Employee Handbook

#### Episcopal Foundation of Dallas

## Employment At Will Policy

Episcopal Foundation of Dallas does not enter into contracts with its employees that guarantee employment. We believe that a professional organization like ours can achieve excellence only when both the Foundation and employees are mutually satisfied with the employment relationship. If either the Foundation or an employee becomes dissatisfied with the relationship for any reason, that party is free to terminate the relationship at will at any time with or without cause.

Although other terms and conditions of employment may change, this at-will employment relationship will remain in effect throughout an employee’s employment with the Foundation. The at-will employment relationship may not be modified by any oral or implied agreement. These statements about the at-will nature of employment constitute the complete understanding between the Foundation and its employees regarding this subject.

## Equal Employment Opportunity Policy

Episcopal Foundation of Dallas is an equal opportunity employer and is committed to nondiscrimination in all of its employment actions. Foundation policy prohibits unlawful discrimination against any employee or applicant for employment on any legally recognized basis, including, but not limited to race, color, national origin, ancestry, sex, creed, religion, age, disability, and other protected classes established by applicable state or local law. This policy of nondiscrimination applies to all employment practices, including, but not limited to, hiring, position assignments, disciplinary actions, compensation, benefits, promotion, training and termination.

The Foundation will not permit retaliation by management, employees or co-workers against anyone who reports a violation of this policy or participates in an investigation of a complaint under this policy.

Employees are encouraged to report discriminatory incidents immediately to the Executive Director. Every effort will be made to keep such issues as confidential as possible. However, the Foundation is compelled to investigate all reports, and in so doing, total confidentiality cannot be guaranteed.

## Anti-harassment Policy

Episcopal Foundation of Dallas is committed to maintaining a work environment free from all forms of unlawful harassment, including, but not limited to, harassment based on sex, race, religion, national origin, disability or age. Harassment undermines the morale and integrity of the Foundation and its employees. It is the Foundation’s goal to create an environment for all employees and applicants that is free from unwelcome harassment by co-workers, independent contractors, supervisory personnel, vendors or clients and their employees.

### Sexual Harassment

Prohibited sexual harassment includes any unwelcome sexual advances, requests for sexual favors or other unwelcome verbal or physical conduct of a sexual nature, whether by persons of different or the same gender, when:

* Submission to such conduct is an explicit or implicit condition of employment.
* Submission to or rejection of such conduct is used as the basis for employment decisions or actions.
* Such conduct has the purpose or effect of unreasonably interfering with an individual’s work performance, or creating an intimidating, hostile or offensive work environment.
* Such conduct otherwise adversely affects an individual’s employment opportunities.

### Other Prohibited Harassment

Other forms of prohibited behavior include any unwelcome verbal or physical conduct that belittles, shows hostility, or ridicules an individual based on their sex, race, religion, national origin, disability or age, which:

* Has the purpose or effect of creating an intimidating, hostile or offensive working environment.
* Has the purpose or effect of unreasonably interfering with an individual’s work performance.
* Otherwise adversely affects an individual’s employment opportunities.

### Reporting Unwelcome Harassment

Employees who have been subject to any of the behaviors described above, or who witness anyone engaging in any such behaviors, must report the incident immediately.

Report concerns or violations of this policy to the following person: Board Chair

### Investigation of Unwelcome Harassment

Reports of unwelcome harassment will be treated seriously and an investigation will be initiated promptly. To the extent possible, confidentiality will be maintained, but cannot be guaranteed.

### Disciplinary Measures

Where an investigation reveals that allegations of unwelcome harassment are substantiated, appropriate remedial action, including discipline up to and including termination, will be taken. All disciplinary measures will be implemented promptly and will be commensurate with the person’s conduct. The remedies will vary depending on the entire facts and circumstances determined through the investigation.

The Foundation believes that open communication is essential to a positive working environment. Employees are encouraged to discuss any problems or concerns with their supervisors or other appropriate members of management; however, concerns relating to workplace harassment should be reported pursuant to the Anti-Harassment policy above.

