APPROVED BY EXECUTIVE DIRECTOR:

SIGNATURE  DATE

APPROVED BY BOARD OF DIRECTORS:

SIGNATURE (Chief Representative)  DATE

TITLE: Human Resources Management

POLICY: A stable, qualified workforce contributes effectively and efficiently to consumer satisfaction and positive service delivery results for Catholic Charities Spokane.
TITLE: Work Environment

PROCEDURE HR 1: Catholic Charities provides an equitable work environment that is supportive of organizational productivity, diversity, and stability.

HR 1.01 Catholic Charities does not unlawfully discriminate against any person or category of persons.

Related RPM 1, RPM 2.01

Equal Employment Opportunity Statement

Catholic Charities believes that equal opportunity for all employees is important for the continuing success of the organization. In accordance with state and federal law, Catholic Charities will not discriminate against an employee or applicant for employment because of race, disability, color, creed, religion, sex, marital status, age, national origin, ancestry, citizenship, veteran status, or non-job related factors in hiring, promoting, demoting, training, benefits, transfers, layoffs, terminations, recommendations, rates of pay or other forms of compensation. Opportunity is provided to all employees based on qualifications and job requirements.

HR 1.02 Policy prohibits personnel from engaging in any form of harassment, as defined by federal, state, or local law.

Related RPM 1, RPM 2.01

Anti-Harassment Policy

In compliance with federal and state laws, it is the policy of Catholic Charities to prohibit sexual harassment of employees, participants and volunteers in the workplace by any person and in any form.

Catholic Charities policy on harassment includes:
A statement that the organization will have zero tolerance for prohibited harassment;

A clear definition of the kinds of behavior the organization recognizes as harassment;

A prohibition against personnel harassing persons served, supervisees, colleagues, community representatives, or other persons or groups with whom they have contact as representatives of the organization;

The organization’s commitment to take necessary and appropriate action to prevent or eliminate harassment on the job; and

A description of the process for reporting harassment to management.

Specifically, no Board member, employee, volunteer or participant will threaten or insinuate either explicitly or implicitly that an employee’s refusal to submit to sexual advances will adversely effect the employee’s employment, evaluation, wages, advancement, assigned duties, shifts, or any other condition of employment or career development.

Other sexually harassing conduct that may create a hostile working environment, whether committed by directors, supervisors, professional staff, program participants, volunteers, or vendors is also prohibited. Such conduct includes, but is not limited to:

- Unwelcome sexual flirtations, touches, advances or propositions;
- Verbal abuse of a sexual nature;
- Verbal comments about an individual’s body;
- Sexually degrading words used to describe an individual;
- Jokes and stories of a sexual nature.

Any employee or volunteer who believes that he or she has been the subject of sexual harassment shall report the alleged act immediately to the Program, Associate, or Executive Director. The Director will ensure that complaints are resolved promptly and efficiently. The complaints will be investigated and the person will be advised of the findings. All findings related to the investigation will be kept as confidential as possible while ensuring a complete investigation.

Any supervisor, employee, participant or volunteer who is found, after appropriate investigation, to have engaged in sexual harassment of another person will be subject to appropriate disciplinary actions, up to and including termination.

HR 1.03 The organization prohibits preferential treatment and nepotism with regard to hiring, supervision, and promotion.
Employment of Relatives:

Catholic Charities strives to have personnel policies free of favoritism or bias of any kind. It is important to avoid even the appearance of preferential treatment toward relatives. Staff members are subject to the following rules governing conflict of interest and nepotism. For purposes of this part, relatives shall include any of the following persons: parent; children; siblings, whether natural, foster, adopted, or step; grandparents; grandchildren; spouse; ex-spouses; nieces; nephews; aunts; uncles; first cousins; parents-in-law; children-in-law; sister and brother-in-law.

- No person shall hold a job while he/she or a member of his/her immediate family serves on the board or a committee if that board or committee has authority to order personnel actions affecting his/her job;

- No person shall hold a job over which a member of his/her immediate family exercises supervisory authority;

- Permission of the Secretary for Social Ministries shall be required for employment of relatives within the same Secretariat.

Catholic Charities will not employ relatives, spouses, or two individuals living together in a relationship that is essentially equivalent to marriage, except under circumstances where (1) neither employee will supervise, appoint, remove or discipline the other; (2) neither party will evaluate the work of the other; and (3) the working relationship will not create a conflict of interest or the appearance of favoritism in the opinion of management. If two employees who work in the same department or supervise each other develop a dating or spousal relationship after employment, one of the two may be transferred, or if no suitable position is available, terminated. The decision as to which employee will be terminated, if transfer is impossible, will be left to the employees involved, unless business necessity requires the agency to make the decision. Supervisors dating subordinates is seen as a conflict of interest and is not allowed.

Catholic Charities also reserves the right not to employ close relatives of officers or other high-level employees of our customers, competitors, or others with whom the agency deals, where such a restriction is necessary to avoid the actuality or appearance of conflict of interest, or to protect confidential information.

It is the policy of Catholic Charities to prohibit sexual harassment of employees in the workplace by any person and in any form. Refer to HR 1.02 for Catholic Charities’ policy on Sexual Harassment.
PROCEDURE HR 2: The organization reassesses its workforce as part of annual planning and prepares for future needs by:

- conducting a gap analysis between the current workforce composition, including number of employees, skills, and demographics, and projected workforce needs; and
- determining how to close gaps when possible, through recruiting, training or outsourcing.

Catholic Charities will address this in the long-term strategic plan and also in the annual short-term plan of each program. Yearly staffing pattern reviews are part of the annual budgeting and outcome measure development process.

At least annually, Catholic Charities reviews and modifies its personnel utilization in accord with:

- Any changes in job classifications;
- Current administrative practices;
- Service objectives; and
- Results from its quality improvement processes.

Catholic Charities retains sufficient numbers of qualified individuals to:

- Efficiently and effectively meet the demand for all services it provides; and
- Provide and coordinate the services that are within the organization’s scope and resources.

Additionally, yearly review of staffing patterns by each Program Director assists in assuring that program service delivery models are adequately staffed with a sufficient number of qualified individuals.

In determining and reviewing the size of employee workloads, management and/or supervisory personnel regularly assess:

- The work and time required to accomplish assigned tasks and job responsibilities;
● Service volume, accounting for assessed level of needs of new and current clients and referrals; and
● Standards of best practice, where they exist.

This assessment is done in conjunction with reviewing the job descriptions and the creation of annual action plans. Each year, Program Directors review and adjust staffing patterns in order to reflect changing personnel needs and job loads. Additionally, Program Directors meet several times per year in retreat setting formats to discuss workload, resources and time management issues.

Approval for New or Revised Positions:

● All new and revised positions must be approved by the Executive Director or Associate Director prior to the position being posted. The authorization for new positions or to fill current positions will include the evaluation of the organization’s ability to fund the position as well as the ability to reorganize current staff to accommodate the new duties.

● The hiring staff member will schedule the in-person interviews, generally with no more than the top three candidates. A three-person interview team shall consist of the hiring person and a person in the program familiar with the position’s duties.

● The hiring staff member will check *three* references of the final candidate(s) and will verify the educational and other required credentials for the person selected prior to their being offered the job.

● Vacant positions may be posted simultaneously both within and outside the Catholic Charities agencies.

Catholic Charities hires or contracts for skilled administrative personnel in the following areas:

● Finance/Accounting;
● Human resources;
● Maintenance of personnel records;
● Management information service;
● Technology;
● Facility maintenance; and
● Other administrative systems, as applicable.
TITLE: Recruitment, Selection, and Deployment

PROCEDURE HR 3: The organization hires enough qualified personnel to meet the demand for services.

- Catholic Charities recruitment and selection procedures and practices meet the human resource needs identified in its planning process.
- Catholic Charities ensures that human resource planning and deployment fosters efficient and effective service delivery, protects vulnerable populations, and promotes the attainment of desired outcomes.
- Catholic Charities organizes and deploys sufficient human resources to provide appropriate services and ensure optimal outcomes.
- Catholic Charities’ Human Resources personnel will keep on file an updated aggregate job category form and service summaries.
- Catholic Charities evaluates and identifies the type and number of personnel required to accomplish its mission, goals, and objectives.

HR 3.01 Job descriptions and selection criteria:

- state the qualifications, job expectations, essential functions, and responsibilities for each position or group of like positions;
- include sensitivity to the service population’s cultural and socioeconomic characteristics; and
- are reviewed and updated regularly.

Catholic Charities has a written job description and selection criteria for each organizational position or group of like positions that includes the qualifications, expectations, and responsibilities

Human Resources and the Executive Director review job descriptions and selection criteria at least every two years to ensure that:

- Education and experience requirements are relevant and appropriate to the organization’s programs, consumer needs, and specific services provided; and
• Qualifications or credentials are reasonably related to the level of competence required for the tasks involved.

Catholic Charities employs only those persons who are qualified according to the job description and selection criteria for the positions they occupy.

**Community Awareness and Personnel Capacities**

Catholic Charities promotes the retention of culturally competent, strengths oriented personnel who possess an understanding of the communities served.

Catholic Charities selection criteria for all personnel include an evaluation of the applicant’s sensitivity to the service population’s cultural and socioeconomic characteristics.

Catholic Charities considers personnel’s awareness of the cultural and socioeconomic characteristics of persons served as a factor in performance evaluation.

Catholic Charities promotes and supports cultural diversity in its human resources policies and programs.

Catholic Charities evaluates the following capacities when interviewing personnel who provide or oversee direct services:

• A commitment to empowering others to solve their own problems;
• Valuing a nurturing family as the ideal environment for a person;
• A conviction about the capacity of people to grow and change;
• The ability to establish a respectful relationship with persons served to help them gain skills and confidence;
• The ability to work collaboratively with other personnel and/or service providers or professionals;
• The capacity to maintain a helping role and to intervene appropriately to meet service goals; and
• The ability to set appropriate limits.

**IMPLEMENTATION:** Catholic Charities utilizes annual performance reviews, job descriptions and trainings(retreats in order to keep an open dialogue on personnel capacities. Staff is evaluated annually based on job descriptions which are based on the core values of Catholic Charities as well as the individualized job requirements of each job description. Through the interviewing process as well as the regular review of job descriptions, Catholic Charities will assure that appropriate individuals with a commitment to empowering others and a commitment to the mission and values of the agency are hired.

Whenever possible Catholic Charities works with area colleges and universities to:
• Prepare graduates for working with its service populations; and
• Conduct training on the social service field.

**IMPLEMENTATION:** Catholic Charities will utilize practicum students, interns, work studies and other service learning placements from local colleges and universities.

Catholic Charities promotes involvement in community affairs and community associations among its personnel who work with persons served.

**IMPLEMENTATION:** A list of relevant community groups for possible involvement by employees of Catholic Charities include but is not limited to:

- Spokane County Domestic Violence Consortium;
- Homeless coalition;
- Chamber of Commerce;
- Providence Services of Eastern Washington Board of Directors; and
- Washington State Catholic Conference Board.

Staff should work with their direct supervisors to discuss the feasibility and appropriateness of possible engagements with other community groups. Staff should not become involved in community groups (for the purposes of their jobs) without approval from their immediate supervisor and/or Program Director.

**Qualifications of Organizational Leadership**

Catholic Charities ensures that persons retained to carry out leadership and supervisory functions are qualified for the roles they assume.

The Executive Director is qualified by:

- An advanced degree from an accredited college or university in a field related to the organization’s services;
- At least five years of related experience;
- Assessed competence in administering and providing services to individuals, families, and/or children;
- Management skills in addressing human resources and financial matters; and
- The ability to coordinate the organization’s services with other community resources.

Catholic Charities senior program managers are qualified by:

- An advanced degree from an accredited college or university in a field related to the organization’s services;
- At least five years of related direct service or administrative experience;
Assessed competence in the role assumed; and
Formal training and/or on-the-job orientation for a specified probationary period to prepare them for their new management responsibilities.

Each of Catholic Charities senior managers promotes continuous quality improvement and service delivery that is aligned with the organization’s primary mission or function.

**HR 3.02** Recruitment and selection procedures include:

- notifying personnel of available positions;
- verifying references and credentials of personnel and independent contractors;
- providing applicants with a written job description;
- giving final candidates the opportunity to speak with currently-employed personnel;
- retaining hiring records for at least one year; and
- using standard interview questions that comply with employment and labor laws.

Related TS 1.03

Catholic Charities’ recruitment and selection procedures and practices aim to select the most qualified applicants and minimize risk of arbitrary or discriminatory treatment of applicants.

Catholic Charities recruitment and selection procedures and practices include:

- Notifying qualified personnel of available positions before or concurrent with external recruitment efforts;
- Encouraging the hiring of former service recipients where applicable to the service;
- Interviewing applicants personally prior to hiring; and
- Obtaining three unrelated references, via documented telephone interview, in writing, or in person required of personnel.

Vacant positions may be posted simultaneously both within and outside the Catholic Charities programs. For posting open positions, Catholic Charities utilizes its Employment page on the website as well as the local newspaper and the Washington State unemployment website.

Applicants will be prescreened and interviews will be scheduled for selected qualified candidates. References will be contacted and criminal history requirements will be completed for final candidates as required by law.
Catholic Charities verifies the credentials of all professional personnel and independent contractors, including:

- Education and training;
- Relevant experience;
- Competence in the required role;
- Recommendations of peers and former employers; and
- State or provincial registration, licensing, or certification requirements for their respective disciplines, if any.

