

LEADING  EDGE

EMPLOYEE HANDBOOK BEST PRACTICES

A Guide for Explaining How
Things Work at Work

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Disclaimer: This is not a comprehensive or all-encompassing document, but rather provides a starting point as you work through your handbook or re-work what exists.

“Engagement is forged with different tools: trust, loyalty, open communication, clearly-articulated goals and expectations, shared values and well-understood reward systems.”

Meghan M. Biro
Author

Your Employees are Engaged... REALLY?

Why Employee Handbooks Matter

Employee handbooks can serve different purposes. Some focus on ensuring legal compliance, while others incorporate the organization’s values and serve as a tool for building an engaged, healthy and connected workplace. This guide aims to help you create an employee handbook that strengthens the organizational culture you are trying to create.

Beyond its most basic functions of sharing operating procedures and protecting the rights of employees and employers, the employee handbook can emphasize organizational brand and culture. **In fact, it can be used as an opportunity to attract and retain top talent.**

According to recent studies by SHRM and GuideSpark, a large proportion of employees either do not read their employee handbooks or even if they do, they don’t feel very knowledgeable about the basics of employer-sponsored benefits. Your employee handbook is part of your brand and value proposition for your employees. **Use it as an opportunity to engage, re-engage and exceed expectations.** An employee handbook doesn’t even have to be called a handbook (because that can sound boring). Consider calling it a “Team Guide,” “How Things Work,” or something else that sounds intriguing to your employees.

Why Employee Handbooks Matter - continued...

Before we get into the actual makeup of an employee handbook, here are some of its basic functions.

- 1. Set the Tone** – Most employee handbooks start with the organization's mission, a letter from senior leadership, or a statement to frame the document. The employee handbook sets the terms and tone of your relationship with your employees.
- 2. Compliance** – You have to ensure that your organization is compliant with State and Federal laws. Check current laws and stay up to date with both State and Federal requirements. Also ensure compliance with any industry-specific rules and regulations (e.g. camping or schools).
- 3. Align Expectations** – A great way for you as the employer to expressly state your rights, clarify expectations, and facilitate better communication with employees. Having clearly stated policies in your employee handbook provides a safety net for both the organization and employees.
- 4. Provide Compensation and Benefits Information** – Outline and explain benefits so employees have a clear understanding of their full employment package, beyond their pay.
- 5. Strengthen Culture** – A well-written employee handbook is a great way to introduce new staff to your organizational culture. Some handbooks use language unique to the organization's culture, while others include an organizational history or anecdotes to tell the story.

The purpose of this guide is to provide you with some ideas and tools to build the handbook for your organization. This guide includes some best practices and sample language for your new or newly-improved employee handbook.

“The highest form of wisdom is kindness.”

The Talmud

Setting the Tone

The employee handbook can be used to make a strong first impression. Here are some ways you can begin to set a positive and welcoming tone in the opening section of the handbook:

- 1 Welcome** — A few words about the organization can help frame the document and your workplace culture. Consider an inspirational message from senior leaders.
- 2 About the Organization** — Include your mission, vision and/or values statement. Consider including some historical context or the founding story of the organization. Include information that gets at the core of who you are as an organization in a succinct way.
- 3 About the Employee Handbook** — Let your employees know what's included in this handbook, how to use it and who to contact if they have any questions.

Setting the tone - continued...

- 4 Note that this is NOT a Contract** — Let your employees know that this handbook is not a contract and is subject to change. Stating this expressly will avoid any confusion, especially if you have a signature page in your handbook.

Sample Language:

“This handbook contains general information and guidelines. It is not a binding, legal contract and does not act as a contractual right to remain employed at the organization.”

- 5 Include an Organizational Chart** — This is an optional but useful piece of information for a new employee. Understanding exactly who is who lets the new hire understand how they fit into the big picture.
- 6 Signature Page** — Having a signature page that indicates that employees have read the handbook and understand your policies is important, and your legal team will thank you. For example, if you have to let an employee go due to them breaking any of the expectations expressly stated in the employee handbook, the signature page provides protection in the case they claim to not have known about the policy.

Compliance

Before you begin writing this section, research current federal and state policies because they tend to change from year to year. It is your responsibility to ensure that your employee handbook reflects the current requirements. On the federal, state and local levels, there may be policies you are required to provide to your employees in writing. **As a best practice, review and revise your employee handbook on an annual basis or whenever policies change.**

You can also find a creative way to present this information. Consider adding a quick summary in non-legal jargon to help your employees digest the message, or adding visual elements to highlight the most important messages. Have some fun with it with a “WARNING! Legal language ahead!” or an “IMPORTANT! Read carefully...” prelude to the compliance section.

No matter your approach, it is **best practice to have legal council review the final version of your handbook** to ensure that there are no statements that may create contractual agreements. This is especially important if there is a signature page included in your Employee Handbook.

So here we go: **WARNING! Legal language ahead...**

As you build this section, make sure you are in contact with legal counsel to ensure you have all your bases covered.

The following are five of the most common compliance policies and statements included in employee handbooks:

- 1 Employee Classifications** — Most workplaces have a few different types of employees. The biggest distinguishing factor is whether they are considered exempt by the **Fair Labor Standards Act (FLSA)**. As an employer, you need to be aware of thresholds and regulations which govern your exempt and non-exempt employees. Defining what constitutes an exempt employee, a non-exempt employee, a part-time employee, a full-time employee, and a temporary or seasonal employee, will help your employees understand their status and therefore their eligibility for overtime pay, benefits, etc. In nonprofit organizations, most salaried employees are considered to be exempt and ineligible for overtime pay, while hourly employees are non-exempt and are eligible for overtime pay.
- 2 At-Will Employment Statement** — The employment relationship is presumed to be at-will in all U.S. states except for Montana, unless modified by a contract. This means that an employer may terminate any employee at any time for any reason, or for no reason without facing legal liability. In turn, an employee can also terminate their employment for any reason at any time. A short statement summarizing at-will employment and the modification by contract clause is an easy way to ensure you and your employees are on the same page.

Sample Language:

All employment is “at will.” This allows either the employee or [Organization Name] to terminate the employment relationship at any time with or without cause or notice. Employment with [Organization Name] is of an indefinite duration and will continue so long as both the employee and [Organization Name] consider it to be of mutual benefit.

All terms and conditions of employment are subject to change without notice. Any representations made to the contrary are unauthorized and void, unless contained in a formal, written employment contract titled as such and signed by an authorized officer of [Organization Name].

“It wasn’t always like this, but there has been a real shift for the better. Our HR department is now great at making us feel knowledgeable and empowered by the policies set in place to protect us and the organization. There is real transparency and trust built during the training process. We know what happens if a policy is violated and we know that we will not be penalized for coming forward. I’m proud of where we are today.”

~ Senior Manager, Jewish Nonprofit

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Equal Opportunity Employment Policy – The United States Equal Employment Opportunity Commission (EEOC)

is responsible for enforcing federal laws protecting certain groups from illegal dismissals. Your organization must adhere to the regulations set by the EEOC. Check your state regulations, as some states add to the protected groups based on state policies.