## Confidentiality Policy

Episcopal Foundation of Dallas considers information about its clients, employees, work product, and processes as confidential data. The disclosure of such confidential data to competitors or anyone outside the Foundation could significantly harm the Foundation’s interests. Employees are prohibited from disclosing to individuals not employed by the Foundation any confidential information or data learned in the course of, or as a result of, employment except with written permission by the Executive Director.

### Conversations

All employees should be careful of where and with whom matters pertaining to clients or the Foundation are discussed. Client or Foundation matters should not be discussed outside of the Foundation’s offices or in the presence of third parties.

### Documents

Client documents should not be left outside of the immediate control of attorneys or individuals responsible for the documents. Such documents should be handled in a confidential manner when employees make copies, transport documents or in any other way work with client documents.

No document or other information pertaining to the activities of the Foundation or its clients should be supplied in response to any requests from persons outside the Foundation unless specifically authorized by the shareholder in charge of the client file or the Foundation’s Executive Director.

### Family Involvement

If an employee’s spouse or another close relative has a position with an organization involved in a matter in which the Foundation is involved, the employee must disclose their relatives’ involvement to the shareholder in charge of the matter as soon as they become aware of the family member’s involvement.

### Preserving Confidentiality of Foundation Business

Information regarding the business of this foundation (e.g. financial information, compensation, employment decisions) is also confidential and the above statement of policy applies equally to such information.

## Substance Abuse Policy

Episcopal Foundation of Dallas is committed to maintaining a drug-free work place. The Foundation prohibits:

* The possession, use, purchase, sale, manufacture, transfer, or state of being under the influence of any illegal drug by any person within the Foundation while on Foundation premises or on Foundation business.
* Being impaired by the use of alcohol or the abuse of prescription drugs when on Foundation premises, when performing Foundation business, when representing the Foundation at functions outside the Foundation, or when any such activity could affect the individual’s suitability for continued employment, by harming the Foundation’s reputation, for example.

Violation of this policy will subject the employee to disciplinary action up to and including termination. The Foundation reserves the right to test employees for prohibited substances in the event of an accident or if reasonable suspicion exists that the employee may be under the influence of a prohibited substance while on Foundation premises or on Foundation business.

## Workplace Violence Policy

Episcopal Foundation of Dallas wants to provide a workplace that is free of intimidation, violence or threats of violence. Any acts or threatened acts of violence by employees, significant others, family members, outside contractors, vendors or clients against Foundation employees will not be tolerated.

Examples of prohibited acts include, but are not limited to:

* Physically striking or attacking an employee.
* Verbally or physically threatening an employee.
* Possessing or displaying any kind of prohibited weapons on Foundation property or at Foundation-sponsored activities. See “Prohibited Weapons” below.
* Loud, angry or disruptive behavior that is inappropriate for a work environment.
* Callous or intentional disregard for another’s safety.
* Intentional destruction of Foundation property or another employee’s property.
* Other conduct that a reasonable person could perceive as constituting a threat.

### Prohibited Weapons

Prohibited weapons include firearms (regardless of whether or not the employee is licensed to carry a handgun), illegal knives and other weapons restricted under local, state or federal regulations. Legal, chemical dispensing devices such as pepper sprays that are sold commercially for personal protection are **not** prohibited under this policy. Employees are responsible for making sure that any items they possess are not prohibited under this policy. Questions about a particular item can be addressed to the Executive Director

### Reporting Workplace Violence

* Employees who encounter someone who is threatening immediate harm to an employee or other person, should immediately report the situation to the appropriate emergency contact (building security/police, etc.). In nonemergency situations, employees who are subjected to, or witness, such behavior should report it to the Executive Director.

Employees should feel free to report such activity without fear of reprisal. The Foundation will make every effort to keep the information confidential to the extent possible. Both a failure to report or fully cooperate in investigations and to knowingly make a false, meritless or malicious report may result in disciplinary action up to and including termination.

