURANCE**

Coverage ceases on the last day of the month in which the termination of employment occurred. Employees may have the option of converting their group insurance policy to an individual policy. Contact the Benefits Administrator for more details.

*This is intended as a brief introduction to the Life Insurance Plan. A more thorough explanation of the plan is contained in the Summary Plan Description, plan documents, and insurance policies available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply.*

### Retirement Income-Church Pension Fund

**Ordained Employees** (except clergy retired from the Church Pension Fund): All Employers must contribute 18% of “Total Assessable Compensation” (TAC), as defined by the Church Pension Fund (CPF), for eligible clergy, towards the clergy pension plan. These contributions also fund group life insurance, short term disability and Medicare supplemental coverage for clergy.

In addition to the defined benefit plan provided by CPF, clergy employees may participate in the RSVP plan (403-B) offered by the Church Pension Group (CPG).

Eligibility to participate in these plans begins immediately upon employment and ends on the last day of employment. All employer & employee contributions are subject to IRS regulations that may limit contributions to certain plans in any given year.

**Lay Employees:** Resolution A138 of the 2009 General Convention requires that all lay employees scheduled to work 1,000 hours or more annually must be provided with a lay pension plan benefit by January 1st, 2013. And, that these plans be administered and designed by The Church Pension Fund.

For defined contribution plans, A138 requires that the employer contribute not less than 5% of the employee’s compensation AND also match (on a dollar-for-dollar basis) not less than 4% of compensation. Therefore, an employee that contributes 4% of their own pay would receive another 9% from the employer, for a total contribution of 13%. This resolution forms the minimum requirement that applies to all employers within the Diocese of Rochester.

Historically the Diocesan policy recommended that employers (Parishes) contribute 12% of the employee’s salary, utilizing the Church Pension Fund (CPF) lay pension program.

Effective January 1st, 2015, the Diocese recommends that all employers contribute 8% of the employee’s salary as an “employer base contribution” and up to an additional 4% “employer matching contribution”, for a total of 12% maximum employer contribution (for employees that contribute 4 % or more to their plan). Employers may elect to “migrate” to this level of benefit by changing the base contribution by 1% point, per year until they reach 8% employer base contribution.

#### ***For Defined Contribution Plans:***

#### **ELIGIBILITY**

Eligible employees are enrolled in the Church Pension Fund on first of the month following their date of hire, and after completing the necessary enrollment forms.

### **EMPLOYEE ELECTIVE CONTRIBUTIONS**

Plan participants may elect to contribute a percentage of their compensation to the retirement plan, subject to the terms of the plan and certain established federal limitations.

### **EMPLOYER MATCHING CONTRIBUTIONS**

The organization may contribute amounts to the participant's retirement plan.

### **VESTING**

Employee and employer contributions are always 100 percent vested in the full amount of their contributions which means that employee contributions are non-forfeitable in the event employment terminates.

### **INVESTMENT OF ACCOUNTS**

Participating employees may direct how their account balances are invested by choosing among several investment options offered under the plan.

### **ADDITIONAL INFORMATION**

Additional information about an employee's Church Pension Fund account can be obtained by contacting the Benefits Administrator.

*This is intended as a brief introduction to the Church Pension Fund. A more thorough explanation of the plan is contained in the Summary Plan Description and plan documents available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply.*

### Short Term Disability Insurance

A loss of income due to disability can be destructive to an individual's or family's security. For this reason, our organization provides eligible employees with short-term disability insurance. This insurance program assists employees in replacing lost income in the event that an employee is disabled due to an off-the-job injury, illness, or pregnancy.

#### **ELIGIBILITY**

All employees who cannot work due to a non-job-related disability are covered under this short-term disability insurance program if they meet the eligibility requirements of the New York State Disability Benefits Law.

#### **BENEFITS**

The benefits begin on the eighth calendar day of the disability and may continue for up to 26 weeks. Disability benefits are 50 percent of the employee's average weekly wage (based on the last eight weeks of employment) up to a maximum weekly benefit of \$170.00.

#### **SUPPLEMENTAL SHORT-TERM DISABILITY INSURANCE**

The Diocese encourages all employers to provide additional supplemental short-term disability insurance at no additional cost to the employee.

#### **COST**

The cost of state-mandated short-term disability insurance may be shared between the employee and the Diocese. However, the cost to the employee is no greater than \$.60 each week and may be deducted from the employee's paycheck.

#### **LEAVE ENTITLEMENT**

Employees are eligible for a Disability Leave. See the Disability Leave policy for more information.

#### **EMPLOYEE'S RESPONSIBILITY**

Employees must notify the Benefits Administrator immediately if they anticipate being on a medical leave beyond seven calendar days.

*This is intended as a brief introduction to the Short-Term Disability Insurance. A more thorough explanation of the plan is contained in the Summary Plan Description and plan documents available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply.*



### Long-Term Disability Insurance

Income protection is vital to anyone disabled for a long period of time. For this reason, the Episcopal Diocese offers eligible employees a long-term disability insurance plan which provides income protection during extended periods of disability.

#### **ELIGIBILITY**

Employees are eligible to participate in this plan through the Church Pension Group.

#### **BENEFITS**

The payment of long-term disability insurance benefits is contingent upon being totally disabled due to illness or non-occupational injury. Total disability is defined in the plan documents.

#### **COST**

The cost of this insurance is paid for by the employee.

#### **EMPLOYEE'S RESPONSIBILITY**

Employees who are on long-term disability are responsible for notifying the organization of any change in their return-to-work status.

*This is intended as a brief introduction to the Long-Term Disability Plan. A more thorough explanation of the plan is contained in the Summary Plan Description and plan documents available from the Benefits Administrator. In the event of a discrepancy between the terms of this policy and the official plan documents, the official plan documents will apply.*

### Social Security

All employees are covered by this federal program, which is funded through payroll taxes known officially as the Federal Insurance Contributions Act (FICA) taxes.

#### **BENEFITS**

Social Security is an important benefit for employees and their families as it provides death, disability, and retirement benefits.

#### **COST**

The cost of this coverage is determined by law. The rates are subject to change in accordance with legislated amendments by Congress. The required amount of an employee's contribution will be deducted automatically from his or her paycheck.

#### **ADDITIONAL INFORMATION**

Questions regarding the Social Security program should be directed to the Social Security Administration, which has answers to many common questions on its website at [www.ssa.gov](http://www.ssa.gov). Questions regarding an individual's FICA or other payroll tax deductions should be directed to the supervisor.

#### **SECA ALLOWANCE FOR ORDAINED STAFF**

It is the policy of the Diocese to pay ordained clergy staff a Self-Employment Contributions Act (SECA) "SECA allowance" based on total salary (including housing) at the applicable SECA rate (currently 15.3%) for all full-time and part-time clergy staff.

### Employee Assistance Program

On occasion, everyone has personal problems. Usually these problems are resolved with the support of relatives and close friends. But sometimes, employees or members of their family may find that they would benefit from the assistance of a trained counselor. It is for this reason that The Episcopal Diocese provides an Employee Assistance Program (EAP) to employees and family members who may need help with personal or behavioral problems.

#### **ELIGIBILITY**

Our EAP, which is offered through the Cigna, is available to all employees and their family members.

#### **BENEFITS**

Through this program, confidential advice and short-term counseling are provided for any employee or member of an employee's family who requests it, or for an employee who is referred by his or her supervisor. Common problems addressed through counseling include alcoholism, drug abuse, financial difficulties, family tensions and conflicts with co-workers. EAP can assist achieving work/life balance by assisting with identify left, child care, senior care, pet care and education guidance.

The privacy of employees and their family members is protected at all times. The Diocese is not informed when anyone seeks assistance, unless the individual so requests, or the organization refers the employee to the program as a requirement of continued employment.

#### **COST**

The Episcopal Diocese pays the full cost of the Employee Assistance Program. Employees are responsible for the cost of outside referrals. However, the cost for outside referral help may be covered by the Episcopal Diocese group health insurance program.

#### **ADDITIONAL INFORMATION**

Employees may contact Cigna at (866) 395-7794 or CignaBehavioral.com. If they are unable to reach help at the EAP number and it is a crisis situation, employees should call 911. If it is not a crisis situation, employees may contact Finger Lakes Region 2-1-1 at 1-877-356-9211, by dialing 211, or by visiting [www.211fingerlakes.org](http://www.211fingerlakes.org). The Finger Lakes Region 211 offers referrals for emergency food, shelter, clothing, crisis counseling, substance abuse issues, employment, financial and legal issues and physical and mental health needs.

### Domestic Partner Benefits

The Episcopal Diocese allows employees to obtain allowable benefits for themselves and their domestic partners. If the domestic partner is not the employee's income tax dependent under applicable IRS rules, then the value of the employer-provided benefits (including any such coverage paid for on a pre-tax basis) may be added to the employee's taxable earnings. If you need further advice on this issue, please consult your tax advisor.

#### **ELIGIBILITY**

Domestic partners of current employees, including same sex and opposite sex partners and children of a current domestic partner are eligible for health insurance and dental insurance benefits. Domestic partners must meet the following requirements:

- Have an exclusive mutual commitment, similar to that of marriage;
- Are each other's sole domestic partner and intend to remain so indefinitely;
- Neither partner is legally married;
- Are not related by blood to a degree of closeness which would prohibit legal marriage in the state in which the partners legally reside;
- Are at least 18 years of age and are legally competent to contract;
- Are currently residing together and have resided together in a common household for at least six consecutive months and intend to reside together indefinitely;
- Share joint responsibility for the partners' common welfare and financial obligations as evidenced by an Affidavit of Domestic Partnership (a prescribed affidavit sworn to by both individuals which demonstrates their personal and financial interdependence).

Same-sex couples who have been legally married are eligible for the same insurance benefits from the organization as are other married couples without meeting the above eligibility requirements.

#### **ENROLLMENT**

To enroll a domestic partner in the Episcopal Diocese health insurance benefit programs, the employee must provide an Affidavit of Domestic Partnership which may be obtained from the Church Pension Group (CPG) or by contacting the Diocesan Benefits Administrator.

#### **CHANGES IN BENEFIT ELECTIONS**

After enrolling, employees may not change their benefit plans until the beginning of the next plan year, unless one of the following events occur and provided the change elected is made on account of and consistent with, such event:

- The domestic partnership is dissolved;
- You have a change in family status; or

- Your employment status changes.

### **TAX IMPLICATIONS**

Unless a domestic partner qualifies as the employee's tax dependent the value of any domestic partner benefit may be taxable compensation for the employee. For further advice, please consult your tax advisor.

### **TERMINATION PROCEDURES**

If there is a change in status of the domestic partnership, the employee must notify the Benefits Administrator within 30 days of the change of status. Benefits will continue until the last day of the month the statement is received.

### **CONFIDENTIALITY**

All employee information concerning domestic partnership status and benefits, including statements of marriage or domestic partnership, will be kept confidential by the Episcopal Diocese and released only on a need to know basis.

### Other Benefits

Our organization offers additional benefits to current employees.

#### **ELIGIBILITY**

Employees are eligible to receive discounts from the following:

- Frontier MEDEX, Inc.
- Health Advocate
- Hear PO

#### **ADDITIONAL INFORMATION**

See the Benefits Administrator for additional information on any one of these programs.

# Time Away from Work

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### Federal Family and Medical Leave Policy

As an employee of The Episcopal Diocese, you may be eligible to take unpaid family and medical leave under the federal Family and Medical Leave Act (FMLA). This policy provides an introduction to the rights and provisions of the federal FMLA. An FMLA summary that is based on the Department of Labor's (DOL's) model notice is attached to this policy and further explains the FMLA. If you have questions regarding the FMLA, please contact Human Resources.

#### Eligibility

To be eligible for leave, you must have been employed by the Company for at least 12 months. In the 12 months immediately preceding the beginning of the leave, you must also have worked at least 1,250 hours to qualify for federal FMLA. In addition, you must work in an office or work site where 50 or more employees are employed within 75 miles of that office or work site.

