

IMPORTANT NOTICE – PLEASE READ

Employment Relationship

Welcome to the Eastern Pennsylvania Conference (EPA) of The United Methodist Church!

This handbook has been developed to give employees (lay & clergy) of EPA general information about working conditions, key policies, and procedures by which EPA operates, and some employee benefits.

Furthermore, conditions may require EPA, in collaboration with the Human Resources Committee, to supplement, modify, or eliminate any of the benefits, work rules, and policies described in this handbook. EPA also reserves the right to structure the workforce as it sees fit, and to change its policies and procedures at any time, with or without notice.

Finally, this handbook does not constitute an expressed or implied contract of employment. Employees have the right to terminate their employment relationship, at any time, with or without notice, and EPA reserves the right to do the same.

In matters pertaining to clergy staff, the current *Book of Discipline* and/or applicable EPA rules apply.



UNITED METHODISTS

OF EASTERN PENNSYLVANIA

Welcome!

We're glad you are on our team! Every EPA staff person is gifted to help us achieve our mission. We also recognize you as a leader, and we welcome you to be a leader among leaders where we believe you will help lead us to be the best for the mission. We are building a team where everyone is expected to learn and grow, support one another in their work, and engage one another with respect and encouragement.

Our Vision

We see a church with boundless hope, led by disciples of Jesus Christ with passionate faith who are engaged in courageous missions around the world.

Our Mission

Recruit and develop transformational leaders to make disciples of Jesus Christ and grow vital congregations for the transformation the world.

Our Focus

We focus on developing transformational leaders to transform the world.

The Employee Handbook provides the practices to create a working environment that promotes innovation and productivity through fair, equitable, and professional relationships among team members. The handbook serves as a statement of current policy and not as a legal contract.

To fulfill our mission, we rely on the dedication and hard work of team members like you. We want you to know we value you and will make our best efforts to make this a great place to work.

We hope you find your work here challenging and rewarding.

Bishop Cynthia Moore-Koikoi

Welcome to Eastern Pennsylvania Conference

Please spend some time reading and becoming familiar with the information in this Employee Handbook. We ask that you use this Employee Handbook as your first source to answer questions you may have regarding Eastern Pennsylvania Conference's personnel practices, workplace safety, wages, hours, time off, and program benefits.

At EPA, we value our employees as individuals, and we feel it is important to treat all employees fairly. We also know it is important to adapt to meeting changing times. For these reasons, this Employee Handbook provides guidelines for EPA and our employees. We will use our judgment in applying these guidelines, and we will modify, adapt, or vary from these guidelines to meet our business and employees' needs.

This Employee Handbook does not create a contract of employment between you and EPA or create any legally binding obligations. No employment agreement or contract can be entered into without the written approval of the Bishop of EPA.

This Employee Handbook may be revised or modified from time to time. This Employee Handbook supersedes and revokes all verbal and written policies, guidelines, and procedures previously discussed or distributed that address the policies and guidelines in this Employee Handbook.

Please feel free to speak to your supervisor or any member of the extended cabinet team if you have questions regarding the application of this Employee Handbook, our business, or personnel practices.

The EPA Way

1. Why do we exist?

We exist to recruit and develop transformational leaders to make disciples of Jesus Christ and grow vital congregations for the transformation of the world.

2. How do we engage? How are we faithful to God?

Prayer, compassion, and gratitude undergird all we do particularly as we set, measure, and achieve missional goals. We value these qualities in each other:

Christ-centered and Christ-like

Open to listening and learning from all faith experiences and theological views

Accepting and including people of all races and cultures

Servanthood

Punctual

Unifying

Joyful in spirit

A self-starter

Cooperative, collaborative, committed to the EPA vision, mission, beliefs and values moral integrity and strong work ethic

Committed to excellence

3. What do we do? Where do needs, gifts, and passion intersect?

We equip leaders and resource congregations so that we have more vital mission congregations. We do this through three resources:

a. Pathways planning with congregations

b. Engage – provide superintending team members with a pastor and congregation for planning, consultation, coaching and cohort groups

c. Leadership Academy – learning experiences to grow understanding and ability of leaders

4. How will we succeed? What fruitfulness points to our faithfulness?

We will grow more vital congregations that change lives, transform communities, and reflect the age, ethnicity, and culture of the community.

5. What is most important right now? Why have we been called for such a time as this?

Recruit and develop transformational leaders and achieve the strategic direction goals.

6. Who must do what? What is God's urgency for the EPA staff at this time?

Connect with clergy and congregational leaders to grow their leadership and support them in serving their communities.

EPA Decision Making Guidelines

We will only invest our financial and human resources in decisions that:

- a. Encourage innovative (creative & risk taking) ministry that connects with people in community.
- b. Develop lay and clergy leadership for making disciples and growing vital mission congregations for the transformation of the world.
- c. Meet our goals.

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WHO WE ARE

Eastern Pennsylvania Conference

Eastern Pennsylvania Conference of the United Methodist Church is the regional body (called an annual conference) with a central office for professional staff and ministry for the more than 400 congregations in Eastern Pennsylvania. There are more than 32,000 people who worship with us each week. EPA is one of 54 annual conferences in the United States and 74 additional annual conferences internationally. There are more than 12 million United Methodists throughout the world. United Methodists are guided by The Book of Discipline, which serves as the laws and doctrines of the denomination.

Human Resources Committee

The purpose of this committee is to support the Director of Human Resources of EPA in the following areas of responsibilities:

- Ensure that human resource policies, programs, practices, and systems are in place that are legally compliant and that advance the mission, strategies, and goals of the EPA. (but not inclusive of local churches)
- Regularly review all policies, programs, practices, and systems and make recommendations for improvement and/or changes.
- Review job descriptions and duties and establish salary ranges and fringe benefits.
- Ensure that EPA is a place that nurtures and develops the individuals who work here, resulting in an inclusive, engaged, committed, and highly skilled organization.
- Update this Employee Handbook periodically and make it available to all employees, including new employees at the time of hiring or upon revision.
- Review and recommend action on other employee matters that may be referred to the Sub-Committee.

The Human Resources Committee Chair or a designated member of the HR Committee is also a member of the Conference Council on Finance and Administration (CCFA). It consists of clergy and lay members and is responsible to CCFA and the Bishop.

Our Leadership

Our Bishop for the Eastern Pennsylvania Conference of the United Methodist Church is both the executive and spiritual leader. The “Cabinet” refers to the District Superintendents of EPA; one District Superintendent serves as the Dean of the Cabinet. The financial officer for EPA is the CFO/Treasurer. Other members of the extended cabinet team include the Director of Communications and the Director of Connectional Ministries.

Code of Ethics

EPA is firmly committed to complying with its legal and ethical obligations under all state and federal laws. As a result, we expect all employees, at every level within EPA, to comply strictly with all legal and ethical obligations. Our philosophy can be implemented only if our employees recognize their responsibility to treat everyone in an honest, fair, and respectful manner. Accordingly, an employee's failure to fulfill their responsibilities under this policy may result in disciplinary action, up to and including immediate termination.

EPA holds all employees responsible for ensuring compliance with this commitment. If any employee becomes aware of any violation of a legal or ethical obligation or any improper treatment of a fellow employee or EPA member, the employee must immediately report the matter so that it can be investigated right away. This policy is intended to cover, but not limited to, concerns such as financial fraud, unlawful or improper financial reporting, or improper use of technology. EPA will take all necessary steps to investigate any potential violations of our

policy and will take appropriate action to correct any violations or perceptions that are found to exist. By making it the responsibility of all employees to ensure compliance with our Code of Ethics, we can continue to maintain our outstanding reputation in the community.

All funds and property are given by congregations and faithful donors to EPA and are entrusted by God to be stewarded by employees for the EPA mission. Therefore, the highest degree of Christian stewardship and fiduciary responsibility is expected of all elected members, volunteers, and staff in matters relating to the receiving, reporting, and use of such funds and property. Ethical, moral, and legal conduct are critical components of Christian stewardship. Fiduciary responsibility also includes loyalty to the objectives and purposes for which funds have been allocated, prudence and care in the administration of entrusted funds, and property and personal commitment to the highest standard of fiscal responsibility.

Employee Protection (Whistleblower) Policy

EPA strives to act with integrity, honesty, and respect for all persons with whom we come into contact. We rely on staff to help us by speaking up whenever any situation threatens our values and our reputation. Employee involvement by providing information allows EPA to remedy the situation.

Scenarios include (but not limited to):

- Ethics and compliance issues, such as concerns about ethical organizational behavior and accounting and financial reporting matters.
- Employee relations, such as concerns about your work environment, discrimination, retaliation, or other Human Resource/Personnel Policy matters.
- Compliance with laws and regulations, such as concerns about labor laws, workers' compensation laws, etc.
- Personal security, such as concerns about harassment, bullying, threats, intimidation, workplace safety, firearms, etc. (specific procedures for reporting and investigating instances of harassment and bullying are detailed in the EPA Employee Handbook)
- Asset protection, such as concerns about theft or misuse of funds, equipment, materials, supplies, etc.
- Illegal acts, such as concerns about sexual molestation of children and at-risk adults, the use, sale or possession of illegal substances on conference property, etc.

Staff should always feel free to discuss these concerns first with their immediate manager, with the Director of Human Resources, or with the CFO/Conference Treasurer.

If you have concerns and do not feel comfortable discussing them with your immediate manager, the Director of Human Resources, or the CFO / Conference Treasurer, or feel that you have not received a satisfactory answer or resolution, please contact:

- For financial related concerns: Chair of Council on Finance and Administration
- For all other concerns: Chair of Human Resources Committee

If you are unsure of which person to contact, you should feel free to e-mail or call both.

EPA will courteously treat any person who invokes the whistleblower policy and will handle all complaints swiftly and confidentially to the extent possible consistent with ability to conduct a full and fair investigation and to comply with legal requirements. All reports will be investigated in a timely manner. EPA prohibits retaliatory

action against an employee or any other person for reporting wrongdoing. EPA may not in any way retaliate against an individual who makes a report of wrongdoing, whether the wrongdoing is found or not.

Confidentiality

Employees may have access to confidential information, including but not limited to information about EPA's employees, finances, and legal matters. As a condition of employment, employees must agree not to disclose EPA's confidential information, either during or after employment, except in the responsible exercise of duties at EPA. When in doubt whether specific information is confidential, employees should discuss this with the supervisor, any member of the extended cabinet team, or the Director of Human Resources.

Conflict of Interest

It is the policy of the EPA that it conducts all staff, volunteer, and agency-related business and duties free from conflict of interest or a substantial appearance of a conflict of interest.

No employee, volunteer, or agency member of EPA may participate in any decision or cause EPA to act upon any dealing in which they may have either a conflict, a potential conflict, or a substantial appearance of a conflict of interest and, in such circumstances, must use their judgment to excuse themselves from the decision-making process whenever appropriate.

The only exception is at annual conference sessions in which votes are necessary to approve budgets, benefits, and other matters that affect participants and their congregations. In these cases, annual conference members are to participate in speaking and voting based on the interests of the mission, vision, and financial health of EPA rather than their own interest or benefit.

A conflict of interest or substantial appearance of a conflict of interest shall be deemed to exist when an individual or a member of their family, business associate, spouse, significant other, domestic partner, any additional employer, or employee of an employee has a direct or indirect financial, personal, legal, or equitable interest in the outcome of a particular decision that they influence.

If any such conflict or appearance of a conflict of interest exists, the employee or volunteer, or another EPA employee or volunteer who believes there is a conflict must fully disclose such conflict or appearance of a conflict of interest and use their judgment to excuse themselves from the decision-making process whenever appropriate.

Employees must report a conflict of interest to the Director of Human Resources who is then obliged to report the conflict of interest to the Bishop and the CFO/Treasurer. The Director of Human Resources and the CFO/Treasurer will coordinate any required investigation and resolution. If the CFO/Treasurer has the conflict, they must report the conflict to the Director of Human Resources, Bishop, and CF&A Chair, and the CF&A Chair will coordinate any required investigation and resolution with the Director of Human Resources. If the Director of Human Resources has the conflict, they must report to the Bishop, CF&A Chair and CF&A's HR Sub-Committee Chair who will coordinate any required investigation and resolution. If the Bishop has a conflict of interest, they must report the conflict to the CF&A Chair and Episcopacy Chair who will coordinate any required investigation and resolution.

Lay volunteers must report a conflict of interest to the chair of the agency on which they serve, who is then obliged to report the conflict of interest to the Director of Connectional Ministries, the CFO/Treasurer and the

Bishop, and the Director of Connectional Ministries, and the CFO/Treasurer will coordinate the investigation and resolution.

All investigations for employees, staff, and volunteers will be coordinated and conducted in such a way as to ensure that said investigations are free of racial and gender bias.

All employees of EPA are required to review and sign the Conflict-of-Interest Policy annually.

Public Relations

EPA's activities may become the subject of community interest or receive newspaper and media attention. All questions from the community or the media regarding EPA, or its projects, as well as any press releases, publications, or other official statements must be referred to the Director of Communications for approval.