# Technology Policies

## E-Mail Policy

Episcopal Foundation of Dallas’s electronic mail (e-mail) system belongs to the Foundation and is provided solely to facilitate Foundation business. All messages sent, received, composed or stored on this system are the property of Episcopal Foundation of Dallas.

### E-Mail Use

The Foundation’s e-mail system is to be used by employees for conducting Foundation business. Incidental and occasional personal use is permitted, but these messages will be treated the same as other messages and have no guarantee of privacy. Messages on the e-mail system are to be accessed only by the intended recipient and by others at the direct request of the intended recipient. Any unauthorized attempt to access another employee’s messages is a violation of Foundation policy.

### Prohibited Activities and Uses

Sending, inviting, displaying, printing, or otherwise disseminating material that is fraudulent, harassing, illegal, sexually oriented and/or explicit, obscene, intimidating, defamatory, containing racial or ethnic slurs or otherwise inconsistent with a professional workplace is prohibited. Employees who encounter violations of this policy should report them promptly to the Board Chair.

### Employees may not use the Foundation’s e-mail resources for personal advertisements, solicitations, promotions, destructive programs, (i.e., viruses and/or self-replicating code), chain letters, political material or any other unlawful use.

### Privacy

### Episcopal Foundation of Dallas reserves the right to access and monitor an employee’s e-mail messages (both incoming and outgoing, business and personal) at any time. Employees waive any right to privacy in anything they create, store, send, or receive on the Foundation e-mail system. The existence of a password is not intended to indicate that messages will remain private. Employees should also be aware that even when a message has been erased, on some systems it might still be possible to retrieve it from a backup system. Therefore, employees should not rely on the erasure of messages to assume that a message has remained private.

### Addressing E-Mails

To prevent messages from being delivered to the wrong person, employees should be careful when addressing and sending messages. Many people in the system share the same last name and first initial, and it is easy to address a message to the wrong person if the sender does not check the message header to make sure it is accurately addressed before sending it. Care should also be given when replying to e-mail messages so that responses are sent only to those who really need them. Using “Reply to All” will send the response to every person on the original distribution. In many cases (i.e. when an e-mail is widely distributed), that is unnecessary and is an annoyance to those who don’t need to receive the reply. Use the “Reply” option to respond to the sender only or to the sender and other specifically selected individuals.

## Phone System and Voice Mail Policy

Episcopal Foundation of Dallas’s phone and voice mail systems belong to the Foundation and are provided solely to facilitate Foundation business. All messages sent, received and/or stored on the voice mail system are the property of Episcopal Foundation of Dallas.

### Prohibited Activities

Employees are prohibited from sending voice messages that contain racial or ethnic slurs, or are fraudulent, harassing, illegal, sexually oriented and/or explicit, obscene, intimidating, defamatory, or are otherwise inconsistent with a professional workplace. Employees encountering such material should report it immediately to the Executive Director.

### Privacy

Episcopal Foundation of Dallas reserves the right to access and monitor an employee’s voice mail messages (both business and personal) at any time. Employees waive any right to privacy in anything they send or receive on the voice mail system. The existence of a password is not intended to indicate that messages will remain private. Because voice mail messages may be overheard or monitored by other Foundation personnel, employees may not indicate to a caller that any voice mail message will be heard by them alone.

## Internet Use Policy

Employees are given access to the Internet to help them in the performance of their jobs. The computer and telecommunications systems belong to the Foundation and may only be used for authorized business purposes. It is the responsibility of all employees to adhere to this policy and to use these resources in a professional, ethical and lawful manner.

### Downloading and Executing

Computer programs (including .EXE files) and software should cautiously be downloaded/executed from the Internet. Users are warned that the downloading or executing of software can cause network and computer instability, as well as security breaches that could be very damaging to the Foundation and its clients.

### Disclaimer of Liability

The Foundation will not be held responsible for any damages, direct or indirect, arising out of the use of its Internet resources.