Sample language:

[Organization Name] provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, [Organization Name] complies with applicable state and local laws governing nondiscrimination in employment in every location in which the organization has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

[Organization Name] expressly prohibits any form of workplace harassment based on race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability, or veteran status. Improper interference with the ability of [Organization Name]’s employees to perform their job duties may result in discipline up to and including discharge.

- 4 Anti-Harassment Policy** — This is a vital statement for your employees. It is a statement of zero tolerance towards discrimination or harassment of any kind. The goal is to alleviate any concerns and to create a safe space for all employees. Although the EEOC sexual harassment policy covers workplaces with 15+ employees, as a best practice, every workplace should have a robust anti-harassment policy, showing your commitment to a safe workplace for all your employees.

Beyond defining discrimination and harassment, it is also vital to provide a step-by-step guide on how to report discrimination and harassment and to identify the hierarchy of people to contact with questions or concerns. (See **Appendix A** for sample Anti-Harassment procedures).

Sample language:

[Organization Name] is committed to providing a work environment that is free from harassment. Harassment based upon an individual's sex, race, ethnicity, national origin, age, religion or any other legally protected characteristic will not be tolerated. All employees, including supervisors and other management personnel, are expected and required to abide by this policy. No person will be adversely affected in employment with the employer as a result of bringing complaints of unlawful harassment.

Sexual Harassment definition - Sexual harassment is behavior of a sexual nature that is unwelcome and offensive to the person or persons it is targeted toward. Examples of harassing behavior may include unwanted physical contact, foul language of an offensive sexual nature, sexual propositions, sexual jokes or remarks, obscene gestures, and displays of pornographic or sexually explicit pictures, drawings, or caricatures. Use of the [Organization Name]'s computer system for the purpose of viewing, displaying, or disseminating material that is sexual in nature may also constitute harassing behavior.

- 5 Whistleblower Policy** — In practicing proper governance and exercising prudent risk management, your organization should have a written whistleblower policy in place. Over 45 states have enacted a whistleblower policy to protect individuals who “blow the whistle” on illegal activity at their workplace. A great way to frame this policy is by stating that **your organization is committed to the highest standards of legal, moral and ethical conduct.**

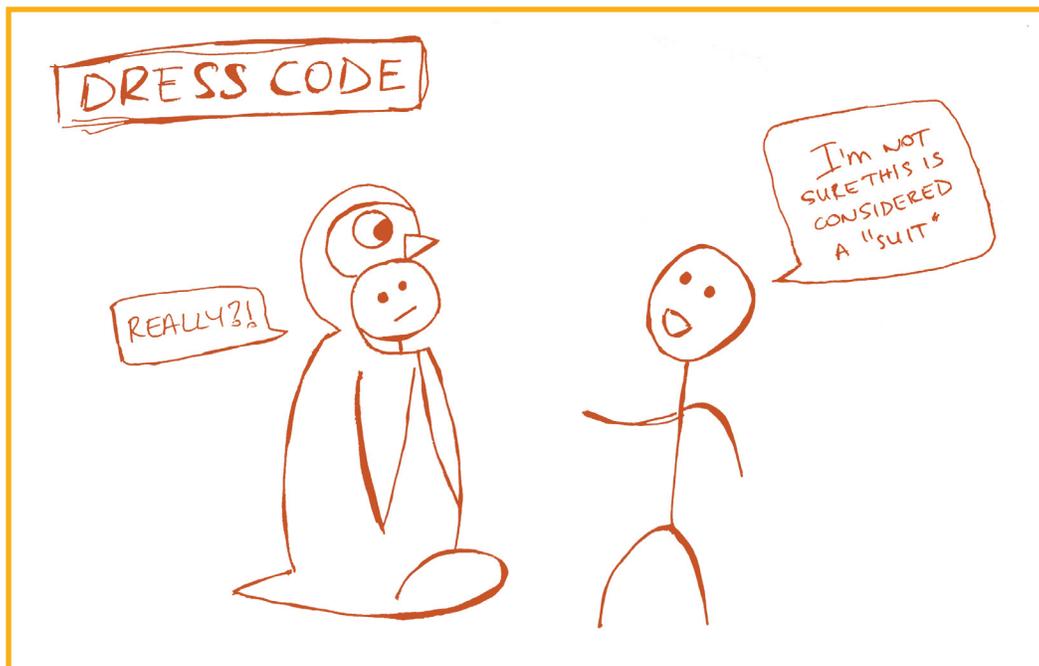
See <http://bit.ly/NCONP> for a *Sample Whistleblower Policy Statement*.

“If you align expectations, you will be rewarded with delight and loyalty. If you merely manage expectations, you may find employee satisfaction, but not much more.”

Matthew Wride
COO
DecisionWise

Aligning Expectations

This section covers a variety of policies to help you set expectations and protect yourself as an employer. By clearly stating what you expect from your employees, you clarify the relationship and the behaviors which are acceptable as an employee at your organization.



NONDISCLOSURE AND CONFIDENTIALITY

Your employees may work with sensitive and/or proprietary information. If this information needs to be protected in an official capacity, consider having a formal signed written nondisclosure statement drafted by your legal team which protects all the proprietary information your employees come in contact with on a daily basis. If you decide that a formal nondisclosure is unnecessary but you still want your employees to use good judgement when speaking about sensitive information, consider including a Confidentiality Statement.

Sample language:

As an employee of [Organization], I agree to treat all sensitive, private and proprietary information I am given access to during the performance of my duties as _____ (title), with the utmost discretion. I understand that it would be a violation of policy to disclose any such information to anyone without first checking with my supervisor.

Signature _____ Date _____

Title _____ Name _____

See <http://bit.ly/IFGUINL> for more *Sample Confidentiality Statements*.

Consult your legal counsel if you are asking your employees to sign a formal non-disclosure agreement which will be legally binding.

Here are some questions to consider when meeting with your legal counsel about a nondisclosure agreement:

- What proprietary or sensitive information do your employees interact with, which you may want to protect?
- What are the worst-case scenarios if an employee shares such sensitive information?
- What are the repercussions you would include in the agreement for violations?
- Do you need a formal non-disclosure agreement?
- If yes, who should sign it?
- If no, do you want a statement of discretion?

PROTECTION OF EMPLOYEE RECORDS

As an employer you have access to sensitive and private information about your employees. You know everything from birth dates to social security numbers and even bank account information. Expressly stating your commitment to protect your employees' information and privacy is a way to build trust and to show your priorities as an employer. This is especially important when you are expecting them to protect the organization as discussed in the previous bullet point.