#### Amount of Leave Available

Eligible employees may take up to a total of 12 weeks of FMLA leave within a rolling 12-month period, measured backward from the date an employee uses any FMLA leave, for any combination of the following reasons:

- The birth of an employee's newborn child or the placement of a child with the employee for adoption or foster care
- To care for the employee's spouse, child or parent with a serious health condition
- The employee has a serious health condition that makes the him or her unable to perform the functions of their job
- A qualifying exigency that arises because the employee's spouse, child or parent is a covered military member on covered active duty (or has been notified of an impending call or order to covered active duty)

Where leave is taken to care for a covered service member with a serious injury or illness, a spouse, child, parent or next of kin may take up to 26 weeks of unpaid FMLA leave during a single 12-month period.

Under the federal FMLA, spouses employed by the Company are jointly entitled to a combined total of 12 weeks of leave for the birth of a newborn child, for the placement of a child for adoption or foster care and to care for a parent who has a serious health condition. The federal FMLA does not cover care for parents-in-law. Spouses employed by the Company are jointly entitled to a combined total of 26 weeks of leave to care for a covered service member with a serious injury or illness, for the birth of a newborn child, for the placement of a child for adoption or foster care and to care for a parent who has a serious health condition.



### Types of Leave Available

*Birth or Placement for Adoption or Foster Care:* FMLA leave is available to eligible male and female employees for the birth of a child or for the placement of a child with the employee for purposes of adoption or foster care. FMLA leave must be completed within 12 months of the birth or placement. This type of leave may not be taken intermittently or on a reduced schedule unless the Company agrees to this request. See below for more details on non-continuous leave.

*Serious Health Condition of Employee:* If, as an eligible employee, you experience a serious health condition as defined by the FMLA, you may take medical leave under this policy (see “Definitions” for the definition of serious health condition). A serious health condition generally occurs when you:

- Receive inpatient care in a hospital, hospice or nursing home
- Suffer a period of incapacity accompanied by continuing outpatient treatment or care by a health care provider
- Have a history of a chronic condition that may cause episodes of incapacity

The following provisions apply to leave for the serious health condition of an employee:

- *Non-continuous leave*—Medical leave may be taken all at once or, when medically necessary, intermittently or on a reduced leave schedule (see below).
- *Certification process*—The need for leave must be documented by your treating health care provider through our medical certification process (see below).
- *Fitness-for-duty statement*—A fitness-for-duty statement will be required in order for you to return from a medical leave. Failure to provide the statement will result in a delay in your return to work.

*Serious Health Condition of Immediate Family Member:* If, as an eligible employee, you need family leave in order to care for your child, spouse or parent who experiences a serious health condition as defined by the FMLA (see “Definitions” for definitions of child, spouse, parent and serious health condition), you may take a leave under this policy.

- *Non-continuous leave*—Leave may be taken all at once or, when medically necessary, intermittently or on a reduced leave schedule (see below).
- *Certification process*—The need for leave must be documented by the family member’s treating health care provider through our medical certification process (see below).

*Qualifying Exigency Because of Active Duty:* If, as an eligible employee, you need family leave because of any qualifying exigency arising out of the fact that your spouse, son, daughter or parent is on covered active duty in the Armed Forces (including the National Guard or Reserves), or has been notified that they will be called or ordered to covered active duty in the Armed Forces (including the National Guard or Reserves), you may take family leave under this policy. (See “Definitions” for a definition of qualifying exigency)

## Time Away From Work

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- *Non-continuous leave*— Family leave for any qualifying exigency arising out of the covered active duty of a family member may be taken all at once, intermittently or on a reduced leave schedule (see below).
- *Certification process*—The need for leave must be documented through our certification process (see below).

*Service Member Family Leave:* If, as an eligible employee, you need family leave to care for a covered service member who is your spouse, child, parent or next of kin and who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status or is otherwise on the temporary disability retired list for a serious injury or illness, you may take up to 26 weeks of unpaid leave during a single 12-month period under this policy. (See “Definitions” for a definition of covered service member and serious injury or illness)

Effective March 8, 2013, an eligible employee may take service member family leave to care for a covered veteran who is the employee’s spouse, child, parent or next of kin and who is undergoing medical treatment, recuperation or therapy for a serious injury or illness. (See “Definitions” for a definition of covered veteran)

- *Non-continuous leave*—Service member family leave may be taken all at once or, when medically necessary, intermittently or on a reduced leave schedule (see below).
- *Certification process*—The need for leave must be documented by the family member’s treating health care provider through our medical certification process (see below).

### **Notifying the Company of the Need for Family or Medical Leave**

Generally, an application for leave must be completed for all leave taken under this policy. A non-emergency leave should generally be requested from Human Resources at least 30 days, or as soon as practical, in advance of the date the leave is expected to begin. In cases of emergency, you (or your representative, if you are incapacitated) should give verbal notice as soon as possible, and the application form should be completed as soon as practical. Failure to provide adequate notice may, in the case of foreseeable leave, result in a delay or denial of leave. It is your responsibility to notify your manager and Human Resources of absences that may be covered by the FMLA.

You must provide sufficient information regarding the reason for an absence for the Company to know that protection may exist under this policy. Failure to provide this information will result in delay or forfeiture of rights under this policy. This means the absence may then be counted against your record for purposes of discipline for attendance or similar matters.

### **Medical Certification Process**

In addition to an application for leave, you will be required to complete a medical certification form when leave is for a family member’s or your own serious health condition. The certification form needs to be signed by the health care provider. The short-term disability certification may be sufficient where the information required is duplicative. These forms are available from Human Resources. Second or third certifications from health care providers and periodic recertification at the Company’s or your expense may be required under certain circumstances.

We may also require periodic reports during federal FMLA leave regarding your status and intent to return to work.

### **Military Family Leave Certifications**

In addition to an application for leave, you will be required to complete a Certification of Qualifying Exigency for Military Family Leave form when leave is for a qualifying exigency. A copy of the military member's active duty orders or other military documentation may also be required to substantiate your need for FMLA leave.

If you request leave to care for a covered service member with a serious injury or illness, you will be required to complete a medical certification form, which must be signed by the service member's health care provider. The certification form will request additional information, such as information regarding the relationship between you and the covered service member, to substantiate your need for FMLA leave.

### **Substituting Paid Leave for Unpaid Leave**

Federal FMLA leave is unpaid. The Company requires you to substitute vacation days according to the schedule below. You may also choose to substitute additional paid or unpaid leave that you have accrued.

When you substitute vacation days or other paid leave, the absence will be counted against your entitlement to FMLA leave under this policy and will not extend your leave. In other words, you are using your paid leave concurrently with your FMLA leave.

<b>Eligible Vacation Remaining</b>	<b>Required Substitution</b>
Less than 5 days	None
5-8 days	3 days
9-12 days	5 days
13-16 days	7 days
17-20 days	9 days

When an employee is absent due to a work-related illness or injury that meets the definition of a serious health condition, the absence will be counted against the employee's entitlement under this policy. In other words, the employee is using FMLA leave concurrently with the workers' compensation absence. An employee is not required to substitute paid time off for an absence covered under workers' compensation.

You may be paid for all or part of a medical leave to the extent you are eligible for benefits such as short-term disability. An employee is not required to substitute paid time off for an absence covered under a disability benefit plan.

### **Non-Continuous Leave**

Intermittent or reduced leave will be permitted only when it is medically necessary or for a qualifying exigency, as explained above. In all cases, the total amount of leave taken in a calendar year should not exceed your total allotment as defined earlier in this policy.

## Time Away From Work

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Intermittent and reduced schedule leave must be scheduled with minimal disruption to an employee's job. To the extent possible, medical appointments and treatments related to an employee's or family member's serious health condition should be scheduled outside of working hours or at such times that allow for a minimal amount of time away from work.

If you request non-continuous federal FMLA leave which is foreseeable based on planned medical treatment for yourself, a family member or a covered service member, you may be required to transfer temporarily to an available alternative position offered by the Company for which you are qualified and which better accommodates recurring periods of leave than your regular employment position. You will be entitled to equivalent pay and benefits, but will not necessarily be assigned the same duties in the alternative position. This provision may also apply if the Company approves a non-continuous leave for the birth of a child or the placement of a child for adoption or foster care.

### **Benefit Continuation during Leave**

The Company will maintain your group health plan coverage and certain other employment benefits (such as group life insurance, AD&D insurance and health and dependent flexible spending accounts) during your FMLA leave on the same terms as if you had continued to work, if these benefits were provided to you before the leave was taken. You will be required to pay your regular portion of premiums – contact Human Resources for an explanation of your options.

Benefits that are accumulated based upon hours worked will not accumulate during the period of FMLA leave.

In some instances, the Company may recover premiums it paid to maintain health plan coverage for an employee who fails to return to work from FMLA leave.

### **Returning to Work**

If the reason for FMLA leave is for your own serious health condition, you will be required to present a fitness-for-duty certification immediately upon return to work.

If you wish to return to work before the scheduled expiration of FMLA leave, you must notify the Company of the change in circumstances as soon as possible, but no later than two working days prior to your desired return date.

If you exhaust all leave under this policy and are still unable to return to work, you must notify the Company as soon as possible. Your situation will be reviewed to determine what rights and protections might exist under other Company policies.

### **Rights upon Return from Leave**

Upon return from family or medical leave, you will be returned to the position you held immediately prior to the leave, if the position is vacant. Certain exceptions exist for key employees, as defined by law. If the position is not vacant, you will be placed in an equivalent employment position with equivalent pay, benefits and other terms and conditions of employment.

The law provides that an employee has no greater rights upon a return from leave than the employee would have had if the employee had continued to work. Therefore, you may be affected by a layoff, termination or other job change if the action would have occurred had you remained actively at work.

### Other Types of Leave

If you do not qualify for the types of leave described in this policy, the Company may approve a personal leave of absence, depending on your circumstances. Except where mandated by law, we cannot guarantee that benefits will continue or that your position will remain open in your absence.

### Definitions

“Spouse”—A husband or wife as defined or recognized under state law for purposes of marriage in the state in which the marriage was entered into. This definition also includes an individual in a same-sex or common law marriage that was entered into in a state that recognizes these marriages. An opposite-sex, same-sex or common law marriage that was entered into outside of any state will be recognized if the marriage is valid in the place where it was entered into and the marriage could have been entered into in at least one state.

“Parent”—A biological parent, adoptive parent, stepparent, foster parent or an individual who provides or provided day-to-day care or financial support to the child. Parent does not include a parent-in-law under this law.

“Child”—A biological, adopted or foster child, stepchild, legal ward or a child who is receiving day-to-day care or financial support from the employee and is under the age of 18. Child also includes a person 18 years of age or older who is incapable of self-care because of a mental or physical disability. For military family leave, the child does not have to be a minor (under the age of 18) and can be of any age.

- “Incapable of self-care”—The child requires active assistance or supervision to provide daily self-care in three or more “activities of daily living,” or “instrumental activities of daily living,” including adaptive activities such as caring appropriately for one’s grooming and hygiene, bathing, dressing, eating or instrumental activities such as shopping, taking public transportation or maintaining a residence.
- “Physical or mental disability”—A physical or mental impairment that substantially limits one or more major life activities of the individual.

“Covered Service Member”—A member of the armed forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status or is otherwise on the temporary disability retired list for a serious injury or illness.

“Covered Veteran”—An individual who is undergoing medical treatment, recuperation or therapy for a serious injury or illness and who was a member of the Armed Forces (including a member of the National Guard or Reserves), and was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employee takes FMLA leave to care for the covered veteran.

“Next of Kin”—Used with respect to an individual, this means the nearest blood relative of that individual, other than the spouse, parent or child.

“Serious Health Condition”—Illness, injury, impairment, or physical or mental condition that involves:

- Inpatient care in a hospital, hospice or residential medical care facility.