EQUAL EMPLOYMENT OPPORTUNITY

Equal Opportunity and Commitment to Diversity

EPA provides equal employment opportunities to all employees and applicants for employment without regard to race, color, creed, ancestry, national origin, citizenship status, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression, sexual orientation, marital status, religion, age, disability, genetic information, service in the military, or any other characteristic protected by applicable federal, state, or local laws and ordinances. Equal employment opportunity applies to all terms and conditions of employment, including hiring, placement, promotion, termination, layoff, recall, transfer, leave of absence, compensation, and training.

EPA expressly prohibits any form of unlawful employee harassment or discrimination based on any of the characteristics mentioned above. Improper interference with the ability of other employees to perform their expected job duties is not tolerated.

EPA will endeavor to make a reasonable accommodation of an otherwise qualified applicant or employee related to an individual's physical or mental disability and/or any other reason required by applicable law, unless doing so would impose an undue hardship upon EPA's operations.

Any employees with questions or concerns about equal employment opportunities in the workplace are encouraged to bring these issues to the attention of the Director of Human Resources. EPA will not allow any form of retaliation against individuals who raise issues of equal employment opportunity. Employees who feel they have been subjected to any such retaliation should bring it to the attention of the Director of Human Resources.

Retaliation means adverse conduct taken because an individual reported an actual or a perceived violation of this policy, opposed practices prohibited by this policy, or participated in the reporting and investigation process described below. "Adverse conduct" includes but is not limited to:

1. Shunning and avoiding an individual who reports harassment, discrimination, or retaliation;

2. Express or implied threats or intimidation intended to prevent an individual from reporting harassment, discrimination, or retaliation; *or*
3. Denying employment benefits because an applicant or employee reported harassment, discrimination, or retaliation or participated in the reporting and investigation process.

Other examples of retaliation include firing, demotion, denial of promotion, unjustified negative evaluations, increased surveillance, harassment, and assault.

Complaints of discrimination should be filed according to the procedures described in the Harassment and Complaint Procedure.

Americans with Disabilities Act (ADA) and Reasonable Accommodation

EPA is committed to the fair and equal employment of individuals with disabilities under the ADA. It is EPA's policy to provide reasonable accommodation(s) to qualified individuals with disabilities unless the accommodation would impose an undue hardship on the company. EPA prohibits any harassment of, or discriminatory treatment of, employees or applicants based on a disability.

An employee or applicant with a disability may request an accommodation from the Director of Human Resources and should specify what accommodation is needed to perform the job and submit supporting documentation explaining the basis for the requested accommodation, to the extent permitted and in accordance with applicable law. EPA will review and analyze the request. If requested, the employee is responsible for providing medical documentation regarding the disability and possible accommodation. All information obtained concerning the medical condition or history of an applicant or employee will be treated as confidential information, maintained in separate medical files, and disclosed only as permitted by law.

Commitment to Diversity

EPA is committed to creating and maintaining a workplace in which all employees have an opportunity to lead, participate, and contribute to the success of EPA and are valued for their skills, experience, and unique perspectives. This commitment is embodied in our employment policies and in the way we do business at EPA. Valuing diversity is a sound business principle.

Immigration Law Compliance

All offers of employment are contingent on verification of the candidate's right to work in the United States. On the first day of work, every new employee will be asked to provide original documents verifying his or her right to work and, as required by federal law, to sign Federal Form I-9, Employment Eligibility Verification Form.

Anti-Harassment Policy and Complaint Process

It is EPA's policy to prohibit intentional and unintentional harassment of or against job applicants, employees, contractors, interns, or volunteers by another employee, supervisor, vendor, contractor or board members or based on actual or perceived race, color, creed, national origin, ancestry, citizenship status, age, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression (including transgender status), sexual orientation, marital status, military service and veteran status, physical or mental disability, genetic information, or any other characteristic protected by applicable federal, state, or local laws. Such conduct will not be tolerated by EPA.

All complaints will be handled swiftly and confidentially to the extent possible in light of the need to thoroughly investigate and take appropriate corrective action. Lodging a complaint in no way will 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. Failure to be truthful is a violation of this policy and the employee is subject to discipline.

Any employee who feels that they have been the subject of harassment in any form should report the alleged conduct by speaking with the supervisor, manager, or Director of Human Resources.

(Complaint Process)

If a supervisor or manager becomes aware that harassment or discrimination is occurring, either from personal observation or because of an employee's coming forward, the supervisor or manager should immediately report it to the Director of Human Resources.

1. Upon receiving a complaint or being advised by a supervisor or manager that violation of this policy may be occurring, the Director of Human Resources will notify both the Bishop and CFO/Treasurer and review the complaint as part of the investigation.
2. The investigation will include interviews with the complainant, the accused, and any witnesses to determine whether there has been a violation of this policy. The Director of Human Resources or other person conducting the investigation will conclude the investigation and submit a written report of their findings to the company.
3. If it is determined that harassment or discrimination in violation of this policy has occurred, the Director of Human Resources will recommend appropriate disciplinary action. The appropriate action will depend on the following factors:
 - the severity, frequency, and pervasiveness of the conduct;
 - past history; and
 - the result of the investigation.
4. If the investigation is inconclusive or if it is determined that there has been no violation of policy, but potentially problematic conduct may have occurred, the Director of Human Resources may recommend appropriate preventive action.
5. After the investigation is concluded, the Director of Human Resources will meet with the complainant and the accused separately, notify them of the findings of the investigation, and inform them of the action being recommended.
6. The complainant and the accused may submit statements to the Director of Human Resources challenging the factual basis of the findings.
7. After the Director of Human Resources meets with the complainant and accused, Bishop will review the investigative report and any statements submitted by the complainant or accused, discuss results of the investigation with the Director of Human Resources and other management staff as may be appropriate, and decide what action, if any, will be taken.

8. The Director of Human Resources will report EPA's decision to the complainant, the accused, and the appropriate management assigned to the department(s) in which the complainant and the accused work. The decision of EPA will be in writing and will include findings of fact and a statement for or against disciplinary action. If disciplinary action is to be taken, the accused will be informed of the nature of the discipline and how it will be implemented.

Upon receiving a complaint or being advised that a violation of this policy may involve the Bishop, the Director of Human Resources will notify the Chair of the Episcopacy Committee and the Chair of the Human Resources Committee. Complaints will be handled as confidentially as possible consistent within the need to investigate the complaint.

Upon receiving a complaint or being advised that a violation of this policy may involve the Director of Human Resources, the Bishop and the Chair of the Human Resources Committee will be notified. Complaints will be handled as confidentially as possible consistent within the need to investigate the complaint.

The above process applies to all individuals who are acting in an official capacity on behalf of EPA whether or not they are direct employees of the EPA.

Complaints of sexual harassment/misconduct by appointed clergy staff shall be handled according to the provisions in the Book of Discipline.

Furthermore, any retaliation against an individual who has complained about sexual, racial, gender, disability or any other harassment or retaliation against individuals for cooperating with an investigation of a harassment complaint is similarly unlawful and will not be tolerated. EPA will take all reasonable steps necessary to prevent and eliminate unlawful harassment.

EPA is committed to providing the best possible working conditions for its employees. Part of this commitment is encouraging an open and frank atmosphere in which any problem, suggestion, or question can be discussed. Supervisors and employees are expected to treat each other with mutual respect and are encouraged to offer positive and constructive feedback.

If employees sincerely disagree with a policy, practice, or other operating condition they can informally express their concern orally or in writing to their supervisor. The supervisor will evaluate the situation and will meet with the employee to respond.

Should this informal attempt at resolution not be satisfactory, the employee may file a written grievance with the supervisor, who will respond in writing within 10 business days of receipt. If the employee is not satisfied with the response, the employee may appeal in writing to the supervisor's manager or director within 10 business days of receipt of the supervisor's response. The supervisor's manager or director will respond in writing within 10 business days of receipt of the appeal.

If the response from the supervisor's manager or director is still not to the employee's satisfaction, the employee may appeal to the Bishop. If the matter is not resolved between the employee and the Bishop, the arbitration process is the next step (see Arbitration Agreement).

If the problem involves the employee's supervisor, the employee may consult with the Director of Human Resources and/or the Extended Cabinet Team. The employee will then be counseled regarding next steps at resolution.

No employee will be discriminated against because of filing a grievance or cooperating in the investigation of one. The complaint process found in the Book of Discipline will be used to handle any complaint against a United Methodist clergy person.

Actions taken to resolve a problem or question are based solely on the specific circumstances involved and should in no way be construed as establishing precedents or changing policies and procedures.

Definition of Unlawful Harassment

Unlawful harassment is conduct that has the purpose or effect of creating an intimidating, a hostile, or an offensive work environment; has the purpose or effect of substantially and unreasonably interfering with an individual's work performance; or otherwise adversely affects an individual's employment opportunities because of the individual's membership in a protected class.

Unlawful harassment includes, but is not limited to epithets, slurs, jokes, pranks, innuendos, comments, written or graphic material, stereotyping, or other threatening, hostile, or intimidating acts based on race, color, ancestry, national origin, gender, sex, sexual orientation, marital status, religion, age, disability, veteran status, or another characteristic protected by state or federal law.

Definition of Sexual Harassment

While all forms of harassment are prohibited, special attention should be paid to sexual harassment. Sexual harassment can include all of the above actions, as well as other unwelcome conduct, and is generally defined under both state and federal law as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature whereby:

- Submission to or rejection of such conduct is made either explicitly or implicitly a term or condition of any individual's employment or as a basis for employment decisions.
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, a hostile, or an offensive work environment.

Other sexually oriented conduct, whether intended or not, that is unwelcome and has the effect of creating a work environment that is hostile, offensive, intimidating, or humiliating to workers may also constitute sexual harassment.

All employees should take special note that, as stated above, retaliation against an individual who has complained about sexual or other harassment and retaliation against individuals for cooperating with an investigation of sexual or other harassment complaints violate EPA's policy.

Definition of Racial Harassment

Racial harassment is an act of covert or overt racism. When prejudicial and/or racist attitudes are expressed in a behavior that is focused specifically on the abuse, humiliation, and defamation of persons because of their race or ethnicity, this will be considered racial harassment. The General Conference defines racial harassment as the following:

- Abusive and/or derogatory language that in a subtle or overt manner belittles, humiliates, impugns, or defames a person or a group of persons based on racial and ethnic traits, heritage, and characteristics.
- A behavior (individual, group, or institutional) that abuses, belittles, humiliates, defames, or demeans a person or group of persons based on racial and ethnic traits, heritage, and characteristics.

- Documentation printed or visual, which abuses, humiliates, defames, or demeans a person or group of persons based on racial and ethnic heritage and traits, heritage, or characteristics.

Definition of Bullying

EPA defines bullying as repeated inappropriate behavior, either direct or indirect, including verbal, physical, gesture, exclusion, social alienation, and cyber bullying, conducted by one or more persons against another or others, at the place of work, and/or in the course of employment. Such behavior is a violation of our Code of Ethics which clearly states that all employees will be treated with dignity and respect.

Employee Protection Against Retaliation

EPA prohibits retaliatory action against an employee or any other person (i.e., vendors, suppliers, auditors, board members, etc.) for reporting wrongdoing.

EPA may not in any way retaliate against an individual who makes a report of harassment or discrimination, nor may it permit any employee to do so. Retaliation is a serious violation of EPA's non-harassment and non-discrimination policies and should be reported immediately. Any employee who feels that they have been the subject to retaliation for reporting harassment or discrimination should report the alleged conduct to the Director of Human Resources.

Any person found to have retaliated against another individual for reporting harassment or discrimination may be subject to the same range of disciplinary action provided for harassment and discriminatory offenders.

If an investigation results in a finding that the complainant falsely accused another of harassment or discrimination, knowingly or in a malicious manner, the complainant will be subject to appropriate sanctions, including potential termination.

EMPLOYMENT AND WORKPLACE PRACTICES

Employees are the key to EPA's success. The following represents expectations for employee conduct and performance, including operational procedures.

Anti-Nepotism Policy

To avoid actual or perceived conflicts of interest, or other personnel concerns, EPA prohibits the employment of family members or other close relations in a direct reporting relationship.

For purposes of this policy, a family member or other close relation includes any person who is related by blood or marriage, or whose relationship with the employee is similar to that of persons who are related by blood or marriage and includes, but is not limited to, spouses, children, stepparents and children, domestic partners, siblings, grandparents and children, aunts, uncles, nieces and nephews, and individuals involved in intimate or romantic relationships.

- No EPA employee may interview, hire, or supervise an immediate family member, relative, or other in a close relationship.
- No employee may be directly supervised by a family member or other persons in a close relationship.
- Relatives, if employed by EPA, may not have financial transactions between them that are related to EPA business or if one would be in a position to directly influence decisions related to the other.

- If a relationship develops during employment that violates this policy, the employee must report the relationship to the appropriate manager or extended cabinet team member.

The manager or extended cabinet team member will promptly determine whether alternate supervision or a transfer to an alternate department, if available, is appropriate to avoid conflicts of interest or personnel concerns. If changes in supervision or assignment are not possible, employment of either or both parties may be terminated.