Sample language:

[ORGANIZATION] prides itself on using the utmost discretion when it comes to protecting the private information of our employees. All employee private records are kept securely though:

- *[LIST METHODS OF STORAGE - ELECTRONIC AND PHYSICAL].*

To ensure all sensitive information is safe, [ORGANIZATION] will:

- *[LIST SAFEGUARDS - e.g. file encryption, password protection, limited access, shredding of physical files when discarding, locked physical files, etc.].*

If at any time you feel that your personal data is compromised, contact [CONTACT NAME/TITLE] immediately.

“We had the most antiquated record keeping method. It was impossible to find anything. The amount of paperwork required to document, not only the basic and legally required information, but the performance record itself, was probably responsible for a few lost forests. The worst part is when we had a fire that spread from the bakery next door. We literally lost half of our historical records and employee files, never to be recovered again.”

~ COO, Jewish Nonprofit

CODE OF PROFESSIONAL CONDUCT

Your employees are an extension of your brand. Depending on the work environment and culture of your organization, a statement on how you expect your employees to act, dress, and present themselves is helpful in ensuring alignment with your brand. As you build your Code of Professional Conduct consider including the following:

Dress code — Depending on the nature of your work, you may require your employees to wear uniforms, suits, business casual or whatever they feel most comfortable in. Many organizations tell staff members to dress for the type of day they're having, taking into account external vs. internal meetings. The outward appearance of your staff in interactions with external stakeholders will be a direct reflection on your organization and brand.

Conflict Resolution — Your team, whether it's three people or 300 people will have times of disagreement. Consider a statement of expectations for informal conflict resolution and also a more robust procedure for when supervisor involvement or mediation is needed.

Sample Language:

[Organization] understands that conflict occurs, but we expect that before seeking to engage the Conflict Resolution Procedure, you try the following:

- *Assume no harm*
- *Take time to hear each other*
- *Try to pin point the point of contention*
- *Take a break, a breath, a day*

If the conflict is beyond repair, please engage the Conflict Resolution Procedure.

See **Appendix B** for *Sample Conflict Resolution Language and Procedure.*

Professionalism in the workplace — You should expect your employees to act with professional courtesy in their day-to-day interactions with peers, managers and other stakeholders. Including expectations in the employee handbook helps get everyone on the same page regarding acceptable behavior.

Sample language:

All employees should respect their colleagues and all stakeholders. We do not allow any kind of discriminatory behavior, harassment or victimization. Employees should conform with our equal opportunity policy in all aspects of their work, from recruitment and performance evaluation to interpersonal relations. Employees should show integrity and professionalism in the workplace. Treating others with respect and consideration is a value integral to our culture, and in turn we will ensure that you are treated with the same respect and consideration.

“I’ve worked at a place where the culture was just disgusting. Gossiping and back-stabbing were part of the daily routine. I hated it so much. As a young and fairly new HR associate I was a constant target. The unprofessional behavior was tolerated and almost encouraged by my director. I’m so glad that, as head of HR today, I can implement a policy to help keep a psychologically safe and professional environment.”

~ VP of HR, Jewish Nonprofit

TECHNOLOGY AND SOCIAL MEDIA

Technology is an essential part of our personal and professional lives and social media is a low-cost way of promoting and enhancing your organization's brand and reach. It is essential for you as an employer to state your expectations related to using technology and social media in the workplace. Consider including:

Telephone use and cell phone use – Communication policies are a way for you as an employer to ensure that your employees are aware of appropriate phone use. Some organizations consider any landline and voicemail service provided for employee use to be property of the organization and therefore implement a written policy on appropriate behavior when using these devices and services. When you have a “bring your own device” (BYOD) policy and employees use their personal devices for business purposes it is important to ensure the continued safety of the organization's data as well as professionalism.

As you make a decision about what devices you will provide your staff or if you will allow them to bring their own, consider: What activities your employees will be engaging in on a daily basis? Are there times you want to restrict phone use? How often would they need access to a mobile device? Do they need email access on a mobile device? Can you maintain an appropriate level of security on their device?

Email and Internet use – Your employees will probably use email and the internet on a daily basis. Most communication in the workplace is done through email, collaboration tools and online platforms. With a large segment of our information exchange happening online, we need safeguards, protocols and clear expectations on how to protect our employees and organizations.

Consider the tools and kinds of information your employees use most frequently. What safeguards do you need to protect yourself and your employees? What policies do you need? See [LINK](#) for sample language.

Blogging and Social Media – Most organizations need an online presence in order to stay relevant and competitive in today's world. Consider what safeguards you need to implement in order to maintain the integrity of your brand. Should all employees have a disclaimer of no-association on

their social media profiles? Should all employees refrain from identifying themselves as employees at your organization? Should your employees receive guidelines in how to interact with your online brand? See <http://bit.ly/SNPTQW> for sample language.

Political Statements – While federal and state laws regulate discrimination based on political views and opinions, they do not regulate how employers regulate political discussion at work. Some common misconceptions center around what employers can and cannot regulate when it comes to political expression in the workplace. **SHRM** offers a state-by-state guide for regulations dealing with politics at work. **The regulations you set in place should be fairly and consistently enforced for all employees.**

With many communication avenues open for expressing opinions on any number of topics, consider having a policy on making political statements.

Ask yourself:

- When an employee expresses a political opinion or comments on political events/issues, are they doing so as individuals or de-facto employees of your organization?
- As a 501(c)3 organization you can discuss politics, but cannot endorse a candidate or take a position on a legislature which is up for a vote. What is your internal threshold? Are political discussions acceptable at the office, in meetings, on social media, etc.?
- If employees engage in any political discourse, do they need to expressly state that their opinions are in no way representative of your organization's point of view?
- What policies do you need to put in place to ensure that both you and your employees are protected from potential issues?

Sample language:

[ORGANIZATION] encourages all of our employees to take an active interest and participate in political affairs. However, political activities may not be conducted during work hours or at any time in the office. Do not identify yourself as a representative of [ORGANIZATION] in any political activity, a politically themed letter, or in any political interviews with any news outlets. Employees are encouraged to stay informed on local, state, federal and national affairs. Employees should always make sure that their participation in political activities in no way reflects unfavorably on the company.

WORK HOURS

Setting expectations for work hours, timeliness, and allowable variations helps hold employees accountable. Consider including the following:

Office hours – Whatever your official office hours are, list the times the office is officially open. If your office is open beyond what are considered normal business hours, add a line saying that office hours do not equal working hours.

Timeliness – What are your expectations of timeliness to work, to meetings, to calls, etc. Is there an expectation that employees show up at 9am sharp or do they have the flexibility to show up between 9am and 9:30am? What, if any, are the repercussions for chronic lateness?

Flex Time – Some jobs do not require a rigid 9-5 work schedule. Sometimes a medical need, childcare or eldercare can come into conflict with the financial need of maintaining a full-time job. You may consider providing flex time options to staff whose work does not require a specific and regular schedule. When adding flex time to your handbook, have very clear language around eligibility and structure. Consider:

- Are all team members eligible for flex time? If not, specify in detail who is eligible and why. Is it certain seniority levels? Is it a certain department?
- How is your flex time structured? Is it based on an alternative day schedule or alternative hours?
- Will you implement core hours when the whole team must be in the office and also allow for flexibility?
- Do you want a formal flex time policy or do you want to have an informal flex time policy which is at the discretion of the supervisor?