The hiring staff member will check references of the final candidate(s) and will verify the educational and other required credentials for the person selected prior to their being offered the job.

A Washington State Patrol Criminal Background check and a disclosure statement will be required for all employees and volunteers. The Human Resources Coordinator will do the Washington State Patrol criminal background check prior to the final candidate receiving a job offer by the hiring staff member. The hiring staff member must do the program required criminal background check (e.g., FBI, DSHS) prior to offering the job to the final candidate.

In situations where personnel lack licensure and certification requirements, the organization demonstrates that:

- A person with requisite credentials provides close supervision to such personnel; and
- Personnel are working toward licensure and/or certification.

Catholic Charities provides all prospective applicants with a written job description and provides to final candidates:

- Criteria for personnel productivity; and
- The opportunity to speak with currently employed personnel regarding the scope and demands of the position.

The following are guidelines for interviews at Catholic Charities:

First Interview:
- Two or three person team;
- Same questions asked to all candidates.

Second Interview:
- At least two staff present.
● Same questions asked to all candidates.

When a person is hired there shall be provided to the employee a written letter of hire specifying that person's date of hire, job title, job description or classification, and starting salary. The letter of hire shall not be considered a contractual employment agreement.

Catholic Charities recruitment and selection procedures also require:

● Retaining records for all stages of the recruitment and selection process, including postings or other advertisements, applications, and interview notes (collectively referred to as “hiring records”) for at least one year.

● The use of standard interview questions that elicit consistent information about the candidate’s skills and abilities related to position requirements that comply with the employment and labor laws.

● The Human Resources Coordinator will maintain a copy of all job descriptions and will prepare the announcement for vacancy agency posting. Both in-house and community posting may occur simultaneously. The Human Resources Coordinator will do a preliminary screening of resumes to make sure the candidates meet minimum requirements and seem appropriate for the position. If there are any questions regarding meeting the minimum requirements, they will be reviewed with the Program Director. All applications not being considered further by the Program Director are to be returned to the Human Resources Coordinator to be kept until after a candidate is hired. The Human Resources Coordinator will send a letter of appreciation to those candidates not chosen. All of the resumes will be returned to the Human Resources Coordinator so that a file of applicants can be maintained.

**HR 3.03** Screening procedures for new employees, contractors, and direct service volunteers include appropriate, legally permissible, and mandated reviews of state criminal history records and civil child abuse and neglect registries to determine the appropriateness of hiring prospective personnel who will:

● work in residential programs; or

● provide direct services to children, the elderly, or other persons determined by the organization to be vulnerable or at risk.

Catholic Charities follows screening procedures for new and existing employees and contractors, in conjunction with human resources administrators or legal counsel that require, unless contraindicated by law:
- Review of state or provincial criminal records;
- Review of state or provincial child abuse and neglect registries for employees and contractors of programs that serve minors and vulnerable adults; and
- Review of sex offender registries.

The Human Resources Coordinator will do the Washington State Patrol or Volunteer Select criminal background (as detailed in the Background Check policy in appendix D) check prior to the final candidate receiving a job offer by the hiring staff member. The hiring staff member must do the program required criminal background check (e.g., FBI, DSHS) prior to offering the job to the final candidate.

Catholic Charities prohibits permitting personnel or contractors who have a documented history of assaultive behavior, such as indicated child abuse findings resulting from criminal or civil proceedings, to have interaction with or provide oversight to vulnerable populations.

With increased number of service requests or the need to provide a service not within the expertise of salaried staff, contracts may be negotiated with a community professional. The contract will abide by the agency’s policy regarding purchase of service.

- The contract personnel will be screened and will be required to agree and abide by the Catholic Charities Policies and Procedures.
- Contract personnel will be expected to follow licensing or certification requirements where necessary.
- The Director or Coordinator will be responsible for supervision of contract personnel.
- The Catholic Charities liability insurance policy is an umbrella which covers officially accepted contract workers.

Catholic Charities provides student field placements or internships and provides regular supervision and accountability for work performed.

Catholic Charities will work in cooperation with each college wishing to place students for field instruction and will layout guidelines requiring:

- A beginning learning contract that will:
  1. Name student
  2. Name agency
  3. Name fieldwork placement instructor
  4. List activities
  5. List approximate number of hours
6. List beginning & ending date
7. Be signed by student, program supervisor, fieldwork instructor, and faculty supervisor

- A field experience learning contract that will set goals for:
  1. Student learning objectives
  2. Student learning activities
  3. Semester
  4. Be dated and signed by student, program supervisor, fieldwork instructor, and faculty supervisor

- A practicum time card that will be kept by the student and signed and dated monthly by student, field instructor and turned into the faculty supervisor.

- A mid-term and final student practicum performance evaluation to be conducted with the student, program supervisor, and faculty supervisor.

**HR 3.04** An organization that recruits and selects personnel with specific cultural traits or other characteristics establishes that such selectivity is:

- legally permissible;
- reviewed and approved by the organization's governing body; and
- appropriately considered a bona fide occupational qualification.

Because administration of Church affairs is itself a ministry of the Christian Community, Catholic Charities reserves the right and discretion to require that designated administrators be members of the Catholic Church. Accordingly, the Secretary for Social Ministries/Catholic Charities Executive Director, Catholic Charities Associate Director for Programs, and the Parish Social Ministry Director shall maintain active status in a Catholic faith community. They must also be conversant with the Church as expressed by the Second Vatican Council and the Catechism of the Catholic Church. All employees, regardless of their personal beliefs, are expected to respect the Catholic character of the Diocese and Catholic Charities and abstain from any public rejection of the official teachings, doctrine or laws of the Roman Catholic Church. The application of this provision will be as interpreted by the Bishop of the Catholic Diocese of Spokane. Catholic Charities recruits and selects personnel with specific characteristics according to:

- Bona fide occupational qualifications;
- Exemptions in the laws governing equal opportunity or employment equity; and
- The review and approval of such a recruitment practice by the governing body.
HR 3.05 Organizations that deploy volunteers to provide direct services specify their roles and responsibilities.

Related HR 5, RPM 2.01, TS 3.05

Catholic Charities uses volunteers and effectively deploys them to augment its ability to serve the community.

Catholic Charities procedures specify the roles and responsibilities that volunteers may assume.

CATHOLIC CHARITIES VOLUNTEER PROCEDURES

Catholic Charities volunteers have a wide variety of ages, skills and experiences to share.

1. Initial contacts by volunteer or group either by phone, mail, or word of mouth... "I’m interested in volunteer opportunities with Catholic Charities"...are referred to Catholic Charities volunteer contact person in the Development Department. At this point, the volunteer or group is not committed or has not been recruited by any particular program of Catholic Charities.

2. The individual or group is mailed a packet of information including:
   a. Volunteer Opportunities brochure
   b. Volunteer application
   c. Letter of welcome with the date and time of the next Informational Meeting
   d. Response card

   At least one follow up contact is made to those who do not respond.

3. Catholic Charities Volunteer Information Meeting - 1 hour
   a. Catholic Charities mission, history and organizational structure
   b. Available volunteer opportunities
   c. Match volunteer’s interest/needs
   d. Complete paperwork including application if it has not already been turned in, confidentiality form, disclosure form, back ground check authorization
   e. After the meeting, run background check and refer to programs within 7 days.
   f. Check for history of a "disqualifying crime" as listed in attachment "A" and make individual evaluation with Program Director and administrators.

4. Referral to Program Directors or designated program contacts for interview, training, assignments and any additional paperwork.
a. Mileage forms  
b. Volunteer hours - need to report  
c. Check references

5. All Catholic Charities volunteers must complete the Diocesan Code of Conduct training prior to volunteering.

6. Program Directors will also be supplied with volunteer packets and paperwork.

When volunteers are recruited or initiate a contact for a specific need, i.e., St. Margaret’s Aftercare, CAPA Doula, orientation, training and assignments can begin as scheduled by Program Director.

a. Names, addresses and phone numbers need to be reported to Coordinator of Volunteers for inclusion in volunteer database for newsletters, etc.

b. Eventually the goal is to have all volunteers attend an Informational Meeting to receive the basic information about Catholic Charities in order that they can identify with the larger corporation and its mission.

7. Program Directors keep files on program volunteers to include a copy of the application, confidentiality form, disclosure form and background check. The Catholic Charities volunteer office files contain this information for all of those who have gone through the Informational Meeting.

Volunteers under age 16 must be accompanied by an adult. When using volunteers under age 16 in groups, the ratio must be 1 adult to 10 youth. Only the adult supervisor responsible for the group must fill out the required paperwork. Supervisor must show proof of school or organization youth permission forms.

Those who are 16-21 years may volunteer under these conditions:

1. All necessary volunteer paperwork must be submitted.
2. Applicant must be able to pass a criminal background check (ages 18+)
3. A face to face preliminary interview must be conducted by staff.
4. A Catholic Charities Spokane Parental Acknowledgement and Permission form must be signed (ages 16-17 only).
5. Volunteers under 21 cannot provide transportation or personal care.

All placements are at the discretion of the Volunteer Coordinator and are contingent upon finding an appropriate match for both the student and agency.
 USING COURT ORDERED COMMUNITY SERVICE VOLUNTEERS

It is the policy of Catholic Charities Volunteer program to allow participation of court ordered community service volunteers only when to do so does not jeopardize the safety of clients and others. Each subcontractor may opt to not include these volunteers as participants at all. If a subcontractor uses court ordered community service volunteers, the following guidelines must apply. In addition, attached to these guidelines is a list of convictions which disqualify volunteers, without individual evaluation by director and administrators, from serving Catholic Charities clients. The list is provided by the Department of Social and Health Services.

**Before service begins:**

- Refer to the list of disqualifying crimes and make sure that the person has not been convicted of one of them
- Interview the person with another staff member present.
- Use your best judgment, in consultation with the probation officer or another officer of the court to determine whether or not you will place the volunteer.
- Decline to work with a court ordered volunteer who is not forthcoming with all information necessary. Insist on having the name and phone number of the probation officer or other officer of the court designated to supervise the volunteer’s service.
- Respect the volunteer’s right to confidentiality, but have the volunteer sign a release of information which will allow you to discuss the placement with the court.
- State clearly and specifically Catholic Charities Programs’ Volunteer policies, guidelines and standards as well as your program’s expectations, policies and standards.
- State clearly how infractions will be addressed and address them the way you said you would. DO NOT DELAY ADDRESSING A PROBLEM!
- Orient the volunteer thoroughly.

**During the service period:**

- Be consistent and clear in your interactions.
- MONITOR THE PLACEMENT REGULARLY. Have contact with the volunteer and the client once a week.
- Have a face-to-face meeting with the volunteer no less than once every 2 weeks.

*Please see the list of Disqualifying Crimes in the Appendix.*

Catholic Charities appropriately provides volunteers with regular, professional supervision or a volunteer peer group, as appropriate, to provide assistance, directions for activity, and support.
Catholic Charities appropriately screens volunteer applicants to ensure that they are able to establish and maintain relationships with community members and persons served, and discuss proposed consumer matches and time commitments with volunteers prior to formal assignment.

The Coordinator of Volunteers will check available volunteer opportunities and match volunteer’s interest/needs to available opportunities. The volunteer will then have an individual evaluation with Program Director and administrators. The volunteer will then be referred to Program Directors or designated program contacts for interview, training, assignments and any additional paperwork.

Personnel who are assigned overall responsibility for coordinating volunteer services report regularly to senior management and:

- Oversee recruitment, selection, assignment, training, supervision, evaluation, and recognition of volunteers; or
- Supervise those to whom such responsibilities have been delegated.

The Coordinator of Volunteers is responsible for volunteer recruitment and is shown under Development on the organizational chart. The Senior Services Program Director is responsible for Volunteer Chore volunteers.
APPROVED BY EXECUTIVE DIRECTOR:

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TITLE: Satisfaction and Retention

PROCEDURE HR 4: The organization promotes a high level of personnel satisfaction and retention.

HR 4.01 Catholic Charities promotes open communication and collaboration among disciplines and staff levels by:

- Holding regular team, organizational, and divisional meetings, as appropriate to the organization; and
- Providing feedback to personnel about their suggestions and recommendations.

HR 4.02 Catholic Charities maintains and implements a personnel development plan that:

- Promotes cooperation among personnel;
- Provides opportunities to increase or broaden responsibilities;
- Includes an education and training program that provides opportunities for learning and skill enhancement;
- Encourages creativity and innovation in program development and service delivery; and
- Rewards and acknowledges the contributions of personnel.

HR 4.03 Catholic Charities annually establishes personnel satisfaction and retention goals and measures rate of personnel turnover and personnel satisfaction.

As applicable, Catholic Charities carefully reviews its retention of independent contractors, volunteers, and temporary employees with respect to exposure to tax law, wage and hour laws, and other applicable employment and labor laws, conforms with legal requirements, and does not place the organization at financial risk.

Catholic Charities regularly establishes goals for retention of personnel, measures and evaluates the rate of personnel turnover against benchmarks established for each job
category, and takes prompt action to correct identified job retention and satisfaction problems.

Catholic Charities annually seeks input, determines the level of personnel satisfaction, and institutes corrective action regarding the following:

- Leadership and management;
- Personnel development, recognition, and career opportunities;
- Quality of work environment;
- Adequacy of compensation and benefits;
- Interdepartmental communication; and
- Organizational policies and procedures as they are revised.