### Privacy

The Foundation has the right, but not the duty, to monitor any and all aspects of its computer system, including, but not limited to, monitoring Web sites employees visit on the Internet, monitoring chat groups and news groups, reviewing material downloaded or uploaded by employees, and reviewing e-mail sent and received by employees. Employees waive any right to privacy in anything they create, store, send, or receive on their computer, the Foundation’s network, or Internet resources.

## System Security Policy

Computers and networks can provide access to resources inside and outside Episcopal Foundation of Dallas. Such open access is a privilege and requires individual employees to act responsibly. Episcopal Foundation of Dallas is committed to providing the security and confidentiality of client information and data, as well as its own. Employees must respect the integrity of the systems and related physical resources, and observe all relevant laws, regulations and contractual obligations.

## Software License and Copyright Policy

### Compliance with Applicable Laws and Licenses

Employees must comply with all software licenses, copyrights, and all other state and federal laws governing intellectual property and online activity. Employees may not load any unlicensed software into any of the Foundation’s computers or use such unlicensed software in conducting business on behalf of the Foundation.

### Amendments

These policies may be amended or revised from time-to-time.

# Workplace Policies and Procedures

## Employment Status

### Regular Full-Time Employees

An employee who regularly works at least 30 hours per week or 130 hours per month on a continuing basis is considered a regular full-time employee.

### Regular Part-Time Employees

An employee who regularly works less than 40 hours per week is considered a regular part-time employee.

### Temporary Employees

Temporary employees are defined as those employees holding jobs of limited duration arising out of special projects, abnormal workloads or emergencies. Temporary employees are not eligible for any benefits.

### Nonexempt Employees

Nonexempt employees include all employees who are covered by the overtime provisions of the Federal Fair Labor Standards Act or any applicable state laws. Employees in this category are entitled to overtime pay.

### Exempt Employees

This category includes all regular employees who are classified by the Foundation as exempt from the overtime provisions of the Federal Fair Labor Standards Act and any applicable state laws. Among the employees included are those who qualify as exempt executive, administrative or professional employees.

## Hours of Work, Attendance and Absenteeism

Attendance is critical to the success of the Episcopal Foundation of Dallas. Absenteeism can create an unnecessary burden on others. Employees are expected to keep regular attendance, be on time, and work as scheduled. An employee who has unapproved absences will be viewed as having an attendance problem. The employee will be given the opportunity to discuss the reason for the attendance problem with the Executive Director. The board may discuss issues of this nature with the Executive Director. Failure to improve or respond to counseling will result in termination.

### Time Records

Federal and state laws require that the Foundation keep records of hours worked by nonexempt employees. These time records are the basis on which overtime is paid under the Federal Fair Labor Standards Act. All nonexempt employees are required to keep a daily record of their time. Failure to do so will be cause for disciplinary action.

Employees are required to record their time four times daily:

* When beginning regular duties.
* When leaving for lunch.
* When returning from lunch.
* When leaving work at the end of the day.

In accordance with state and federal law, an employee may round his or her time to the nearest one-quarter hour.

Maintaining inaccurate records, or misrepresenting the amount of actual time worked, in favor of either the Foundation or the employee, is a violation of the law and may result in termination. The actual number of hours worked must be recorded during the week in which they are worked. The employee’s supervisor should review the time sheet and sign it, showing approval of hours indicated. Under no circumstances is an employee permitted to sign for the supervisor.

If employees arrive before the scheduled starting time, they should not begin work earlier than the scheduled time unless specifically requested to do so.

## Pay Periods

Employees are paid once a month and each paycheck covers regular hours worked through the completion of that time period. Paychecks are distributed on the last day of the month except when that day falls on a Saturday, Sunday or a holiday. In such cases, payday will be on the preceding business day.

If for any reason employees are not present when checks are distributed, they may obtain their checks from the Executive Director. If an employee is absent because of a leave of absence, any checks due to the employee will be mailed to the current address on file or another designated address at the employee’s written request.