77% of millennials believe that flex time is a productivity booster. A best practice in the nonprofit sector is to consider flex time options on a case-by-case basis to ensure that it will not negatively impact the organization, that the employee requesting flex time is dependable and trustworthy, and that the employee is capable of filling the demands of the position. Offering flex time across the organization is not always possible, especially given the diversity of roles that exist within most Jewish nonprofits.

Swap time – Swap time originated in shift-based industries in order to lessen the administrative burden on managers to find shift replacements. This empowered employees to cover their shift in order to maintain the work flow. Some organizations are adapting this concept to help employees manage unexpected life moments while ensuring appropriate work coverage. Consider:

- Are there employees who may be eligible for swap time?
- What boundaries would you need to set in order to ensure work continuity and quality?
- Would this help your employees with work-life integration?
- Would this make things easier or harder for your employees and their ability to be successful at work?

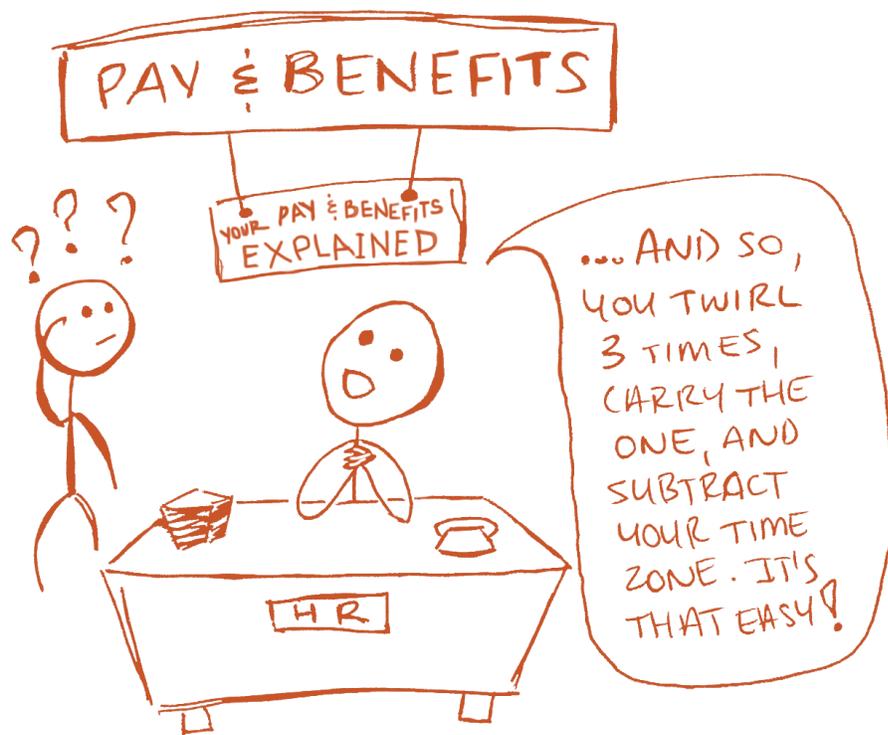
“At my last job, we were tethered to our desks. If you’re not at your desk, then you’re not working. If you had a family emergency and were willing to work from home you would get docked a vacation day no matter what, even if you did spend the day working. The managers would watch out for ‘slackers,’ those who would take too many bathroom breaks or would stop at someone else’s desk to chat or just say hello.”

~ VP of HR, Jewish Nonprofit

“In order to build a rewarding employee experience, you need to understand what matters most to your people.”

Julie Bevacqua
CRO
Rise

Provide Compensation and Benefits Information



Transparency in how compensation and benefit packages are calculated can be more powerful in building an appealing workplace than paying top percentile salaries. As you define what your organization values when it comes to your employees, consider what you can add to the package to make your employees feel valued, cared for, and engaged. It does not have to break the bank!

Compensation – Explain your pay schedule, overtime policy, performance review cycle, and any pertinent information regarding salary increases. There should be no surprises about when people get paid, what happens if they work overtime, or how raises are awarded.

Some organizations include general salary bands for entry level, management level and senior management level staff. Having this information readily available for your staff can show your commitment to honesty and transparency. Some organizations share information about how salaries are determined without sharing numbers or bands.

Some resources to help you think through what makes sense for your organization are available through [Guidestar](#) and [PayScale](#).

Benefits – The benefits package you offer can set you apart as an employer and help demonstrate the value you place on the well-being of your employees. Make it easy for employees to take advantage of the benefits they are offered by helping with enrollment, explaining plan features in easily digestible terms, and communicating clearly about all the benefits your employees are eligible for.

Some benefits are not optional. As an employer, you are required to:

- Comply with all workers' compensation requirements.
- Pay state and federal unemployment taxes, thus providing benefits for unemployed workers.
- Contribute to state short-term disability programs in states where such programs exist.

CHART OF BENEFITS

	HEALTH PLANS	DENTAL AND/ OR VISION PLANS	SHORT-TERM DISABILITY	LONG-TERM DISABILITY
RULE	Except in Hawaii, you are not required to provide if you have under 50 employees	Not required to provide	Not required to provide in most states. Check your local state laws to make sure you are compliant	Not required to provide in most states. Check your local state laws to make sure you are compliant
STANDARD	Provide a plan for your employees to opt into, paying a portion of the premium	Provide a plan for your employees to opt into	Provide employee coverage at 40% to 60% of the employee's weekly pay	Provide employee coverage at 50% to 60% of the employee's weekly pay
BEST PRACTICE	Pay 80% of premium costs and have employee contribute 20%; provide spouse and family coverage.	Provide a plan for your employees to opt into, pay a portion of the premium	Provide employee coverage at 60% to 75% of the employee's weekly pay	Provide employee coverage through retirement or Social Security eligibility
QUESTIONS TO CONSIDER	<p>What is the best value insurance available for your organization?</p> <p>Will you provide spouse and family options?</p> <p>How much of the premium will you pay?</p>		<p>Will you provide Short-term Disability and Long-term Disability insurance?</p> <p>What is the best value insurance available for your organization?</p> <p>Under what terms will you provide coverage for your employees?</p>	

	LIFE INSURANCE	401k / 403b	RETIREMENT PLANS	FLEXIBLE SPENDING ACCOUNT (FSA)
RULE	Not required to provide	Not required to provide	Not required to provide	Not required to provide
STANDARD	Offer group-term life insurance	Provide 401(K)/403(b) options	N/A	Offer an FSA option with the allowable limit of \$2,600 (as of 2017)
BEST PRACTICE	Offer group-term life insurance	Provide 401(K)/403(b) options with an employer match	Offer an IRA option such as a Roth IRA or a Simple IRA	Offer an FSA option with the allowable limit of \$2,600 (as of 2017)
QUESTIONS TO CONSIDER	What is the best value insurance available for your organization?	What are the best options available for your organization? Do you have the capacity to match a contribution?	What are the best options available for your organization?	