Employees should immediately report a concern in writing to a member of the extended cabinet team or to the Director of Human Resources if they believe this policy may be violated.

Appearance

Grooming and personal cleanliness standards contribute to the morale of all employees and affect the image presented by EPA. Employees should dress in business casual or business attire as appropriate and conduct themselves in a professional, businesslike manner so as to properly represent themselves and EPA.

Employees who come to work or appear online while at work with an inappropriate appearance may be excused from work and directed to return with the proper appearance. Under such circumstances, employees will not be compensated for the time away from work.

All employees are asked to refrain from wearing excessive cologne and perfume or other scents.

Business Expense Reimbursement

The purpose of the policy is to ensure that the expenses of the EPA Conference staff are controlled by establishing certain standards. It is the policy of EPA to reimburse staff for reasonable and necessary expenses incurred during approved work-related travel (see appendix for full policy).

Abuse of this policy, including falsifying expense reports to reflect costs not incurred by the employee or not incurred for business purposes, may subject the employee to disciplinary action, up to and including termination from employment.

Employee References and Employment Verification

Upon a request for an employment reference, EPA will only confirm dates of employment and position title. The Director of Human Resources manages all employment verification requests.

Fees and Honoraria

Employees (both lay and clergy) receive support from the Eastern Pennsylvania churches through shared ministry so that they may serve as resource persons and consultants to the churches and agencies of EPA. EPA employees will not accept honoraria and fees for services that are within the scope of an employee's job description. If honoraria are received, it must be turned over to the CFO/Treasurer.

Bank Accounts

No EPA staff person may open a bank account for any aspect of ministry within EPA without the approval of the Council on Finance and Administration. All EPA ministry related bank accounts overseen, supervised, influenced, or managed by a EPA staff person will be audited by a CFA approved auditor.

Complaints and Just Resolutions

Any resolution of a supervisory or misconduct matter involving a EPA employee that has financial implications shall be reviewed by the Council on Finance and Administration and any resolutions that presently or in the future may require EPA to provide financial payments or settlement shall be approved by the Council on Finance and Administration.

EPA Emails, Documents, Files, Computers, Tablets, and Phones

All electronic documents, files, and emails for EPA staff including computers, tablets, and phones are the property of EPA. As such, these electronic materials are to remain intact, never to be deleted from the EPA server without the approval of the Bishop, CFO/Treasurer and Director of Human Resources. When a staff person completes employment or an appointment with EPA, computers, tablets and phones are not to be erased clean but turned in with their documents.

No EPA staff member is to falsify any information on documents. A violation of this policy will subject the employee to discipline up to and including termination.

No Solicitation

We recognize that staff enjoy supporting one another and each other's family. Special appeals or solicitations for family members like cookie and candy sales are supported as long as they are within the values of EPA. Emails may not be sent out to the staff announcing the appeal.

Open Door Policy

The door of every director, manager, supervisor, and bishop is open to every employee. The purpose of the Open Door Policy is to encourage open communication, feedback, and discussion about any matter of importance to the employee. The Open Door Policy means that employees are free to talk with any management level person at any time about any topic.

Benefits of the Open Door Policy

By helping to solve problems, managers and supervisors benefit by gaining valuable insight into possible problems with existing methods, procedures, and approaches. While there may not be an easy answer or solution to every concern, EPA's employees can be always heard.

Grievances

While EPA hopes employment matters can be resolved informally through direct communication with the immediate supervisor or manager or the Open Door Policy, there may be instances when this doesn't happen. This grievance procedure provides the opportunity to take the issue to the next level in the employee reporting relationship (in matters related to harassment, bullying or discrimination, refer to the procedure outlined in Section II on Harassment and Complaint Process).

The employee may file a written grievance with the supervisor, who will respond within 10 business days. If the employee is not satisfied with the response, the employee may appeal to the supervisor's manager or director, who will respond within 10 business days.

If the response from the next level is still not to the employee's satisfaction, the employee may appeal to the Bishop. If not resolved between the employee and the Bishop, the arbitration process is the next step (see Arbitration Policy).

No employee will be discriminated against because of filing a grievance or cooperating in the investigation of one. The complaint process found in the Book of Discipline will be used to handle any complaint against a United Methodist clergy person.

Outside Employment

Any employment outside EPA, including in local churches, is to be discussed in advance with one's supervisor who will share the employee's intent with the extended cabinet team for approval.

Volunteer Positions in the Local Church

We encourage all employees of EPA to participate in our work by being active members of our local churches. At the same time, we aim to conduct our business and duties free from conflict of interest or a substantial appearance of a conflict of interest, as outlined in our Conflict-of-Interest Policy included elsewhere in this handbook.

Personnel Records

Personnel records will be maintained as permanent records as long as the employee remains with EPA and for such longer period as the Director of Human Resources determines is required to comply with law.

1. Personnel records for all employees will be maintained by the Director of Human Resources.
2. The CFO/Treasurer will maintain all records necessary to prepare payrolls and related tax returns and documents.

All personnel records are confidential and may only be used as needed by EPA employees to do their jobs. Otherwise, the information is not to be released to anyone unless authorized in writing or by properly served court order.

An employee may see their personnel file upon request at a mutually agreeable time with the custodian of those records. Neither the employee nor the custodian may remove any records from the file other than for copying or scanning on site. The custodian may monitor the employee's review of their personnel file in order to ensure that records are not removed, altered or supplemented in any way.

Employees are responsible for keeping their data current. Examples include tax information (W-4), address and telephone numbers.

Certain personal information about EPA employees, clergy and local church employees is maintained in insurance and pension files. These are confidential records and not to be provided to any unauthorized persons.

Substance Abuse

The use, possession, sale, purchase, or transfer of alcohol, or illegal drugs on EPA premises or while conducting EPA business is strictly prohibited.

Any employee who comes to work while under the influence of alcohol or illegal drugs is subject to immediate discharge. Any employee who has a substance abuse problem or who becomes addicted to prescription drugs is urged to seek help to overcome the addiction or substance abuse problem.

An employee who is under treatment for substance abuse or addiction will not be penalized as long as the substance abuse or addiction does not interfere with the employee's work. Any conversations an employee has with their supervisor about a problem of this kind will be kept confidential. The only file notations that will be made are those required by law.

Smoking Policy

The EPA's facilities support a smoke-free environment. Smoking of tobacco and use of tobacco, and/ or vaping products is permitted only in designated areas on EPA premises.

Gambling

EPA prohibits gambling of any type, by any means, in the EPA premises or in the conduct of EPA business.

Use of Automobiles

Employees who need to use a motor vehicle in the performance of their duties will provide EPA with a copy of a current valid driver's license and valid and current insurance ID cards on an annual basis.

Use of EPA Equipment and Records

All computers, computer programs, computer files, hard copies of EPA records, other EPA owned items, telephone lists, membership directories, files of EPA and similar equipment and records are the exclusive property of EPA and are made available to employees for the sole purpose of assisting in their duties.

The use of personal devices such as phones can be disruptive to the workplace. Such use should be limited in duration and frequency and should not contain inappropriate content or be disruptive. Any charges resulting from personal use of an EPA telephone must be reimbursed to the EPA. Employees are reminded that they should not have any expectation of privacy when conducting personal business in the workplace.

EPA equipment is not to be used for personal recordkeeping, games, or other personal purposes. Some employees are given equipment (e.g., laptop computers) for their use as part of their jobs. When the equipment is being replaced, employees may apply through the CFO/Treasurer for permission to purchase the equipment for their own personal use. Reasonable instances include cases where old laptops are being replaced, or when an employee has received a new appointment. The fair value of the equipment, if any, will be established by the CFO/Treasurer. Specialized or high-cost equipment will be retained by EPA.

Return of EPA Property

All EPA property issued to employees, such as computer equipment, cell phones, keys, etc. must be returned to the Director of Human Resources in acceptable condition at the end of employment. Employees will be responsible for any loss or damage to EPA property.

For staff who are exiting due to retirement and layoffs from position elimination or budget reduction,

- Option to purchase the equipment and cell phone based on fair market value determined by the CFO/Treasurer

- If equipment and cell phone is 3-4 years old and is due for an upgrade, the equipment and cell phone will be released at no cost
- Access to EPA drives and software will be removed before equipment is released

At the conclusion of a person's employment, all such equipment, lists and records, as well as any personal copies the employee may have made, will be returned to EPA.

TRAINING AND PROFESSIONAL DEVELOPMENT

Training and Professional Development

EPA is committed to providing opportunities for the ongoing training and professional development of its employees. EPA views training and development as an investment in its people and the organization. Training and development can take many forms including on-the-job, online, or in-person classes, utilization of resources, webinars and seminars, college courses, and certifications. At times, there will be required training for all employees that will be provided by EPA. Newly hired employees may require specific training in order to learn or enhance skills and quickly become efficient in their roles. Such training will be identified and planned with the employee's supervisor during the first 30 days on the job.

Training and professional development should be related to the employees' role or related to career development. Employees may seek out training and development that applies to their development goals, e.g., on-the-job, online courses and seminars, webinars, classes, conferences, membership in professional associations, newsletters, professional books, journals, or other resources.

Employees must first review and receive written approval from their supervisor to participate and to receive reimbursement for desired training or development, at least 30 days in advance. Clergy employees will be eligible for continuing education leave as defined in the most recent Book of Discipline. The request must include applicable program, purpose, job relevance, cost, dates, times of training or professional development, and the name of the institution or source of training/development (including planned on-the-job training.) The supervisor will present the employee's request to the Staff Management Team and the Extended Cabinet Team for a final approval including approval of the budget for the training or development.

Upon satisfactory completion of the training and/or development program, the employee must provide documentation to support completion and to receive reimbursement. Subscriptions, membership dues, books, and journals, etc., must also be approved in advance by the employee's supervisor. Receipts for subscriptions, membership dues or other similar expenses should be submitted in a timely manner.

Professional Development and Reimbursement Program Policy

Participation in tuition reimbursement or professional development coursework must be approved in advance by the Extended Cabinet Team. The employee must have the recommendation of their supervisor and complete and submit the Professional Development and Reimbursement Proposal. (see appendix)

Degree and/or coursework must be directly related to the individual's role or related career development.

The maximum tuition reimbursement amount for degrees and certificates will be \$2,000 per person per calendar year with total reimbursement not exceeding \$6,000.

Generally, full-time, lay employees, who have been employed by the EPA for at least one (1) year, may be able to use up to five (5) days of continuing education per year. The allowance will be prorated for part-time employees.

There will be no reimbursement for unsatisfactory completion of the coursework or professional development program. In the case of college tuition, tuition for a course in which the individual receives a grade of less than a "C" will not be reimbursed. Other professional development coursework must be accompanied by an action plan with evidence of how the coursework enhances impact and performance in order to be reimbursed.

Employees accepting the terms of this Tuition Reimbursement policy will be required to sign a written agreement to remain with the organization for one year from the date of the educational reimbursement. If the employee terminates within that year, they will be required to pay a monthly prorated amount to the organization.

Performance Evaluation and Development

The EPA performance evaluation process aligns the mission and goals of EPA and provides employees with ongoing feedback about their performance. Employees at EPA are leaders and as leaders, we value continued learning, growth, and development. The process is centered on feedback, clarity, direction, and self-reflection.

4 Part Yearly Professional Growth Plan Schedule

- April: Self-Assessment of the work done January – March of present year
- July: Mid-Year Appraisal
- October: Self-Assessment of work done in July - September of present year
- December: Goals for coming year and final assessment for October to November

Self-assessment focuses on essential functions and the Mid-Year Appraisal encompasses all aspects of the employee's job description, including essential functions, organizational responsibilities, core competencies, and goals.

EPA will make decisions on salary changes at the end of the year. EPA may make cost of living adjustments as set by CCFA. Employees who have demonstrated considerable growth in their yearly professional growth plan may be considered for salary increases.

Letters regarding the upcoming salary changes will typically go out by December 31.

(See Appendix for Self-Assessment and Mid-Year Appraisal templates)

Probation Period

During the probationary period, employees will receive an initial orientation to EPA, their department and their positions. Supervisor will establish a 30/60/90 days plan. Throughout this probationary period, employees will have continued supervision of three months for professional staff and administrative staff and one month for maintenance staff.

EPA personnel practices are the same for full and part-time employees except where The Book of Discipline requires something different for clergy. The Book of Discipline will apply in all instances for ordained clergy.

At the end of the probationary period, the supervisor will meet with the employee and provide feedback on performance, including a written evaluation of the employee's work. If the evaluation is unfavorable, the employee's introductory period may be extended for a maximum of three months (after which another evaluation will be prepared). If job dismissal is part of the evaluation, the employee will be given two (2) weeks' written notice. When there is gross incompetence or misconduct, termination may be immediate.

Performance Improvement Plan

EPA wants to create an environment where employees can perform their jobs to the best of their abilities. If performance or behavior is not acceptable, EPA will work with the employee to improve performance. If performance does not improve, corrective action may be necessary.