**HR 4.04** Catholic Charities takes action to address identified staff satisfaction and retention concerns.

Input is compiled and processed through the CQI program.

Catholic Charities promotes open communication and collaboration among disciplines and staff levels by:

- Holding regular team, organizational, and divisional meetings, as appropriate to the organization;
- Maintaining written records of committee and personnel meetings; and
- Providing feedback to personnel about their suggestions and recommendations.

Catholic Charities takes retention concerns very seriously and strives to address the problem with the most effective solution possible. Examples of solutions the agency has applied in the past include implementing a salary ladder including differentials for education for teachers to encourage retention and professional growth, developing training and development programs specific to managers, and inviting applicants for teaching positions to have a “trial-run” in the classroom before an offer is made.

**HR 4.05** Catholic Charities establishes a formal mechanism through which employees can express and resolve complaints, which includes:

- how complaints are filed, to whom, and who will make a final determination;
- timely written notification of the resolution and an explanation of any further appeal, rights, or recourse;
- documenting responses and actions taken;
- maintaining a copy of the notification of resolution in the personnel record; and
at least one level of review that does not involve the person about whom the complaint/grievance has been made or the person who reached the decision under review.

(SEE ALSO PROCEDURE CR 3)

**Complaint Procedure:** When possible the employee should try to discuss his/her complaint with the staff person(s) involved. If this does not resolve his/her concerns or if s/he is not comfortable doing this they may:

1. Put the complaint in writing, date and sign. The person may have a representative do this for them. They may choose a staff member, family member, friend or other advocate to represent them through the complaint procedure.
2. Send their complaint to the Program Director whose address will be on the consumer complaint procedure form. The employee may also telephone the Director at the number supplied on the form and express their complaint verbally.
3. The Director will make an appointment to discuss the complaint with them within seven working days of receiving the complaint.
4. A written report of the Director’s review and initial disposition of the complaint will be sent to the person or otherwise made available to them within 30 calendar days of their appointment.
5. If the employee is still dissatisfied, they may request that the disposition of the complaint be appealed to the Associate Director of Catholic Charities. The Program Director will ensure that the complaint is brought to the Associate Director’s attention.
6. A written report of the decision/disposition of the Associate Director of Catholic Charities will be made available within 15 working days of the date their request for appeal was made to the Program Director.
7. If the complaint is still not resolved under the above guidelines, a complainant may contact the Executive Director directly. The Associate Director will ensure that the complaint is brought to the Executive Director’s attention. A written response will be provided to the complainant within thirty calendar days.
8. A copy of the notification of resolution is maintained in an HR file and kept separate from the personnel records so that no appearance of retaliation may occur.

There will be no retaliation, formal or informal, against them for filing a complaint.
COMPLAINT FORM

NAME: _______________________________________

ADDRESS: ____________________________________

PHONE: _______________________________________

POSITION: _____________________________________

1. The Complaint: What was done to you (or not done), by whom, when etc.

2. What, if any, justification or explanation of this action was given by the administrator or person with whom you have the complaint? Why do you regard it as insufficient?

3. What efforts have been made toward conciliation in this matter?

4. What action do you request to remedy this situation?

DATE: _______________________________________

SIGNATURE: __________________________________

DATE RECEIVED: ______________________________
TITLE: Human Resource Practices

PROCEDURE HR 5: Human resource practices are equitable and consistently applied.

HR 5.01 Catholic Charities complies with applicable laws and regulations governing fair employment practices and contractual relationships.

Catholic Charities is committed to being a fair employer. While acknowledging local, state and federal laws and regulations regarding at will employment laws and practices, Catholic Charities also recognizes and affirms its unique relationship and responsibility to Canon Law. Catholic Charities, in accordance with acceptable management principles, will periodically review and revise the policies, practices and procedures included in this manual.

Immigration Reform and Control Act of 1986:

The Immigration Reform and Control Act of 1986 requires that Catholic Charities of Spokane employees be authorized for employment in the United States. Therefore, only individuals lawfully authorized for employment in the U.S. will be employed.

In connection with the Immigration Reform and Control Act of 1986, Catholic Charities must collect certain information on INS Form I-9 and review certain documentation concerning the employment authorization of individuals hired after November 6, 1986. This information and documentation will be used only for compliance with the Immigration Reform and Control Act of 1986 and not for any unlawful purpose. Consequently, forms will be maintained separately from the personnel file.

ADA Compliance

Catholic Charities welcomes applications from people with disabilities and does not discriminate against them in any way. Catholic Charities complies with the Americans with Disabilities Act (ADA) of 1990. Requests for accommodations are to be made to the Associate Director.
The organization follows procedures governing disciplinary actions and non-voluntary terminations of personnel that specify actions that are considered violations of organization policy, including actions that are considered to be substandard performance.

**IMPLEMENTATION:** Termination of Employment

Either the employer or employee can terminate employment at any time for any reason. Notification of termination is to be given by or to the immediate supervisor.

Due to the nature of the service provided by Catholic Charities, advance notification of employee termination is requested. Ideally, employees resigning are requested to give their supervisor a minimum of thirty (30) days written notice. Clerical staff is requested to give fifteen (15) days written notice.

Employees may request a hearing on disciplinary actions as outlined in Catholic Charities’ procedures regarding Resolution of Grievances.

Prior to terminating an employee, the Executive/Associate Directors are required to consult with the Diocesan attorney.

**IMPLEMENTATION:** Continuation of Medical/Dental Benefits (COBRA)

When an employee terminates employment with Catholic Charities, for any reason, or there is a reduction in hours worked resulting in the transition to less than 20 hours per week, all employer sponsored health coverage will be canceled the last day of the month in which the termination/change occurs, unless the employee elects continuation of coverage through the Consolidated Omnibus Budget Reconciliation Act (COBRA). (See Appendix B for explanation of benefits.) For information regarding COBRA procedures, contact Human Resources.

**IMPLEMENTATION:** Family Medical Leave Act

Catholic Charities, as required by law, provides leave for certain family and medical reasons. (See Appendix C for an explanation.) For information regarding procedures, contact Human Resources.
Personnel Policies and Procedures:

The Catholic Charities Council on Accreditation (COA) team and the Continuous Quality Improvement (CQI) team will review new policies and procedures to determine if they should be submitted for further consideration to the Executive Director to be proposed at the next meeting of the Board of Directors. The Board of Directors, through a process of consultation, approves the personnel policies for Catholic Charities. A major review will be undertaken at least every three years. Amendments and procedures approved by the Board become effective immediately upon adoption unless otherwise provided. In compliance with the laws of Washington State, Catholic Charities reserves the right to modify these policies without notice. All policies and procedures should have a standard format.

The Executive Director oversees the personnel function.

Opening Statement

Catholic Charities strives for peace, justice, and love among all persons. The staff functions as part of the Christian community, which gives witness to the solidarity of all people and to the fulfillment of mercy, justice and charity.

Administrators and all other personnel who are in positions to affect philosophy, overall direction or program determination are expected to conduct themselves in their employment in such a manner that is congruent with the teaching of the Roman Catholic Church.

Within the limits dictated by prudent fiscal management of its resources, Catholic Charities strives:

- To seek employees of the highest quality, selecting them on the basis of merit, skill, experience, training, and character;

- To respect the individual rights of each employee and strives to treat all employees with courtesy, dignity, and consideration;

- To make prompt and fair settlements of complaints that may arise in the ordinary operations of Catholic Charities;

- To the extent that is reasonably possible and where applicable:
  - protect employees from medical and financial hazard through an insurance and benefits program;
  - make available to employees opportunities for training, development, and
advancement consistent with individual goals and the requirements of Catholic Charities;

- offer a retirement benefit to employees who qualify under the guidelines of the program.

EMPLOYEE RELATIONS

Cultural Diversity Policy

Catholic Charities values and promotes diversity as a matter of justice and as a strategic advantage. Diversity refers to human differences, including those based on culture, ethnicity, gender and age.

Some of the benefits Catholic Charities derives from the diversity of its workforce are:

- Different viewpoints and perspectives in decision-making;
- Greater innovation and creativity;
- A broad pool of qualified employees; and
- A diverse group of individuals who understand the different needs of all of our community members.

Catholic Charities promotes diversity awareness programs, which are designed to promote an environment in which differences are respected, employees and clients are treated fairly, and individual contributions are valued and rewarded.

All Program Directors receive diversity training and, in turn, are responsible for working to encourage awareness and respect for diversity within their programs.

Employment at Will Statement

This Personnel Policy Manual is intended to be a source of information and general statement of the personnel policies of Catholic Charities. It is not a contract of employment. Catholic Charities is committed to being a fair employer. While acknowledging local, state and federal laws and regulations regarding at will employment laws and practices, Catholic Charities also recognizes and affirms its unique relationship and responsibility to Canon Law. Catholic Charities, in accordance with acceptable management principles, will periodically review and revise the policies, practices and procedures included in this manual.

The policies stated in this manual are guidelines only and are subject to change at the sole discretion of Catholic Charities, as are all policies, procedures, benefits, or other programs of Catholic Charities. This manual is not a contract, expressed or implied, guaranteeing employment for any specific duration. Although we hope employment will be long
term, either the employee or Catholic Charities, as an at-will employer, may terminate this relationship at any time, for any reason, with or without cause or notice. Please understand that no supervisor, manager, or representative of Catholic Charities has the authority to enter into any agreement for employment for any specified period of time or to make any promises or commitments contrary to the foregoing.

Employees will be required to sign an Employee Acknowledgment form indicating that they have received and agree to review these policies (see Appendix A).

**Open Door Communications Policy**

In our desire and willingness to listen to employees, Catholic Charities believes in an open door communication policy. In order to have open door communication, there must be mutual trust.

Employees are encouraged to see their immediate supervisor with questions or problems relating to the job or feelings of well-being. The supervisor’s assistance may involve securing the assistance of other resource persons.

An employee may also request a meeting with any Director without regard to his or her position in Catholic Charities. Any matter of concern may be discussed directly with them. Although the Director may need to involve others to help investigate or resolve the concern, employees may bring the concern to any Director with whom they are comfortable.

Employees are requested not to keep a problem to themselves. A solution cannot be reached if no one knows about it. This procedure may be used without fear of reprisal.

**HR 5.02** All personnel receive, and confirm in writing, receipt of an up-to-date employee policies and procedures manual that articulates current:

- conditions of employment;
- benefits;
- rights and responsibilities of employees; and
- other important employment-related information.

Related ETH 2, ETH 4, ETH 5, TS 2.01
Safety: Catholic Charities strives, as the employer, to provide a work environment free from recognized hazards likely to cause injury, and has set forth certain rules and regulations relating to good safety practices.

Each employee has a responsibility to comply with all safety and health standards, rules, and regulations which are applicable to their own actions and conduct.

Included here are general rules covering safety to guide employees.

- **Reporting Procedure**
  1. Report all injuries incurred at work to your supervisor immediately.
  2. If you require medical attention, tell your provider that this was an on-the-job injury and let your supervisor know that the injury requires medical attention.

- **General Rules**
  1. Report all unsafe conditions to your supervisor.
  2. Since horseplay causes needless hazard, it will not be permitted at any time.
  3. If you do not know the safe way to do your job, ask your supervisor for instructions.
  4. Wear suitable clothing and footwear at all times.

Workplace Violence: It is the policy of Catholic Charities to expressly prohibit any acts or threats of violence by any employee or former employee against any other employee in or about Catholic Charities’ facilities or elsewhere at any time. Catholic Charities also will not condone any acts or threats of violence against employees, participants or volunteers on Catholic Charities premises at any time or while they are engaged in business with or on behalf of Catholic Charities, on or off the premises.

Threats must be reported to the appropriate Program Director or Associate Director immediately.

Drug–Free Workplace: Catholic Charities’ policy is to maintain a work environment that is free from substance abuse. We have developed this policy out of concern for employees' physical and mental health, and workplace safety and productivity. This policy establishes guidelines for maintaining a Drug-Free Workplace as delineated in the Federal Drug-Free Workplace Act.

- All employees are prohibited from unlawfully manufacturing, distributing, dispensing, possessing or using controlled substances or any prescription strength medication that has not been prescribed to the user. Any staff member violating this policy is subject to disciplinary action, up to and including termination, for a
first offense. Controlled substances may include, but are not limited to: non-prescribed narcotics, Marijuana, stimulants, depressants, and hallucinogens.

- Any staff member convicted of violating a criminal drug statute must inform Catholic Charities of such conviction (including pleas of guilty or nolo contendere) within five (5) days of the conviction occurring. Failure to notify Catholic Charities may be grounds for disciplinary action, up to and including termination, even for the first offense.

- Catholic Charities, in the person of the Executive Director, reserves the right to offer staff members who violate this policy an opportunity to participate in an approved rehabilitation or drug abuse assistance program at their own expense as an alternative to discipline. If such a program is offered and accepted by the staff member, he or she must satisfactorily participate in and successfully complete the program as a condition of continued employment.

The use of alcohol during working hours is also prohibited. Furthermore, employees may not work while under the influence of alcohol or controlled substances. If an employee is under a physician prescribed drug that may affect their work performance, they must inform their immediate supervisor.

**Testing:** Catholic Charities may use drug and alcohol testing to help continue the administration of this policy. Reasonable suspicion tests may be administered when a supervisor has reason to believe an employee might be under the influence of alcohol or drugs. Symptoms suggesting drug or alcohol use include, but may not be limited to, visible needle marks, red eyes, liquor smell on breath or clothing, sudden changes in work performance, inappropriate behavior, and unexplained and/or frequent absenteeism. Post accident testing may also be completed where required by law or under this policy.