## Time Away From Work

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- A period of incapacity of more than three consecutive calendar days (including any subsequent treatment or period of incapacity relating to the same condition) that also involves: 1) treatment two or more times within 30 days of the first day of incapacity, unless extenuating circumstances exist, by or under the orders of a health care provider; or 2) treatment by a health care provider on at least one occasion which results in a regimen of continuing treatment under the supervision of a health care provider. The first (or only) visit must occur in person within seven days of the first day of incapacity.
- Any incapacity due to pregnancy or for prenatal care.
- Chronic conditions requiring periodic treatment by or under the supervision of a health care provider, which continue over an extended period of time and may cause an episodic rather than a continuing period of incapacity (for example, asthma, diabetes and epilepsy).
- Permanent or long-term conditions requiring supervision for which treatment may not be effective (for example, Alzheimer's, a severe stroke or the terminal stages of a disease).
- Multiple treatments by or under the supervision of a health care provider either for restorative surgery after an accident or other injury or for a condition that would likely result in a period of incapacity of more than three calendar days in the absence of medical intervention or treatment, such as cancer (chemotherapy), severe arthritis (physical therapy) or kidney disease (dialysis).

“Serious Injury or Illness”—can be:

- In the case of a member of the Armed Forces, including a member of the National Guard or Reserves, an injury or illness incurred by the member in the line of duty on active duty in the Armed Forces (or existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty in the Armed Forces) and that may render the member medically unfit to perform the duties of the member's office, grade, rank or rating.
- In the case of a veteran who was a member of the Armed Forces, including a member of the National Guard or Reserves, an injury or illness incurred by the member in the line of duty on active duty in the Armed Forces (or existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty in the Armed Forces) and that manifested itself before or after the member became a veteran and is:
  - A continuation of a serious injury or illness that was incurred or aggravated when the covered veteran was a member of the Armed Forces and rendered the servicemember unable to perform the duties of the servicemember's office, grade, rank or rating;
  - A physical or mental condition for which the covered veteran has received a U.S. Department of Veterans Affairs Service-Related Disability Rating (VASRD) of 50 percent or greater, and such VASRD rating is based, in whole or in part, on the condition precipitating the need for servicemember family leave;
  - A physical or mental condition that substantially impairs the covered veteran's ability to secure or follow a substantially gainful occupation by reason of a disability or disabilities related to military service, or would do so absent treatment; or

## Time Away From Work

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- An injury, including a psychological injury, on the basis of which the covered veteran has been enrolled in the Department of Veterans Affairs Program of Comprehensive Assistance for Family Caregivers.

“Qualifying Exigency”—includes:

- Short-notice deployment (seven days or less)
- Military events and related activities
- Child care and school activities
- Financial and legal arrangements
- Counseling
- Rest and recuperation (up to five days; effective March 8, 2013, up to 15 days)
- Post-deployment activities
- Parental care (effective March 8, 2013)
- Additional activities agreed to by the Company and the employee

### **More Information**

Please contact the Benefits Administrator for additional information.

### **EMPLOYEE RIGHTS AND RESPONSIBILITIES UNDER THE FAMILY AND MEDICAL LEAVE ACT**

#### **Basic Leave Entitlement**

FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for the following reasons:

- For incapacity due to pregnancy, prenatal medical care or child birth;
- To care for the employee's child after birth, or placement for adoption or foster care;
- To care for the employee's spouse, son, daughter or parent, who has a serious health condition; or
- For a serious health condition that makes the employee unable to perform the employee's job.

#### **Military Family Leave Entitlements**

Eligible employees whose spouse, son, daughter or parent is on covered active duty or call to covered active duty status may use their 12-week leave entitlement to address certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings.

FMLA also includes a special leave entitlement that permits eligible employees to take up to 26 weeks of leave to care for a covered servicemember during a single 12-month period. A covered servicemember is: (1) a current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness\*; or (2) a veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employee takes FMLA leave to care for the covered veteran, and who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness.\*

**\*The FMLA definitions of "serious injury or illness" for current servicemembers and veterans are distinct from the FMLA definition of "serious health condition".**

#### **Benefits and Protections**

During FMLA leave, the employer must maintain the employee's health coverage under any "group health plan" on the same terms as if the employee had continued to work. Upon return from FMLA leave, most employees must be restored to their original or equivalent positions with equivalent pay, benefits, and other employment terms.

Use of FMLA leave cannot result in the loss of any employment benefit that accrued prior to the start of an employee's leave.

#### **Eligibility Requirements**

Employees are eligible if they have worked for a covered employer for at least 12 months, have 1,250 hours of service in the previous 12 months\*, and if at least 50 employees are employed by the employer within 75 miles.

**\*Special hours of service eligibility requirements apply to airline flight crew employees.**

#### **Definition of Serious Health Condition**

A serious health condition is an illness, injury, impairment, or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee's job or prevents the qualified family member from participating in school or other daily activities.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than 3 consecutive calendar days combined with at least two visits to a health care



## Time Away From Work

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provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

### **Use of Leave**

An employee does not need to use this leave entitlement in one block. Leave can be taken intermittently or on a reduced leave schedule when medically necessary. Employees must make reasonable efforts to schedule leave for planned medical treatment so as not to unduly disrupt the employer's operations. Leave due to qualifying exigencies may also be taken on an intermittent basis.

### **Substitution of Paid Leave for Unpaid Leave**

Employees may choose, or employers may require use of accrued paid leave while taking FMLA leave. In order to use paid leave for FMLA leave, employees must comply with the employer's normal paid leave policies.

### **Employee Responsibilities**

Employees must provide 30 days' notice of the need to take FMLA leave when the need is foreseeable. When 30 day's notice is not possible, the employee must provide notice as soon as practicable and generally must comply with an employer's normal call-in procedures.

Employees must provide sufficient information for the employer to determine if the leave may qualify for FMLA protection and the anticipated timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, the family member is unable to perform daily activities, the need for hospitalization or continuing treatment by a health care provider, or circumstances supporting the need for military family leave. Employees also must inform the employer if the requested leave is for a reason for which FMLA leave was previously taken or certified. Employees also may be required to provide a certification and periodic recertification supporting the need for leave.

### **Employer Responsibilities**

Covered employers must inform employees requesting leave whether they are eligible under FMLA. If they are, the notice must specify any additional information required as well as the employees' rights and responsibilities. If they are not eligible, the employer must provide a reason for the ineligibility.

Covered employers must inform employees if leave will be designated as FMLA-protected and the amount of leave counted against the employee's leave entitlement. If the employer determines that the leave is not FMLA-protected, the employer must notify the employee.

### **Unlawful Acts by Employers**

FMLA makes it unlawful for any employer to:

- Interfere with, restrain, or deny the exercise of any right provided under FMLA; and
- Discharge or discriminate against any person for opposing any practice made unlawful by FMLA or for involvement in any proceeding under or relating to FMLA.

### **Enforcement**

An employee may file a complaint with the U.S. Department of Labor or may bring a private lawsuit against an employer.

FMLA does not affect any Federal or State law prohibiting discrimination or supersede any State or local law or collective bargaining agreement which provides greater family or medical leave rights.

**FMLA section 109 (29 U.S.C. § 2619) requires FMLA covered employers to post the text of this notice. Regulation 29 C.F.R. § 825.300(a) may require additional disclosures.**

### NYS Paid Family Leave

Starting January 1, 2018, paid family leave will provide paid time off, so an employee can: Bond with a newly born, adopted, or fostered child, care for a family member with a serious health condition, or assist loved ones when a family member is deployed abroad on active military duty.

PFL protects employees in the following ways: You have the right to return to the same or comparable job upon return from Paid Family Leave. Employees are guaranteed continued health insurance while on leave (if you are already enrolled), however you will be required to pay your health insurance premium contributions while on leave. Your citizenship and immigration status do not impact your eligibility. The Episcopal Diocese cannot discriminate against employees for taking Paid Family Leave in any way.

Employees with a regular work schedule of 20 or more hours per week are eligible after 26 weeks of employment.

Employees with a regular work schedule of less than 20 hours per week are eligible after 175 days worked.

Benefits will be paid for through a small weekly payroll deduction from each check.

You can opt out of Paid Family Leave if you do not expect to work for The Episcopal Diocese for the minimum amount of time required for eligibility. If you meet these criteria and wish to opt out, you can do so by completing a Paid Family Leave Waiver and returning it to The Episcopal Diocese. Your waiver will be automatically revoked if your schedule changes or you may voluntarily revoke it at any time.

Please visit [ny.gov/paidfamilyleave](http://ny.gov/paidfamilyleave) or call (844) 337-6303 for information on how to apply and for up to date benefit details including weekly length of eligible benefits and percentage of average weekly wage pay out.

**Short-term disability and PFL cannot be used at the same time. You can however take one first, and then the other, but you cannot take more than 26 weeks of combined short-term disability and Paid Family Leave in a 52-week period.**

### Jury Duty Policy

Our organization considers service on a jury to be an important civic duty.

#### **JURY DUTY PAY**

If an employee is called to serve, he or she will be paid by the Diocese the New York State mandated per diem for the first three days of jury service. Exempt employees will be paid their full weekly salary if they work any part of the week in which they perform jury service.

#### **DOCUMENTATION**

Employees must submit a copy of the Jury Duty Attendance Certificate to their supervisor indicating the dates served. Employees will receive this statement when their jury duty is complete.

#### **TIME AWAY FROM WORK**

In fairness to the organization, employees are expected to return to work if they are excused from jury duty during their regular working hours.

#### **COURT ATTENDANCE**

Employees who are subpoenaed to appear in court as a witness in a criminal proceeding, or who attend court as a victim of a crime, will be granted unpaid time off for their attendance.

### Military Leave Policy

The Episcopal Diocese provides military leave to eligible employees in compliance with federal and state laws, including the federal Uniformed Services Employment and Reemployment Rights Act (USERRA). Questions regarding the Company's military leave policy should be directed to Human Resources.

Employees should notify their managers as soon as they become aware of a military service obligation.

#### Leave for Annual Training

Employees who are members of the U.S. Army, Navy, Air Force, Marines or Coast Guard Reserves or the National Guard may be granted leaves of absence for the purpose of participating in Reserve or National Guard training programs.

Employees will be granted the minimum amount of leave needed to meet the minimum training requirements of their units. No employee will be required to use vacation time for military duty, but employees who do elect to schedule their vacations to coincide with military duty will receive their full regular vacation pay in addition to any pay from the military.

In recognition of the public service performed by Reservists and members of the National Guard, employees will receive the difference between their regular pay and their service pay, excluding any military subsistence allowance or other expense allowances during the training period. If state law requires a different arrangement, The Episcopal Diocese will comply with state law. Please contact Human Resources with any questions.

#### Leave for Military Service

Permanent employees who perform service in the uniformed services may be granted leaves of absence for the purpose of participating in military service. Under USERRA, "uniformed services" consists of the U.S. Army, Navy, Marine Corps, Air Force and Coast Guard and their Reserve components, U.S. National Guard and Air National Guard, the Commissioned Corps of the Public Health Service and any other category of persons designated by the President of the United States in time of war or emergency.

Employees will be granted leave as required to complete the military service, for up to five years of cumulative uniformed service-related absences. Some special categories of military service are exempt from this five-year limit.

Employees with leaves of less than 31 days must report back to work by the beginning of the first regularly scheduled work period after the end of the last calendar day of service, plus the time required to return home safely and have an eight hour rest period.

Employees with leaves between 31 and 180 days must apply for re-employment no later than 14 days after completion of uniformed service. Employees with leaves longer than 180 days must apply for re-employment no later than 90 days after completion of uniformed service.

## Time Away From Work

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The reporting or application deadlines are extended for persons who are hospitalized or convalescing because of an injury or illness incurred or aggravated during the performance of military service.

Returning service members will be reemployed in the job that they would have attained had they not been absent for military service, with the same seniority, status and pay, as well as other rights and benefits determined by seniority (escalator position). The Company will make reasonable efforts (such as training or retraining) to enable returning service members to refresh or upgrade their skills to help them qualify for reemployment. However, certain exceptions apply and a service member may be placed in an alternative reemployment position if he or she cannot qualify for the escalator position.

Reemployed service members are entitled to the seniority and rights and benefits based on seniority that they would have attained with reasonable certainty had they remained continuously employed.

During a period of military service, the employees will be treated as if they are on a furlough or leave of absence. Consequently, during their period of service they are entitled to participate in any rights and benefits not based on seniority that are available to employees on comparable nonmilitary leaves of absence.