Most matters are handled between the employee and supervisor. The first step may be a private conversation between the employee and supervisor where the supervisor clarifies performance expectations and a plan for the employee to improve performance. The supervisor will follow up the conversation with an email to confirm what was discussed and a time frame to talk again about performance.

Should performance be a problem, EPA follows a three-step process for performance improvement:

1. A verbal conversation occurs between the supervisor and employee in which the supervisor gives specific examples of the employee not meeting standards and actionable examples of how to improve. (this should also include any identification of what the employee may need to improve, e.g., training, equipment) The supervisor will advise the Director of Human Resources of this verbal warning and that they have initiated the performance improvement process. The Director of Human Resources will maintain the communication in the personnel file along with all subsequent documentation. The supervisor will determine the timeframe, no more than 60 days total.
2. If performance does not improve within the supervisor's specified time frame of no more than 30 days, supervisor documents in an email to the employee specific examples where the employee has not met standards that they have already discussed and provides additional actionable examples of how to improve. The Director of Human Resources will maintain the communication in the personnel file along with all subsequent documentation.
3. The third step will be a written Performance Improvement Plan with specific steps to improve within a specific timeline and the employee has addressed the issues outlined in the earlier conversation and document. The employee will be asked to sign the document as confirmation that they are aware of the potential for future termination should performance or behavior not improve. The Director of Human Resources will maintain a copy of the signed document for the personnel file. The supervisor will determine the timeframe, no more than 30 days.

EPA reserves the right to terminate an employee's employment without taking any of these steps because the employment is "at-will."

Misconduct

To ensure orderly operations and provide the best possible work environment, EPA expects our employees to follow rules of conduct that will protect the interests and safety of all employees and the organization.

While not possible to list all the behaviors that are considered unacceptable in the workplace, the following are examples of misconduct that may result in corrective/disciplinary action, up to and including immediate termination of employment:

1. Theft or inappropriate removal or possession of property
2. Falsification of timekeeping, expense records, employment application, or records and reports
3. Working under the influence of alcohol or illegal drugs
4. Possession, distribution, sale, or use of alcohol or illegal drugs while on duty
5. Fighting or threatening violence in the workplace
6. Boisterous or disruptive activity in the workplace
7. Negligence or improper conduct leading to damage of employer-owned or member-owned property
8. Insubordination or other disrespectful conduct
9. Violation of safety or health rules
10. Smoking, including vaping anywhere other than designated areas on the EPA campus
11. Sexual, racial, or other unlawful harassment
12. Possession of dangerous or unauthorized materials, such as explosives or firearms in the workplace
13. Excessive absenteeism or absence without notice
14. Excessive tardiness or tardiness without notice
15. Unauthorized absence from workstation during the workday
16. Unauthorized use of telephones, mail system, copier, or other EPA-owned equipment
17. Unauthorized use of computers or tablets for any type of online gambling or use/distribution of pornography
18. Unauthorized disclosure of confidential information
19. Violation of personnel guidelines or EPA policies

EPA will take appropriate disciplinary actions up to and including termination for misconduct.

SAFETY

EPA is committed to providing a secure and safe work environment for all employees and members of the public who visit EPA facilities. All visitors must check in and sign with the Hospitality Coordinator. All visitors must be escorted by an employee.

Safety Training

Safety in the workplace is everyone's responsibility. EPA accomplishes this only through the cooperation of everyone. Each employee must learn safety practices and follow them.

Each supervisor/manager is responsible to communicate EPA safety practices, safety education and training, dissemination of safety materials, fire protection information and accident prevention programs.

Emergency Evacuation and Procedures

In the event of fire, security violations or other emergencies, evacuation of the entire building may be required. Emergency evacuation routes are posted throughout the building. False reports of emergencies or unauthorized

or inappropriate orders to evacuate may result in corrective and/or disciplinary action, including termination of employment.

Reports of Injury

All employees are instructed to report promptly any injuries or accidents to their supervisor, regardless of the severity of the injury. If the supervisor cannot be reached promptly, the Director of Human Resources or any member of the Extended Cabinet Team should be notified.

Should an employee be involved in, or witness, an accident and/or injury to anyone on EPA premises, the employee should give whatever assistance to the injured person, including notifying emergency medical personnel by calling 911. If the person appears seriously injured, DO NOT MOVE the employee unless directed to do so by emergency medical personnel.

EPA must report all injuries or accidents to the appropriate government officials and to EPA's general liability and workers' compensation insurance carrier. Supervisors are responsible for filling out all appropriate medical forms, Occupational Safety and Health forms and Workers' Compensation Employer's Report of Industrial Injury forms. An investigation of every accident will be conducted to determine the cause of the accident and to prevent other accidents of the same nature.

Workplace Violence

EPA seeks to provide a safe environment for employees. EPA will respond quickly and appropriately to any threats of violence to employees. When an employee believes a coworker or anyone else has threatened their safety, the employee should notify the supervisor or any member of the Extended Cabinet Team so that appropriate action can be taken. If there is an immediate threat of violence in the workplace, immediately call 911.

Employees who commit or threaten violence in the workplace may be subject to corrective and/or disciplinary action, including termination.

Firearms and Weapons

EPA does not allow or tolerate the possession of firearms, imitation firearms, knives, or other dangerous instruments or other weapons for any purpose while on our premises or conducting business on our behalf. Employees who possess weapons or firearms in violation of this policy are subject to corrective/disciplinary action, including termination.

Employees should immediately notify the Director of Human Resources if any firearms or weapons are brought or observed on our premises.

Communications Inside and Outside of EPA

EPA has a professional and efficient workplace. Employees should become familiar with expectations, guidelines, and policies for how the EPA staff interacts with each other, with clergy and laity and with the public at large.

Phone Usage and Texting

EPA recognizes that employees are people with families and other responsibilities outside of the office. Sometimes personal responsibilities will need to be addressed during work hours. When that happens, employees should respect the work environment and consider the following:

Personal phone calls and text messaging can disrupt work. When necessary to make or receive personal phone calls while at work, the calls should be kept brief. Employees should have no expectation of privacy when using EPA's phone system. By using EPA's phones, employees knowingly and voluntarily consent to being monitored as necessary when it is believed that an employee has broken a law, committed an immoral act or is excessively using work time and equipment for personal business.

Cell Phone

EPA issues or reimburses for individual cellular phones to exempt positions who are required to be in close contact with EPA. All employees are required to be always professional and conscientious when using the company phones. EPA has zero tolerance policy regarding using cell phone while driving. For the safety of our employees and others it is imperative that you pull over and stop at a safe location to dial, receive, or converse on the cell phone in any way.

Employees who choose to use personal phones instead of company-purchased phones will be reimbursed as follows:

- a. Monthly reimbursement at the average rate of an EPA plan
- b. Eligible upgrades on phone every 3 years up to the amount EPA would pay through the company plan
- c. Lost/damaged phones will not be reimbursed.

Electronic Communications Policy

Technology, including computers and electronic communications, is an essential tool to support EPA's ministry. In using EPA's technology, including but not limited to, electronic mail and the internet, all employees should act in a manner that:

1. Is responsible, professional, and legal
2. Does not compromise confidentiality or other sensitive information
3. Does not compromise the security of EPA's technology and
4. Is consistent with good stewardship, the mission and ministry of EPA.

User ID's and passwords for all EPA information systems, networks, and email are for the employees exclusive use and should not be shared or revealed to anyone besides the authorized user.

Misuse of technology by any employee may result in disciplinary action, including termination of employment. Examples of inappropriate conduct include, but are not limited to:

1. Use of inappropriate or offensive or abusive language in either public or private messages
2. Unlawful activities
3. Gambling
4. Harassment
5. Slander
6. Malice
7. Defamation
8. Infringement of copyrights

9. Misrepresentation of oneself or EPA
10. Logging on or accessing obscene, pornographic, sexually explicit, racist, or violent sites
11. Pirating software or transmitting software programs or other copyrighted or trademarked material
12. Engaging in transactions or activity for personal financial gain
13. Jeopardizing EPA's tax-exempt status
14. Creating unauthorized contractual liability for EPA
15. Violating any EPA policy or procedure
16. Engaging in any activity or communication that is inconsistent with norms of professional and business conduct, and
17. Promoting political parties.

Any questions about the appropriateness of a particular use of technology should be discussed with the employee's supervisor.

No Privacy

Employees do not have a personal privacy right in any matter created, received, sent, or stored with EPA's technology, whether or not the matter is designated as "private" or "confidential." EPA reserves the right to access all computer resources when it is believed that an employee has broken a law, committed an immoral act or excessively used work time and equipment for personal business.

All aspects of EPA's computer, technology, and communications systems, including but not limited to hardware, software and all files and message contents, are the property of EPA. The computer, technology, and communication systems, including e-mail and internet access, are business tools provided by EPA that should be used for business purposes.

EPA reserves the right to monitor and review employees work on all technological platforms without prior notice when it is believed that an employee has broken a law, committed an immoral act or excessively used work time and equipment for personal business. This includes the right to monitor internet sites visited, duration of employee's internet use and files that have been viewed, accessed, or downloaded. E-mail messages and internet access are not private, including an employee's access of third-party email systems (e.g., Gmail). An employee's access code or password does not give them any right to privacy with respect to using the EPA's technology.

Any violation of this policy may result in disciplinary action, including termination of employment.

Social Media/Social Networking

Social media and networks are a regular part of many positions within EPA. The use of social media also presents certain risks and carries with it certain responsibilities.

As a EPA employee, your social media presence reflects the organization. Your personal social media accounts should reflect the values and character of United Methodists of Eastern Pennsylvania.

Employees are encouraged to use social media to share the good news of EPA. When appropriate, "like" and "share" social media posts from EPA's family of social sites. If an employee writes a blog or has other media outlets, they should consider linking the document to EPA's sites. When questions arise about linkage, check with the Communication Department for approval and guidance.

When sharing or using EPA content, employees are required to repost or re-share the information with direct attribution and links back to EPA sites. EPA retains ownership of employees' work products. Employees may promote these work products to outside publications with proper attribution to EPA and with the approval of the Director of Communications.

All content created for EPA or under the EPA brand is the property of EPA, not the individual creator. Therefore, all EPA content, including but not limited to the podcast, videos, blogposts, etc. cannot be uploaded directly or copy-pasted onto one's personal social media account.

To make responsible decisions about social media, EPA has established these guidelines:

1. Do not post false information, unsubstantiated information, or rumors about EPA, fellow employees or members of the EPA community.
2. Employees are expected to maintain the confidentiality of EPA records, documents, information, and data and to respect the privacy of others. Confidential information shall not be discussed, copied, or otherwise disseminated outside an employee's appropriate areas of responsibility.
3. Any questions about the appropriateness of social media and information sharing should be addressed to the Director of Communications.
4. The Communications Department has the right to request you alter all private posts and information sharing to comply with these policies and guidelines.

Inappropriate postings that may include discriminatory remarks, harassment, and threats of violence or similar inappropriate or unlawful conduct will not be tolerated and will subject you to disciplinary action up to and including termination.

Retaliation is Prohibited

EPA prohibits taking negative action against any employee or others working on behalf of EPA for reporting a possible deviation from this policy or for cooperating in an investigation. Any associate who retaliates against another employee for reporting a possible deviation from this policy or for cooperating in an investigation will be subject to disciplinary action, up to and including termination.

Media contacts

Employees should not speak to the media on EPA's behalf without contacting the Director of Communications. All media inquiries should be directed to the Director of Communications.

Job Position, Compensation, and Work Hours

At Will Employment

All employees with EPA, hired and appointed are employed at-will. This means that either the employee or EPA may terminate the employment relationship at any time. No verbal or written modification of the at-will relationship can be made.

Employment with EPA begins as of the actual date of hire as an EPA employee. Therefore, time spent as a volunteer or as a temporary agency employee assigned to EPA is not credited for purposes of determining longevity of service under these policies.

Employee Categories

- **Regular Full-Time:** any employee who is regularly scheduled to work 30 or more hours per week. These employees are eligible for the full range of benefits under these policies.
- **Regular Part-Time:** any employee who is regularly scheduled to work less than 30 hours per week. These employees may be eligible for limited benefits on a pro-rated basis as specified in these policies.
- **Temporary:** any employee who is hired to be scheduled on an as-needed basis with no guarantee of hours. Hours will vary based on the needs of the job.
- **Seasonal:** any employee hired for scheduled for seasonal events only (retreats, summer camp, etc.)

Exempt and Non-Exempt

In addition to the above categories, all employees are designated as “Exempt” Or “Non-Exempt”. Employees in qualified executive, professional, administrative, and supervisory positions are considered “exempt” employees under these policies, regardless of whether they are classified as Regular Full-Time, Regular Part-Time, or Temporary under this policy. All other employees, including support staff, are considered “non-exempt” employees regardless of classification under this policy. According to the Fair Labor Standards Act (FLSA), employees who are “non-exempt” are entitled to overtime pay for hours worked more than 40 hours per work week.

EPA provides its employees with flexible work hours and fair compensation. All employees are responsible for understanding attendance requirements and record-keeping expectations.