All test results are kept confidential. If an initial drug test is positive, a confirmation test is performed on the same specimen. All drug and alcohol testing conforms to federal and state laws.

**Training:** Catholic Charities will offer alcohol and drug-free awareness training to all supervisors. The program covers the dangers of drug and alcohol abuse in the workplace and the penalties for violating the substance abuse policy. Supervisors also receive training regarding the symptoms of drug and alcohol abuse.
Behavior/Incident Documentation Form

This form is provided for managers and supervisors to guide them in observing and documenting objective factors that support a suspicion that the employee’s work performance and well-being might be affected adversely by the use of drugs and/or alcohol.

When possible, this form should be completed as observations are being made, or as soon as possible after observation has occurred. Preserve any physical evidence of the incident, i.e. empty alcohol bottles, drug paraphernalia, and/or broken or damaged property.

Contact Human Resources or designee immediately upon witnessing any suspicious behavior in which you think drug and/or alcohol use is suspected.

Complete the following information. This form should be completed and given to Human Resources as soon as possible.

Employee Name: ___________________________________

Program: _________________________________________

Date and Time of Incident: __________________________

Location of Incident: ______________________________

Length of Period Observed: _________________________

Distance from Employee: ___________________________

Description of Behavior:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Description of Employee’s Appearance:
________________________________________________________________________
________________________________________________________________________

Description of Employee’s Speech:
________________________________________________________________________
________________________________________________________________________
Description of Employee’s Movements:
________________________________________________________________________

Description of any odor on Employee’s breath or clothing:
________________________________________________________________________

Description of Employee’s reaction when confronted/asked about suspicious behavior:
________________________________________________________________________

Did Employee report any use of legally prescribed medications?
_____ Yes
_____ No

Did police/others need to be notified?

Was Employee referred to testing? What arrangements were made for Employee to be transported to testing facility?
________________________________________________________________________

If incident involved a vehicle, make/model and license number:
________________________________________________________________________

Witnesses, including their contact information. Provide them with a copy of this form to report their observation. Completed forms need to be returned to Human Resources.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Additional Comments:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Manager’s/Supervisor’s Name: __________________________
Signature: _____________________________________________
Date: ________________________________________________

Human Resources or designee’s Signature: __________________________
Date: ________________________________________________
Promotions: Advancement to a more responsible position will be based on performance in the current position and the ability to meet new job requirements. First consideration will be given to the promotion of a qualified employee when filling a vacant position if factors are relatively equal between two or more applicants.

Seniority: Seniority is the status acquired by the staff member through length of service in the Catholic Charities positions held. Seniority, while taken into consideration, is of secondary importance to demonstrated work performance. In situations such as promotions, reductions in force, abolition of a position due to reorganization, budget costs and program changes, seniority shall be considered when job performance training skills and abilities are relatively equal between two or more employees.

Professional development: The ongoing professional development of the employee as well as orientation to the identity and role of Catholic Charities is the mutual responsibility of the employer and the employee. Catholic Charities provides the climate in which professional growth and development are seen as important and provides opportunities for staff development as deemed appropriate based on the employee’s position. Employees required by a particular program of Catholic Charities to attend workshops, seminars, conferences or training programs will have the cost of such programs paid from the appropriate budget in an amount determined by the Associate Director. Attendance at workshops, seminars and conferences requires the approval of the Program Director and must be within budget constraints.

Dress Code: Appropriate attire is assumed for all staff and may be defined at the discretion of the Catholic Charities Executive Director. Questions may be referred to the Program Director.

Catholic Charities’ personnel policies and procedures state that it will not unlawfully discriminate against any person or categories of persons protected by applicable federal, state or provincial, and/or local requirements.

Technology: The following Technology Directives outline the acceptable uses of technology within Catholic Charities. The purpose is to ensure that technology is utilized in a manner consistent with Catholic Charities mission, ethical and client confidentiality standards and to control the unauthorized use of technology that could cause interruption in the provision of services. Any violation of these Directives will result in disciplinary action up to and including termination.

Employees are expected to conduct themselves honestly and appropriately in the use of technology and respect all copyrights, software licensing rules, client confidentiality and privacy of others.
TECHNOLOGY DIRECTIVES & EQUIPMENT PROTOCOLS

1. The technology resources of Catholic Charities are placed at the use of staff to further the mission of the agency. These resources include but are not limited to: computers, servers, cell phones, fax machines, copiers, the software and hardware of both the computers and the networks as well as the internet and email capabilities of the systems involved.

2. Catholic Charities will often use email to communicate information to the employees of the agency. All employees receive a Catholic Charities email account. Employees must attempt to check that account at least once per shift. If an employee is not scheduled to work for a period of 7 days or more, for reasons other than vacation, they must attempt to check their email account at least once during each 7 day period.

3. Computers, Internet connection, and other electronic office technology are the property of Catholic Charities and employees are expected to use these systems responsibly and primarily for conducting the business of the agency. These resources are not to be used to conduct private business, chain mailing or to conduct political campaigning activities. Employees are not to use Catholic Charities property to participate in or intervene in any partisan political campaign on behalf of any candidate for public office. This includes publishing or distributing e-mail that could be construed as a campaigning activity.

4. Catholic Charities will not purchase computers for staff persons to permanently maintain or work with at their homes without direct approval from the Executive Director. As of the writing of this policy there are only 3 computers that were purchased by the agency but permanently reside in a staff person’s home. It should be in only the rarest of situations where an agency owned computer permanently resides at a staff person’s home.

5. Cell phones are often an essential office tool for some staff of Catholic Charities. In fact, in some cases, it is of great benefit to the agency that a staff person has and carries a cell phone – especially in emergent or urgent situations where the agency needs to contact the staff outside of regular work hours. Each Program Director will dialogue with staff to determine if a cell phone is appropriate or needed for that staff person’s job. If it is determined that a phone is needed or appropriate, cell phones should be purchased by the staff person needing the phone and the account should be in the staff person’s name and not in Catholic Charities’ name (the only exception being the on-call phones used at 24-hour facilities like at SMS and PCL).

The staff and his/her supervisor will need to determine how much the cell
phone will be used for work purposes and how much the phone could possibly end up being used for personal purposes. Catholic Charities will utilize the **85-15 rule** in discerning cell phone usage and billing charges. If the staff cell phone is being used for work purposes for 85% (or more) of the time, the staff shall receive reimbursement for all charges related to the cell phone including initial equipment purchase. If the staff cell phone is being used for work purposes for less than 85% of the time, the staff shall determine (with the approval of the supervisor) the actual percentage of work versus personal use and only be reimbursed at that percentage level. Percentages should be determined at the onset by a best guess/discussion between the staff and his/her supervisor and verified on-going by evaluating at least two bills per year. Catholic Charities’ on-going belief is that if the phone is being used for at least 85% work purposes, the benefits resulting from the staff having the phone and being reachable by the agency far outweighs the time, effort or actual cost of recovering the 15% personal usage. Should the employee leave the agency, the staff will discuss and agree upon the fair resolution of disposition of any equipment that was paid for by Catholic Charities at the time of the exit interview.

6. E-mail and other information sent and received within the offices of Catholic Charities are not personal property of the creator of the message or record. As a result, administration reserves the right to access, review and monitor e-mail, all electronic messages and records as deemed necessary. Employees should be aware that this material in some situations could be potentially discoverable information for purposes of lawsuits and legal inquiry. Employees should not expect privacy in the use of e-mail messages or Internet sites. Administration for its purposes is reviewing and monitoring the use of these electronic systems.

7. Employees may not use these technical systems in any deemed fraudulent, harassing, sexually explicit, profane, obscene, intimidating, defamatory or otherwise unlawful or inappropriate. Examples of forbidden use include sexually explicit messages, cartoons or jokes, propositions or love letters, ethnic or racial slurs; any messages that can be construed to be harassing or disparaging of others based on their sex, race, sexual orientation, age, national origin or religious beliefs.

8. Concealing or misrepresenting identifying information or affiliation is prohibited as well as altering sources and attribution of messages or sending anonymous or pseudonymous messages.

9. Electronic storage on the Catholic Charities network servers will be periodically deleted after stated time periods. This includes records, e-mail and other folders. Responsibility for maintaining long term information is a
matter of Catholic Charities policy as well as contract requirement. The prudent use of resources demands that unnecessary or non-identified material will be deleted regularly.

10. Mass mailings of email to all staff or general notice are subject to review in terms of the appropriate use of the resources and time involved.

11. Only those employees who are duly authorized to speak to the media or in public gatherings on behalf of Catholic Charities may speak/write in the name of Catholic Charities to any news group or chat room. Other employees may participate in news groups or chats in the course of business when relevant to their work at Catholic Charities, but they do so as individuals speaking only for themselves.

12. Internet chat and news groups are public forums and Catholic Charities employees are prohibited from revealing or identifying client information and other Catholic Charities confidential information on these public forums.

13. Catholic Charities has installed a variety of proxies and other security systems to assure the safety and security of our network. Any employee who attempts to disable, defeat, or circumvent any company security system can be subject to immediate dismissal.

14. Computers that use their own modems to create independent data connections sidestep our network security mechanisms. An individual’s computer’s private connection to any outside computer can be used by an attacker to compromise any company network to which that computer is attached. Therefore, any computer used for independent dial-up or leased line connections to any outside computer or network must be physically isolated from Catholic Charities network.

15. User ID and passwords help maintain individual accountability for Internet resource usage. Any employee who obtains a password or ID for an Internet resource must keep his or her password confidential with the exception of their immediate supervisor. Catholic Charities policy prohibits the sharing of any computer related User ID or password.

**Equal Employment Opportunity Statement**

Catholic Charities believes that equal opportunity for all employees is important for the continuing success of our organization. In accordance with state and federal law, Catholic Charities will not discriminate against an employee or applicant for employment because of race, disability, color, creed, religion, sex, marital status, age, national origin, ancestry, citizenship, veteran status, or non-job related factors in hiring, promoting,
demoting, training, benefits, transfers, layoffs, terminations, recommendations, rates of pay or other forms of compensation. Opportunity is provided to all employees based on qualifications and job requirements.

**Attendance:** Employees will be evaluated on their attendance and chronic absenteeism may be grounds for termination. Employees absent for more than four frequencies (two or more absent days that occur consecutively are one frequency) during the calendar year may receive a warning, which will be placed in their permanent file.

**Partisan Political Activity:** Catholic Charities is a 501(c)(3) not-for-profit social service agency and does not engage in partisan political activity. Therefore, when acting in an official capacity, Board, staff and volunteers are to avoid endorsing or opposing political candidates or parties, or actively engaging in political campaigns for or against any candidate or party.

**Confidentiality:**

**Matters of Catholic Charities**

Matters of the organization such as compensation, contracts, budgets or personnel items are not to be discussed with others either inside or outside of the organization. Inquiries involving confidential matters are to be referred to the Executive or Associate Director.

**Matters of Program Participants**

Discussions by staff members of program participants will not be held within hearing of other staff members who do not have a need to know. Information related to participants must not be discussed with outsiders or in public places. All matters known to a staff member through their work with program participants must be held in strict confidence. The client’s affairs must not be discussed with anyone outside of the team of professionals involved in that client’s case or designated family members.

Failure to maintain confidentiality may result in disciplinary action, up to and including termination of employment.

**Conflicts of Interest:** All employees must avoid activities or relationships that conflict with Catholic Charities’ interests or adversely affect Catholic Charities’ reputation. The types of activities and relationships employees must avoid include, but are not limited to:

- Accepting or soliciting a gift, favor, or service that is intended to, or might appear to, influence the employee’s decision-making or professional conduct;
• Accepting, agreeing to accept, or soliciting money or other tangible or intangible benefit in exchange for the employee’s favorable decisions or actions in the performance of his or her job;

• Accepting employment or compensation or engaging in any business or professional activity that might require disclosure of Catholic Charities’ confidential information;

• Accepting employment or compensation that could reasonably be expected to impair the individual’s independent judgment in the performance of official duties.

Secondary employment will be prohibited in those cases where it conflicts or appears to conflict with the best interests of Catholic Charities or its program participants.

Employees must disclose actual or potential conflicts to their supervisor as soon as they become aware of them. Failure to make required disclosures or resolve conflicts of interest satisfactorily can result in discipline, up to and including termination of employment.

**Solicitation/Literature Distribution Policy:** To avoid work disruptions and possible discord among employees, Catholic Charities prohibits employees from soliciting other employees or distributing literature in connection with non-work related causes, commercial pursuits, groups or interests.

**Staffing-Hardship Incentive Policy:** On extremely rare occasions, Catholic Charities may experience difficulties in maintaining minimum staffing levels at facilities that operate on a 24-hour or weekend schedule. Such occasions can be due to special events, rituals based in religious traditions, or celebrations in the community that present challenges to adequate staffing.

The Associate Director will have the discretion to authorize a staffing-hardship incentive for an employee who fills a staffing need during these occasions. The actual incentive may be a temporary pay increase given for hours worked, or the authorization of time off given in exchange for hours worked. The Associate Director will consult the employee’s direct supervisor to determine what (if any) staffing-hardship incentive is appropriate.

