

# UNITED WAY OF KENTUCKY PERSONNEL POLICIES

## **CODE OF CONDUCT**

United Way of Kentucky is judged to a great extent by the public perception of its personnel. For that reason, it is essential that the behavior of all employees be above reproach off the job as well as on. Employees are expected to maintain the highest standards of personal and professional integrity and honesty in all public activities so as to inspire public confidence and trust in the United Ways of Kentucky and all philanthropic institutions.

### **Confidential Matters**

United Way of Kentucky is an organization in which many matters of a confidential nature are entrusted. Each employee must keep in strictest confidence any information acquired and be generally discreet on matters related to United Way.

### **Political Activities**

Employees of United Way of Kentucky shall not participate in or intervene in any political campaign on behalf of any candidate for public office in a manner, which could be construed as representing the views, attitudes, or opinions of United Way of Kentucky. This includes publishing or distribution of supporting or opposing statements.

### **Caring Attitude**

The success of United Way of Kentucky is dependent on the public perception of it as a caring, community minded organization. It is essential that every employee demonstrate an attitude of respect, concern, courtesy and responsiveness in all their daily contacts with volunteers, members, donors, and people in need of assistance.

### **Use of Equipment**

The use of United Way of Kentucky equipment or supplies for personal reasons is strictly prohibited unless there is prior approval by the President.

## **GENERAL INFORMATION**

### **DISCLAIMER**

These personnel policies and the Employee's Handbook book are presented as a matter of information only for the purpose of clarifying and defining policies for all employees. They do not constitute a contract between United Way of Kentucky and its employees. Each employee is hired for an indefinite period, and there can be no guarantee as to the length of time for which United Way of Kentucky will continue any employee's employment.

### **EQUAL EMPLOYMENT OPPORTUNITY**

It is the policy of United Way of Kentucky to provide equal employment opportunities to both applicants and employees without regard to race, color, religion, sex, national origin, age, status as a Vietnam Era Veteran, or handicap. This policy relates to all phases of employment including, but not limited to, recruiting, employment, placement, upgrading, demotion or transfer, reduction of work force, termination, rates of pay or other forms of compensation, selection for training, and to the use of all facilities and participation in all agency-sponsored employee activities.

### **EMPLOYMENT PRACTICES**

The staff of United Way of Kentucky will be selected on the basis of the individual's qualifications and ability to perform the duties of the position. Generally, United Way of Kentucky will not employ immediate relatives of current employees.

When positions become available, qualified internal candidates and employees of the United Ways in Kentucky will be considered.

### **NEW EMPLOYEE INTRODUCTORY PERIOD**

The first 90 days of employment constitute a trial period in which the employee and United Way of Kentucky determine their mutual suitability. During this time the employee will be given every opportunity and assistance to learn the duties and responsibilities of the job and to get to know the organization. If, at the end of 90 days both the employee and United Way of Kentucky are satisfied, the employee will become a regular employee. The first performance appraisal will be conducted at this time.

### **HOURS OF WORK**

Normal scheduled work hours will be from 8:30 a.m. until 5:00 p.m., Monday through Friday with a one (1) hour unpaid lunch period each day. Employees may be required to work at times other than the normally scheduled hours of work. The workweek is defined as 12:00 midnight Saturday until 12:00 midnight on Saturday of the following week. The normal workday is 7 and 1/2 hours. The President will designate the hours to be worked by part-time employees.

All employees will complete and sign a daily functional record of hours worked.

## **ATTENDANCE REQUIREMENTS**

Regular attendance and punctuality are valuable employee assets and are expected of all employees. Tardiness and absenteeism conflict with the satisfactory accomplishment of our services and may hinder the performance of others. Employees who for any reason are unable to report for work must notify their supervisor in advance, if possible, otherwise as promptly as possible after the scheduled start of work.

## **COMPENSATION**

Employees will be paid twice monthly on the 15th and the last day of the month. The hourly non-exempt staff will be compensated at time and one-half the employee regular rate for hours worked, with the approval of the President, in excess of 40 hours during any workweek. The exempt staff will not be compensated for hours worked in excess of 40 hours per week. When necessary, the President may determine if compensatory time off is appropriate.

## **EMPLOYEE STATUS**

Categories of employment are:

Temporary - Temporary employees are hired on other than a permanent basis. Such employees will be compensated on an hourly or monthly basis and are not eligible for benefits.

Regular Part-time - Permanent part-time employee are hired on a permanent basis but work less than 37 1/2 hours per week. Part-time employees are eligible for benefits as set forth below.

Regular Full-time - An exempt or non-exempt employee who works at least 37 1/2 hours per week.

## **EMPLOYEE BENEFITS**

For the purpose of benefits eligibility, credit may be given for time employed in another United Way at the discretion of the President.