Compensation and Benefits - continued...

Paid Time Off (PTO) – There are no federal laws requiring you to provide paid time off to your employees. However, they are widely-seen across sectors as a de-facto requirement with many tech organizations even offering unlimited PTO.

Some **states and jurisdictions** require or soon will require employers to provide paid sick leave.

As you build your time-off and leave policies, consider them as two categories. The first, are all the days your employees will have off or will take off throughout the year. The second, are days that will be used less frequently.

Group 1 – Frequent use

Secular holidays
Jewish holidays
Sick Days
Vacation Days
Personal Days

Group 2 – Infrequent use

Parental Leave
Family Leave
Medical Leave
Disability Leave
Military Leave
Bereavement Leave
Jury Duty Leave
Time off to vote
Sabbatical Leave

Consider the following questions as you build your leave policies:

- What kind of culture would you like to create around work and life?
- Does your state consider some paid leave as wages? For example, vacation days that must be paid out when the employee leaves.
- What will you allow employees to carry over from year-to-year? Is there a limit on how many, for example, vacation days an employee can carryover? Will you pay out any of the days upon their tenure's end?
- Are all paid time off classifications available to employees from the start? Is there an accrual? Is there a probationary period?
- What is the time period for usage? Is it based on your fiscal year or on the employee anniversary date?
- Does tenure effect an employee's number of PTO days? Are there tiers based on seniority and/or tenure? Are all employees eligible for the same amount of PTO?

! **RULE** – You are required to give time off for voting in any election and serving on a jury. You must also comply with the federal **Family and Medical Leave Act (FMLA)**. All other time off is up to the discretion of the employer.

As you build your policies around time off, the following are some options, samples language and considerations.

Group 1 - Frequent use

Holidays - [Organization] will be closed for the following holidays:

SECULAR HOLIDAYS

- New Year's Day*
- President's Day*
- Memorial Day*
- Independence Day*
- Labor Day*
- Thanksgiving Day*
- Day after Thanksgiving*
- Christmas Day*

JEWISH HOLIDAYS

- Rosh Hashanah: two (2) days*
- Yom Kippur: one (1) day*
- Sukkot: two (2) days*
- Simchat Torah: one (1) day*
- Shemini Atzeret: one (1) day*
- Passover: four (4) days*
- Shavuot: two (2) days*

Option - Have floating holidays like Martin Luther King Jr. Day, Columbus Day, Veterans' Day, etc. Floating holidays are days when the employee is able to pick one or two days from a list as an additional day off.

Sick Days and Vacation Days - Sample language for Fiscal Year

Sick Days

All employees are eligible for 10 sick days every fiscal year, with all 10 days available for use on the first day of the new fiscal year. No sick days can be carried over to the following year. To take a sick day, notify [SUPERVISOR/HR] with as much advance notice as possible. NOTE - Consider how you may want to prorate sick days for staff starting a few months into the year.

Vacation Days

All employees are eligible for 20 vacation days every fiscal year, with all 20 days available for use on the first days of the new fiscal year. You may carryover 10 vacation days to the following fiscal year. To take vacation days, notify [SUPERVISOR/HR] with as much advance notice as possible. NOTE - Consider how you may want to prorate vacation days for staff starting a few months into the year.

Compensation and Benefits - continued...

Sick Days and Vacation Days - Sample language for Anniversary Year

Sick Days

Employees are eligible for 10 sick days every anniversary year, with all 10 days available for use on the first day of the next anniversary year. No sick days can be carried over to the following anniversary year. To take a sick day notify [SUPERVISOR/HR] with as much advance notice as possible. NOTE - Consider if you want to add sick days for employees who have been with the organization for 5, 10, etc. years.

Vacation Days

Employees are eligible for 20 vacation days every anniversary year, with all 20 days available for use on the first days of the next anniversary year. You may carryover 10 vacation days to the following anniversary year. To take vacation days, notify [SUPERVISOR/HR] with as much advance notice as possible. NOTE - Consider if you want to add vacation days for employees who have been with the organization for 5, 10, etc. years.

Personal Days - Some organizations include personal days as a compliment to Sick or Vacation days. If you don't want to add more days to your PTO policy consider giving employees a few personal days as part of the package. Personal days are open for interpretation. They can be used for a mental health day, chaperoning a school trip, going to the doctor, etc. Giving personal days allows employees to take the time they need to take care of things without having to call out the day of to use a sick day.

“When I first took on this post, almost 2 years ago, I was surprised at the time off policies which were in place for a few years already. The generous PTO package was unlike anything I’ve ever seen before and I was apprehensive about employees abusing the system. What I quickly learned, was how responsible and appreciative the staff was towards the flexibility our PTO policy offered. It really showed them that we cared about them, not just as a team members but as whole people.”

- CEO, Jewish Nonprofit

Group 2 - Infrequent use

Parental, Family, and Medical Leave – Make sure you are compliant with FMLA and state laws.

The Federal* Standard:

Eligible employee must be provided with up to 12 weeks of unpaid leave each year for any of the following reasons:

- for the birth and care of the newborn child of an employee;
- for placement with the employee of a child for adoption or foster care;
- to care for an immediate family member (spouse, child, or parent) with a serious health condition; or
- to take medical leave when the employee is unable to work because of a serious health condition.

**Some state laws supersede the federal mandate and require paid leave to be provided by the employer. Check your local and state laws to make sure you are compliant with legal requirements.*

Best Practice:

All full-time employees are eligible for paid leave under the following guidelines:

All parents are eligible for twelve (12) weeks of paid parental leave. Some organizations link this to tenure (e.g. for every year of work, you will be eligible for four (4) weeks of paid leave, up to the maximum twelve (12) weeks).

All part-time employees are eligible for paid leave under a pro-rated basis.

Military Leave – The **Uniformed Services Employment and Reemployment Rights Act** (USERRA) ensures military service members are able to take a leave of absence from their civilian jobs when called to active duty. The Act ensures that they are able to retain employment with appropriate accrued seniority, potential promotions, and benefits. When called to service, your employee is eligible for unpaid leave up to a cumulative 5 years. Consult with USERRA guidelines, state laws and your legal counsel to ensure full compliance with laws governing military leave.

You may choose to supplement the wages your employee receives for their service. The Veteran's Association offers the **military leave policy of a federal agency** and strongly recommends the creation of an official military leave policy.

Compensation and Benefits - continued...

Disability Leave - In the case that the employer does not have disability insurance, disability leave is covered under FMLA as medical leave.

Bereavement Leave - With the exception of Oregon, no state or federal law requires employers to provide any type of bereavement leave. As a best practice and a Jewish value, employers offer at least five (5) days of bereavement for immediate family members, defined as an employee's spouse, parents, stepparents, sisters, brothers, children, stepchildren, grandparents, father-in-law, mother-in-law, brother-in-law, sister-in-law, son-in-law, daughter-in-law, or grandchild. In the case of extended family or close non-family members consider providing time to attend the funeral or give consideration on a case by case basis.