If an employee's health plan coverage would terminate because of an absence due to military service, he or she may elect to continue the health plan coverage for up to 24 months after the absence begins or for the period of service (plus the time allowed to apply for reemployment), whichever period is shorter. The employee may be required to pay up to 102 percent of the full premium for the coverage. However, if the military service is for 30 or fewer days, the employee cannot be required to pay more than the normal employee share of any premium.

### Vacation & Paid Time Off Policy

The Dioceses provides eligible employees with paid vacation leave to give them time off for rest and relaxation.

#### **ELIGIBILITY**

Vacation periods are calculated based upon the calendar year January to December. Employees are provided with 15 days of annual vacation that is accrued monthly at the rate of 1.25 days of vacation for each month on payroll. Part-time employees scheduled to work at least 1,000 or more annually receive vacation on a pro-rated basis. Unused vacation days do not carry over to the next calendar year.

#### **SCHEDULING**

Every effort will be made to permit employees to take their vacation at the time requested. However, due to the nature of our organization, coordination within scheduling is essential.

Employees who change their vacation request later in the year must receive approval from the supervisor. Approval will depend on the department's workload and the number of people who are scheduled for vacation at that time.

#### **DEFERRAL OF VACATION TIME**

Vacation may not be carried over from one year to the next.

#### **VACATION PAY**

An employee's vacation pay is based on the number of hours he or she is regularly scheduled to work at his or her straight time hourly rate. Part-time employees will receive vacation on a pro-rated basis.

#### **EXCESS LEAVE AND UNPAID VACATION**

Leave taken in excess of an employee's allotment will be unpaid and must be approved in advance by his or her supervisor. All vacation must be used before any unpaid time is granted.

#### **PAY IN LIEU OF VACATION**

Employees may not receive pay in lieu of taking the actual time off.

#### **VACATION PAY AT TERMINATION**

Employees who resign voluntarily, giving at least two weeks advance notice, will be paid for earned but unused vacation time. Earned but unused vacation time may not be paid to employees who resign with less than the specified advance notice or to employees who are terminated by the organization.

### **List of Paid Company Holidays**

- Martin Luther King Jr. Day
- Presidents' Day
- Good Friday
- Easter Monday (following Easter)
- Memorial Day
- Independence Day
- Labor Day
- Columbus Day
- Monday following the Diocesan Convention
- Veterans Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve Day through New Year's Day

**\*\*Please note individual parishes may have different holidays; employees should verify with their supervisor\*\***

### Sick Time Policy

Employees who are absent due to personal matters, illness or injury may be eligible to be paid through our organization's sick/personal day plan. They also may be eligible for disability insurance or Workers' Compensation insurance benefits.

#### **SICK/PERSONAL DAY ELIGIBILITY**

Full-time employees and part-time employees (on a pro-rated basis) are eligible for 12 sick/personal days annually that is accrued monthly at the rate of 1 day per month. Sick/personal days are calculated based upon the calendar year.

#### **USE OF SICK/PERSONAL DAYS**

Sick/personal days may be used in cases of employee injury or illness, for doctors' appointments, personal matters or death of a family member. Sick/personal days may not be used as vacation time.

#### **EMPLOYEE'S RESPONSIBILITY**

An employee who is going to be late or absent from work must personally call the supervisor before the employee's scheduled start time. If the Episcopal Diocese is closed, employees may leave a message.

An employee absent for three (3) consecutively scheduled days without contacting his or her supervisor will be considered to have voluntarily resigned from their position.

#### **CARRY OVER OF SICK/PERSONAL DAYS**

Sick/personal days may not be carried over from one year to the next.

#### **SICK/PERSONAL DAYS AT TERMINATION**

Unused sick/personal days are not paid at termination.



### Voting Leave

The Episcopal Diocese encourages all employees to vote. It is the policy of The Episcopal Diocese to comply with all state election law requirements with respect to providing employees, when necessary, with time off to vote.

All registered voters may request up to three hours of time off, regardless of their schedule, without loss of pay to enable the employee to vote in any public election.

Employees requiring working time off to vote will be required to notify their supervisor that time off to vote will be required not less than 2 days before the day of the election.

Time off to vote is paid and does not count against an employee's accrued paid time off or sick time.

If state law requires a different arrangement, The Episcopal Diocese will comply with state law. Questions regarding the policy for time off to vote should be directed to your supervisor or leadership.

### **Bone Marrow & Blood Donation Leave**

In accordance with New York State law, our organization offers employees a leave of absence for the purpose of bone marrow or blood donation.

#### **TIME AWAY FROM WORK**

Employees who work at least 20 hours per week who seek to undergo a medical procedure to donate bone marrow will be granted a leave of absence no longer than 24 work hours. This leave is unpaid.

Employees who work at least 20 hours per week may be granted three hours of unpaid leave in any 12-month period for the purposes of donating blood.

#### **VERIFICATION**

Employees are requested to give as much notice as possible. Employees who donate bone marrow must provide the supervisor with verification from a physician as to the purpose and length of leave requested.

### Disability Leave

Our organization offers employees a leave of absence due to an injury or illness, including pregnancy-related disability.

#### **ELIGIBILITY**

All employees are eligible for this leave.

#### **LENGTH OF LEAVE**

Leave will be provided as medically necessary and consistent with the operational needs of the organization. The Diocese will comply with the requirements of the Americans with Disabilities Act and state law.

#### **PAY DURING LEAVE**

Disability leaves are unpaid except to the extent an employee is eligible to receive Workers' Compensation benefits, short-term disability benefits, or paid sick/personal or vacation days. (See those policies for details.)

#### **MEDICAL CERTIFICATION**

Prior to the granting of such leave, employees must provide the supervisor with a health care provider's certificate justifying the medical need for the disability leave and the expected date of return.

#### **HEALTH INSURANCE DURING LEAVE**

Our organization will continue to provide health insurance coverage for full-time employees on authorized disability leave for three months. Employees are required to pay their portion of the premium on the first day of each month. Coverage will cease if an employee's premium payment is more than 30 days late. The employee may then be entitled to continuation coverage at the employee's expense. (See Extension of Benefits Program policy for details.)

If an employee qualifies for leave under the Family and Medical Leave Act, he or she will receive health benefits during their FMLA leave under the same terms and conditions as if he or she was on the job. (See the Family and Medical Leave Act policy.)

#### **RETURN TO WORK**

Before returning to work, employees are required to present documentation from a health care provider certifying they can return to work.

#### **JOB REINSTATEMENT**

We will make all reasonable efforts to return employees to the same or similar position as held prior to the disability leave, subject to our staffing and business requirements. An employee's continued absence from work beyond the period of disability will be deemed a voluntary termination of employment.

### Sabbatical Leave

Our organization offers ordained clergy a sabbatical leave.

#### **ELIGIBILITY**

Ordained clergy employed as either parochial clergy or who serve on the Bishop's staff, are entitled to a three-month sabbatical after five years of service (in the sixth year). Sabbatical time is accrued at a rate of 0.6 months per year of service and may be pro-rated for part-time clergy.

#### **LENGTH OF LEAVE**

A sabbatical may be for a period of less than three months, carrying forward the remaining time accrued, but the maximum accrued sabbatical will never exceed three months. Accrued sabbatical time will not be paid upon resignation or termination.

#### **RETURN TO WORK**

Clergy who take a sabbatical are expected to return to work for at least one year following the end of the sabbatical period.

#### **REQUEST FOR LEAVE**

To assist in coordinating coverage, all requests for sabbatical leave should be communicated in writing to the office of the Bishop at least six months prior to the requested sabbatical start date.

# Information & Office Security

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### Facility Access & Visitors Policy

All visitors are to be escorted by authorized personnel at all times. Please do not allow visitors to roam the premises unattended.

#### **VISITORS**

Visitors requiring access to the Episcopal Diocese's offices are to be met in the reception area, escorted while in the building by an authorized employee. Visitors should only have access to the areas/offices within the building that are needed to conduct business. Parishes may have other policies.

#### **DELIVERIES**

Delivery people are seldom thought of as visitors, but they are and should be treated as any other visitor.

#### **PROHIBITED ITEMS**

The following articles may not be brought onto organization premises:

- Firearms, weapons, explosives;
- Narcotics or alcoholic beverages;
- Copying or reproduction devices; and
- Other items similar in effect or purpose to any of the above, as well as items which may be considered illegal under local, state, or federal laws or contrary to standard industrial practice.

Any personal items brought on the premises are subject to inspection as necessary to protect organization property and personnel.

#### **USE OF ORGANIZATION PROPERTY/VEHICLES**

Company property may not be removed from the premises or equipment operated for personal use without the written approval of the supervisor and/or appropriate Leadership.

# General Computer Usage Policy

The Internet is a powerful communications tool and a valuable source of information. However, an employee's improper use of employer provided Internet services can waste time and resources and create legal liability and embarrassment for both organization and the employee.

### **ACCESS**

The company policy applies to any organization provided Internet service that is accessed on or from the organization's premises, accessed using organization computer equipment or via organization - paid access methods and/or used in a manner that identifies the employee with the Episcopal Diocese/Parish/Mission.

### **IMPROPER USES**

Employees are strictly prohibited from using employer -provided Internet services in connection with, but not limited to, any of the following activities:

Engaging in illegal or fraudulent conduct which includes improper use or downloading of copyrighted material;

Viewing, sending, receiving, or storing material that could be viewed as malicious, obscene, threatening, or contributing to a hostile work environment on the basis of any status protected by law or organization policy;

Monitoring or intercepting the files or electronic communications of employees or third parties;

Obtaining unauthorized access to any computer system;

Using another individual's account or identity without explicit authorization from the supervisor and/or Leadership;

Attempting to test, circumvent, or defeat security or auditing systems of the Episcopal Diocese or any other organization without prior authorization; or

Distributing or storing chain letters, jokes, offers to buy or sell goods.

### **USE OF INSTANT MESSAGING, WEBLOGS, AND SOCIAL NETWORKING SITES**

Blogging, instant messaging, and visiting social networking sites such as Facebook are not appropriate working time activities unless required by the scope and responsibilities of an employee's job. Such personal activities, if engaged in, must be limited to non-work time and must comply with the Episcopal Diocese policies governing the proper use of the internet, e-mail, off- duty social networking, and computer files.

### **CONFIDENTIALITY**

Employees should not expect privacy with respect to any of their activities using employer -provided Internet access or services. The organization reserves the right to review any site visits and/or files, messages, or communications sent, received or stored on organization computer systems.

### **VIOLATIONS**

Employees violating this policy are subject to disciplinary action, up to and including termination. Employees using organization computer systems for illegal or fraudulent purposes also may be subject to civil liability and/or criminal prosecution. The organization may also report suspected unlawful conduct to the appropriate law enforcement authorities.

### Voicemail, Email & Computer Systems

The organizations telephone and computer systems permit employees to receive, send and transfer voice mail, text, and e-mail messages. The purpose of these systems is to facilitate business communications. The organization reserves the right to access all voicemail, text, and e-mail messages left on or recorded on the phone system or the computer mail system, as well as the right to access any computer file on the computer system, at any time without advance notice.

#### **CONFIDENTIALITY**

Employees should not assume that messages on voice mail, e-mail, or organization-provided cell phones and electronic devices are private or confidential. Security codes limit access to employees' messages, but management reserves the right to search or monitor the phone and computer systems, without advance notice.

#### **BUSINESS RELATED**

Our computer and phone systems are maintained for organization business purposes. Employees should not use the organization's systems to conduct personal business or maintain personal files.

#### **IMPROPER USES**

As with all organization communications, messages of a discriminatory or harassing nature may not be transmitted on organization network systems. Employees are expected to use professional and respectful language when communicating over organization computer and phone systems and other organization-provided electronic devices.

Employees are prohibited from downloading any software from the Internet. Employees must respect copyright and license agreements for software, digital artwork and other forms of data. Employees may not use other employees' passwords to access organization data unless authorized in writing in advance by the supervisor.