Work Hours

The standard work week for a non-exempt employee is Monday through Friday and is a 35-hour workweek. The standard workday is 8 hours scheduled from 8:30 a.m. to 4:30 p.m. with a 1-hour unpaid lunch. In consultation with the supervisor, an employee may start work at any of the following times: 7:30am, 8:00am, 8:30am, or 9:00am. Supervisors will advise employees of their individual work schedules.

Exempt employees’ work week and workdays may vary because of evening and weekend responsibilities. Exempt employees are to modify and adjust days in conversation with their supervisor.

Part-time employees will have their schedules established by their supervisor.

Summer Hours

Starting the week of Memorial Day and ending the week of Labor Day, the Conference office will be open for extended hours Monday through Thursday. The office will be closed on Fridays.

Work Location

EPA is a hybrid office. Some positions are required to be in the office Monday to Friday while other positions will have more flexibility. This will be determined by the Extended Cabinet team in consultation with the supervisors. It will vary based on the type of work and needs of a team.

There is an expectation for all staff to be in the office on a designated day, every week at the same time for team building purposes, reinforcing EPA culture and collaboration. There will be other required staff gatherings for training purposes. These days will be scheduled in advance and staff will be given advance notice if there are changes or an additional day or two added.

Absenteeism and Tardiness

Absenteeism and tardiness affect the service EPA provides, reduces employee effectiveness, increases costs and places a burden on work teams and fellow employees. EPA encourages all employees to maintain regular and punctual attendance. Unexcused absences from work are not tolerated.

Employees are expected to notify their supervisor as soon as possible in the event of an emergency or illness so the employee's position can be staffed properly.

Repeated absenteeism or tardiness that is unexcused or excessive in the judgment of EPA may be subject to corrective action, including termination of employment. Unexcused absences of three (3) consecutive days or more will be considered a voluntary resignation.

Wages and Compensation

EPA strives to compensate employees commensurate with their position, experience, responsibilities, performance, similar church/nonprofit organizations and EPA's current realities and needs so that we further the mission and provide excellent service to our congregations and communities. All job positions at EPA fall into one of five bands:

- Executive Leader
- Director Leader
- Managerial Leader
- Specialist Leader
- Administrative Leader

The five band groupings have salary bands reflecting a minimum and a maximum for the grouping. Within each grouping, there are three levels reflecting an employee's competency in the position:

Developing	A person performing at Developing Level functions at or above entry level requirements and performs work tasks with competence, understanding and knowledge. This employee can grow further to achieve greater results.
Advancing	A person performing at Advancing Level performs virtually all work with little or no supervision. They identify what needs to be done, is fully knowledgeable about their job function and may be involved in coaching/mentoring and teaching others.
Mastering	A person performing at Mastering Level is a functional expert in the position. This employee can perform the most complex and technically demanding work, displays thoughtful leadership, is involved in improving programs and work processes and makes decisions that have greater scope and impact.

We do not use a fixed schedule for increases or adjustments to compensation. Questions about compensation should be discussed with a supervisor or the Director of Human Resources.

Time Records

Non-exempt employees are required to keep accurate records of time worked. Each employee must fill out the appropriate electronic EPA time record each week, and time records must be completed in accordance with the EPA time-reporting guidelines.

Falsification of EPA records is strictly prohibited and will result in immediate dismissal. This includes payroll records, or the records of time kept supporting payrolls.

Debts and Garnishments

Each employee is expected to conduct their personal affairs so that EPA does not become involved in personal credit problems. The law requires EPA to accept legal claims against employee's wages. An employee's paycheck will not be garnished to cover debts unless EPA is legally required to do so. In accordance with the law, EPA will recognize child support orders upon proper verification.

Payroll and Deposit

EPA staff will be paid through direct deposit semi-monthly, the 15th and the 30th of each month, or on the last working day previous if pay date is a non-working day.

As required by law, the EPA will make the following deductions (if applicable) from an employee's gross pay: Federal and State income taxes, Social Security, and Medicare taxes. Other employee deductions

For employee convenience, EPA offers an automated payroll deposit system that requires employees to transfer their paychecks directly into their checking and/or savings accounts. All employees are required to use the automatic payroll deposit system.

Overtime

Working overtime is sometimes necessary. Employees are expected to cooperate with their supervisor when asked to work overtime. No overtime work will be authorized except at the request of the supervisor.

For non-exempt employees, overtime is paid for work hours that exceed 40 hours per week. Overtime, which must be authorized and approved by your supervisor before it is performed, will be paid at the rate of one and one-half times your base rate, above 40 hours. Voluntary overtime is prohibited by non-exempt staff in the best interests of the employee and EPA. A supervisor must approve any overtime worked in advance for budgeting and accounting needs. If an employee finds difficulty on a regular basis in completing assigned work within the set hours, the employee should talk with the supervisor about the amount of work and seek collaborative solutions to address the issues. A non-exempt employee who works overtime without approval could possibly be subject to discipline up to and including termination.

Exempt employees do not qualify for overtime and are required to work as necessary to complete the tasks associated with the position regardless of the time of day or number of hours in a week required. If an exempt employee finds it difficult to complete work in a reasonable time frame, the employee should talk with the supervisor to seek collaborative solutions to address the issues.

Overtime is paid for actual hours worked only. Hours for sick and vacation pay are not included in the total hours worked for calculating overtime rates for that week.

Housing Policy

Traditionally clergy have been provided a house that has included utilities and repairs as part of their compensation. Clergy have also been provided a housing allowance to allow them to rent or purchase a home.

Housing allowances have been offered when the house provided is not appropriate based on a clergy family's needs. Housing allowances or a house have been provided to clergy because of the two reasons listed above and because the U.S. tax code provides advantages for clergy. Salaries of clergy staff are reduced to reflect the housing compensation they receive.

Today, housing costs in PA influences housing decisions made by EPA staff. The housing needs of both clergy and lay staff members is important to EPA. EPA will continue to evaluate the housing needs of staff and make decisions based on the current principles of housing decisions:

- Facilitates clergy appointments.
- Allows staff to live in the community where they serve or near the EPA office.

The following are the practices regarding staff housing.

- Housing allowances for clergy appointed to the EPA staff and lay staff members of the extended cabinet team will be the norm. The housing allowance is set by CCFA and approved as part of the budget by the annual conference during its annual meeting.
- On occasion, EPA may have housing available for non-clergy staff. This may include EPA owned homes and available church parsonages. Lay staff are welcome to inquire about available housing at any time. EPA will work with all lay staff to provide housing when available. It may be a church parsonage or conference owned housing.

When a lay staff person receives housing, rent, utilities, and maintenance costs will be negotiated with the church when it is a church parsonage or EPA when it is a conference house. A year-to-year lease agreement will be signed that will outline the terms of the agreement. When a staff person living in a church parsonage or conference housing leaves their staff position, the staff person will vacate the home according to the lease. When a lay staff person is to rent or live in a church parsonage or conference housing, it must be approved by the bishop, their supervisor and CCFA. If it is a church parsonage, it must also be approved by the district superintendent where the parsonage is located, the church trustees and the district board of church building and location.

Weather and Other Unexpected Closures

The decision to close the office, or to not open it, due to severe weather or other unexpected events will be made by the CFO/Treasurer and the Bishop. If a decision to close is made during the day, supervisors will advise their team members. If a decision is made not to open the office for a regular working day, the following process will take place,

By 6:00 a.m. the CFO/Treasurer and the Bishop will decide if and when the EPA office will be closed and informs Director of Human Resources, who then:

1. Sends text messages to leadership team and all managers who then contact their team members.
2. Contacts Hospitality Services Administrator who updates EPA voice mail.

Temporary Reassignment

Employees may be temporarily reassigned to other duties for the purposes of training and cross training of employees in general or for the purpose of performing duties for which they have been cross trained. Employees are expected to perform such reassigned duties as requested.

Employees may be temporarily reassigned to another location and other duties when required to support the work of EPA. Examples may include assignment to work at the Annual Conference session, district meetings or for other similar EPA business. Employees will be reimbursed for travel costs in such reassignment and for non-exempt employees travel time will be included as part of their workday and they will be expected to perform the reassigned duties as requested by their supervisor.

TIME-OFF AND LEAVES OF ABSENCE

EPA provides generous time away from work. All employees should plan time away from work in advance whenever possible and always check with their supervisor first. If an employee is employed before July 1st, the employee qualifies for the full amount of vacation, sick and personal days, or any other time off benefits, as applicable to the employee's position and type of employment. If an employee is employed after July 1st, the employee qualifies for half of the full amount of vacation, sick and personal days, or any other time off benefits, applicable to the employee's position and type of employment. Employees must complete the initial thirty (30) day probationary period before using the time off benefits.

Eligibility for Time-off

The terms of taking time-off and leaves of absence may vary depending on whether an employee is an exempt or non-exempt employee and whether an employee is a regular, temporary, full, or part-time employee. Employees with questions about these policies should speak to their supervisor or the Director of Human Resources.

Scheduling Time Off

Time-off must be scheduled and approved in advance by one's supervisor and in accordance with any department guidelines. Employees should make their requests for time-off as far in advance as possible. The longer the requested amount of time-off, the greater the needs for advance notice. Requests will be accommodated, if possible, but some requests might be denied to meet EPA and department needs.

Employees are expected to be at work unless the supervisor has granted the request for time off. In the event of an unscheduled absence, employees must notify their supervisor at least thirty (30) minutes before the scheduled start time. Non-exempt employees report their time off on time cards each week.

Holidays

EPA observes thirteen paid holidays. All regular full-time, regular part-time, and part-time employees are eligible for holiday pay. EPA observes the following holidays:

- New Year's Day
- Martin Luther King, Jr. Day
- President's Day

- Good Friday
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Indigenous Peoples' Day
- Thanksgiving
- Thanksgiving Friday
- Christmas Eve
- Christmas Day

Vacation

In recognition that employees are happier and more productive when they have opportunities for rest, relaxation, and personal pursuits, EPA has adopted a vacation policy permitting time off with pay for its regular full-time, regular part-time, and part-time employees. For purposes of this policy, a vacation day is counted as seven (7) hours.

Clergy and lay exempt and non-exempt full-time employees shall receive 4 weeks of vacation per year and 5 weeks after 10 years of employment. The vacation benefit shall be governed by the policy for clergy of the Annual Conference (currently 4 weeks per appointment year up to 10 years of service; 5 weeks of vacation after 10 years of service) and will apply to EPA clergy and full-time lay employees (exempt and non-exempt). Regular part-time employees shall receive half the vacation days allotted for regular full-time employees. Staff time spent in leadership responsibilities in EPA activities is not considered vacation leave.

Employees may carry over a maximum of 5 vacation days. EPA will not reimburse an employee for unused vacation. All time off should be scheduled thirty (30) days in advance with the supervisor whenever possible. If EPA determines that it is necessary for an employee to work during all or part of one's scheduled vacation, the employee will have the option of taking vacation at another time during the year, as mutually agreed upon, or vacation pay in lieu thereof.

For unscheduled or emergency absences, as much advance notice as possible must be given. In these circumstances, vacation benefits will be used first and once exhausted, time off (if available) will be without pay. Employees will not be permitted to carry a negative balance in one's vacation benefits bank. Use of vacation benefits for an unscheduled absence does not excuse that absence or prevent application of the EPA Attendance and Punctuality policy.

Sick Leave

EPA provides full-time and regular part-time employees with sick leave benefits. Temporary employees are not eligible for sick leave benefits. Sick leave benefits are provided as a benefit for the employee who is unable to work due to medical emergency or medical preventive care. Sick leave is for the illness/injury of an employee, employee medical/dental appointments, or for emergency dependent care for ill members of the employee's family. Employees are encouraged to use and accrue sick leave for the primary purpose of having steady income during unexpected illness or injury. EPA sick leave benefits are not an entitlement for the employee's expected use for paid time off.

Sick Leave benefits are calculated on the basis of a calendar year.

- **Regular Full-Time** employees receive six (6) days of sick leave.
- **Regular Part-Time** employees working less than a full schedule accrue sick leave benefits on a pro-rated basis according to their part time schedule. For example, part time employees who work 20 hours per week would earn 3 sick days per year.

Sick leave may be carried over from year to year with a maximum accrual of 30 days. Unused sick leave is not paid at the time of separation. Paid sick days are not counted toward overtime.

Employees who are unable to report to work due to illness or injury should notify their supervisor promptly before the scheduled start of each workday. At the discretion of the supervisor, eligibility for sick pay is subject to a physician's written report after three consecutive days of absence. Sick leave benefits are intended to provide income protection in the event of illness or injury and may not be used for other absences without the specific prior approval of your supervisor.

Sick leave shall be granted in one-half day or one day increments and will be charged against accumulated sick leave. Sick leave benefits shall be calculated based on the employee's base pay rate at the time of the absence. In the event the employee does not have accrued sick leave available, unpaid leave time may be provided in the discretion of the supervisor.

Unused sick leave benefits may be accumulated until the employee has accrued a total of 30 days. If the employee's benefits reach this maximum, further accrual of sick leave benefits will be suspended until the employee's balance has reduced below the limit. Employees will not be paid for unused sick leave benefits while they are employed or at the termination of employment.