Jury Duty Leave - There are eight states which require employers to pay employees for jury duty, Alabama, Colorado, Connecticut, Louisiana, Massachusetts, Nebraska, New York, and Tennessee. Always check your state guidelines for current policies and requirements. As a best practice, make sure your employees know they will not be penalized for answering their summons or for sitting on a jury. For a sample Jury Duty Leave Policy [CLICK HERE](#).

Time off to vote - Every state varies on time off to vote policies. Some states have policies requiring employers to provide paid time off for voting while others have to set policies in place. Make sure you adhere to your state's laws. As a best practice, make sure your employees know that they have the ability to take a few hours off, if necessary, to get their vote in.

Sabbatical Leave - Paid sabbatical leave is offered at only 5% of companies in the US, but nearly 25% of Fortune's 100 Best Companies to Work For in 2012 offered this as a benefit. The biggest benefit to giving your staff of a certain tenure the opportunity to take a significant amount of time off is giving them the break they would only find if they quit and then looked for a new job. Taking a sabbatical often rejuvenates and energizes your employees. Consider creating a sabbatical policy allowing staff to take some time off every few years.



BEST IN CLASS

NY STATE - as of January 1, 2018, in New York State, almost all employees are eligible for **paid** family leave, and employers **are mandated** to give their employees **paid** family leave.

Professional Development (e.g. tuition reimbursement, work with a coach, etc.) – Providing a professional development budget is a great way to support your staff’s growth. Consider what kind of development you are willing to support, the budget per employee and the process for getting approval for professional development. Some employers offer tuition reimbursement. Employers who do this should consider whether to reimburse a certain percentage of tuition or use a flat reimbursement rate per semester or credit. They should also consider the commitment you want your employees to make once they complete their coursework. Most industries require a two to four-year commitment to stay at the organization after this kind of investment.

Consider being on the cutting-edge by offering an alternative to the tuition reimbursement option with a stipend to be used for student loan repayment. Even a \$180 annual stipend to use towards student loan repayment will set you apart as an employer.

Best practices:

- Setting a budget for professional development per employee.
- A tiered system based on seniority or years of employment.
- Managers encouraging their reports to seek development opportunities for their growth.
- Creating an accountability system to further embed professional development into your organizational culture.

Commuting and Parking Reimbursement – Some organizations acknowledge the costs of commuting by giving a parking subsidy or contributing to a commuter train/bus pass. Some organizations subsidize the cost of commuting via public transportation in order to show their value of protecting the environment. Some questions to consider:

- What are the most used means of transportation for your employees? Personal or public transit?
- What is the average monthly cost your employees incur when traveling to and from work?
- What are some local options available to you as an employer which may help supplement the cost of travel?

Compensation and Benefits - continued...

Dependent Care – Finding affordable and convenient dependent care can be very stressful, especially to first-time parents and parents with multiple children. As an employer, you can provide some piece of mind by offering dependent care assistance. Some organizations offer programs allocating pretax funds for dependent care, while other organizations offer childcare or eldercare reimbursement programs. Policies though **1199** or a **Dependent Care FSA** are great options. Some large organizations provide on-site childcare at no cost or low-cost to the employees. While this is not an option for most organizations, consider childcare options during conferences or out-of-town engagement.

Expense Reimbursement – Some expense policies leave employees picking up the tab for expenses directly associated with work-related costs. Make sure to clearly state how work meals, travel, mileage, and other types of expenses your staff may incur will be reimbursed. Note – not all organizations reimburse staff incurred expenses at 100%.

You might provide corporate credit cards with a clear parameter for appropriate charges, how to file expense reports and staff eligibility. You can set spending limits, avoid extra steps during the reimbursement process and take away the financial burden of employees paying out-of-pocket. Collecting the appropriate receipts, filing timely expense reports and security are a few concerns to consider when determining if corporate cards will work for your organization.

Fitness Club Membership – Encouraging health and fitness leads to happier, more productive, and engaged employees. Increased levels of serotonin, endorphins, and dopamine help employees manage stress. Consider a corporate membership to a fitness club or a fitness club membership reimbursement program. Whether you cover 100%, a portion of the cost, or up to a certain amount, this is an inexpensive way to add great value to your benefits package. Some fitness centers charge as little as \$25/month and some offer great promotions. For more expensive clubs, providing a fitness stipend can make a huge difference. Some JCCs have corporate membership rates or might offer discounted rates to professionals at your organization.

“When people go to work, they shouldn’t have to leave their hearts at home.”

Betty Bender
Author

Strengthening Culture

Employee Handbooks are not typically considered fun or engaging, but with a little work they can reflect a positive culture. This section suggests a few ways to use your Employee Handbook as an extension of your organizational culture.

STYLE

Employee Handbooks come in many shapes and sizes. Some are 200+ pages long, while others are just a few pages. As you consider the content you want to have in your employee handbook, think about the user experience.

- 1 Language** - Think about what you want to call your staff, your managers and your organization. Are they team members, faculty, associates, or employees? Are you speaking to them or about them? Language matters! As always, do your best to be clear and concise. If it can take you one sentence to state your policy, great! Enough said.
- 2 Table of Contents (TOC)** - The TOC sets the tone! Consolidate, remove and reorganize with the user experience in mind. In Appendix A, you will find three sample “Table of Contents” you can use to get an idea of three different approaches. As you embark on this journey, stay true to your organizational culture, whether current or aspirational.

Strengthening Culture - continued...

- 3 Vehicle** – How do you want to tell your story? You can write your handbook like a roadmap to the job or like a story about your workplace. Get creative! For examples, check out People Handbook <http://bit.ly/PPLHDBK> and Valve Handbook - <http://bit.ly/VALVPE>.

ORGANIZATION CULTURE

The tone of your Employee Handbook is crucial in distinguishing it between a drab manual and a culture builder. Consider the following:

- 1 Jargon** – Do you have any insider terms? Define them! New employees will want to learn the language of your workplace. Some handbooks include an organizational dictionary to help the new employee get acquainted with the most commonly used acronyms and terms.
- 2 Folklore** – Do you have any fun stories about your workplace? Are there anecdotes people laugh about? Was there a Dave who once ate the wrong sandwich so now you have the Dave rule on the fridge? Consider adding a few stories in the sidebars of your handbook.
- 3 Traditions** – Does your office have traditions? Do you always have cake for birthdays? Is your Chanukah staff-lunch a BIG deal? Throw a few office traditions into the mix to showcase the fun and unique aspects of your workplace culture.