Employees may not disclose their passwords or allow others to use their access to organization systems and equipment. Employees must protect data from unauthorized use or disclosure and respect the integrity of computing systems. Employees must take care not to introduce viruses into organization systems by not opening messages or documents sent by unknown users. Employees should utilize anti-virus software and notify management immediately if there is reason to believe a virus has been introduced into our computer system or that any person may have accessed data which they were not authorized to view.

#### **MAINTENANCE**

Employees are responsible for maintaining their files and messages on these systems and devices. Messages should be accessed, acted upon, filed or deleted on a regular basis.



# General Practices

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### Anti-discrimination Policy

The organization is committed to a policy of Equal Employment Opportunity with respect to all employees and applicants for employment. The organization prohibits discrimination against qualified employees and applicants in all aspects of employment including, but not limited to: recruitment, hiring, compensation, promotion, job assignments, transfers, demotions, training, leaves of absence, layoff, benefits, termination, and employer-sponsored activities, including social and recreational programs. This policy prohibits discrimination against all legally protected classes including, but not limited to: race, color, sex, age, disability, religion, citizenship, national origin, ancestry, military status or veteran status, marital status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.

#### **PRACTICES**

This policy is observed in all employment practices, including, but not limited to: recruitment, hiring, compensation, promotion, job assignments, transfers, demotions, training, leaves of absence, layoff, benefits, termination, and employer-sponsored activities, including social and recreational programs and on-the-job treatment of individuals.

#### **DECISIONS**

Decisions regarding all employment practices and terms of employment, including, but not limited to: recruitment, hiring, compensation, promotion, job assignments, transfers, demotions, training, leaves of absence, layoff, benefits, termination and employer-sponsored activities, including social and recreational programs, will be made in accordance with this policy.

#### **MANAGEMENT RESPONSIBILITIES**

All members of management are responsible for understanding our organization's commitment to this policy and ensuring this policy is carried out. Supervisors are responsible for immediately reporting and responding to a discrimination complaint. It is critical that any reference to discrimination, whether formal or informal, is taken seriously.

#### **QUESTIONS AND COMPLAINTS**

Questions regarding the administration of this policy, or a complaint regarding Equal Employment Opportunity, should be directed to the employee's supervisor or to the Leadership. The organization will promptly and thoroughly investigate all complaints. Confidentiality will be maintained to the greatest degree possible, consistent with the organization's obligation to thoroughly investigate the complaint. If not satisfied with the resolution, an employee may pursue an appeal. Appeals will generally follow the steps outlined in the Open Communication policy.

#### **NO RETALIATION**

It is the policy of the organization that any employee who makes or participates in the investigation of a discrimination complaint will not be retaliated against in any way. Employees who feel that they have been retaliated against for such activity should immediately contact Parish Leadership and/or the Bishop's Office.

### Attendance and Standard Working Hours Policy

Each employee's position and the work that he or she does at the organization is important. It is essential that employees be at work on time in order for us to serve our members and run our organization in an efficient manner.

#### **PUNCTUALITY**

Although individual schedules may vary, employees should be at their work area on time, ready to work. Punctuality is important. Consistent, unexcused tardiness, as determined by the organization, is considered a performance issue and is subject to disciplinary action, up to and including termination of employment.

#### **EMPLOYEE RESPONSIBILITIES**

An employee who is going to be late or absent from work must personally call the supervisor before the employee's scheduled start time. If the organization is closed, employees may leave a message.

An employee absent for three (3) consecutively scheduled days without contacting his or her supervisor will be considered to have voluntarily resigned from their position. Due to the nature of the organization, hours of operation vary per day based on location. Time records are kept for each non-exempt employee showing the hours worked each week.

#### **WORKWEEK**

Because of the nature of our organization, workdays and hours may vary with the job.

#### **MEAL BREAK**

At least a 30-minute, paid meal break is standard, unless otherwise stated for an employee's position and/or department. Supervisors are responsible for the scheduling of meal breaks.

#### **NURSING MOTHERS' PROTECTION**

Nursing mothers may receive break time each day to express breast milk for up to three years after the birth of a child. Meal periods may also be used for this purpose. A nearby private area or room, which is not a bathroom, will be provided in which the employee may express breast milk. No employee will be penalized or retaliated against for choosing to express breast milk. Employees needing a private area for expressing breast milk should see their supervisors or Leadership for more details.

#### **TIME RECORDS**

Non-exempt employees are responsible for recording their hours worked and any absences. Time recordkeeping varies based on the location and employees should speak directly with their supervisor on how to keep track of their hours worked.

# Business Expense Reimbursement Policy

Employees will be reimbursed for reasonable expenses incurred in connection with approved travel on behalf of the organization. The Travel & Expense Reimbursement Policy is designed to facilitate cost effective expenditures that are in compliance with approved budgets and all IRS regulations. Reimbursement can only be made in accordance with available budget authority, approved expense reimbursement forms and receipts that are submitted in a timely manner.

Travelers seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid the appearance of impropriety. If a circumstance arises that is not specifically covered in the travel policies, the most conservative course of action should be adopted.

Travel for staff must be authorized in advance. Travelers should verify that planned travel is eligible for reimbursement before making travel arrangements. Upon completion of the trip, and within 30 days, the traveler must submit a Business Expense Report with supporting documentation to obtain reimbursement of expenses.

### REPORTING RESPONSIBILITY

Employees must file a Business Expense Report no later than 30 days following the completion of a trip or of incurring expenses. Expenses submitted more than 60 days after being incurred, may not be reimbursed. Expense reports must include: an accounting for all Diocesan credit card charges, all applicable receipts and/or statements, signature of the employee's supervisor and/or finance officer (CFO or Treasurer), approving the reimbursement. Employees should make a copy of their expense reports and receipts for their own records.

### APPROVAL / AUTHORIZATION PROCESS

Supervisors must review and approve employee business expense reports and present to the CFO or Treasurer for approval prior to submission for payment. The CFO will review and approve business expenses for the direct reports of the Bishop. The Treasurer will review the reimbursements for the Bishop and the CFO on a quarterly basis.

The Diocese assumes no obligation to reimburse employees for expenses that are not in compliance with this policy. Employees who do not comply with this policy may be subject to delay or denial of reimbursement. Disregard for this policy or improper reimbursements may result in disciplinary action up to and including termination.

### DOCUMENTATION REQUIREMENTS FOR ALL EXPENSE REPORTING:

Employees must submit the following documentation with any Business Expense Report:

- Original receipts including: Vendor name, location, date and amount of the expense
- Copies of invoices (cell phone charges)
- Diocesan Credit Card Statement

Business Expense Reports that are incorrect, incomplete or include disorganized receipts may be returned to the employee for completion and result in delay or denial of reimbursement for specific items.

### CREDIT CARD EXPENSES

**The Diocesan credit card is to be used for Diocesan business expense. No personal use is allowed.**

### NONREIMBURSABLE ITEMS

The following items are NOT reimbursable under this policy:

- Parking tickets or other fines
- Delinquency fees / Finance charges for personal credit cards
- Expenses for travel incurred by companions / family members except where specifically approved for official travel on behalf of the organization.
- Expenses related to vacation or personal days while on a business trip
- Loss or theft of personal funds or property (lost baggage)
- Avoidable "No-Show" charges for hotels or other services
- Non-Compulsory insurance coverage
- Repairs due to accidents on personal business
- Mini-bar charges, TV, Movies, seat upgrades changes

**Cell Phones:** Employees that asked to utilize their cell phone for company business will be reimbursed for 75% of the cost of individual cell phone service, up to a maximum reimbursement of \$75/month. Employees are responsible for purchasing their own phone (hardware). Use of a cell phone while driving is not recommended in any situation. While on company business employees are expected to refrain from using their phone when driving, be in compliance with any pertinent laws and use hands free equipment.

**Internet:** Employees are not reimbursed for internet access, either at home or while traveling, as the company provides office internet access and/or cell phone reimbursement.

**Hotel Telephone Usage:** When staying at a hotel, employees should use cell phones and avoid using hotel phones that are subject to local and long distance phone charges.

**Meals:** Expenses for employee meals will be reimbursed when traveling outside the diocese on approved business. Reimbursement may be disallowed for excessive expenditures. Meals Taken with Other Employees are not generally reimbursed unless they are part of a specific business meeting, and not so regular as to be in place of the employees' normal meal expense.

**Entertainment Expenses:** Entertainment expenses include events such as meals, theatre and sporting events, whereby a business discussion takes place during, immediately before, or immediately after the event AND involving persons outside the staff. Employees must provide the following information in order to be reimbursed for any such meals, entertainment or other expenditures:

- Names of all individuals, including title and organization/company affiliation
- Date, name and location of where the meal or event took place
- Exact amount of the expense
- Detailed receipts for all expenditures

**Club Memberships and Use:** The fees for social and business club memberships may be reimbursed and are subject to reporting as W-2 income. For business purposes, expenses such as meals at a club may be reimbursed if properly submitted. Airline club memberships will not be reimbursed.

**Air/Rail Travel:** Air travel reservations should be made in such a manner as to secure the lowest available coach fare. If the employee elects to travel on a more expensive flight or class of service,

only the portion equal to lowest available coach fare will be reimbursed. Employees may be reimbursed for baggage checking charges.

**Airport and Train Station Parking:** When parking at an airport or train station as part of business travel, employees should utilize the lowest cost parking (i.e. long term parking or off-premise lots) that provides reasonable level of safety and security.

**Taxi / Shuttle Service:** The use of airport shuttles and taxis upon arrival at the employee's destination is the preferred mode of transportation.

**Car Rental:** Employees may rent a car to get to their destination when driving is more cost effective than airline, rail or use of personal vehicle. Employees must rent the most cost effective vehicle for the group traveling and return vehicles with a full tank of gas.

**Business Use of Personal Vehicle:** Employees may use their personal vehicle for business purposes if it is less expensive than using alternate transportation. Employees must record business mileage, business purpose, dates and destinations on the Business Expense Report in order to be reimbursed at the applicable IRS mileage rate. Commuting expenses are not reimbursed.

The Company requires that employees who regularly use their personal vehicle for Company business maintain minimum of \$100,000/\$300,000 bodily injury coverage and \$50,000 property damage coverage on their vehicles.

**Business Use of Diocesan Owned Vehicle:** Employees who have use of a Company owned vehicle must complete the mileage log in their monthly expense report. Every attempt should be made to charge all expenses for fuel, maintenance and repair costs on the Company credit card, but if that is not possible these costs will be reimbursed.

All mileage on the expense report that is not specifically identified as "business mileage" is recorded as "personal use", including mileage from an employee's home to the office and back home. Personal use of a Company owned vehicle is reported as additional W-2 income, as recorded on the Business Expense Report.

**Lodging / Hotels:** Hotel reservations should be made in such a manner as to secure the best available rate at moderately priced establishments.

**Office equipment, software, services or furniture:** All other purchases must be approved in advance by the employee's supervisor and/or CFO, and are subject to budget authority.

### Company Vehicle Policy

The use of Company vehicles is limited to authorized employees. It is the responsibility of every employee operating a Company vehicle or operating his or her own vehicle for Company business to drive safely and obey all traffic, vehicle safety, and parking laws or regulations.

#### **VALID DRIVER'S LICENSE**

All employees authorized to drive Company or personal vehicles for use in conducting organization business must possess a current, valid driver's license and their driving record must meet the qualifications of our insurance carrier.

#### **WORK-RELATED ACTIVITIES**

Our vehicles must only be used in work-related activities and may not be used for personal business or activities without the approval of the senior leader in the organization. In accordance with New York State law, smoking is not allowed in organization-owned vehicles. Employees may not use portable electronic devices, including hand-held cellular telephones, while operating an organization vehicle.

#### **PERSONAL VEHICLES**

In some instances, employees may be required to drive their own personal vehicle for the purposes of conducting organization business. Employees must maintain adequate personal automobile liability insurance. The Company is not responsible for any damages or fines incurred while conducting organization business in a personal vehicle. Employees may not use portable electronic devices, including hand-held cellular telephones, while operating a personal vehicle for organization business.