Personal Day

Three personal days are provided for use in a calendar year. Personal days are to be used to handle personal matters. Some examples of personal day usage include:

- Non-covered religious holidays
- Tending to personal business such as meetings with lawyers, accountants, contractors, or school personnel.

When possible, personal days should be scheduled and approved in advance. Personal days are not additional vacation days and cannot be carried over to the following year. Unused personal day is not paid at the time of separation.

Bereavement Policy

Staff may take up to five days for bereavement of an immediate family member, mother, father, child, brother, sister, spouse, and grandparent.

Staff may take up to two days for an extended family member.

Workers Compensation and Absences for On-the-job Injuries

If injured on the job, an employee will be paid by EPA for the remainder of the workday in which the injury takes place. If hospitalized on the day of the injury, or if required to miss work to recover from the injury, the employee will receive no further wages but may receive benefits through worker's compensation.

EPA and its worker's compensation insurance carrier shall not be responsible for the payment of worker's compensation benefits for any injury which arises out of an employee's voluntary participation in any off-duty recreational, social, or athletic activity which is not part of the employee's work-related duties with EPA.

Return to Work Following Illness/Injury

Any employee who has been out as a result of job-related injury must provide a doctor's note stating that the employee is capable of returning to work. In general, employees are not required to have a doctor's note authorizing return to work from illness (except after three consecutive days of absence), but are expected to exercise good judgment from the perspective of both themselves and other employees.

Family and Medical Leave Policies

Eligible employees may take up to 12 workweeks of unpaid leave during a 12-month period under the federal Family and Medical Leave Act for those reasons permitted under the Act. The EPA will pay the employee's wages or salary during the first four weeks of leave taken under FMLA for the birth or adoption of a child, and employees may substitute any accrued vacation time or other paid leave for the remainder of such leave. All other employees taking leave under the FMLA must substitute any accrued vacation or other paid leave. Any paid leave substituted for FMLA leave will run concurrently with and does not extend the total duration of leave permitted under the FMLA. Employees should consult the Director of Human Resources for further details and for a copy of the EPA's FMLA policy.

Voting

If an employee is unable to vote before work or after work the EPA encourages employees to vote by absentee ballot. The EPA wants its employees to fulfill their civic responsibility and if necessary, EPA will permit time during the workday if voting absentee or before or after work is not possible.

Jury Duty

EPA recognizes its employees may be called to jury duty. Please report jury duty to your supervisor and provide your supervisor with a copy of the subpoena, jury certificate, or court order for jury duty. EPA will pay its employees while on jury duty and expect its employees to turn the jury duty check over to the EPA.

Military Service

Employees called for military duty should report such a call to their supervisor as soon as received. EPA will provide employment when active duty is completed, consistent with our obligations under applicable laws.

A military leave of absence will be granted to regular full-time employees to attend scheduled drills or training, or if called to active duty with the U.S. armed services.

Employees will receive unpaid leave for all training or active-duty assignment as permitted by law. However, employees may use any available paid vacation for the absence.

Subject to the terms, conditions, and limitations of the applicable plans for which the employee is otherwise eligible, health insurance benefits will be provided until the end of the month after the military leave begins. At that time employees will be responsible for the full cost of medical benefit if they wish to continue coverage. When the employee returns from military leave, benefits will again be provided according to the applicable plans.

Employees on two-week active-duty training assignments or inactive duty training drills are required to return to work on the first regularly scheduled workday after the end of training, allowing reasonable travel time. Employees on longer military leave must apply for reemployment in accordance with all applicable state and federal laws. Eligibility of reinstatement after completion of military duty is determined in accordance with applicable state and federal laws.

BENEFITS

EPA sponsors a comprehensive benefits program for eligible employees, and each benefit plan has specific eligibility conditions. The benefits are summarized in separate booklets called “summary plan descriptions,” which are provided to, or are otherwise available to, all eligible employees. The details of each benefit are contained in separate legal documents known as the “plan documents,” which take precedence over anything contradictory in the summaries.

Full-time employees may enjoy the benefits described herein and the individual plan summaries as soon as they meet all the eligibility requirements for each benefit. Part-time employees may be eligible for certain benefits if they meet the eligibility conditions.

Health Insurance Benefits

All regular staff in positions requiring 30 or more hours each week, and their eligible dependents, may participate in the EPA’s group health insurance program. If the employee chooses to participate, coverage will be effective on the employee’s first day of work. If the employee elects not to participate, he/she must complete a waiver of participation.

Terms and conditions of the health insurance program will be described in a separate document which will be available to all eligible employees. Enrolled staff will be informed of changes to the program.

Proposed changes in health insurance enrollment should be discussed with the Conference Benefits Team within 30 days of any event precipitating the change. Employees seeking to start or stop participating in the health insurance program are advised that such a change may not be affected immediately.

It is the employee’s responsibility to advise the Benefits Office when dependents are no longer eligible for coverage or when dependents are to be added to the plan.

Generally, health insurance coverage for employees ceases with the termination of employment. However, departing employees who have been participating in the EPA plan may be eligible to continue coverage at their own expense for up to 18 months after cessation of employment, when applicable written notice of this eligibility will be provided.

Pension

All regular lay staff, working an average of 1,040 or more hours per year, may participate in the EPA Lay Pension Program.

Lay employees must choose to participate. If the employee elects not to participate in the pension program, he/she must complete a waiver of participation. To receive employer contributions to pension, the employee must contribute 3% of compensation.

Terms and conditions of the pension program will be described in a separate document which will be available to all eligible employees. Enrolled staff will be informed of changes to the program.

Eligible clergy employees are enrolled automatically upon appointment into the clergy pension plan.

Life Insurance and Accidental Death and Dismemberment

The EPA Group Life Insurance covers all eligible employees. To be eligible, employees must be at least age 21 and must work at least 1,040 hours in a year. This insurance is payable in the event of the employee's death to the beneficiary on file. If there is no beneficiary, benefits will be payable to the estate.

The summary plan booklet provided by our insurance company includes details on employee life insurance and accidental death and dismemberment (ADD) coverage.

Retirement

EPA provides retirement programs to eligible clergy and lay employees through the Wespeth Benefits and Investments. These retirement programs are designed to provide retirement savings opportunities to employees who meet the eligibility requirements set forth in the plan documents.

All information on Wespeth benefits can be found at www.wespeth.org.

Recruitment and Employment Procedures

Vacancies

Vacancies can occur for a variety of reasons including a new funding of positions, employee turnover, or restructuring of positions.

Filling an Open Position

All open positions will be posted internally for one week before external posting. EPA is committed to excellence in our staff. When hiring for an open position, EPA will strive to find the best candidates available including current employees, clergy, laity, and outside recruits.

Job Posting

EPA wants all employees to be aware of open positions and have the opportunity to apply for those for which they are qualified. EPA believes in promoting from within when possible. EPA is committed to employing the best candidates for approved positions and engaging in effective recruitment and selection practices in compliance with all applicable employment laws. This policy applies to all EPA positions except for District Superintendents.

Managing the Appointment/Hiring Process

EPA uses a team approach to hire open positions.

1. The Bishop manages appointments of District Superintendent.
2. CCF&A manages recruiting and hiring of the CFO/Treasurer.
3. The Director of Human Resources manages the hiring of all other staff.

All EPA hires are to go through the EPA hiring process except for temporary hires up to three months. The hiring process includes initial screening by the hiring supervisor, a team interview for character and values

consistent with EPA and a final interview by the extended cabinet team. From time to time an employee may be promoted without going through the full hiring process. Such promotions must be approved by the extended cabinet team.

Governing Policies

1. EPA Employee Handbook will govern all EPA employee positions.
2. The Book of Discipline will govern all clergy persons. If there is any conflict between the Employee Handbook and The Book of Discipline, The Book of Discipline takes precedence.
3. Salaries and benefits will be approved in the EPA budget. In the case of an organization restructuring, the total of the salaries in the restructured positions may not exceed the total of the original positions' salaries as contained in the approved budget except by appeal to the CF&A.
4. For employees whose salaries are reimbursed by other agencies, those salaries are to be comparable to salaries for similar positions in EPA.
5. Offers of employment to persons who were previously employed by the EPA will be conditional until the Bishop and CFO/Treasurer confirms that the person is eligible for reemployment.
6. Any offer of employment and benefits involving housing, or a housing allowance shall comply with legislation approved by the Uniting Conference entitled "Housing Provided by Another Church/Charge". That legislation states in item 4 "Any pastor who does not wish to live in the housing provided by the church to which the pastor is appointed must obtain approval..." Item 5 of that legislation "If the approval is granted...the pastor will not be entitled to receive any allowance or other remuneration in lieu of the housing not required...." This means that a member of the clergy cannot receive a housing allowance if they are in a house owned by a spouse or other family member or in a parsonage furnished to a clergy spouse.

Procedures

1. When a vacancy exists, the hiring manager will review the existing position description in coordination with the Director of Human Resources to assure that it correctly describes the current requirements of the position. The position description is to be revised as mutually agreed by the Director of Human Resources and hiring manager.
2. The hiring manager may recommend to the Director of Human Resources the best means of identifying candidates, who will proceed to solicit applicants through such means as websites, advertising, etc.
3. The first announcement of an opening will be internal.
4. All positions are to be advertised with EPA congregations through appropriate advertising, such as the web page and weekly Digest.
5. The Director of Human Resources will review all applications and send up to 25 to the hiring manager. The hiring manager will review applications and resumes and screen appropriate candidates via a telephone interview.
6. The hiring manager will send the resumes to the Director of Human Resources who will set up the interviews with the staff management team.
7. The finalists will be interviewed by the extended cabinet team, along with the hiring manager and Director of Human Resources.
8. At the time of the interview, the candidate will be furnished a copy of the position description and the EPA Employee Handbook so that the applicant can be fully aware of the guidelines and policies governing the position.
9. Once a decision is made, the Director of Human Resources will check references and conduct a background check.

10. The hiring manager, with the assistance of the CFO/Treasurer and Director of Human Resources, will determine the salary to be offered, based upon the employee's experience and qualifications and appropriate placement within the position's salary range.
11. Offers of employment are to be in writing and are to state the salary, benefits, and housing (if appropriate) to be provided. Offers are to be conditional upon the new employee accepting the guidelines and policies in the Employee Handbook and signing the acknowledgement of receiving the Employee Handbook, the Arbitration Agreement, and the Ethics Policy Acknowledgement.
12. Offers of employment to persons who were previously employed by EPA will be conditional until the Bishop and CFO/Treasurer confirms that the person is eligible for reemployment.
13. Upon acceptance of an offer, the Director of Human Resources is to advise the CFO/Treasurer and the hiring manager of the hire and provide a copy of the offer letter and the expected first day of work.
14. The Director of Human Resources will collect the necessary tax information from the new employee on the first day of work and will establish the required payroll records including form I-9 (Employment Eligibility Verification) for the new employee.

Immigration Law Compliance

All offers of employment are contingent on verification of the candidate's right to work in the United States. On the first day of work, every new employee will be asked to provide original documents verifying their right to work and as required by federal law, to sign Federal Form I-9, Employment Eligibility Verification Form.

Employee Background Check or Criminal Record

Prior to employment all employees must undergo a successful criminal background check and verification of references. Director of Human Resources will obtain a release form from the potential employee for any background check activities. EPA also reserves the right to conduct a drug test.

New Employee Orientation

All new employees must attend an onboarding session with the Director of Human Resources within three (3) days of employment to receive a review of the Employee Handbook and to complete necessary employment forms. The immediate supervisor will onboard the new employee to the specific task of the job and the work of the department, including a review of the employee's job description and the supervisor's expectations with a 30-60-90 benchmark document.

Job Description

EPA has a job description for every employee which includes a list of essential functions, organizational responsibilities, and core competencies. The job description identifies job titles and who supervises the position. Job descriptions may be reviewed, updated, and changed periodically. Such updates and changes may include conversations with the employee holding the position. Every EPA employee will be given a copy of their job description at the start of employment and whenever the description is updated.

Employment Termination/Resignation/Re-Employment

All individuals are employed at the will of the EPA, unless elected, appointed or under contract for a stated period. Under the “at will” relationship, the EPA may terminate employment at any time, with or without cause, and with or without notice. Employees may similarly terminate the employment relationship. Circumstances which may warrant termination of employment include but are not limited to violation of employee conduct and work policies of the EPA, unsatisfactory performance, reduction in workforce, change in employment requirements, reorganization, or any other reason that the EPA determines is appropriate.

Resignation

Should an employee intend to resign, we request whenever possible an advance notice in writing according should be given to the immediate supervisor according to the following guidelines:

CFO/Treasurer - 90 days

Exempt Staff - 4 weeks

Non-Exempt Staff - 2 weeks

If an employee resigns voluntarily, the employee will be paid through the effective date of their resignation (vacation benefit leave requests may be denied during the notice period; refer to the vacation policy).