DESIGN

In 1971, Herbert Simon, articulated an early concept of ‘attention economics’ with this quote:

“*...in an information-rich world, the wealth of information means a dearth of something else: a scarcity of whatever it is that information consumes. What information consumes is rather obvious: it consumes the attention of its recipients. Hence a wealth of information creates a poverty of attention and **a need to allocate that attention efficiently among the overabundance of information sources that might consume it.**”*

Incentivize your employees to keep on reading by adding design elements, gamifying the handbook, or building it in piece by piece into your onboarding process. Giving staff a 120-page document with long winded paragraphs is a sure-fire way to have them skim through some important information.

- 1 Design** – The balance of text, graphics and colors makes or breaks most documents, including your employee handbook. Find ways to incorporate images, charts, infographics, side bars, etc. to tell the story better than a full page of text. Some organizations keep their handbooks online by creating a dedicated “staff learning” page that can be accessed any time and is updated on a regular basis.
- 2 BONUS!** Get creative. If you can engage your employees and get them excited about the policies, you WIN! Make it fun by making it a creative roadmap, a scavenger hunt, or even an interactive walk through.

Appendices

- 33** Appendix A - Sample "Anti-Harassment Policies and Procedures"
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- 35** Appendix C - Sample "Table of Contents"

Appendix A

Sample “Anti-Harassment Policies and Procedures”

[ORGANIZATION] is committed to providing a work environment free of unlawful harassment. Organization policy prohibits sexual harassment and harassment based on pregnancy, childbirth or related medical conditions, race, religious creed, color, gender, national origin or ancestry, physical or mental disability, medical condition, marital status, age, sexual orientation, or any other basis protected by federal, state, or local law or ordinance or regulation. It also prohibits unlawful harassment based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics. All such harassment is unlawful. [ORGANIZATION]’s anti-harassment policy applies to all employer agents and employees, including supervisors and non-supervisory employees. It also extends to vendors, independent contractors, family members, and others doing business with the organization. Prohibited unlawful harassment includes, but is not limited to, the following behavior:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations, or comments;
- Visual displays such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings, or gestures;
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work because of sex, race, or any other protected basis;
- Threats and demands to submit to sexual requests as a condition of continued employment, or to avoid some other loss, and offers of employment benefits in return for sexual favors; and
- Retaliation for reporting or threatening to report harassment.

If you believe that you have been unlawfully harassed, promptly report the facts of the incident or incidents and the names of the individuals involved

to your supervisor or the [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING] as soon as possible after the incident. Your complaint should include details of the incident or incidents, names of any individual(s) involved, and names of any witnesses. Supervisors will refer all harassment complaints to the [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING]. The organization will immediately undertake an effective, thorough, and objective investigation of the harassment allegations.

If [ORGANIZATION] determines that unlawful harassment has occurred, effective remedial action will be taken in accordance with the circumstances involved. Any employee determined by [ORGANIZATION] to be responsible for unlawful harassment will be subject to appropriate disciplinary action, up to and including termination. An organization representative will advise all parties concerned of the results of the investigation. [ORGANIZATION] will not retaliate against you for filing a valid complaint and will not tolerate or permit retaliation by management, employees, or co-workers.

[ORGANIZATION] encourages all employees to report any incidents of harassment forbidden by this policy immediately so that complaints can be quickly and fairly resolved. You also should be aware that the Federal Equal Employment Opportunity Commission and the [STATE] Department of [EMPLOYMENT AGENCY] investigate and prosecute complaints of prohibited harassment in employment. If you think you have been harassed or that you have been retaliated against for resisting or complaining, you may file a complaint with the appropriate agency. The nearest offices are listed here:

- Federal Equal Employment Opportunity:
<http://www.eeoc.gov/field/index.cfm>
- [INSERT YOUR STATE'S EMPLOYMENT ARM WEBSITE]

These behaviors are defined and described in a manner consistent with the law. When it comes to dealing with the subject of unlawful harassment, specifically sexual harassment, the following applies:

- Quid pro quo harassment- (Latin meaning "this for that") harassment occurs when specific employment benefits (like a job offer, a raise, a comfortable office) are promised or withheld as a means of coercing sexual favors.
- Hostile Environment harassment occurs when certain conduct that unreasonably interferes with the victim's work performance or creates an

intimidating, hostile, or offensive working environment.

- In certain cases, sexual harassment can include gender-based harassment of a person of the same sex.

Pursuant to [ORGANIZATION]'s commitment to ensure that unlawful harassment is not tolerated, it is everyone's responsibility to report all incidents of unlawful harassment to the [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING]. Even if the unlawful harassment is not directed at you, it is still your responsibility to report witnessed unlawful harassment.

Below are the procedures and responsibilities that [ORGANIZATION] requires of every employee to follow and adhere to:

VERSION A: PROCEDURE AND REPORTING POLICY

All **employees** are to comply with this policy.

Any employee who believes that he or she is being unlawfully harassed by anyone on the premises of this organization should promptly take the following steps:

- 1.** If possible, politely but firmly confront whoever is doing the harassing. State how you feel about his or her actions, and request that the person cease harassing you immediately.
- 2.** If the harassment continues, or if you believe some employment consequences may result from your confrontation, you must immediately and promptly report the facts of the incident or incidents and the names of the individuals involved to your supervisor or [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING] as soon as possible after the incident.
- 3.** If you believe inadequate action is being taken to resolve your complaint, communicate it directly to the [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING] for resolution of your problem. The policy of this organization is to listen to all corroboration, and quickly apply sanctions when appropriate.
- 4.** Sanctions against unlawful harassment will depend upon the circumstances surrounding the incident. Minor first offenses may lead to written reprimands and/or time off without pay. Major or multiple offenses may lead to the dismissal of the offender.

If you have any questions in regard to this policy, please see your supervisor or [NAME/TITLE AND CONTACT OF THE PERSON OR PEOPLE FOR REPORTING].

Every **individual in a management or supervisory position** is responsible for ensuring that no unlawful harassment of any kind occurs within their area of authority.

1. Any complaint of unlawful harassment should receive the immediate attention of the supervisor to whom it is made and should be reported immediately to the [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING].
2. No supervisor is to conduct any investigation of unlawful harassment without the consent and involvement of the [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING]. Investigation of a complaint of harassment normally will include conferring with the parties and witnesses named by the complaining employee.
3. Because of the sensitive nature, complaints of harassment will be investigated with particular care and will remain, to the extent possible, strictly confidential.
4. In no event will information concerning a complaint of harassment be released by [ORGANIZATION] to third parties or to anyone within the organization who is not involved with the investigation. More specifically, information will not be released to an affected employee's family, the news media, or a prospective employer seeking a reference. The purpose of this provision is to protect the confidentiality of the employee who files a complaint, to encourage the reporting of any incidents of unlawful harassment, and to protect the reputation of any employee wrongfully charged with harassment.
5. If the investigation reveals that the complaint is valid, prompt disciplinary action designed to stop the unlawful harassment immediately and to prevent its recurrence will be taken.
6. Management will ensure that the policy statement is posted in a position of high visibility and distributed throughout the organization.