The amount of any pay adjustment and/or the amount of time off shall be at the discretion of the Associate Director based on the evaluation of each situation when a Director makes a formal request for a staffing-hardship incentive to be awarded to an employee.
Catholic Identity: Because administration of Church affairs is itself a ministry of the Christian Community, Catholic Charities reserves the right and discretion to require that designated administrators be members of the Catholic Church. Accordingly, the Secretary for Social Ministries/Catholic Charities Executive Director, Catholic Charities Associate Director for Programs, and the Parish Social Ministry Director shall maintain active status in a Catholic faith community. They must also be conversant with the Church as expressed by the Second Vatican Council and the Catechism of the Catholic Church. All employees, regardless of their personal beliefs, are expected to respect the Catholic character of the Diocese and Catholic Charities and abstain from any public rejection of the official teachings, doctrines or laws of the Roman Catholic Church. The application of this provision will be as interpreted by the Bishop of the Catholic Diocese of Spokane.

Sick Leave: All full-time and part-time employees are eligible for sick leave. Sick leave is accrued, up to 90 working days, at the rate of one day per month for all full-time employees who work 40 hours per week. Employees who work less than 40 hours per week accrue sick leave in proportion to the amount of time per month they work. Sick leave may be charged only to the extent of accumulated credits and may be used only for personal illness, extended medical or dental care, or an illness in the family where the presence of the employee is required.

Sick leave is meant as an insurance against illness and therefore can not be paid out at the end of an employee’s employment.

Sick Bank Policy: The sick bank is supplied by employees donating their sick time to be used by other employees who do not have any leave time available.

Employees who would like to request leave from the sick bank must have exhausted all sick, annual, and personal leave.

The employee requesting the leave must contact their immediate supervisor as well as the Human Resources Department of Catholic Charities with a request in writing. Direct solicitation of co-workers by an employee requesting leave is prohibited and automatically disqualifies the employee from eligibility under this policy. An announcement will go out to all Catholic Charities employees from the administrative offices explaining that an employee is requesting donated sick leave. Only the name of the employee will be given. Circumstances of the condition will not be disclosed. Donations can only be made to specific employees; Sick Bank Donations will only occur in extreme and highly extenuating circumstances deemed by the Executive Director and the Human Resources Department. The following guidelines will be taken into consideration:
A review of the employee’s past attendance record
The length of the period of absence
Must be an extreme, life-threatening case
Employee must have at least 1 year of service at Catholic Charities
Other forms of income for the employee will be considered (insurance payments, etc.)

Employees who wish to donate sick leave must complete the Sick Bank Donation Form and submit it to the HR department by the date given in the announcement of the sick bank. (Only sick time will be accepted; vacation time may not be given. Employees may not donate more than half of their sick leave time). HR will then submit the form to the Payroll department, where adjustments will be made to the donating employee’s sick time balance.

Disclaimer: Catholic Charities reserves the right to cancel this policy if it is misused or misrequested. Before requesting leave or requesting to donate leave, please carefully review the above guidelines to prevent misuse of the policy.

**Group Insurance:**

A. Eligibility
   Coverage under the Medical, Dental, Life and Term Disability, and Group Voluntary Term Life plans are available for eligible personnel the first of the month following employment.

B. Costs
   Catholic Charities pays the medical/dental premium for qualifying employees who work a minimum of 20 hours per week. Dependant coverage is offered at the expense of the employee and will be deducted from the employee's payroll.

   Employees may choose additional Group Voluntary Term Life Insurance. The premium for this plan is paid in full by the employee and will be paid through payroll deduction.

   Full details for the above stated plans may be available in booklets provided at the time of employment or from the Human Resources Coordinator. Employees are urged to read the booklets thoroughly; any questions may be referred to the Human Resources Coordinator.

**Life and Long Term Disability Insurance:** This insurance may be provided at no cost to designated employees working 30 or more hours per week. (See the Human Resources for information.)
Medical/Dental Appointments: As much as possible, employees are expected to schedule appointments outside regular working hours. If not possible, time off for medical and dental appointments (i.e., annual exams, dental cleaning) for full-time employees is permitted with the Director's approval. Compensation for this time off may result in a charge to accrued sick leave or be unpaid time off. The employee is expected to schedule appointments appropriate to the program workload, such as near starting time, during the lunch break period, or towards the end of the day. Catholic Charities also asks that employees plan appointments on the days of the month when program participants would be least affected.

Retirement Benefits: A defined contribution retirement program is provided for all qualifying employees of Catholic Charities who work 1,000 or more hours per year. Details concerning the retirement program are available from the Support Services Coordinator. Catholic Charities contributes toward Social Security benefits for eligible employees in accordance with the Social Security Act of 1935, as amended.

Tax Sheltered Annuity: Catholic Charities provides a Tax Sheltered Annuity toward which the eligible employee may make a monthly contribution.

Credit Union: Catholic Charities allows employees to participate in the Catholic Credit Union through payroll deduction.

Unemployment Insurance: Catholic Charities participates in the Washington State Employment Security Program. Employees are eligible as defined and administered by the State plan.

Workers Compensation Insurance: Catholic Charities participates in the Washington State program for industrial insurance to protect employees who sustain work-related injuries.

Continuation of Medical/Dental Benefits (COBRA): When an employee terminates employment with Catholic Charities, for any reason, or there is a reduction in hours worked resulting in the transition to less than 20 hours per week, all employer sponsored health coverage will be canceled the last day of the month in which the termination/change occurs, unless the employee elects continuation of coverage through the Consolidated Omnibus Budget Reconciliation Act (COBRA). (See Appendix B for explanation of benefits.) For information regarding COBRA procedures, contact Human Resources.

Credit for Prior Service: Former employees who return to Catholic Charities within twelve months of separation will accrue benefits at their former rate. Employees separated longer than twelve months accrue benefits at the introductory rate.
EMPLOYMENT BASICS

Employment Classifications:

Full-Time Employee: An employee is considered "full-time" when regularly scheduled to work 40 hours per week. The employee is eligible for benefits and salary based on the number of hours paid per week.

Part-Time Employee: An employee is considered part-time if regularly scheduled to work less than 40 hours per week. Employees hired after July 1, 2002, will be eligible for annual leave only if they work a minimum of 20 hrs per week. They will receive other benefits proportionate to the hours paid per week.

On-Call: On-Call employees work irregular hours, are reimbursed at an hourly rate, and are not eligible for benefits.

Contract Vendors: Individuals are engaged through contracts at agreed upon rates for specific services and are responsible for their own licenses and taxes. They are not eligible for benefits.

Temporary Employee: An employee is considered temporary when the position to which the person is assigned is expected to continue for a limited period, usually less than twelve (12) months. They are not eligible for benefits.

Exempt: Executive, administrative and professional employees who are exempt from the overtime requirement of the Fair Labor Standards Act are classified as exempt employees.

Non-exempt: Non-exempt employees perform technical, clerical and/or administrative duties which are stipulated by federal law to require overtime pay.

Questions regarding exempt or non-exempt status may be referred to the Executive or Associate Director. Both exempt and non-exempt employees must prepare time reports.

Hours of Work: The Executive Director will establish the hours of work per day and per week on the basis of need. Occasions may arise which will require employees to work hours outside the parameters of the normal work schedule. Supervisors will provide as much advance notice as possible. Overtime is paid for non-exempt employees who work more than 40 hours in any workweek. Overtime is paid at one and one-half times the normal hourly rate. The workweek is from Saturday at 12:01
AM to Friday midnight. Overtime must be approved by the Director prior to being worked. Non-exempt employees working unauthorized overtime may be subject to disciplinary action. Supervisors have the responsibility to see that non-exempt employee’s hours do not exceed the established work hours.

**Orientation:** New employees will be introduced to their new position, covering responsibilities and duties, benefits, safety rules and regulations, and other appropriate items. The respective Program Director will be responsible for this introduction.

**Introductory Period:** New employees shall serve an introductory period of six (6) months during which time they can demonstrate their qualifications to their Director. These employees will also receive a written evaluation from their Director at the end of the introductory period. Introductory employees are entitled to accumulate but not expend annual leave benefits or a personal leave day. During this period of introduction, employees are entitled to benefits such as holiday pay and sick leave. Following the period of introduction, eligibility for vacation benefits is dated from the first day of employment. Reassignment to another classification does not impact eligibility for benefits. Employees who are reassigned to another classification or are promoted incur a new introductory period and will receive written notice of such change.

**Pay Policy:** Catholic Charities employees are encouraged to receive their pay by direct deposit, usually on the last day of each month. If a scheduled payday falls on a Saturday, Sunday, or observed holiday, employees will usually be paid on the day preceding the weekend or holiday. All required deductions, such as for federal, state, and local taxes, and all authorized voluntary deductions, such as for health insurance contributions, will be withheld automatically from the paycheck.

Employees are encouraged to carefully review the paycheck for errors. If a mistake is found, it is to be reported to the supervisor immediately. The supervisor will assure that the steps necessary to correct the error are taken.

In the event that a paycheck is lost or stolen, the supervisor needs to be notified immediately. The supervisor will, in turn, notify the Finance/Accounting Department who will attempt to put a stop-payment notice on the check. If Catholic Charities is able to do so, the employee will be issued another check. Unfortunately, however, Catholic Charities is unable to take responsibility for lost or stolen paychecks. The employee alone will be responsible for such loss.

**Termination of Employment:**

Either the employer or employee can terminate employment at any time for any reason. Notification of termination is to be given by or to the immediate supervisor.
Due to the nature of the service provided by Catholic Charities, advance notification of employee termination is requested. Ideally, employees resigning are requested to give their supervisor a minimum of thirty (30) days written notice. Clerical staff is requested to give fifteen (15) days written notice. Employees may not be eligible for rehire if appropriate notification is not given.

Employees may request a hearing on disciplinary actions as outlined in Catholic Charities’ procedures regarding Resolution of Complaints. (Form attached)

Prior to terminating an employee, the Executive Director, Associate Director or Human Resources is required to consult with the Diocesan attorney.

Reinstatement of Former Employees:

Employees who are laid off or who terminate voluntarily from Catholic Charities and are reemployed at a later date are eligible for the reinstatement of certain benefits according to eligibility requirements noted below. (Employees who leave due to military leave are covered under USERRA.)

Reinstatement upon reemployment applies only to the following benefits: vacation eligibility and accrual, Tuition Reduction Program, vesting under the 403(b) retirement plan, and rules applying to sick leave. It is specifically not intended for other illness-related benefits, such as extended sick leave or long-term disability.

Reinstatement upon reemployment from any form of termination other than layoff may be granted only once to any individual, regardless of circumstances.

Formula for Reinstatement:

<table>
<thead>
<tr>
<th>Prior Length of Service</th>
<th>Allowable Length of Break in Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 year</td>
<td>None</td>
</tr>
<tr>
<td>1 year but less than 2 years</td>
<td>1 year break</td>
</tr>
<tr>
<td>2 years but less than 3 years</td>
<td>2 year break</td>
</tr>
<tr>
<td>5 years but less than 10 years</td>
<td>3 year break</td>
</tr>
<tr>
<td>10 years but less than 20 years</td>
<td>4 year break</td>
</tr>
<tr>
<td>20 or more years</td>
<td>5 year break</td>
</tr>
</tbody>
</table>

There is no waiting period for benefits to be re-established. Medical and dental insurance will commence as with any new hire according to established insurance contracts.
Reinstatement of Laid Off Employees:

An employee who has been laid off and who has not rejected any comparable job offer at Catholic Charities will be eligible for reinstatement for his or her prior length of service, and for the period of absence between termination and reemployment, if reemployed within two years of the termination. This policy applies to the determination of eligibility for vacation benefits.

Individuals who are reemployed after the two year period or those who have turned down a comparable job offer are eligible for reinstatement according to the policy as stated above in “General Policy”.

Transportation Expenses: Transportation costs related to employment and other expenses related to attendance at approved meetings are allowable expense items chargeable to the agency. Documentation in the form of odometer readings, using the form provided by Catholic Charities is required. The forms are subject to random audits and therefore accuracy is critical. Falsified documents will result in disciplinary action.

The rate of compensation for use of personal automobiles will be the same as determined by IRS. The employee shall have a valid driver’s license and appropriate insurance coverage.

Expense Vouchers: Expenses are subject to the approval of the appropriate Program Director. Vouchers are to be used in presenting claims and are to be approved by the Director. Expense forms must be submitted within the month of the incurred expense. Receipts are essential for reimbursement.

LEAVES AND ABSENCES

Absences/Time Off: Whenever an employee is absent or late for work for any reason, the employee must call the Program Director within thirty (30) minutes of the start of the shift. An unexcused absence is one that is not reported to or approved by the Director. If an unexcused absence extends beyond three (3) working days, the employee may be terminated. If illness is given as the reason for an absence, Catholic Charities reserves the right to require a written statement from the employee's physician. Chronic absenteeism which interferes with job performance will be cause for dismissal.
Catholic Charities may grant, at Catholic Charities discretion, a leave of absence for medical and family reasons, military service, or for other personal needs dependent upon the employment status and length of service.

A "Request for Leave" form must be completed and submitted to the Program Director thirty (30) days prior to the start of the leave when possible. The Program Director must sign the "Request for Leave" form and send it to the Associate Director.

**Death in the Family:** Time off for a death in the immediate family* may be granted with pay. Time off is typically permitted from the death through the day of the funeral; generally, this is limited to three days.

* For this policy an immediate family is defined as: child, sister, brother, mother, father, spouse, grandparents, grandchildren and in-laws.