#### **SAFETY WHILE DRIVING**

Employees, while driving on organization business, are expected to:

- Follow all driving laws and safety rules such as following posted speed limits and directional signs;
- Avoid confrontational or offensive behavior;
- Practice defensive driving;
- Wear seat belts, whether they are the driver or the passenger; and
- Take a sufficient number of driving breaks.

Employees while driving on organization business must refrain from distracting activities, including but not limited to:

- Using a portable electronic device while driving to: view, take, or transmit images; to play games; or to compose, send, read, view, access, browse, transmit, save, or retrieve e-mail, text messages, or other electronic data; and
- Any other activity unrelated to the operation of the motor vehicle that jeopardizes an employee's safety or the safety of others while driving.

Portable electronic devices include hand-held mobile telephones, hand-held devices with mobile data access, personal digital assistants (PDAs), laptop computers or other portable computing devices, pagers, text message devices, electronic games, and broadband personal communication

devices. Drivers who hold portable electronic devices in a conspicuous manner while driving are presumed to be using such devices.

Employees who drive as part of their job duties are permitted to use hands-free cell phones while driving. Employees with hands-free devices for their cell phones are to make conversations brief. If road conditions are poor, traffic is heavy, the conversation is involved, or other safety concerns are present, employees should find a proper parking space to continue their conversations.

Employees are permitted to use portable electronic devices to communicate during an emergency to emergency-response operators, hospitals, physician offices, health clinics, ambulance and other emergency vehicle drivers, firefighters, and the police department.



### Dress Code (General)

The impression that we make on visitors to our organization is important. There is no substitute for neatness, propriety of dress, good grooming and speech, and a professional attitude. Sensitivity to these areas will ensure that our good relationships with members are maintained and fostered.

#### **DRESS CODE**

Although no formal dress code exists, employees are asked to wear clothing that is appropriate for their position and the work that they do. Clothing should be neat, clean, in good taste and not constitute a safety hazard.

The Organization will make accommodations when necessary to comply with state and/or federal law. Please contact your supervisor with questions regarding this policy.

### Employee Classification Policy

Employees are classified as either exempt or non-exempt for pay administration purposes, as determined by the federal Fair Labor Standards Act (FLSA).

The definitions of the worker classification categories can be summarized as follows:

**Exempt**—Employees who meet any of the FLSA’s exemption standards, including managerial, supervisory, professional, sales or administrative employees.

**Non-exempt**—Employees whose positions do not meet the FLSA exemption standards. Overtime work is prohibited without specific supervisor authorization for these employees.

In addition, each individual’s employment status is defined as one of the following:

**Full-time** - Employees who work at least 40 hours per week are considered to be full-time. Such full-time employees are eligible for benefits after applicable requirements for length of service have been met.

The Organization may supplement its regular work force with temporary or part-time employees to help compensate for workload, employee absences or other situations. Management will determine which positions are permanent and which are considered temporary or seasonal.

**Part-time** - Employees who work fewer than 40 hours per week are considered to be part-time. These employees will receive all legally mandated benefits (such as workers’ compensation and Social Security benefits), but are ineligible for other benefit programs.

**Temporary** - Temporary employees are individuals engaged to work either part time or full time on the Company payroll, but have been hired with the understanding that their employment will be terminated no later than the completion of their specific assignment. This category includes interns and co-op students. Such employees may be either “exempt” or “non-exempt” but are not eligible for Company benefits except as mandated by law.

**Independent contractors** - Consultants, freelancers and independent contractors are not employees of the Organization. The distinction between employees and independent contractors is crucial because employees may be entitled to participate in the Company’s benefits programs, while independent contractors are not. In addition, the Organization is not required to satisfy income, Social Security, Medicare or unemployment tax withholdings or payment requirements for independent contractors.

### Employment of Relatives Policy

The employment of relatives is a sensitive issue that could possibly create a conflict of interest situation for the related individuals. Hiring decisions and continued employment must be handled in accordance with the following provisions. Relatives of a currently employed worker generally are considered for employment based on their qualifications. However, where the hiring or employment of a worker's relative would result in the types of prohibited employment relationships identified below, the organization may not consider or accept such applications for employment.

#### **LIMITATIONS**

It is the organization's policy that employees will not be hired into, or work in, a department where they directly or indirectly supervise or are supervised by an immediate family member or someone with whom they are romantically involved. Employees will not be placed in a position where they work with, or have access to, sensitive or confidential information about an immediate family member or someone with whom they are romantically involved.

#### **DEFINITION OF RELATIVES**

For the purposes of this policy, the term "immediate family" refers to spouses, domestic partners, parents, children, stepchildren, sisters, brothers, parents-in-law, sons/daughters-in-law, stepparents or family members residing in the same household.

#### **MARRIAGES OR RELATIONSHIPS BETWEEN EMPLOYEES**

Employees who marry or establish a close personal relationship can continue in their current positions as long as a prohibited employment relationship is not created. If one of the prohibited situations does occur, attempts will be made to find another position within the organization to which one of the employees can transfer. All practical efforts will be made to arrange such a transfer at the earliest possible time. If accommodations of this nature are not feasible, the employees will be permitted to determine which of them will resign.

### Media Relations Policy

The Organization is committed to providing the media with accurate information. To avoid discrepancies, specific guidelines should be followed when a media inquiry is received.

All media inquiries regarding The Diocese or Parish and its operation must be immediately be referred to the Office of The Bishop/Priest/Leadership, who is authorized to make or approve public statements regarding company business. Unless specifically designated by this person, you are not authorized to make those statements. If you wish to write or publish an article, paper or other publication on behalf of the Organization, you must first obtain approval.

The Organization will generally provide a response to media inquiries within 24 hours. Should the response require a detailed technical explanation, a spokesperson will be designated to address the issue. The spokesperson will be chosen carefully, based on their area(s) of expertise.

Media inquiries include, but are not limited to, official statements, press releases and advertisements.

Please contact your Leadership with any questions or concerns you have regarding the Media Relations Policy.

### **Member & Visitor Relations**

The professional treatment of members, visitors and the impression that we make on our community are very important. The reputation of the Diocese is built on how we treat others. To maintain our reputation requires the active participation and cooperation of every employee.

#### **EACH EMPLOYEE'S RESPONSIBILITY**

The opinions and attitudes that members and potential members have toward our organization may be determined for a long period of time by the actions of one employee. Each employee must be sensitive to the importance of providing courteous treatment in all working relationships.

#### **QUALITY SERVICE**

Quality service can only be achieved when every employee understands that serving members and building strong community are critically important to the success of our organization.

We are committed to always providing quality service and a high level of professionalism to all that we serve.

### Online Social Networking Policy

This policy establishes a set of rules and guidelines for any activity and participation in “social media” by all the Company “users.” These rules are intended to be adaptable to the changes in technology and norms of online communication and behavior, and may be amended by the Company at any time, for any reason, without notice to users.

#### **DEFINITIONS**

The term “social media” applies to any web-based and mobile technologies, in use now or developed in the future, that enable individuals or entities to disseminate or receive information, communicate, or otherwise interact, and includes, without limitation, email, texting, messaging, social networking, blogging, micro-blogging, bulletin boards, and so on, through providers such as Facebook, LinkedIn, Twitter, YouTube, Google+ or others.

The term “users” refers to employees, management and supervisors, and anyone else employed by the Organization.

#### **EXERCISE RESPONSIBILITY ONLINE**

This policy applies to any social media activity conducted with an Organization email address or on an Organization website or page, and/or which can be traced back to the Organizations domain, and/or which uses the Organizations Information Systems and/or which expressly or implicitly identifies the individual as an employee of the Organization.

If, from an employee’s post in a blog or elsewhere in social media, it is clear the employee is an Organizations employee, or if the employee mentions the Organizations name, or it is reasonably clear the employee is referring to the Organization or a position taken by the Organization, and the employee expresses a political opinion or an opinion regarding the Organization’s positions or actions, the post must specifically note that the opinion expressed is the employee’s personal opinion and not necessarily the Organization’s position.

#### **FOLLOW EXISTING POLICIES**

Observe and follow: (a) existing Diocesan policy and agreements, such as our Employee Handbook and (b) applicable laws and regulations. This means that employees are prohibited from using social media to post or display comments about co-workers or supervisors of the Organization that are maliciously false, obscene, threatening, intimidating, or in violation of the Organization’s workplace policies against discrimination on the basis of race, color, sex, age, disability, religion, citizenship, national origin, ancestry, military status or veteran status, marital status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.

The rules in the Organization’s Employee Handbook and “Non- Harassment,” “Sexual Harassment,” “Non-Discrimination,” “Code of Ethics,” “Standards of Conduct,” “Voicemail, E-mail, and Computer Systems,” and “Use of Internet” policies apply to employee behavior within social media and in public online spaces.

Do not post any information or conduct any online activity that violates applicable local, state, or federal laws and regulations. Any conduct which under the law is impermissible if expressed in any other form or forum is also impermissible if expressed through social media.

### **RECOGNIZE OTHERS' PRIVACY**

It is inappropriate to use or disclose "confidential personal information" (as defined below) about another individual or use or disclose the Organization's "proprietary confidential information" in any form of social media.

For purposes of this Policy, "confidential personal information" refers to an individual's Social Security number, financial account numbers, driver's license number, or personal medical information (including family medical history). The Organization's "proprietary confidential information" refers to internal information regarding Diocesan finances, future organization performance and plans and strategies

All Diocesan rules regarding the Organization's confidential proprietary information and confidential personal information, apply in full to social media, such as blogs or social networking sites.

### **USE YOUR TRUE IDENTITY**

When commenting on or promoting any Episcopal Diocesan venue or service on any form of social media, employees must clearly and conspicuously disclose his or her relationship with the Organization to the members and readers of that social media.

### **MANAGE EXPECTATIONS OF PRIVACY**

Consistent with the Organization's "Voicemail," E-mail," "Computer Systems," and "Use of Internet" policies, the Organization may access and monitor its Information Systems and obtain the communications within the systems, including email, Internet usage, and the like, with or without notice to users of the system, in the ordinary course of business when the organization deems it appropriate to do so. As such, when using such systems, employees should have no expectation of privacy with regard to time, frequency, content, or other aspects of use, including the websites the employee visits and other Internet/Intranet activity. The reasons the Organization accesses and monitors these systems include, but are not limited to: maintaining the system; preventing or investigating allegations of system abuse or misuse; assuring compliance with software copyright laws; and complying with legal and regulatory requirements.

### **INTERACT ON YOUR OWN TIME**

The Organization respects the right of any employee to participate in social media, such as maintaining a blog or participating in online forums. However, to ensure proper employee focus on their job duties and adequate functioning of organization equipment, employees are not permitted to engage in social media activities during work time. Moreover, during non-work time, employees must avoid excessive social media or other email or internet activity while using Diocesan equipment or Diocesan networks.

### **IDENTIFY ANY COPYRIGHTED OR BORROWED MATERIAL WITH CITATIONS AND LINKS**

When publishing any online material through social media employees must respect and follow all copyright and other intellectual property laws.

### **ADDITIONAL INFORMATION**

Please see your supervisor and/or appropriate leadership for additional information or clarification of any aspect of this policy.

### Open Door Policy

Our organization is committed to the principle of open communication between employees and their supervisors concerning any aspect of the employment relationship.

#### **WORKING TOGETHER, WE CAN FIND A SOLUTION TO ANY PROBLEM**

In every organization there are honest differences of opinion about working conditions, discipline, policies and other work-related matters. Employees should not keep concerns to themselves and are encouraged to communicate their issues to management via the steps outlined below. Problems that are unknown cannot be solved.

#### **FIRST STEP**

Employees who have a problem, complaint, question or suggestion about any aspect of our organization are encouraged to discuss the issue with their immediate supervisor. We hope that most matters can be satisfactorily resolved by such discussions.

#### **SECOND STEP**

Employees who are not satisfied with the outcome of this first session, or are not comfortable raising a particular issue with their supervisor, are welcome to discuss the situation with local Leadership. The leader will meet with the employee and/or his or her supervisor and attempt to reach a satisfactory solution.