### Resignations

Employees who decide to resign from employment, should notify the Executive Director or Board Chair in writing, giving specific details of the resignation as far in advance as possible. It is expected that a full-time or regular part-time employee will give at least two weeks’ advance notice of the effective date of a resignation. At the Foundation’s option, an employee who gives appropriate notice may be paid in lieu of notice.

Notice of resignation should include the date the notice is being submitted, the effective date of termination (the last date the employee plans to work), forwarding address, and signature of resignee. The Foundation reserves the right to accelerate the effective date of termination at its sole discretion.

# Employee Benefits

## Holidays

The Foundation provides exempt employees with a certain number of paid holidays each year. Exempt employees will receive a day off with pay on each of these recognized holidays. Non-exempt employees will receive the same benefit, on a case-by-case basis depending on their role with the Foundation.

Temporary employees are not eligible for holiday benefits and do not receive pay for holidays on which they do not work.

**Paid Holidays**

* New Year’s Day – January 1
* Martin Luther King, Jr. Day – January (Third Monday of the month)
* Good Friday – March or April (Friday prior to Easter Sunday)
* Memorial Day – May (Last Monday of the month)
* Independence Day – July 4 (observed on Friday or Monday if falls on weekend)
* Labor Day – September (First Monday of the Month)
* Thanksgiving Day – November (Fourth Thursday of the Month)
* Day after Thanksgiving Day – November (Friday following holiday)
* Christmas Day – December 25
* Day before or after Christmas Day – December (Dependent upon which day of the week the holiday falls)

## Vacation and Personal Time Off

The Episcopal Foundation of Dallas is committed to supporting its employees in as many ways as possible. Studies have shown that time off from the workplace is important to overall employee production and both mental and physical health. As such, we have created the following Vacation and Paid Time Off (PTO) policy, which is effective on June 12, 2018:

To be eligible for Vacation and PTO, an employee must be an Exempt employee have worked for and be in good standing with The Episcopal Foundation of Dallas for 90 days from their start date.

All Vacation and PTO requests must be submitted in advance for approval to cover business operations accordingly. The Episcopal Foundation of Dallas has the right to refuse all requests for vacation/PTO but will do the best to accommodate them when advance requests are given.

Vacation and PTO are on a “use it or lose it” system, which means any unused vacation or PTO time will be lost each year.

**Vacation**

Vacation leave is defined as traditional paid time off for a family vacation, an out of town wedding, family reunion, etc... It must be requested in advance and must be approved by your supervisor.

Employees will receive ten (10) days of vacation leave each year. Temporary employees, non-exempt employees, contract employees, and interns are not eligible for vacation.

**Paid Time Off**

The purpose of [Paid Time Off (PTO)](http://humanresources.about.com/od/glossaryp/g/pto_policy.htm) is to provide employees with flexible paid time off from work that can be used for such needs as personal or family illness, doctor appointments, school, volunteerism, and other activities of the employee's choice. The company's goal is to reduce [unscheduled absences](http://humanresources.about.com/od/glossaryofterms/g/absence_uns.htm) and the need for supervisory oversight.

Exempt employees will receive ten (10) days of paid time off from work each year. Temporary employees, non-exempt employees, contract employees, and interns are not eligible for PTO.

## Holiday Office Operations

The normal operations of the Episcopal Foundation of Dallas are minimized over the holiday period. The Foundation allows staff members time off between Christmas and New Year's Day inclusive, as long as email and phone are checked and responded to daily. Any work that is required for the smooth operations of the Foundation must also be completed.

The actual dates of this time period (normal working days) will be determined by the Executive Director with approval from the Board Chair.

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# Miscellaneous Information

## Change of Status

Employee personnel records are maintained by the Foundation. Employees should promptly report any changes in status to their supervisor. These include change of:

 Name

 Address

 Telephone number

 Marital status

 Person(s) to notify in case of emergency

We need current information about employees and their families for our personnel records. Keeping this data current is vital to employees and might affect insurance benefits, payroll deductions or how quickly an employee’s family may be contacted in case of an emergency.