**Funeral Other Than Family:** Time off to attend the funeral of someone other than an immediate family member is allowed with prior discretionary approval from the employee's Program Director. Time off is generally limited to the time of the service.

**Jury Duty:** Employees are expected to fulfill their civic responsibilities by serving as jury members when called. Employees will notify their supervisor as soon as they have been called for Jury Duty. The employee will receive their regular pay while on jury duty unless the time exceeds two (2) weeks. Jury Duty that extends beyond 2 weeks can be charged to vacation time or is unpaid. Employees going on jury duty will be expected to preserve their jury summons and present to their supervisor, at the conclusion of their service, the document provided by the court that shows attendance. While serving on jury duty, employees are expected to report for work on any day or portion of any day that they are not required to appear in court.

**Military Service:** It is the policy of Catholic Charities to grant leaves of absence without pay to full-time or part-time employees who enlist or are recalled to active service in the armed forces of the United States. This policy also applies to employees who are active members of military reserve units and who are required to participate in periodic summer encampments.

**Annual Leave:** Catholic Charities recognizes that respite from daily responsibilities is important for the health and morale of the employee and therefore provides leave which, except in rare circumstances, is to be taken on an annual basis.

1. Qualifying full- and part-time employees working more than 20 hours per week are eligible for annual leave.
2. Annual leave time is accrued from the date of employment but cannot be utilized until the employee has been with Catholic Charities for at least six (6) months and has satisfactorily completed the introductory period.

3. Annual leave must first be earned before it can be taken.

4. The time of the year during which annual leave time is taken is at the discretion of the employee, provided that adequate attention is paid to the smooth running of the program or agency. This must be arranged in advance with the immediate supervisor. There is no minimum number of annual leave days an employee may use.

5. Effective July 1, 2002, new employees working less than 20 hours per week will not accrue annual leave. Part-time workers hired prior to June 30, 2002 will accrue annual leave time in proportion to the amount of time per month they work.

6. Annual leave days may be accumulated for not more than two years. In the event of termination of service, all accrued annual leave time will be paid up to the maximum allowed by this policy.

7. Annual leave pay will not be paid in lieu of time off, that is, annual leave time is to be taken as time off.

8. There are two plans in place for determining accrual rates. Plan 1 is designated for employees hired on or prior to December 31, 2008. Plan 2 is designated for employees hired on January 1, 2009 and later.

Plan 1 - Employees hired on or prior to December 31, 2008 who are eligible for annual leave will accrue time according to the following monthly calculations:

Year 1: 
2 x scheduled hours per week divided by 12
After one year, but less than 20 years: 
3 x scheduled hours per week divided by 12
20 or more years: 
4 x hours worked per week divided by 12

Plan 2 - Employees hired on January 1, 2009 and later who are eligible for annual leave will accrue time according to the following monthly calculations:

Year 1 and year 2: 
1 x scheduled hours per week divided by 12
After year 3 but less than 5 years:
   2 x scheduled hours per week divided by 12
After year 5 but less than 20 years:
   3 x scheduled hours per week divided by 12
20 or more years:
   4 x scheduled hours per week divided by 12

9. Employees should request information from their supervisor in regards to any program specific procedures in requesting annual leave.

**Holidays:** It is the policy of Catholic Charities to recognize certain holidays during the year. In the 24-hour facilities, if a holiday occurs during a period in which a non-exempt employee is required to work, double time will be paid. If the employee in the 24 hour facility is exempt, an alternate day off will be provided. Program Directors will determine the holiday schedule based on staffing needs for each individual program. Approved holidays include:

- New Year’s Day
- Martin Luther King Jr. Day
- Presidents Day
- Memorial Day
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Friday after Thanksgiving
- Christmas Eve Day (non transferable)
- Christmas Day

Holidays for Catholic Charities employees with a non-traditional or part-time schedule are non-transferable.

**Family Medical Leave Act:** Catholic Charities, as required by law, provides leave for certain family and medical reasons. (See Appendix C for an explanation.) For information regarding procedures, contact the Associate Director.

**Personal Leave:** One personal leave day is provided for each employee working more than 20 hours per week per calendar year who does not work 10 hour days. While this holiday may be taken at any time during the calendar year with the approval of the eligible employee’s supervisor and after satisfactory completion of the introductory period, Catholic Charities employees are encouraged to take the day prior to December. Personal leave days are not carried over from one calendar year to another.
CATHOLIC CHARITIES LEADERSHIP SABBATICAL POLICY

Purpose:

Catholic Charities is committed to the care and protection of its leaders. The agency’s leadership resource is one of our most valuable treasures and should be aggressively safeguarded, protected and cultivated. Leader self-care is essential in the agency’s ability to retain good leaders and prevent elements of compassion fatigue, burnout and turnover – which are so common to social services agencies and human services in general. In order to care for and protect its leaders, Catholic Charities will offer a sabbatical program to its leadership. The sabbatical program will be an opportunity for a tenured leader to take extended leave for the purpose of rest, professional development and spiritual renewal. The Catholic Charities sabbatical program will afford leaders in the agency the opportunity to revitalize the body, mind and spirit. Such revitalization is key to the on-going health of the agency’s leadership and will benefit the individual leader as well as the agency at large.

The word “sabbatical” is derived from the “Sabbath”. Sabbath time is based on Genesis 2:1-4 in which God is modeled and later required (Exodus 17:8-11) the setting aside of 1/7th of our time for re-creation and restoration. For ancient Israel, Sabbath keeping was a spiritual discipline that was designed to develop the Israelites’ ability to trust God. For one day a week, the Israelites would entrust themselves to God’s care rather than to their own ability to work.

Values and Assumptions of the Catholic Charities Sabbatical

The best sabbaticals usually are more open-ended than rigid, allowing for the surprises and possibilities that may come. Jesus’ forty days in the wilderness marked a turning point in his ministry. Moses’ time spent tending sheep helped change his perspective on his calling and life. Paul, struck down on the road to Damascus, disappeared into the desert of Arabia for three years and emerged with a new vision. Sabbatical is a time to receive, to be nurtured, to reflect on your relationships and on your own story so that you can be renewed, refreshed and revitalized for a life of service to others.

Some values and assumptions of the Catholic Charities sabbatical include:

1. Encouraging Catholic Charities leadership staff to maintain good self-care is an essential component of retaining and refreshing good leaders. Good self-care enables a Catholic Charities leader to achieve a new sense of vision, renew his/her calling to service and evaluate his/her gifts and skills with regards to the program and, staff and clients.
2. When there is a good match between a Catholic Charities leader and his/her program area, a long term relationship is desired. In such instances, a sabbatical is a wise investment in the agency’s infrastructure.

3. The Catholic Charities sabbatical should be an ongoing and intentional part of the agency’s policies and procedures, not a reaction to a crisis like burnout, compassion fatigue or turnover in staff due to compassion fatigue.

Benefits of the Catholic Charities Sabbatical

1. An experienced, professional leader at Catholic Charities who returns from a sabbatical with a renewed energy and rediscovered zeal for serving those in need.

2. Renewed commitment to the agency and enhanced job performance.

3. The ability to stay current with professional developments in the leader’s field and an opportunity to pursue academic and hands-on growth in an area of interest that could benefit the agency.

4. Replenished energy stores, renewed emotional health and increased spiritual vitality are all valuable assets to a leader at Catholic Charities. When modeled and displayed by leaders, these assets can be transferred to staff, volunteers and clients.

5. Rekindled sense of calling and the ability to nurture the body and soul are key components to retaining good leaders within the agency structure.

6. Opportunity to develop agency leadership within the programs by providing other staff leadership development in assuming managerial roles during the interim of a sabbatical.

7. Cost efficiency. When an experienced Catholic Charities leader leaves the agency due to burn-out, fatigue or other dis-satisfaction, the agency loses financial resources due to a loss in momentum, leadership continuity as well as incurs the expense to hire and train new leaders. Gaps between leaders in programs cause turmoil and expense that is ultimately passed on to the client and will cost the agency valuable time and treasure.

Guidelines, Conditions and Eligibility for the Catholic Charities sabbatical

Timing
Timing is crucial to the sabbatical process. Timing must be considered in order to minimize the disruption to the program, the staff and the clients. Sabbaticals should be planned and applied for at least 6 months in advance in order to set up interim leadership structures, plan for smooth transitions and brainstorm any possible challenges while the leader is away. The term and timing of the sabbatical shall be as follows:

- After a leader is with the agency for a period of at least 5 ½ years, he/she may apply for a sabbatical to begin on his/her 6 year anniversary of employment as a leader with Catholic Charities.

- The sabbatical term will be 10 weeks. The first week and final week of the sabbatical will be spent in a retreat-like program setting to be developed and determined during the sabbatical planning process by the leader and the Executive Director.

- A sabbatical can only be taken when the time is right for a program. A program that is experiencing turmoil, uncertainty, crisis or unusual activities should not be left by its leadership. The leader and the Executive Director will work together during the sabbatical planning process to ensure that the “time is right” for the program as well as the leader.

**Eligibility & Application**

- Leadership personnel of Catholic Charities who are eligible for application for a sabbatical include: Full time, 40 hour per week staff in the following job areas: Program Coordinators/Managers, Associate Directors and the Executive Director. Sabbaticals will include the leader’s regular salary during the sabbatical unless otherwise negotiated by the leader and the Executive Director.

- Eligibility will be confirmed during the application process. Eligibility criteria will also include an assessment by the leader’s supervisor(s) to verify that the leader is in good standing, has received positive evaluations and does not have any recent disciplinary concerns or formal reprimands in his/her employment history with the agency. The Executive Director has ultimate discretion in determining a leader’s eligibility for sabbatical, and can determine that a sabbatical is not timely, appropriate or possible for a leader and/or his/her program.

- Application will be made by the leader via a formal letter of request to the Executive Director. The letter should include information that outlines:
  
  - When the sabbatical would start (must be at least 6 months from time of the letter)
  - The length of the sabbatical
o Brief summary of why the sabbatical will benefit the leader, the program and the agency at large
o Goals of the sabbatical and an outcome measurement suggestion for those goals upon completion of the sabbatical
o Purpose of the sabbatical - is it for rest, spiritual renewal, new experiences, intellectual growth, decision making time, travel? Be specific.
o What is the plan to fill the leadership structure during the sabbatical within the program? How does this plan protect other leaders, staff or volunteers within the program? What key events, cycles, grants, administrative tasks, decisions, etc are likely to occur in the program while the leader is away? How will those things be covered?
o What is the “re-entry” plan for the leader after the sabbatical is finished?

• Review and Evaluation of the leader’s sabbatical is essential. A written letter from the leader to the Executive Director should be drafted upon completion of the sabbatical describing the leader’s perception of the effectiveness of time spent away and suggestions for future leadership development. Additionally, the sabbatical policy and process itself should be reviewed by the Executive Director and the Program Directors as a group at least yearly to determine the continued effectiveness, appropriateness and feasibility of the sabbatical program.

• Alternatives. A sabbatical may not always be possible or appropriate. Here are some short-term alternatives to consider if a Sabbatical can not be taken when requested:
o The agency could invest in a continuing education opportunity for the leader
o The leader could engage in an activity outside of work – coach children’s sports, participate in a community activity, volunteer at a local community agency
o The leader could begin meeting with a spiritual director.
o The leader could join a peer support group or other social, academic or spiritual group.

**HR 5.03** Total compensation and benefits are reviewed regularly in relation to industry practices and legal and regulatory requirements.

Related GOV 6.07

To the best of its ability, Catholic Charities will pay salaries and provide other benefits which are just compensation for the work, responsibility and performance. Further, Catholic Charities seeks to establish comparable wages for similar work in the community.
Catholic Charities participates in the Federal and Washington State Unemployment Compensation Plans and in the State program for Industrial Accident Insurance to protect employees who sustain work-related injury.

**HR 5.04** The organization analyzes employment patterns, and when the cultural characteristics of personnel do not generally reflect those of its defined service population, the organization implements a plan that:

- establishes goals for recruitment, employment, and promotion; and
- includes timetables for correction.

Catholic Charities promotes equal employment opportunity and a workplace that is reflective of its community through practices that encourage the hiring of personnel from diverse backgrounds.

Catholic Charities has a written equal employment opportunity or employment equity policy that:

- Clearly states its practices in recruitment, employment, transfer, and promotion of personnel;
- Is appropriately disseminated, with written acknowledgement of receipt required; and
- Is used in recruitment processes.

Every two years, Catholic Charities analyzes and compares its current employment patterns with the following factors:

- Availability of persons with required qualifications in the area’s work force;
- Demographic composition of the organization’s defined service population;
- The need to make required changes such as re-assignments and transfers; and
- The need for culturally responsive and competent practitioners.

Catholic Charities has the expectation of its Program Directors to continually monitor their programs for changing cultural dynamics. With this in mind as positions become available they will seek to fill those positions with qualified persons who also match the cultural dynamics of the program at the time of the opening.