#### **THIRD STEP**

The resolution to a problem, complaint, question or suggestion may be appealed to the Bishop's Office. The Bishop's Office's decision on this appeal is final.



### Whistleblower Protection

The Organization strives to protect its employees, members and community as best as possible. As a matter of policy and practice, as well as in compliance with various laws, we offer employees whistleblower protection when they report certain activities or make a complaint to management about a specific situation or occurrence in the workplace that may be unsafe, illegal, abusive or fraudulent. The complaint will be taken seriously and investigated to the fullest extent possible. Employees who make complaints of this nature will be protected from retaliation.

#### **MAKING A COMPLAINT**

If an employee believes that a workplace activity or situation is unsafe, illegal, abusive or fraudulent, he/she should bring the problem to the attention of the supervisor and/or appropriate Leadership. The Organization will, if appropriate, conduct a prompt and thorough investigation of the situation. Employees may report problems anonymously, but should be aware that this may hamper the Organization's ability to obtain further details and/or ask follow-up questions during its investigation.

Problems that are covered by other the Organization complaint procedures (e.g., employment discrimination, harassment) must be reported in the manner and to the individual(s) set out in those specific procedures, and not under this policy.

#### **NO RETALIATION**

Employees who make a complaint in good faith will not be retaliated against or penalized in any manner. The employee's identity, if made known to the Organization, will be protected to the greatest extent possible, consistent with the need to investigate and remedy the situation. Any employee who believes he or she has been retaliated against in violation of this policy should notify the Bishop's Office immediately.

### Outside Employment

We hope our employees will not find it necessary to accept additional outside employment. However, if the need arises, employees may accept part-time employment providing the following provisions are observed.

#### **NOTIFICATION**

Employees must notify their supervisor in writing of their intent to accept another position at another organization while they are still employed by the Organization. This notice should specify the name of the employer, the nature of the job duties, and the hours of work.

#### **CONFLICT OF INTEREST**

Outside employment must not interfere in any way with your capability for giving full service to our organization.

### Overtime Pay Policy

Our organization occasionally requires longer-than-average hours of its employees in order to meet the needs of our members. It is necessary and requested that each of us comply with overtime needs so that we may meet the needs of our members.

#### **OVERTIME RATES**

Non-exempt employees are paid one and one-half times their regular hourly rate of pay for overtime hours worked in excess of 40 hours in a workweek.

For purposes of calculating overtime, the workweek varies per location, employee should speak directly with their supervisor to find out what is the defined workweek is.

#### **AUTHORIZATION**

All overtime must be authorized in advance by the supervisor.

#### **DEFINITION OF HOURS WORKED**

Only actual hours worked are counted when calculating overtime.

#### **VIOLATIONS**

Violations of this policy will be subject to disciplinary action, up to and including termination.

### Pay Periods and Check Distribution Policy

The Organization is committed to a policy of fair and equitable compensation for work well done.

#### **WAGE AND SALARY PROGRAM**

The Diocese assigns wage rates to each job based on the job requirements and the economic conditions of the organization and the community.

Employees will be notified annually of their pay rate, regular payday, and related information.

#### **MERIT INCREASES**

It is the policy of the Diocese to fairly compensate all employees based on the local market compensation practices for comparable positions, as well as the performance of the individual in the position. Staff positions are periodically reviewed and compared with similar positions in other non-profit organizations in the community using market compensation data, reviewed by the HR Committee and approved by the Bishop. Each year, the HR Committee of the Diocese reviews any proposed changes to salary ranges and/or benefits and makes appropriate recommendations to the Bishop and Diocesan Council to assist in the formulation of the annual operating budget.

Annual salary reviews for Diocesan Staff are conducted using the following process:

- Annual salary adjustments are recommended by each supervisor, based on both the employee's annual performance rating and the employee's current salary relative to the mid-point of the salary range for each position.
- All recommended salary changes are reviewed by the CFO and must be approved by the Bishop before being communicated to the employee.
- Salary increases are effective July 1st.
- Any change in salary due to a current employee taking on a new position, will be effective on the first of the month that the change is effective.
- Employees that are new to their position are eligible for the annual salary review at any point after six months in the new position.
- All salary increases are subject to budget availability.
- No increase to salary will be approved if performance is rated as "needs improvement or below expectations."
- Any recommended salary increase greater than 9% will be reviewed by the HR Committee and must be approved by the Bishop.

- Any salary below or above the approved salary range must be reviewed by the HR Committee and approved by the Bishop.

### **PAYDAY**

Employees will be informed upon hire of the pay frequency and pay day, as it varies based on location. Generally, if payday falls on a holiday, employees ordinarily will be paid on the day before the holiday.

### **DIRECT PAYROLL DEPOSIT**

Employees may have the option of being compensated through direct deposit. The supervisor answers questions regarding direct deposit.

### **GARNISHMENTS**

A court may order the organization to garnish amounts directly from the employee's paycheck. The Diocese must withhold the amount indicated in the garnishment from the employee's paycheck in accordance with federal and state law.

### **TRAVEL TIME**

Non-exempt employees required to travel for work-related reasons are paid in accordance with federal and state wage and hour laws. For more information see the supervisor.

### **TRAVEL/EXPENSE REIMBURSEMENT**

Employees will be reimbursed for pre-authorized expenses incurred on behalf of the Organization. For more details, please refer to the detailed Travel & Expense Reimbursement Policy & Procedures provided in Appendix A.

### **OVERPAYMENTS**

In the event an employee is overpaid due to a mathematical or clerical error, the Diocese will proceed to recoup the overpayment as outlined by NYS law. For more information, see the supervisor.

### **POLICY FOR DEDUCTIONS FROM WAGES**

It is our policy to comply with the salary basis requirements of the FLSA. Therefore, we prohibit all supervisors from making any improper deductions from the salaries of exempt employees or from the wages of any other employee that are not consistent with state wage and hour laws. The organization does not allow deductions that violate the FLSA or state wage and hour laws.

### **PERMITTED DEDUCTIONS FROM EXEMPT EMPLOYEE'S PAY**

Deductions from pay are permissible for exempt employees, for example, under the following circumstances:

- For absences from work for one or more full days for personal reasons other than sickness or disability;

For absences of one or more full days due to sickness or disability if the deduction is made in accordance with a bona fide plan, policy or practice of providing compensation for salary lost due to illness;

- For required local, state or federal withholding taxes;
- To offset amounts employees receive as jury or witness fees, or military pay; or
- For unpaid disciplinary suspensions of one or more full days imposed in good faith for workplace conduct rule infractions.

In addition, the organization is not required to pay the exempt employee's full weekly salary:

- For time not worked in the initial or terminal week of employment;
- For penalties imposed in good faith for infractions of safety rules of major significance; or
- For unpaid leave taken under the Family and Medical Leave Act (if applicable).

In the above three circumstances, either partial-day or full-day deductions may be made.

### **REPORTING IMPROPER DEDUCTIONS**

Employees should report improper deductions immediately to their direct supervisor or to appropriate leadership. Employees will not be retaliated against for making a complaint. Reports of improper deductions will be promptly investigated. If it is determined that an improper deduction has occurred, the employee will be promptly reimbursed for any improper deduction made.

# Performance Evaluation Policy

To help employees grow in their jobs, supervisors will evaluate an employee's performance, provide feedback on a regular basis and complete an annual, written appraisal. The purpose of this performance appraisal plan is to provide a basis for better understanding between employees and their supervisors with respect to job performance, potential and development within the Diocese.

### **MEETING WITH YOUR SUPERVISOR**

Performance is evaluated by immediate supervisors. Evaluations should not take the place of informal discussions between employees and their supervisors regarding performance, but rather should provide regular opportunities to discuss the job relationship in depth.

The process for establishing individual goals and reviewing performance has several purposes:

- To clarify each individual's role.
- To establish mutually agreed upon goals and priorities.
- To review progress on goals and provide regular feedback on performance.
- To provide an equitable basis for annual salary review.
- To aid in employee development.

### **FREQUENCY**

Supervisors and employees are encouraged to meet on a regularly scheduled basis to review roles, goals and performance. Each review includes both a self- evaluation and supervisory feedback. Annually, supervisors will provide a written performance evaluation and rating of overall performance for review and discussion with each employee. Both the employee and Supervisor sign the annual review to acknowledge that the document was reviewed and discussed. Signature of the employee does not necessarily imply complete agreement with the evaluation and/or rating. Supervisors must review all employee performance evaluations with their manager prior to employee discussions.

Performance appraisals are a review of the employee's work performance; not necessarily a review of pay rate. The Organization addresses merit increases separately in accordance with policy. For further information, please refer to the Pay Practices Policy.

### **FORMS**

Performance appraisals are completed on forms designed for this purpose. The information on the form is to be the basis for discussion between employees and their supervisors. Employees may obtain a sample of this form from their supervisors.

# Personnel Records Policy

The Diocese maintains an official personnel file for each employee that contains necessary job-related and personal information. These files are confidential and guidelines exist to safeguard against improper disclosure.

### **ACCESS TO PERSONNEL FILE**

Current employees may see information which is kept in their own personnel file if they wish, except for confidential materials such as job references or information relating to other employees. Employees may make arrangements with their supervisor to see these documents. Employees may request and receive copies of all documents they have signed at the time they are signed.

Internal availability and access to personnel files is limited to those with proper authorization and a business need to know.

### **INQUIRIES ABOUT EMPLOYEES**

All inquiries or requests for information about employees (active or inactive) from people outside the organization should be referred to your supervisor and/or appropriate leadership. This applies to all requests, whether written or verbal.

In some cases, employers are required by federal, state or local law to disclose information to the government or other authorized entities even if the Organization would ordinarily keep such information confidential. The Organization will comply with all laws which require disclosure of employee information upon receipt of a properly authorized request.

### **PROTECTION AND DISPOSAL OF PERSONAL RECORDS**

The Organization is committed to ensuring that records containing personal identifying information are protected and disposed of in accordance with state law. Personal information is disposed of in a manner that ensures no unauthorized person will have access to employee personal information. The Organization strives to keep accurate and up-to-date personnel records.

Employee personnel files may include the following:

- Employee demographic information
- Job application
- Position description
- Resume
- Training records
- Salary history
- Disciplinary action records
- Performance reviews
- Coaching and mentoring records

To ensure the accuracy of your personnel records, please notify us immediately of the following changes:

- Name
- Address
- Telephone number
- Marital status
- Dependent status



- Tax status

Personnel records are confidential and are not available to anyone outside of the organization, unless you have personally authorized their release. A release may not be required when reporting certain information as required by law or when an authorized governmental agency inspects certain records. To obtain access to your records, contact the organizations leadership.

### Phone Call Policy

The Organization may provide phones to employees to increase efficiency in doing business. There are important things to consider when using telephones. Please adhere to the following guidelines, based on the type of call you are making or receiving:

#### **NON-BUSINESS CALLS**

Our telephones are maintained for business purposes only. The Diocese recognizes that employees may occasionally need to use the organizations telephones for non-business-related matters. Employees are requested to limit these calls to an absolute minimum and place calls only during non-working periods.

#### **LONG DISTANCE CALLS**

The organization's telephones may not be used to make non-business long distance calls except in emergencies with prior permission from an employee's supervisor.

#### **PERSONAL CELL PHONES AND ELECTRONIC DEVICES**

Most of today's hand-held electronic devices make it easy to bring music, entertainment, and personal communications to the workplace. However, due to safety, productivity and efficiency reasons, the use of personal electronic devices should be limited to break and meal periods, unless used for work-related reasons, e.g. podcasts, etc.

Radios, iPods, MP3 players, and other personal electronic devices may be used to play music during work time with prior permission from the supervisor and if the devices are not distracting to others and do not interfere with work performance.

### Position Descriptions

A position description is written for each position in our organization and maintained on file in the organizations office. The purpose of these position descriptions is to define job standards and essential functions and physical requirements, as well as marginal or peripheral duties and reporting relationships for the various positions throughout our organization.

#### **EMPLOYEE ACCESS TO POSITION DESCRIPTIONS**

Employees are provided with a copy of their position description at the time of hire and whenever accountabilities change significantly.