Vacation Pay

Upon termination from employment with EPA, qualifying employees will receive pay equivalent to 100% of accumulated, unused vacation benefit hours multiplied by the employee’s current base rate of pay. Vacation benefit leave requests during the employees’ notice period may be denied and any time off may be without pay and subject to corrective action. Vacation benefits may be requested and granted during the notice period with management’s approval and in consideration of EPA needs.

Sick Pay

Employees will not be paid for unused sick leave benefits upon termination of employment.

Personal Day Pay

Employees will not be paid for unused personal day benefits upon termination of employment.

Exit Interviews

The Director of Human Resources will schedule exit interviews for terminating employees. The exit interview will afford an opportunity to discuss such issues as employee benefits, conversion privileges, return of EPA property, materials, and information, as well as provide employees with an opportunity to discuss their job-related experiences.

Re-Employment

Consistent with EPA policy of obtaining and keeping the most qualified employees possible, EPA does not prohibit reemployment, provided that the employee separated from EPA on good terms. Employees who

separated without adequate notice or who were dismissed for performance or disciplinary reasons will not be considered for reemployment, except under unusual circumstances. Reemployment of persons will be conditional until the Bishop, CFO/Treasurer, and the Director of Human Resources confirm that the person is eligible for reemployment.

Severance Pay

The EPA may provide severance pay if an employee otherwise in good standing is terminated through no fault of their own, provided they have been employed for at least six months. The employee in good standing may receive up to one week base for each year of service, plus an additional two weeks of base pay. The employee must execute a General Release and comply with all the conditions specified in that document to receive severance.

The recommendation for severance pay must be approved by CCFA. Because clergy in The United Methodist Church are guaranteed appointment under the Discipline, elders will not be eligible for any such severance packages unless the clergy staff person must be laid off prior to a new appointment year.

APPENDIX

Family Medical Leave Act Policy

Harassment Complaint Form

Conflict of Interest Agreement

Background Check Agreement

EPA Employee Expense Reimbursement and Credit Card Policy

Professional Development and Reimbursement Proposal

Self-Assessment Template

Performance Appraisal Template

Acknowledgment and Receipt of EPA Employee Handbook Employment Arbitration Agreement

Code of Ethics Policy Acknowledgement

Family Medical Leave Policies

Family Medical Leave Act (FMLA)

An employee is covered under the Family and Medical Leave Act ("FMLA"), to a maximum of 12 weeks per year of unpaid leave for specific FMLA-qualifying reasons, or 26 weeks in the event the leave is taken to care for a covered service member, if the employee has worked for EPA for twelve (12) months in total, and have worked at least one thousand two hundred fifty (1,250) hours during the twelve (12) month period prior to commencement of the leave.

FMLA will be granted to eligible employees for the following reasons:

- The birth of a child or placement of a child with the employee for adoption or foster care;
- To bond with a child (leave must be taken within 1 year of the child's birth or placement);
- To care for the employee's spouse, domestic partner, child, or parent who has a qualifying serious health condition;
- For the employee's own qualifying serious health condition that makes the employee unable to perform the employee's job;
- For qualifying exigencies related to the foreign deployment of a military member who is the employee's spouse, child, or parent.

For purposes of these provisions, a "serious health condition" is a condition that involves inpatient care in a hospital, hospice or residential medical care facility or continuing treatment by a health care provider even when the family member is living at home.

For purposes of this FMLA policy, a "domestic partner" is defined as an adult who i) is in a committed and mutually exclusive relationship, jointly responsible for the other's welfare and financial obligations; ii) resides with the domestic partner in the same principal residence and intends to do so permanently; iii) is at least 18 years of age; and iv) is not a blood relative of the other domestic partner.

Employees may take up to 26 weeks of leave in a single 12-month period for military caregiver leave. However, this is a per-injury, per-service member entitlement. Unless the same family member is injured again, or another family member suffers an injury while on active duty, an employee may not take additional leave for this purpose.

Scheduling of FMLA leave

EPA calculates FMLA leave using a "rolling" twelve (12) month period. This means that the twelve (12) month period rolls backwards from the first day that FMLA time-off is taken. Accordingly, no more than three (3) months of leave can be taken in any twelve (12) month period. In other words, each time an employee takes FMLA leave, the remaining leave entitlement would be the balance of the 12 weeks which has not been used during the immediately preceding 12 months.

To take FMLA, you need to provide:

- A thirty (30) day written advance notice of the need to take leave when the need is foreseeable, and as much notice as is reasonable when the leave is not foreseeable; a request form is available

in office of the Business and Regional Services Manager. (Form WH-380-E for employee and Form WH380-F for family member)

- Medical certifications supporting the need for leave due to a serious health condition affecting you or an immediate family member;
- Periodic reports during leave of your status and intent to return to work; and/or
- A "fitness-for-duty" certification to return to work.

An employee may take leave due to a serious health condition of you or your spouse, child, or parent on an intermittent or reduced leave schedule. If leave is required on this basis, however, we may require you to transfer temporarily to an alternative position that better accommodates the recurring periods of absence or a part-time schedule.

You may choose to take the full twelve (12) weeks leave, intermittent leave or work a reduced work schedule, up to the maximum of 12 weeks. Leave of absence for an illness or injury covered by Workers' Compensation will be not counted against your twelve (12) week entitlement. Depending upon the circumstances, at its option, EPA may choose to transfer you to an area in which the work is better suited to recurring periods of leave.

Upon return from FMLA leave, most employees are entitled to reinstatement in the same or equivalent position with equivalent pay, benefits, and terms and conditions of employment. In some cases, reinstatement may be denied. Reinstatement may be denied if:

1. EPA eliminates the employee's position while the employee is on leave and would have eliminated the position even if the employee had not been on leave; or
2. The employee is a "key employee" (one of the highest paid 10% of all employees within a 75- mile radius of the employee's worksite) and reinstatement of the employee would cause substantial and grievous economic harm to EPA's operations; or
3. The employee fails to provide EPA with the required fitness-for- duty certification.

This policy statement on the Family and Medical Leave Act is intended to summarize the basic provisions of the FMLA. It is not intended to address all situations which may arise under FMLA. Employees should address specific questions to the Human Resources Coordinator.



UNITED METHODISTS

OF EASTERN PENNSYLVANIA

Harassment Complaint Form

Name:

Dept:

Today's Date:

Date of Incident:

(If more than one event, please report each event on a separate form.)

Where did the specific event occur?

Please explain the events that occurred.

Were there any witnesses to this specific event? (If yes, please provide their names)

How did you feel?

What would be your desired outcome as a result of an investigation?

Please return this form to EPA Director of Human Resources.

Signature: _____

Date: _____

Conflict of Interest Report and Policy

From a legal perspective, a potential conflict of interest arises within an organization when a key individual (either an employee or volunteer) or a relative of that individual (a) stands to gain a financial benefit by personally influencing the action taken by the organization or a transaction entered into by the organization; or (b) has another interest that impairs, or could be seen to impair, the independence or objectivity of the key individual in discharging their duties within the organization.

Within the Eastern Pennsylvania Annual Conference of The United Methodist Church (EPA), a conflict, potential conflict or the appearance of conflict of interest occurs when an individual, be it the bishop, clergy, staff or laity, or a member of their family, business associate, significant other, domestic partner, any additional employer or employee of a staff member, has a direct or indirect financial, personal, legal or equitable interest in the outcome of a particular decision that they can influence.

Recognizing, understanding, and managing conflicts of interest are fundamental to trust and good, fair, ethical, and just decision-making and sound financial management.

Whenever an instance of conflict of interest is self-identified or identified by a member of the Annual Conference, members of EPA should seek to be ethical, transparent and act with integrity, committed to our mission in all decision making. Employees and laity are expected to self-identify all conflicts of interest or potential conflicts of interest and, where feasible and practical, excuse themselves from decisions from which they will financially benefit. Questions of conflict of interest will be investigated by the appropriate parties as defined in the EPA Conflict-of-Interest Policy in accordance with the Book of Discipline Paragraph 702.2 which calls for the establishment of a Conflict-of-Interest Policy.

While EPA is committed to operating with integrity and transparency in making decisions, there are some inherent potential conflicts of interest within the way we operate. In The United Methodist Church, clergy and lay persons are financial beneficiaries of employment, benefit programs and grants offered by EPA and on which they have voting power. Likewise, clergy and lay members of the annual conference vote on issues that affect their congregation's budget and programming. EPA expects that our clergy and lay members of the annual conference will vote based on what is best for all members and all churches and in the best interest of meeting the overall mission, vision, and financial goals of EPA.

An example of such a potential conflict of interest is voting on lay and clergy benefit programs. The majority of clergy voting are directly affected by the benefit program they are voting on, and a lay person's congregational budget is affected by the type and the dollar amount of the benefit program. It is estimated that more than 90% of those voting at 41 annual conferences have such a conflict of interest when voting on clergy and lay employee benefit programs.

United Methodists are also generational with respect to membership and employment of both clergy and laity. EPA has benefited from generations of clergy and lay employees from the same family.

EPA recognizes there are inherent conflicts of interest in our system and expects that everyone (clergy, staff and laity) will recommend, vote, approve and act based on what is in the best interest of meeting the overall mission and financial goals of EPA.

CONFLICT OF INTEREST POLICY

INTRODUCTION

The Conflict-of-Interest Policy guides our decision making so that our decisions are made based on what is best for all members and all churches and in the best interest of meeting the overall vision and mission of EPA.

The EPA Conflict of Interest Policy is published in the EPA Employee Handbook and on the EPA Website under the “Administration” tab, “Finance and Administration” subtab. Further, a policy and procedures handbook is being prepared for all policies and procedures of EPA and it will be published there as well. All EPA policies and procedures are reviewed to insure there is no implicit bias in said policies and procedures before they are implemented.

All EPA employees (clergy, laity, and staff) and the bishop are required to review and sign the Conflict-of-Interest Policy annually. All EPA volunteers (lay members of agencies, boards, commissions, and committees) are required to review and indicate their understanding and agreement to abide by the Conflict of Interest prior to serving on any EPA agency.

EPA Vision:

We see transformational leaders cultivating passionate disciples of Jesus Christ in congregations with:

- Passionate Faith – Shape mature and fearless disciples that others want to emulate
- Boundless Hope – Inspire positive vision of current and future ministry
- Courageous Spirit – Connect with the community through risk-taking relevant mercy and justice ministries
- Transformational Leadership – Difference-makers who transform people’s lives, the congregation, and the community
- Congregational Vitality – Vibrant and life changing congregations
- Regenerative Resources – Extravagant generosity that inspires new giving and resources

EPA Purpose/Mission:

Transform the world by recruiting and developing transformational leaders who make passionate disciples of Jesus Christ and grow vital congregations.

DEFINITIONS

For the purpose of this policy, the term “employee” refers to all clergy, laity and staff who are employed by EPA as well as the bishop, even though the bishop is not a direct employee of EPA.

For the purpose of this policy, the term “volunteer” refers to all laity who voluntarily participate and serve as a voting member on any of the EPA boards, agencies, commissions or committees.

For the purpose of this policy, the term “agency(ies)” refers to any and all of the agencies, boards, commissions or committees that are part of EPA.

POLICY

It is the policy of the Eastern Pennsylvania Annual Conference of the United Methodist Church that it conducts all staff, volunteer and agency-related business and duties free from conflict of interest or a substantial appearance of a conflict of interest.

No employee, volunteer or agency member of the Eastern Pennsylvania Annual Conference of the United Methodist Church may participate in any decision or cause EPA to act upon any dealing in which they may

have either a conflict, a potential conflict or a substantial appearance of a conflict of interest and, in such circumstances, must use their judgment to excuse themselves from the decision-making process whenever appropriate.

The only exception is at annual conference sessions in which votes are necessary to approve budgets, benefits and other matters that affect participants and their congregations. In these cases, annual conference members are to participate in speaking and voting based on the interests of the mission, vision, and financial health of EPA rather than their own interest or benefit.

A conflict of interest or substantial appearance of a conflict of interest shall be deemed to exist when an individual or a member of their family, business associate, spouse, significant other, domestic partner, any additional employer, or employee of an employee has a direct or indirect financial, personal, legal or equitable interest in the outcome of a particular decision that they influence.

If any such conflict or appearance of a conflict of interest exists, the employee or volunteer, or another EPA employee or volunteer who believes there is a conflict, must fully disclose such conflict or appearance of a conflict of interest and use their judgment to excuse themselves from the decision-making process whenever appropriate.

Employees must report a conflict of interest to the Director of Human Resources who is then obliged to report the conflict of interest to the Bishop and the CFO. The Director of Human Resources and the CFO will coordinate any required investigation and resolution. If the CFO has the conflict, they must report the conflict to the Director of Human Resources, Bishop and CFA Chair and the CFA Chair will coordinate any required investigation and resolution with the Director of Human Resources. If the Director of Human Resources has the conflict, they must report to the Bishop, CFA Chair and CFA's HR Committee Chair who will coordinate any required investigation and resolution. If the bishop has a conflict of interest, they must report the conflict to the CFA Chair and Episcopacy Chair who will coordinate any required investigation and resolution.