## **PAID HOLIDAYS**

The following ten (10) paid holidays are observed each calendar year:

New Year's Day	Thanksgiving Day
Martin Luther King's Birthday	Day after Thanksgiving
Memorial Day	Christmas Eve <u>or</u> New Year's Eve
Independence Day (July 4)	Christmas Day
Labor Day	Personal Holiday

If any of the specified holidays fall on a Saturday, such holiday will usually be observed the proceeding Friday. If the holiday falls on a Sunday, the following Monday will usually be observed as the holiday. Vacation time cannot be charged on a holiday. An employee must work on the workday before and after the holiday in order to qualify for holiday pay.

## **VACATIONS**

The United Way of Kentucky provides an annual vacation for all employees based on length of continuous service with the United Way organization. Vacations are granted so that employees may enjoy rest and relaxation or needed time away from the job.

<u>Years of Service</u>	<u>Days of Vacation</u>	<u>Accrual Rate</u>
1 - 3 Years	10 Days	.83 days per calendar month
4 - 10 Years	15 Days	1.25 days per calendar month
11 -Years or more	20 Days	1.66 days per calendar month

These days in the first year are counted from the employee's hire date. Each subsequent calendar year's vacation accrues beginning on January 1.

Up to five days of the current year's vacation eligibility not taken by December 31 may be carried over to the following year, but must be taken in the first 3 months. Carryover days not taken in the first quarter will be forfeited.

Vacation may be taken all at one time or spread over the year, but cannot be taken in increments of less than 1/2 day. Vacation time must be scheduled in advance with the President, and is discouraged during the fall campaign (August 1st - November 15th).

Vacation may not be taken in the first three (3) months of employment.

Employees may not elect to receive pay in lieu of time off.

## **SICK LEAVE**

Regular employees who have completed three (3) months continuous service) are eligible for compensation for time lost due to personal illness or injury. After completing the New Employee Introductory Period, an employee will be compensated for sick leave accrued at one day per month. Unused sick pay may be accumulated up to a maximum of 130 days.

The President may request verification including a doctor's statement for consecutive sick pay beyond five (5) working days.

Payment for accumulated sick leave will not be provided at termination of employment.

Pay for absences due to a serious illness in an employee's immediate family may be authorized by the President and charged against sick pay.

## **DEATH IN IMMEDIATE FAMILY**

Up to three (3) regularly scheduled workdays without loss of pay may be granted for a death to allow an employee to attend the funeral; the day before the funeral, the day of the funeral, and the day after the funeral. Relatives included are - spouse, child, father, mother, brother, sister, and "in-law" relatives to the same degree. Also, stepparents, stepchildren, grandparents, and grandchildren.

## **GROUP MEDICAL INSURANCE**

United Way of Kentucky provides each regular full-time employee with a health insurance benefit package at no cost to the employee and to regular part-time on a contributory pro rata basis. Health insurance benefits are effective on the first of the month following 30 days of employment.

If an employee elects, eligible dependents may be insured at the employee's expense under the same plan after proper enrollment. Employee costs for the additional dependent coverage will be at the group premium rate. Details about this coverage may be obtained from the insurance administrator.

An individual dental plan is provided to regular full-time employees and to regular part-time on a contributory pro rata basis.

## **LONG-TERM DISABILITY INSURANCE**

United Way of Kentucky provides each regular full-time employee with a long-term disability insurance benefit package at no cost to the employee. Long-term Disability insurance benefits are effective on the first of the month following 30 days of employment.

## **RETIREMENT PLAN**

Regular full-time employees who have completed the required hours of work, as specified by SEP-IRA laws, are eligible to participate in the retirement plan. United Way of Kentucky contributes ten percent of the employee's base salary beginning on January 1 of the year following completion of the requirement.

## **LIFE INSURANCE**

Regular full-time employees, after 90 days are provided with, at no cost to the employee, an individual life insurance policy equal to three times their annual salary as of the date of purchase at a rate guaranteed for ten years.

## **TAX DEFERRED ANNUITY**

Employees have an option to participate in a Tax Deferred Annuity Plan.

## **OTHER BENEFITS**

United Way of Kentucky provides coverage for Social Security, Worker's Compensation and other required fiduciary benefits.

## **LEAVES**

### **MILITARY LEAVE**

Regular employees who enter the Armed Forces of the United States will be granted a leave of absence without pay for one period of induction or enlistment to satisfy a military obligation. United Way of Kentucky will accord to an employee applying for re-employment at the conclusion of military service such re-employment rights provided under applicable statutes and laws.

Employees called to individual military reserve duty, not to exceed 10 working days per year, shall be granted necessary time off without loss of benefits. The absence can be covered by voluntary use of vacation or as excused absence without pay.