When an analysis demonstrates that ethnic and racial backgrounds of personnel do not reflect the defined community’s composition, the organization develops and implements a plan to promote equal employment opportunity that:

- Establishes goals for recruitment, employment, and promotion; and
• Includes timetables for correction of any deficiencies identified in the analysis

**Equal opportunity Statement**

The established goals for recruitment, employment and promotion within Catholic Charities are to always search the community for the most qualified and best experienced individuals regardless of ethnic and racial backgrounds. Catholic Charities encourages all with the appropriate qualifications to apply for any open position. Catholic Charities will carefully review all qualified applications and all things being equal will, when possible and appropriate, have as a goal to maintain an appropriate mix of ethnic and racial backgrounds so as to mirror that of the population served. The Program Directors will be responsible for monitoring any perceived imbalance and will keep the Associate Director informed and/or use the CQI process to make aware any perceived problems. The Program Directors will always ensure that all staff is sensitive to the cultural needs of an ever changing ethnic and racial diverse client population. The equal employment opportunity plan:

• Specifies those employees responsible for implementation; and
• Establishes a mechanism for periodic review by management.

**HR 5.05** To ensure compliance with legal requirements the organization reviews its use of contingent workers, including independent contractors, leased workers, volunteers, and temporary employees, with respect to tax law, wage and hour laws, and other applicable employment and labor laws.

Related RPM 1, RPM 2.01

As applicable, Catholic Charities carefully reviews its retention of independent contractors, volunteers, and temporary employees with respect to exposure to tax law, wage and hour laws, and other applicable employment and labor laws, conforms with legal requirements, and does not place the organization at financial risk.
TITLE: Performance Evaluation

PROCEDURE HR 6: The organization holds both supervisors and supervised personnel accountable for performance and facilitates open, two-way communication as a means to encourage performance improvement.

HR 6.01 Every full-time and part-time employee receives a written annual performance evaluation conducted by the person to whom he or she reports. The organization has a standard process for providing every full-time and part-time employee with a written performance review at regular intervals that involves the employee and the supervisor.

Related TS 3.03

HR 6.02 Performance evaluations assess job performance, recognize accomplishments, provide constructive feedback, and emphasize self-development and professional growth, in relation to:

- specific expectations defined in the job description;
- organization-wide expectations for personnel;
- objectives established in the most recent evaluation and objectives for future performance as they relate to the organizations' mission and goals;
- developmental and professional objectives;
- recommendations for further training and skill building; and
- knowledge and competence related to the characteristics and needs of service recipients, if applicable.

Related TS 2, TS 3.03

Performance evaluations constitute one element of the personnel file. The complete personnel file, along with proven skills and experience, will be reviewed when considering continuation of employment, transfer or reassignment to another classification, promotion, demotion, termination or reduction in force.

Accountability and Performance Review
Catholic Charities holds personnel accountable for their work performance.

Catholic Charities uses qualified supervisory staff to hold personnel accountable for their assigned duties and responsibilities.
Catholic Charities uses the services of professionals on a per-interview, hourly, part-time, or independent contractor basis and has regular mechanisms to ensure the quality of services provided.

Each employee's performance will be reviewed in writing and evaluated by the Supervisor and Program Director at the end of the introductory period and then at least annually thereafter. An evaluation may also be done when there has been a significant change in the performance or job duties of the employee. Performance reviews are conducted at least annually between each employee or volunteer and the person to whom s/he is accountable.

All evaluations are to be in writing. The employee, Supervisor and Associate or Executive Director will review the evaluation and sign it signifying it has been read.

Administrators and Program Directors are expected to engage each employee in a mutual ongoing process of performance evaluation for such purposes as:

- To clarify duties and expectations as defined in the job description;
- To identify present training and development needs of the employee;
- To measure both strengths and weaknesses of present performance, including knowledge and competence related to the characteristics and needs of service recipients, if applicable;
- To identify areas of potential future interest, ability and growth;
- To clarify goals and the means to achieve them.

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**Spokane Catholic Charities**

**Employee Performance Review Instructions**

The Employee Performance Review process involves 9 steps:

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>Approximately 30 days before the scheduled review, the <strong>Program Director</strong> gives the Employee Feedback Form to the individuals <strong>who</strong> interact with the employee on a regular basis. The <strong>Director</strong> requests that the Feedback <strong>Form</strong> be returned within the next 10 days.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2:</td>
<td>The <strong>Director</strong> completes the <strong>Employee Performance Review Form</strong> using the</td>
</tr>
</tbody>
</table>
feedback received and documenting specific examples of performance.

Step 3: Approximately 2 weeks before the scheduled review the Director e-mails the completed Employee Performance Review Form for review to the Associate/Executive Director (one level up from the Program Director), along with their recommendation for salary increase based on the employee’s performance and current salary guideline.

Step 4: The Associate Director sends back the Employee Review Form to the Program Director with relevant changes and approval of the merit increase.

Step 5: Approximately one week before the review, the Director makes an appointment with the employee for the review meeting (set aside approximately one hour). The Director also gives the employee a copy of the Employee Action Plan Form to be used by the employee in drafting their action plan for the coming year. (The employee is to be told that the Final Employee Action Plan Form will be developed together with the Director.)

Step 6: The Program Director and Employee meet to discuss the Employee Performance Review Form and the Employee’s Action Plan Form. They agree on goals for the coming review period. If desired, the Employee adds comments in Part III: Comments area of the review form.

Step 7: Both the Program Director and the Employee sign the review form and action plan.

Step 8: The Employee receives a copy of the Employee Performance Review Form and the signed Employee Action Plan Form.

Step 9: The originals go back to the Associate/Executive Director for signatures and are then filed in the employee’s personnel file.

Spokane Catholic Charities
PROGRAM DIRECTOR Performance Review Instructions

The Program Director Performance Review process involves 9 steps:

Step 1: Approximately 30 days before the scheduled review, the Associate
**Director/Executive Director** gives the Employee Feedback Form to the individuals who interact with the **Program Director** on a regular basis. The **Associate Director/Executive Director** requests that the Feedback Form be returned within the next 10 days.

**Step 2:** The **Associate Director/Executive Director** completes the **Program Director Performance Review Form** using the feedback received and documenting specific examples of performance.

**Step 3:** Approximately 2 weeks before the scheduled review the **Associate Director/Executive Director** e-mails the completed **Program Director Performance Review Form** for review to the Executive Director along with their recommendation for salary increase based on the Program Director’s performance and current salary guideline.

**Step 4:** The **Executive Director** sends back the **Program Director Review Form** to the **Associate Director** with relevant changes and approval of the merit increase.

**Step 5:** Approximately one week before the review, the **Associate Director/Executive Director** makes an appointment with the **Program Director** for the review meeting (set aside approximately one hour). The **Associate Director/Executive Director** also gives the **Program Director** a copy of the **Employee Action Plan Form** to be used by the **Program Director** in drafting their action plan for the coming year. (The Program Director is to be told that the Final **Employee Action Plan Form** will be developed together with the **Associate Director/Executive Director**.)

**Step 6:** The **Associate Director/Executive Director** and **Program Director** meet to discuss the **Program Director Performance Review Form** and the **Employee’s Action Plan Form**. They agree on goals for the coming review period. If desired, the Program Director adds comments in the Part III: Comments area of the review form.

**Step 7:** Both the **Associate Director/Executive Director** and the **Program Director** sign the review form and action plan.

**Step 8:** The **Program Director** receives a copy of the **Program Director Performance Review Form** and the signed **Employee Action Plan Form**.

**Step 9:** The originals go back to the **Executive Director** for signatures and are then filed in the employee’s personnel file.

In conjunction with personnel, the organization develops outcomes-oriented performance expectations for each position, which are discussed with each employee.

Performance reviews include:

- An assessment of job performance in relation to the expectations defined in the job description and the objectives established in the most recent evaluation;
- Clearly defined objectives for future performance; and
- Recommendations for further training and skill building, if applicable.
HR 6.03 Personnel are given the opportunity to sign the written performance review, obtain a copy, and provide written comments before the report is entered into their personnel record.

The employee will be given a copy of the evaluation and an opportunity to file a statement within five (5) workdays on the designated evaluation form covering any items. Such a statement, along with all the evaluations, shall become an integral part of the personnel record.

HR 6.04 The organization monitors the quality of services provided by independent contractors.
TITLE: Personnel Records

PROCEDURE HR 7: The organization maintains personnel records.

Related RPM 5, RPM 6

HR 7.01 Catholic Charities maintains personnel records for all employees and volunteers, and these records are regularly updated and contain, as appropriate:

- Information on personnel recruitment and selection,
- Identifying information and emergency contacts;
- The application for employment, hiring documents including job postings and interview notes,
- Job description(s);
- Compensation documentation, as appropriate;
- Reference verification;
- Pre-service and in-service training records; and
- Performance evaluations and all documentation relating to performance, including disciplinary actions and termination summaries, if applicable.

IMPLEMENTATION: A personnel record will be established and maintained for each employee. The record will be kept in confidence. If a copy of the personnel record is required at the program site, it will be the responsibility of the Program Director to forward the original documents to the Catholic Charities Central Office. An employee may review with the Director his or her own personnel file by making a mutually agreed upon appointment to do so.

HR 7.02 Personnel records contain health information or reports for annual physical examinations, appropriate to the job position or when required by law

Catholic Charities keeps health records for employees with food service responsibilities separate from personnel records.
HR 7.03 Access to personnel records is limited to authorized personnel on a need-to-know basis.

HR 7.04 Catholic Charities procedures ensure that personnel have access to their own records and may review, add, and correct information contained in them, in accordance with applicable state law.

HR 7.05 Personnel who leave the organization voluntarily have the opportunity to participate in an exit interview.

Catholic Charities conducts an exit interview with all personnel who voluntarily leave the organization.
APPENDIX A

Employee Acknowledgement

This is to acknowledge that I have available to me an on-line copy of the Catholic Charities Personnel Policies (http://www.catholiccharitiesspokane.org) go to About and select Policies and Procedures.

A printed copy is also available from my supervisor. It is my responsibility to review the Policies, and I understand that if I have any questions about these policies and procedures, I will ask my Director for clarification. I also understand that the Policies are not an employment contract or a guarantee of employment. Rather, the Policies set forth general statements of Catholic Charities for all employees. I understand that Catholic Charities may modify these policies and procedures at any time without prior notice.

Signed: ________________________________

Date: ________________________________
APPENDIX B

COBRA

This federal law, referred to as COBRA, affects employers with twenty (20) or more employees. It allows those persons enrolled in an employer's group health care contract the right to continue their coverage under the employer's group health plan beyond the date that it might otherwise terminate. Catholic Charities contracts with A.W. Rehn & Associates, Inc. to administer the premium payment and benefits under COBRA. The Support Services Coordinator notifies A.W. Rehn & Associates if an employee terminates employment or reduces hours. It is the responsibility of the employee to notify the Support Services Coordinator if an employee or dependant loses coverage for any other reason. The entire premium cost (which the law provides, may be up to 102% of the applicable premium when continuation is elected and up to 150% of the applicable premium when coverage is extended for disability) must be paid by the employee.

Coverage may be continued as indicated below:

THE QUALIFYING EVENTS

As an employee of Catholic Charities covered either by Medical Service Corporation or Washington Dental Service, you and your spouse have a right to continue coverage if:

1. You lose your health coverage because of a reduction in hours or you are terminated (for reasons other than gross misconduct on your part).

As the spouse of an employee of Catholic Charities covered by Medical Service Corporation or Washington Dental Service, you have the right to continue coverage for yourself if you lose health coverage for any of the following reasons:

1. Your spouse dies;

2. Your spouse stops working (for reasons other than gross misconduct) or reduces hours of employment;

3. Divorce or legal separation from your spouse; or

4. Your spouse becomes entitled to Medicare benefits (applies only to those who qualified for an 11 month period).

A covered dependent child of an employee of Catholic Charities may continue coverage if health coverage is lost for any of the following reasons:
1. The death of a parent;
2. The employee terminates employment (for reasons other than gross misconduct) or reduced hours of employment with Catholic Charities;
3. The parents divorce or legally separate;
4. The employee/parent becomes entitled to Medicare; or
5. The child ceases to be an eligible dependent child.

NOTICES REQUIRED

Under the law, you or a family member has the responsibility to inform Catholic Charities of a divorce, legal separation, or a child’s loss of dependent status under Medical Service Corporation or Washington Dental. You must inform Catholic Charities within sixty (60) days of the later event or the date on which coverage would otherwise end because of the event in order to be eligible for continued health coverage. In addition, in the event of the birth or adoption of a child after the qualifying event, you must notify Catholic Charities of the employee’s death, termination of employment or reduction in work hours, or Medicare entitlement.

Similar rights may apply to certain retirees, spouses and dependent children if Catholic Charities begins bankruptcy proceedings and these individuals lose coverage.

COBRA ELECTION PERIOD

When Catholic Charities is notified that one of these events has occurred, A.W. Rehn & Associates will in turn notify you of your right to continue coverage. Under the law, you have at least sixty (60) days from the date you would lose coverage because of one of the events described above to inform A.W. Rehn & Assoc. that you want continuation of coverage. The 60 days starts with the later of the qualifying event or the date of the administrator’s election notice.

If you do not elect to continue coverage within 60 days, your health insurance will end at the end of the month of your termination.

DESCRIPTION AND MAXIMUM LENGTH OF COBRA COVERAGE

If you continue coverage, you will receive coverage identical to that provided under the plan for similarly situated employees or family members. You may continue coverage for 36 months unless you lost health coverage because of termination of employment or reduction in hours. In that case, the maximum continuation coverage period is 18 months.
If you are covered for an 18-month period (due to termination or a reduction in hours) and a second event occurs that would also qualify you for continued coverage, you may extend coverage to 36 months. A second event includes death of spouse, divorce, legal separation, or Medicare entitlement.