VERSION B: PROCEDURE AND REPORTING POLICY

[ORGANIZATION] will courteously treat any person who invokes this complaint procedure, and the organization will handle all complaints swiftly and confidentially to the extent possible in light of the need to take appropriate corrective action. Lodging a complaint will in no way be used against the employee or have an adverse impact on the individual's employment status. Because of the damaging nature of harassment to the victims and to the entire workforce, aggrieved employees are strongly urged to use this procedure. However, filing groundless or malicious complaints is an abuse of this policy and will be treated as a violation.

Complaint procedure

[ORGANIZATION] has established the following procedure for lodging a complaint of harassment, discrimination or retaliation. The organization will treat all aspects of the procedure confidentially to the extent reasonably possible.

- 1. Complaint is filed** - Any individual feeling harassed, discriminated or retaliated against (Complainant) is encouraged to file a complaint in writing with [NAME/TITLE OF CONTACT]. Formal action will not be taken under this policy unless [NAME/TITLE OF CONTACT] has received a written and signed complaint, with sufficient details to determine if a violation has occurred. If a supervisor or manager becomes aware that harassment or discrimination is occurring, either from personal observation or as a result of an employee's coming forward, the supervisor or manager has a responsibility to immediately report it to [NAME/TITLE OF CONTACT].
- 2. Leadership is notified** - Once a complaint is received or a supervisor brings up their observation that violation of this policy may be occurring, [NAME/TITLE OF CONTACT] will proceed to notify the [ORGANIZATIONAL LEADERSHIP].
- 3. Parties are notified of investigation - Within three to five business days** of receiving the written complaint, [NAME/TITLE OF CONTACT] will notify the person(s) charged (Respondent) of a complaint. They will then proceed to initiate the investigation, calling upon other management team members and/or legal counsel, to determine if the complaint filed has a reasonable basis to be considered a violation of the policy.
- 4. Investigation begins** - [NAME/TITLE OF CONTACT], together with legal counsel or other management employees, will interview the Complainant, the Respondent and any witnesses available. They will also collect any

evidence that may help in determining whether the policy was violated or not. They will file all findings from these conversations into the official report, to be filed at the end of the investigation.

- 5. Report is submitted - Within 10 to 15 business days** of the complaint being filed or brought to attention the investigation will end with the submission of a written report to the [ORGANIZATIONAL LEADERSHIP].
- 6. Violation occurred** - In the case that the violation of this policy has occurred, [NAME/TITLE OF CONTACT] will recommend appropriate disciplinary action. The appropriate action will depend on the severity, frequency and pervasiveness of the conduct, as well as prior complaints made by the complainant and complaints made against the respondent. The last consideration will be given to the quality of the evidence (e.g., first-hand knowledge, credible corroboration, documentation, etc.).
- 7. No violation or inconclusive** - In the case that the investigation is inconclusive or if it is determined that there has been no violation of policy but potentially problematic conduct may have occurred, [NAME/TITLE OF CONTACT] will recommend appropriate preventive action.
- 8. Parties notified of investigation conclusion - Within three to five business days** after the investigation is concluded, [NAME/TITLE OF CONTACT] will meet with the Complainant and the Respondent separately, notifying them of the findings and informing them of the action being recommended.
- 9. Decision made and parties notified - Within three to five business days** from the date [NAME/TITLE OF CONTACT] reviews their findings and recommendation with the Complainant and Respondent, the [ORGANIZATIONAL LEADERSHIP] will consider the report and recommendations and discuss results of the investigation with legal counsel. Together with legal counsel they will decide what action, if any, will be taken. The Complainant and Respondent will be notified of the decision by [NAME/TITLE OF CONTACT]. If disciplinary action is decided upon, the Respondent will be notified of the decision and, if relevant, how it will be executed.

VERSION C: PROCEDURE AND REPORTING POLICY

If an employee believes he or she has been subjected to harassment, violence, intimidation, or discrimination (including any such action by an officer of the [ORGANIZATION]), that employee must report it immediately, either in person or in writing, to the [NAME/TITLE OF THE PERSON OR PEOPLE FOR REPORTING]. Each report will be promptly investigated. Confidentiality will be maintained throughout the investigation process to the extent possible.

If the report has merit, appropriate corrective action will be taken. Depending on the severity of the misconduct and the surrounding circumstances, the disciplinary action may vary from a warning, up to and including discharge.

No retaliation will be tolerated against any employee for reporting violations of this policy or for filing or otherwise participating in any investigation. Any attempt at retaliation will subject the offender to appropriate disciplinary action, up to and including discharge. Employees should promptly report any perceived incidents of retaliation using the reporting procedure above.

Appendix B

Sample “Conflict Resolution Procedure”

[Organization] understands that conflict occurs, but we expect that before seeking to engage the Conflict Resolution Procedure, you try the following:

- Assume no harm
- Take time to hear each other
- Try to pin point the point of contention
- Take a break, a breath, a day

If the conflict is beyond repair, please engage the Conflict Resolution Procedure.

First Tier – Engage with supervisor – Bring your concern to your immediate supervisor, as long as they are not the person you are in conflict with. The supervisor will document the complaint and will attempt to resolve the conflict fairly. The supervisor may use mediation or may pass a decision on how the conflict will be solved. If the result is not to your satisfaction, you may continue to the next tier.

Second Tier – File a formal complaint

- If engaging with your immediate supervisor does not result in a resolution which is mutually satisfactory to both you and your supervisor, if the complaint involves your supervisor, or if your supervisor does not respond to the complaint, you may submit a written complaint to [NAME OF PERSON, CAN BE DEPARTMENT HEAD OR HR].
- The complaint should be filed within a week of receiving a response from your supervisor and should include:
 - All relevant details – date of conflict, description of the incident, who was present, where it occurred, and any other pertinent information.
 - Your suggestion on how the problem can be solved.
 - A copy of your immediate supervisors written response or summary of verbal response, if there was any. If no response was provided, state so in the complaint.

- Once the complaint is received by [NAME OF PERSON, CAN BE DEPARTMENT HEAD OR HR], they will schedule a meeting to discuss the complaint within a week. Following the review of all provided accounts and meeting discussion, [NAME OF PERSON, CAN BE DEPARTMENT HEAD OR HR] will make a formal decision and recommend a course of action, how it is to be carried out and timeline of execution.

Third Tier - Appealing the Decision

- If you are dissatisfied with the decision offered by [NAME OF PERSON, CAN BE DEPARTMENT HEAD OR HR], you may appeal in writing to [HIGHER LEVEL DECISION MAKER].
- [HIGHER LEVEL DECISION MAKER], at their discretion, may accept the appeal and investigate the complaint, or can deny the appeal and consider the matter closed.
- Conflicts are best resolved on an individual level and the process may be adjusted to fit the needs of the situation.

Appendix C

Sample “Table of Contents”

VERSION 1

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ABOUT LEADING EDGE

Founded in 2014, Leading Edge seeks to influence, inspire, and enable dramatic change in attracting, developing, and retaining top talent for Jewish organizations so that the Jewish nonprofit sector may thrive.