## **JURY DUTY**

You are expected as a citizen of your community to fulfill your civic obligations when requested. Any individual receiving a legal summons to serve on a properly constituted jury or to serve as a witness will be paid his normal pay for the time lost, up to two weeks, while actually on jury service or acting as a witness. If jury duty is for a portion of the day, the staff member is expected, when practical, to return to work for the remainder of the day.

## **MEDICAL LEAVE OF ABSENCE**

Regular employees who have completed six months continuous service may be eligible for a medical leave of absence. If a medical condition renders an employee unable to perform their normal duties and the condition is supported by a physician's statement a leave may be granted. If the leave is to extend beyond thirty days, an updated medical statement must be presented certifying the projected extension. No extension may be more than thirty (30) days.

Any absence beyond five working days requires a physician's release to return to work.

If necessity requires an employee's job to be filled while they are on medical leave they may return to the same or similar job, if available. If no vacancy exists, they may be placed on a waiting list for a period not to exceed twelve months.

During a leave of absence, employees with dependent medical, surgical and major medical benefits coverage will be allowed to continue such coverage by paying their normal contributory premium.

Sick leave days may be applied to a medical leave of absence at the employee's discretion. Long-term disability insurance coverage takes effect after six months after the onset of the illness or disability.

## **ABSENCE WITHOUT PAY**

On occasion, it is unavoidable for an employee to be away from the job. Employees without sick leave or vacation pay (as appropriate) may be granted reasonable leave without pay upon approval of the President.

## **CONDITIONS OF EMPLOYMENT**

### **PERFORMANCE REVIEW**

It is essential that employees understand how well they are performing on their job. The President & Chief Professional Officer will conduct a formal performance review at least once a year. This yearly progress report will be in writing, reviewed, and signed by the employee, and placed in the employee's personnel file. Each year's review will include establishing mutually agreed upon goals for the coming year.

### **SALARY ADMINISTRATION**

Salaries will be administered according to the current compensation policy.

## **GRIEVANCE PROCEDURE**

An employee who is unable to resolve a difference with the President may appeal a decision to the Chairman of the Board of Directors.

## **EMPLOYMENT AT WILL**

It is understood that employment and compensation can be terminated, with or without cause or notice at any time, at the option of either the organization or the employee.

## **DISMISSAL**

An employee may be disciplined up to and including dismissal by the President for reasons of unsatisfactory performance or breaches of appropriate conduct such as, but not limited to, cheating, misrepresentation of the organization, absenteeism, illegal or unethical activities, conflict of interest, misuse of the organization's resources, falsification of records, drug or alcohol abuse, or other violations of policies.

## **RESIGNATION**

An employee choosing to leave employment with United Way of Kentucky should give adequate notice to allow for hiring a replacement as follows:

Exempt Staff - 4 weeks

Non-exempt Staff - 2 weeks

## **PAYMENT UPON DEPARTURE**

Employees leaving employment with United Way of Kentucky, through resignation or dismissal, will be paid for actual time worked during the final pay period plus any vacation accrued in the current year. Employees will not be paid for carry-over vacation or accumulated sick days. Insurance benefits will be continued until the end of the month of the employee's departure.

## **CHANGES TO POLICY**

From time to time, changes or additions may be made in these personnel policies. Such changes will be recommended by the Executive Committee and approved by the Board of Directors. They will be in writing and posted in a convenient location or given to each employee.

## **EXPENSE REIMBURSEMENTS**

### **CONFERENCES AND MEETING**

Expenses for staff to attend approved out-of-town conferences will be paid by the organization in the amount of actual cost for reasonable travel, meals, and motel accommodations. The reasonable cost of a breakfast, lunch, or dinner will be reimbursed to staff members when the meal was at a legitimate United Way business meeting. When normal in-town meetings or conferences require a staff member to work beyond the evening dinner meal or the lunch meal on Saturday; the actual out-of-pocket meal expense will be reimbursed. Reasonable cost of transportation for business will be paid by the organization. Staff members who use a personal car for business will be reimbursed at the approved IRS rate per mile driven. Employees using their own car for work-related travel are fully liable for accidents and must carry adequate insurance coverage.

### **REQUEST FOR ADVANCE FUNDS**

When traveling for an extended period for United Way of Kentucky, an employee may request a reasonable advance to cover cash expenses. Requests for advance funds must be made one week prior to the trip and approved by the President. All advances must be accounted for or repaid within five days of returning from the trip.

### **MEMBERSHIP DUES AND INITIATION FEES**

Membership dues and initiation fees for service clubs may be paid by the organization if the budget permits. The number of separate memberships should be restricted to an average of one membership per staff professional.

### **APPLICANT EXPENSES**

Applicants who are invited to interview for specific jobs at the United Way of Kentucky will be reimbursed by the organization for reasonable travel, meals, and motel accommodations.

Approved: February 17, 2004

I acknowledge receiving a copy of the UWKY Personnel Policy and having read it will abide by the policy.

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Dated