The 18-month period may also be extended if, at any time of the qualifying event or during the first 60 days of COBRA coverage (effective January 1, 1997), you were disabled (as determined by Social Security). Your coverage period may be extended from 18 months to a maximum of 29 months. To obtain these extended 11 months of benefits you must notify A.W. Rehn & Associates of Social Security’s determination of disability within 60 days of the date the determination is made and before the initial 18 months of COBRA coverage ends. The extension will end if during the 11-month period a final determination is made by Social Security that you are no longer disabled. You must notify A.W. Rehn & Assoc. within 30 days of any final determination that you are no longer disabled.

In no event will continuation coverage last beyond 3 years (36 months) from the date of the original qualifying event. The 36 months is counted from the first qualifying event.

The law provides that your continuation of coverage may end for any of the following reasons:

1. Catholic Charities no longer provides health coverage to any employee;
2. You do not pay the premium for your continued coverage by the required deadline;
3. You become covered under another group health plan which has no preexisting condition exclusions or limitations that apply to you (effective January 1, 1997);
4. You become entitled to Medicare benefits;
5. Your maximum continuation period (18, 29 or 36 months) ends; or
6. There has been a final determination by Social Security that you are no longer disabled, and you have completed at least 18 months of COBRA coverage (this applies only to those who qualified for an 11 month period).

You do not have to show that you are insurable to choose continuation coverage. However, COBRA coverage is provided subject to your eligibility for coverage. A.W. Rehn & Assoc. reserves the right to terminate your COBRA coverage retroactively if you are determined to be ineligible.
PREMIUM PAYMENTS

The premium you will be charged will not be more than 102% of the total cost of providing coverage. The premium for a Social Security disabled person can be as much as 150% of the cost of coverage for the 19th through 29th months of coverage.

You will be notified of the cost of continuing benefits if you experience a qualifying event. You will have 45 days from the election date to pay the first premium; after that, premiums will be due and payable once each month. You will have a 30-day grace period to pay each monthly premium. The first premium should cover premiums due from the date you lost coverage through the date you elected COBRA. Any monthly premium that becomes due during the 45-day period is payable at the end of the 45-day period.

FUTURE CHANGES IN BENEFITS AND PREMIUM

If Catholic Charities changes any regular health plan benefits during your continuation period, your coverage will also be changed in the same manner. Your required monthly premiums may also change during your continuation period in the manner allowed by law*. You will be notified of any changes in benefits and/or rates during your continuation period.

* Note: Premiums may change only once in the determination year of the plan (once every 12 months). Prop. Reg %1.162-26,Q.45

IF YOU DO NOT ACT BY THE ELECTION DEADLINE

If you or your dependents do not complete the Election Form and return it to A.W. Rehn & Associates within 60 days of receiving the Election Form/Notice of COBRA Rights (or within 60 days of the Qualifying Event if that is later), you and your dependents will lose your right to elect continuation coverage.

At the end of COBRA coverage, you may be eligible for an individual conversion policy under your present health insurance. This depends on whether such conversion policies are otherwise available to members of the group at that time or your state requires conversion policies be available. The cost and benefits of the conversion policy may be different from those under COBRA.
FAMILY MEDICAL LEAVES (FML) OF ABSENCES

In compliance with the Family and Medical Leave Act (FMLA), Catholic Charities will grant an unpaid leave of absence up to twelve weeks in a twelve-month period for eligible employees. The purpose of this leave is to provide job protection for employees who must take time off work to deal with birth, adoption or foster placement of a child, their own illness or care for family members with a serious health condition. Employee health benefits are maintained during any period of unpaid FMLA leave under the same conditions as if the employee continued to work. With the exception of certain designated individuals, employees also have the right to be restored to the same or an equivalent job with the same pay, benefits, and terms and conditions of employment on their return from leave.

Qualifications for Family Medical Leave

- **Length of Service**
  An employee must have completed at least one full year of service with Catholic Charities and have worked a minimum of 1,250 hours in the twelve-month period preceding the leave.

- **Reason for Leave**
  The employee is needed to care for his or her own newborn child, or a newly adopted or newly placed foster child, as long as the leave is taken in the year following the child’s birth or placement OR
  The employee is needed to care for his or her child, spouse or parent with a serious health condition OR
  The employee has a serious health condition and is unable to work.

- **Prior Notice**
  Employees who know in advance that they will need FMLA leave, must give their supervisor at least 30 days’ notice prior to the anticipated leave date, using the Catholic Charities FML Request Form. If the leave is unexpected, the employee must notify his or her supervisor as quickly as possible (normally within 2 days of the time when the employee realizes the need for leave).

- **Medical Certification**
  Employees who request FMLA leave because of a serious health condition, whether their own or a family member’s, must also submit a “Medical Certification Form” before the leave can be approved. The form is available from their supervisor. The completed “Medical Certification Form” should be directly returned to the Catholic
Charities Support Services Coordinator by the health care practitioner. Catholic Charities may require second or third opinions (at CC expense).

The employee may also be required to submit medical certification reports on a periodic basis through the leave period and a fitness-for-duty report to return to work.

**Leave Stipulations**

**Pay and Benefits**
FML is unpaid unless an employee has accrued paid leave. If the FML is for the birth, adoption, or foster placement of a child, the employee must use all accrued, unused vacation days before going on to the unpaid portion of the leave. If the leave is for care for a family member’s serious health condition or one’s own serious health condition, the employee must use all accrued, unused sick and vacation days prior to entering the unpaid portion of the leave period.

Employees on FML continue to be covered by Catholic Charities’ group health benefit plans on the same terms that are applicable for active employees. Other benefits, such as pension, 401(k), life insurance, and long-term disability, will be governed in accordance with the terms of each benefit plan. Employees do not lose employment benefits that accrued prior to the start of the FML.

**Husband and Wife Shared Leave**
If there is a situation where a husband and wife both work for Catholic Charities, the two employees are limited to a combined total of 12 weeks of family leave to cover the time off they need after the birth or placement of a child or to care for a seriously ill parent. However, each employee is eligible to take any unused portion of the 12 weeks for his or her own serious health condition, the care of a seriously ill child or the care of the other spouse.

**Intermittent Leave**
Employees taking leave because of their own or a relative’s serious health condition can take their allotment of FMLA leave intermittently or on a reduced work schedule, if this is medically necessary. Where employees have some control over the timing of their leave, they are expected to consult with their supervisors to try to arrange a mutually acceptable time. Employees taking leave to care for a newly born or newly placed child do not have a legal right to take intermittent leave and can do so only with their supervisor’s consent.

**Reinstatement**
On returning from an FMLA leave, employees normally are restored to their original or equivalent positions with equivalent employment benefits, pay, and other employment terms. Exceptions to this provision may apply if business circumstances have changed (e.g., if the employee’s position is no longer available due to a job elimination).
Exceptions may also apply for certain key employees who are notified of their status at the time they request FML. Key employees who take FML are reinstated to their former or equivalent positions only if their reinstatement does not cause Catholic Charities substantial and grievous economic injury.

If an employee has been on FML, due to his or her own serious illness and wants to return to work, Catholic Charities requires a fitness-for-duty note from the employee’s physician. The note must indicate that the employee is capable of returning to work and performing the essential functions of his or her position, with or without reasonable accommodation. Where required, Catholic Charities will consider making reasonable accommodation for any disability the employee may have in accordance with applicable laws.

**Privacy and Leave Requests**
Employees must inform their supervisors that they need family or medical leave and when they expect to be absent. To ensure the worker’s privacy, the Secretary for Social Ministry in coordination with the Support Services Coordinator will make any necessary inquiries and evaluates whether there is a medical need for the leave. The Support Services Coordinator also is responsible for ensuring that all medical information provided by employees is maintained in the strictest confidence.

**Communication**
Successful FML programs report that communication is very important. Catholic Charities encourages employees on FML to stay in regular communication with their supervisors and the Support Services Coordinator. As the date for return nears this is especially crucial. Sometimes situations change and the employee’s plans change. Due to unexpected circumstances the employee may want to return early or may want to extend the leave further. Catholic Charities staff can respond more quickly to changes when they have advance notice. Employees help themselves by taking responsibility for communication.
CATHOLIC CHARITIES
REQUEST FOR FMLA LEAVE

| Name: | .......................................................... .................................................. |

I am requesting a leave of absence under the provisions of the Family & Medical Leave Act for the following reason:

[ ] The birth of a child, or the placement of a child for adoption or foster care.

[ ] A serious health condition affecting my [ ] spouse
   [ ] child
   [ ] parent

[ ] My own serious health condition.

Date I will be unable to work (date the leave of absence will begin): _________________

Date I anticipate returning to work: _________________

Number of hours of paid time off I will be using: sick leave ________

(Employees must use paid leave before requesting unpaid leave. Sick leave may be vacation ________
used for your own illness or to care for a child who is ill. Vacation or personal time may be
used for any other needed time off.) other ________

Total hours of paid time will be: ________
Total hours unpaid leave will be: ________

If leave is for a medical reason, certification may be required. If required, I will furnish certification within 15 days of the request. I understand that failure to furnish certification may result in denial of continuation of the leave or a delay in the commencement of the leave.

____________________________________
Employee Signature

____________________________________
Supervisor Signature
APPENDIX D

Volunteer and Employee Background Checks Policy

Performing background checks on all employees and volunteers who work with vulnerable people is an essential element in preventing abuse, neglect and exploitation. This policy describes when a background check is required, what it entails, and what actions are taken if a background check reveals a potential problem.

Contract guidelines for background check requirements will be complied with by all Catholic Charities programs. When no contract guidelines exist, the following minimum guidelines will be followed. Volunteers and employees of Catholic Charities will be required to submit to state/federal criminal checks. An offer of employment or a volunteer assignment may be made contingent upon a satisfactory background check. Additionally, some programs may require that a background check be conducted on visitors to the program.

If the employee/volunteer has resided in Washington State for at least 3 years (or since they turned 18), the minimum requirement will be to run a Washington State Patrol background check. If they have lived in a state other than Washington in the last 3 years, the minimum requirement will be to run a background check in each of the other states that they have lived in during the last seven years. This background check will be conducted by Human Resources, the Coordinator of Volunteers, or the designated employee of the program for running volunteer background checks and is done through Volunteer Select (ChoicePoint).

Employees Procedure:
1. New employees will make an appointment to meet with Human Resources during their first week of employment.
2. Human Resources will assure that all paperwork is filled out, including the required releases to conduct the background check.
3. Human Resources will conduct background checks in each state that the employee has lived in during the last seven years.
4. Any crime listed that is disqualifying according to Catholic Charities’ crime list, will be reported to the Program Director and the Associate Director.
5. Any employee who has an adverse action taken because of the information that comes back from their criminal background check will receive notification from Human Resources as required by the Fair Credit Reporting Act (see “FCRA” below).

Volunteers Procedure:
1. Any employee or volunteer of Catholic Charities who is approached by an individual, who would like to volunteer at any of the Catholic Charities programs or offices, should refer the individual to our Coordinator of Volunteers or the person who coordinates of Volunteers for the specific Catholic Charities program.
2. The Coordinator of Volunteers will provide the necessary paperwork to the individual to fill out including any releases necessary to conduct state criminal history checks.

3. The Coordinator of Volunteers will conduct background checks in each state that the volunteer has lived in during the last seven years or since they turned 18 (whichever is less).

4. Any felony reported will be reported to the Program Director and the Associate Director.

5. Any volunteer who has an adverse action taken because of the information that comes back from their criminal background check will receive notification from the Coordinator of Volunteers.

The FCRA was designed to protect privacy of employees as well as to guarantee that the information received by employers from reporting agencies is as accurate as possible. It is necessary that the employer notify the individual in writing that a background check will be obtained for employment/volunteering purposes. Also, Catholic Charities must get the person’s written authorization before asking a reporting agency for the report. Since Catholic Charities depends on a background check for an “adverse action” (denying a job application, terminating an employee, or denying volunteer opportunities), there are two steps that must take place (for employment purposes only):

1) Prior to taking adverse action, Catholic Charities must give the individual a pre-adverse action disclosure that includes a copy of the individual’s background check and a copy of “A Summary of Your Rights Under the Fair Credit Reporting Act”. The reporting agency that supplies the report will give Catholic Charities a summary of consumer rights.

2) After taking adverse action, Catholic Charities must give the individual notice (orally, in writing, or electronically) that the action has been taken. This must include the following information:
   - The name, address, and phone number of the agency that supplied the report.
   - A statement that the reporting agency that did not make the decision to take adverse action and cannot give specific reasons for why adverse action was taken.
   - A notice of the individual’s right to dispute the accuracy or completeness of any information the agency provided, and his or her right to an additional free background check from the agency upon request within 60 days.

As of August 1, 2006, the “DSHS Secretary’s Crime and Action List for Background Checks” shall be used as a guide in determining if a conviction disqualifies the employee or volunteer from working with Catholic Charities. Applicants shall not be charged for the costs of performing background checks. All employment and volunteering background checks will be charged to the appropriate department. All records related to background checks will be kept in either the personnel file of the employee or the volunteer’s file.
In addition to the initial background check, the agency may conduct checks that are random and periodic as well as for due cause. Also, certain programs may be required by agencies such as DSHS to conduct their own separate background checks that include fingerprinting as well.

Variances of this policy may be granted only under exceptional circumstances. Only the Executive Director is responsible for the decision to grant a variance under this policy. Written documentation to grant a waiver must be made stating the justification and any conditions that may apply.