#### **USE OF POSITION DESCRIPTIONS**

Position descriptions are designed to promote a better understanding of the total job for both employees and their supervisors. Supervisors will refer to position descriptions during the recruitment and hiring process, as well as during performance appraisal discussions.

#### **UPDATING POSITION DESCRIPTIONS**

Position descriptions are updated periodically to reflect changes in job duties and organizational structure. Employees should schedule time to meet with their supervisor if they believe their position description needs updating or if they have questions.

### Protected Health Information Privacy

For employers with self-insured medical plans or medical flexible spending account plans, the Health Insurance Portability and Accountability Act (HIPAA) privacy rules require group health plans like the Organization's group health plan to take steps to ensure the privacy of personally identifiable health information (PHI) and provide notice of the plan's legal duties and privacy practices to participants. Generally, the plan cannot use or disclose PHI without written authorization except for the purposes stated in the plan's Notice of Privacy Practices. The summary below briefly describes some of the aspects of how medical information may be used and disclosed by the Organization's group health plan and how employees can get access to this information. A more complete summary is contained in the plan's Notice of Privacy Practices.

#### **USE AND DISCLOSURE OF PHI**

The plan is required to provide an employee access to certain PHI in order to inspect or copy it. Use and disclosure may also be required by the Department of Health and Human Services to enable the Department to investigate or determine compliance with the privacy regulations.

#### **YOUR RIGHTS**

Employees may request that the plan restrict the use and disclosure of PHI to carry out treatment, payment, or health care operations. Employees also may request that the plan allow the use and disclosure of PHI to relatives, friends, or other individuals identified by the employee. However, there is no requirement that the request be granted.

Employees generally have the right to inspect and copy their PHI. The plan will provide requested information within the federally established timeframe. If the request is denied, the employee will receive a written notice.

Employees have the right to request an amendment of their PHI. The plan will act on the request within the legally required timeframe. If the plan is unable to comply with the request for amendment, the employee will be provided with a written denial that explains the basis for denial. Employees may also submit a written statement disagreeing with the denial.

Employees have the right to request an accounting of disclosures of their PHI. However, such accounting need not include PHI disclosures made to carry out treatment, payment or health care operations, or certain other types of disclosures identified in the privacy regulations.

#### **MORE INFORMATION**

Requests to restrict use and disclosure, inspect or copy PHI, amend PHI, or receive an accounting of PHI should be made to the Benefits Administrator, 935 East Avenue, Rochester, New York, 14607. The plan will make every effort to accommodate the request within a reasonable period of time.

### Safety Policy

The Organization wants to ensure that our employees remain safe and injury-free at all times. The Company intends to comply with all applicable safety laws. In order to guarantee that accidents are avoided whenever possible, we expect our employees to refrain from horseplay, careless behavior and negligent actions. It is the Company's policy to maintain a safe and secure working environment for all employees and clients.

While working, employees must observe safety precautions for their safety and for the safety of others. All work areas must be kept clean, and free of clutter and debris. Any hazards or potentially dangerous conditions must be corrected immediately or reported to a supervisor.

If you are involved in an accident, you must:

- Report the accident to your supervisor or to Human Resources immediately
- Obtain any necessary medical treatment
- Fill out an Accident Report, regardless of the severity of the injury
- If you must seek additional medical treatment, obtain your supervisor's consent before leaving the premises

Employees who fail to comply with this procedure may be subject to disciplinary action.

### Smoke-free Environment Policy

The Organization is a smoke-free environment. Smoking, chewing, use of e-cigarettes/pipes and other tobacco and nicotine products is not permitted at any time in Company work areas or vehicles, or in client work areas or vehicles.

If smoking is allowed outside of the building, smokers should be considerate of colleagues, customers and members of the public. Help to maintain a clean entryway by depositing cigarettes in appropriate containers and staying far enough away from doors so that smoke does not blow into the building.

Employees who smoke or chew must observe the same guidelines as non-smokers for the frequency and length of break periods..

This policy applies equally to all employees, customers, and visitors.

### Solicitations, Distributions & Use of Bulletin Boards Policy

Understanding that employees may occasionally wish to communicate with their co-workers to advertise personal items for sale or to participate in fundraisers for non-profit organizations, children's schools and other non-work events, we allow use of lunch rooms and electronic bulletin boards to distribute such information.

The Organization maintains bulletin boards in suitable places for the posting of official notices relating to Company business, job opportunities, sponsored activities, and federal and state regulations.

Leadership reserves the right to monitor such communications and remove them if inappropriate or not in the best interest of the Organization operations.

In respect for other's efficiency, please do not use work email, voicemail or other resources as a means to solicit or distribute non-work materials. Activities that disrupt work hours or operations are prohibited.

Persons not employed by the Organization may not solicit employees for any purpose on the premises.

### Workers' Compensation Policy

The Organization will provide workers' compensation, a type of accident and injury insurance, that compensates an employee for lost time, medical expenses and loss of life or dismemberment from an injury arising out of or in the course of work. Employees must report any work-related injury or disease immediately (or as soon as practicable) to their supervisor and Human Resources so that the necessary paperwork can be completed in a timely manner. Please note that under state laws, employees who fail to report work-related injuries in a timely manner may see a reduction or denial of their workers' compensation benefits. Reports of accidents or injuries, even minor, must be reported within 24 hours with the Diocese.

Employees returning to work from an injury or illness for which they were receiving workers' compensation must provide proof of rehabilitation or treatment from a licensed physician and verification that they are able to complete all job-related tasks. In the event that the employee returns to work under strict medical restrictions, the Company will make every reasonable effort to accommodate the employee's work ability and job responsibilities. Once a physician removes work restrictions, the employee is expected to perform his or her regular duties and will no longer receive workers' compensation benefits.



# Appendix

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## Application for Re-employment Following Military Leave

To be submitted no later than \_\_\_\_\_ days (depending on length of military leave) following completion of military service.

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Applying for (position): \_\_\_\_\_

Please accept this as my application to return to the position listed above as soon as possible. Attached is documentation verifying my dates of leave for \_\_\_\_\_ (division of military service) and my honorable discharge.

\_\_\_\_\_

Employee Signature

FOR HUMAN RESOURCES USE ONLY:

**Date Received:** \_\_\_\_\_

Approved:  Date of re-employment: \_\_\_\_\_

Denied:

Reason for denial:

By: \_\_\_\_\_



## Certificate of Entrance into Military Service

This form should be filed with Human Resources.

This is to certify that \_\_\_\_\_, who is employed as \_\_\_\_\_ at a salary rate of \$\_\_\_\_\_ in the department of \_\_\_\_\_ is entering military service effective \_\_\_\_\_.

This position is:

- Unclassified
- Exempt
- Nonexempt

If employee is employed on a seasonal, temporary or provisional basis, indicate:

- Seasonal
- Temporary
- Provisional

Date employment commenced (\_\_\_\_\_) or date employment would have terminated, had such employee not entered military service (\_\_\_\_\_).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## Certificate of Return from Military Service

This form should be filed with Human Resources.

This is to certify that \_\_\_\_\_ has requested to return from military service to his or her position of \_\_\_\_\_ in the \_\_\_\_\_ department, at a salary rate of \$ \_\_\_\_\_.

Date of entry into service: \_\_\_\_\_

Date of discharge: \_\_\_\_\_

Please attach a copy of discharge.

This position has been filled on a substitute basis by \_\_\_\_\_.

This position has been vacant pending return of incumbent.

Employee had permanent status in the following job class:

\_\_\_ Competitive

\_\_\_ Noncompetitive

\_\_\_ Labor

Employee was temporarily or provisionally employed

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## Employee's Request to Take Voting Leave

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Department/Location: \_\_\_\_\_

In accordance with the terms of the Episcopal Diocese or member Parish "Time Off to Vote" policy, employees who are registered voters may take the necessary time to vote at the beginning or the end of their shift, whichever allows more time for voting and requires less time off the job; however, not more than 2 hours will be provided with pay.

I am requesting voting leave for: \_\_\_\_\_ on: \_\_\_\_\_

(Election Type)

(Date)

Employees wishing to serve as election judges are encouraged to do so. The Company will pay the difference between the amount an employee receives for serving as a judge and the employee's normal day's pay (earnings factor times base rate) for performing this civic duty.

I will be serving as an election judge.

Employees who serve as election judges must submit copies of pay stubs from the Elections Commission for reimbursement.

\_\_\_\_\_

Employee Signature

Date

### FOR OFFICE USE ONLY

Voting leave approved by: \_\_\_\_\_ Date: \_\_\_\_\_

Voting leave denied by: \_\_\_\_\_ Date: \_\_\_\_\_

Reason for denial:

# Report of Jury Duty



# Pay

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

Employee Location: \_\_\_\_\_

Employee ID#: \_\_\_\_\_

This form should be submitted to Human Resources.

I was out of the office on jury duty from \_\_\_\_\_ to \_\_\_\_\_, or (if you did not serve on consecutive days) on these dates: \_\_\_\_\_.

This is a copy of my jury duty pay statement. I understand that, although The Organizations benefits program includes pay continuation during jury duty, the additional money I earn while performing jury duty must be paid to The Episcopal Diocese or Parish. I understand, therefore, that my jury duty pay—pay only, not the transportation allowance—will be:

- Subtracted from a future paycheck
- Endorsed and paid directly to The Episcopal Diocese or Parish

Signed: \_\_\_\_\_



## Vacation Request Form

Employees of The Episcopal Diocese or Parish must submit their vacation requests for approval at 1 week in advance. Vacations may be taken in full days or in 4 hour increments.

Employee Name: \_\_\_\_\_

Supervisor Name: \_\_\_\_\_

Department: \_\_\_\_\_

Date: \_\_\_\_\_ Number of Hours: \_\_\_\_\_

Reason for Vacation:

Vacation Request is:     Approved     Denied

Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## Receipt of The Episcopal Diocese Employee Handbook

The Employee Handbook (sometimes referred to as a Personnel Policy Manual, or the “Manual”) is a compilation of personnel policies, practices and procedures currently in effect at The Episcopal Diocese, Parish or Mission an equal opportunity employer. The Manual handbook and the information within it are confidential.

This handbook is designed to introduce employees to the organization, familiarize you with Company policies as they pertain to you as an employee, provide general guidelines on work rules, disciplinary procedures and other issues related to your employment, and to help answer many of the questions that may arise in connection with your employment.

This handbook and any other provisions contained herein do not constitute a guarantee of employment or an employment contract, express or implied. You understand that your employment is “at-will” and that your employment may be terminated for any reason, with or without cause, and with or without notice. Only the Bishop or other authorized representative(s) of The Episcopal Diocese or Parish has the authority to enter into a signed written agreement guaranteeing employment for a specific term. This handbook is intended solely to describe the present policies and working conditions at the Organization. This handbook does not purport to include every conceivable situation; it is merely meant as a guideline and, unless laws prescribe otherwise, common sense shall prevail. Of course, federal, state and local laws will take precedence over Organization policies when applicable.

Personnel policies are applied at the discretion of the Organization. The Organization reserves the right to change, withdraw, apply or amend any of our policies or benefits, including those covered in this handbook, at any time. The Organization may notify you of such changes via email, posting on the Company’s intranet, portal or website, or via a printed memo, notice, amendment to or reprinting of this handbook, but may, in its discretion, make such changes at any time, with or without notice and without a written revision of this handbook.

By signing below, you acknowledge that you have received a copy of The Organizations Employee Handbook, and understand that it is your responsibility to read and comply with the policies contained within it and any revisions made to it. Furthermore, you acknowledge that you are employed “at-will” and that this handbook is neither a contract of employment nor a legal document.

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Signature

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Date

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Please print your full name

Please sign and date one copy of this notice and return it to Human Resources. Retain a second copy for your reference.





## Receipt of Harassment Policies

As described in the Harassment Policy and the Sexual Harassment Policy, harassment is prohibited at The Episcopal Diocese

By signing below, you acknowledge that you have received a copy of the Organizations Harassment Policy and Sexual Harassment Policy, and understand that it is your responsibility to read and comply with both policies and any revisions made to them.

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Signature

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Date

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Print your full name