Lay volunteers must report a conflict of interest to the chair of the agency on which they serve, who is then obliged to report the conflict of interest to the Director of Connectional Ministries, the CFO and the Bishop, and the Director of Connectional Ministries and the CFO will coordinate the investigation and resolution. All investigations for employees, staff and volunteers will be coordinated and conducted in such a way as to ensure that said investigations are free of racial and gender bias.

All employees of EPA are required to review and sign the Conflict-of-Interest Policy annually.

By signing, I indicate that I have read and understand the EPA Conflict of Interest policy and will abide by this policy during my employment with EPA.

Name (print) _____

Employee Signature _____

Date _____

Background Check Authorization Form

United Methodists of Eastern Pennsylvania Will Obtain a Background Check

You acknowledge and understand that in connection with your application for employment with United Methodists of Eastern Pennsylvania (including any independent contract for services) or when deciding whether to modify or continue your ongoing employment, if hired, we may obtain a “consumer report” and/or an “investigative consumer report” on you from Trak-1, a consumer reporting agency, or from any third party, in strict compliance with both state and federal law.

Consumer Report Defined

A consumer report is any communication of information by a consumer reporting agency bearing on your credit worthiness, credit standing, credit capacity, character, general reputation, personal characteristics, or mode of living which is used or expected to be used for purposes of serving as a factor in establishing your current and/or continuing eligibility for employment purposes. A common term for a consumer report is a “background check report.”

Investigative Consumer Report Defined

An investigative consumer report is obtained through personal interviews with individuals who may have knowledge of your character, general reputation, personal characteristics, or mode of living. An investigative consumer report might include, for example, calls to the personal references you provide or conversations with former supervisors or colleagues where you worked.

Reports May Contain

The consumer reports or investigative consumer reports may contain public record information which may be requested or made on you including, but not limited to: consumer credit, criminal records, civil cases in which you have been involved, driving history records, current motor vehicle insurance coverage information, education records, previous employment history, workers compensation claims history, social security traces, military records, professional licensure records, eviction records, drug testing, government records, and others.

You further understand that these reports may include experience information along with reasons for termination of past employment. You also acknowledge and understand that information from various federal, state, local and other agencies which contain information about your past activities will be requested, and that a consumer report containing injury and illness, drug testing, or other medical records and medical information may be obtained only after a tentative offer of employment has been made.

Your Rights as a Consumer

You are hereby notified that you have the right to make a timely request for a copy of the scope and nature of the above investigative background report and/or a complete copy of your consumer report contained in Trak-1's files on you at the time of your request by providing proper identification.

You are further notified that, prior to being denied employment based in whole or in part on information obtained in the consumer report, you will be provided a copy of the report, the name, address and telephone number of the consumer reporting agency and a description in writing of your rights under the Fair Credit Reporting Act

AUTHORIZATION TO OBTAIN CONSUMER REPORT

The following is information required in order for United Methodists of Eastern Pennsylvania to obtain a complete consumer report:

Full Legal Name: _____
(First Name, Full Middle Name, Last Name)

Street Address: _____

City: _____ State: _____ Zip: _____

Email Address: _____ Gender*: M / F Race*: _____

Social Security Number: _____ Date of Birth: _____

Driver's License Number: _____

Issuing State: _____ Expiration Date: _____

Other or Former Names (AKA, Maiden Names, Married Names, Surnames, etc.): _____

Your signature below indicates the following:

1. You authorize, without reservation, Trak-1 or any third party to obtain and/or furnish to United Methodists of Eastern Pennsylvania any records or information referenced in the provided disclosure statement for employment related purposes;
2. You authorize ongoing procurement of any records or information, reports and records at any time during your employment to the extent allowed by law;
3. You authorize the use of a fax or photocopy of this authorization as having the same authority as the original;
4. You authorize and request, without reservation, any present or former employer, school, police department, financial institution, division of motor vehicles, consumer reporting agency, or other entity, person or agency having knowledge about you to furnish EMPLOYER NAME and/or Trak-1 with any and all background information in their possession regarding you for these stated employment purposes;
5. You understand and agree that in connection with your employment your consumer report information, whether investigative or otherwise, may be shared with and/or reviewed by all applicable parties involved in the hiring process;
6. You have read and fully understand the foregoing disclosure and this authorization.
7. You certify that all the information you have provided on this form is true, complete, correct and accurate; and
8. You certify you have received, reviewed and understand the "Summary of Your Rights under the Fair Credit Reporting Act (15 U.S.C. §1681 et seq.)" which is published by the Federal Trade Commission to help you know your rights.

Signature: _____ Date: _____



UNITED METHODISTS

OF EASTERN PENNSYLVANIA

Disbursements, Expense Reimbursement & Credit Card Policies & Procedures Updated 2024

The below are excerpts from EPA's overall Fiscal & Administrative Policies and Procedures:

A) Disbursements

Policies:

- Disbursements shall not be made for any purpose prohibited by *The Book of Discipline* (e.g. the purchase or consumption of alcohol).
- Disbursements shall be supported by an invoice or reimbursement request with appropriate supporting documents and approvals.
- Disbursements for reimbursement shall be requested within 30 days of the date of the expense.
- The Accounting Team shall coordinate the process of accruing for disbursements for goods and services that have been received but not yet processed as of 12/31.
- Checks are signed through the Shelby system.
- Requests for recurring monthly payments (e.g. stipends) shall be authorized for a period of up to 12 months. Payments must be to the same person and a detailed schedule specifying the payment dates and amounts must be included.
- Disbursements related to salary support for clergy shall be made only to the church, not to the individual.
- Recurring invoices – limited to phone, utilities, water, sewer and rent:
 - a. Do not require signature
 - i. A/P maintains list of eligible properties where payment is EPA/Mission Partners' responsibility.
 - 1. A/P shall partner with Property Team to create/maintain a worksheet of all Conference owned properties and the related recurring payments expected on each.
 - 2. Property Manager will submit a monthly report of all properties that EPA/Mission partners are responsible for and highlight any changes to the report (i.e. properties newly added, sold, merged, left denomination).
 - ii. A/P maintains list of individuals eligible for company paid phone.

1. Director of Human Resources responsible to communicate individuals that are no longer eligible.
 - b. If charges are significantly higher than “normal” in any given month, AP will escalate to Department Manager for approval (via email) with a copy to CFO.
- Legal Invoices
 - a. Only the Bishop, CFO, Property Manager (for property related matters only) and Director of Human Resources (for labor related matters only) are allowed to authorize legal assistance.
 - i. Pre-approval (via email) is required for all other staff members engaging in legal assistance; such approval to be attached as support when the invoice is submitted for payment.
 - ii. CCFA’s Audit Committee and/or Board of Trustees can hire legal counsel when warranted; the CFO must be made aware of the expenditure.
 - b. Legal invoices are to be mailed to and approved by the individual who authorized the work along with his/her supervisor.
 - i. Multiple matters on one invoice should be approved by each requesting individual; the requesting individual should also request that the legal advisor separate matters on different invoices if possible.
 - c. Approved invoices, along with pre-approval if required, are to be submitted to A/P via one of the approved methods noted in # 4 below.
 - i. Any legal invoice more than \$10,000 requires CFO approval.
 - All other invoices require approval based on the following thresholds:
 - a. Non-Management Staff – up to \$500
 - b. Managers – up to \$1,000
 - c. Directors / District Superintendents – up to \$2,500
 - d. CFO - \$2,500+
 - e. Thresholds are based on the total project cost; not the individual invoice amount. For example, if a project costs \$2,500 but is to be invoiced over five periods, each \$500 invoice must be approved by a Director/DS.
 - Invoice submission:
 - a. The individual who authorized/contracted for the service must review and approve the invoice, up to the limits disclosed above; obtain additional approvals as required.
 - i. If services are secured by one department on behalf of another department, the department manager whose budget is impacted must pre-approve the work via email.
 - b. “Approvals” can be in one of three forms:
 - i. Signature(s) on the actual invoice.
 - ii. Signature(s) on a check request form.
 - iii. An email from the individual(s) approving the invoice.
 - Invoice Processing:
 - a. Only “Current Amount Due” will be paid.
 - i. Past due balances require the original invoice(s) with the necessary approvals.
 - ii. Statements will not be paid.

- b. A/P will attach/file supporting approvals (check request form / email) after processing for payment, along with the pre-approval document as required.

Procedures:

- The Accounting Team acts as the “gatekeeper” to ensure proper approvals are obtained prior to payments.
- The Accounting Team prepares checks/ACH/wires and processes them after approval.
- For ACH and wires one approval other than the originator of the transaction is required.
- Check signers review daily check registers prior to processing of payments.
- Checks are signed using the Shelby system after review of payments by the Controller or CFO.
 - The Shelby system keeps track of what the next check number should be and if it doesn’t match, the Accounts Payable Associate investigates and reports findings to the Controller and CFO.

B) Employee Expense Reimbursements

Policies:

- The Purpose of this policy is to ensure that the expenses of EPA staff are controlled by establishing certain standards. Employees must control work-related expenses by making sound judgment with respect to use of EPA’s funds.
- EPA’s travel and expense reimbursement policy is included in the employee handbook, signed annually by each employee. As such, they acknowledge that they have read and understood the policy and acknowledge that by submitting expenses for reimbursement and/or credit card payment that all expenses are for reasonable, customary, and documented business purposes.

Reimbursable Employee Expenses (Cash and Credit Card Charges):

- It is the policy of EPA to reimburse staff for reasonable, necessary and documented expenses incurred during approved work-related travel.
- Employees seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid impropriety or the appearance of impropriety. Business travel policies are aligned with EPA’s reimbursement rules. All business-related travel paid with EPA funds must comply with EPA’s expenditure policies.
- All travel by Managers, Administrative and Specialist staff must be approved by the employee’s supervisor. Every attempt should be made to have travel approved at least 10 days in advance.
- All travel outside the boundaries of EPA requires pre-approval from the Bishop or CFO; expense reimbursements require the same approval.
 - a. When traveling by air, employees are expected to take the lowest airfare and expected to fly in economy class. A department head is allowed to approve exceptions if the lowest cost option adds significant delays to the travel time and impedes on the travel agenda.
 - i. The airline confirmation email showing all flight details is required to be submitted as part of the supporting documentation.
 - b. Travel insurance should not be purchased.
 - c. If applicable, rental cars should be the most economical class. Consider ride-share apps (such as Uber, Lyft) if it’s more economical.

- Mileage shall be reimbursed for business travel at the prevailing IRS mileage rate but net of the employee's normal commuting miles to and from their home.
 - a. Gas usage is not separately reimbursed as this is included in the IRS mileage rate.
 - b. On occasion, some staff will not be assigned an office at the Mission Resource Center (MRC) or other EPA location. In such cases, the CFO will assign your home or other location as your designated office.
 - c. Unless traveling from an approved, designated "home office" travel to/from the MRC is not reimbursable.
 - d. If you are traveling from a home office that is not in the district/region/conference you are serving, you are to identify a location in the middle of your district (superintendents) or region (regional staff) or conference (conferencewide staff) to submit travel reimbursement. You will take the shorter mileage either from your home or from the designated location to calculate your reimbursement.
 - e. Working from home during COVID or other state of emergency is not considered a "home office"
- Meeting Meal receipts require the reason/purpose for the meal and all attendee names to be clearly printed on the receipt and/or supporting documentation attached to the reimbursement request.
 - a. A meeting meal is defined as a meeting where business is conducted while eating. Simply going for a meal with a co-worker is not a meeting meal.
 - b. Expenses without the reason/purpose and list of attendees will not be reimbursed and, in the case of a EPA credit card transaction, the employee will be required to reimburse EPA.
 - c. The highest-ranking person in the staff group of attendees must pay for the meal.
 - d. The detailed restaurant receipt (not just the payment receipt) is required to be submitted as part of the supporting documentation.
- Hotel reimbursement requires the complete folio to be submitted as part of the supporting documentation.
- Travel Meals will be reimbursable as follows (increasing 3% per year after 2024):
 - a. Breakfast – only if travel requires overnight stay (excluding the day of travel); up to \$21 per day
 - b. Lunch – up to \$31 per day
 - c. Dinner – up to \$52 per day
 - d. Detail restaurant receipts (not just the payment receipt) are required for support.
 - e. Travel meals are reimbursable if the individual is conducting official conference business while traveling. Commuting to/from work is not considered traveling.
- Other approved, reimbursable business meals include:
 - a. Periodic department celebrations which are to be treated the same as Meeting Meals; require pre-approval from the department head.
 - b. After hour meals (dinner if working after 6pm) and/or weekends (lunch/dinner only) while working at the MRC.
- Team Building activities (e.g. bowling, escape rooms or other group activities) must be pre-approved by a department head; amounts over \$2,500 in single payment or several payments in excess of, also require the CFO's pre-approval.
 - a. Pre-approval should be requested via email with the email(s) used as part of the supporting documents when the expense is submitted for reimbursement.
- Membership fees in professional organizations shall be reimbursed if such organizations relate to the work being performed by the employee; must be pre-approved by the department head. Reimbursements are subject to annual evaluation by the CFO.
- Approved office expenses should be purchased using EPA's Staples and Amazon accounts. Under no circumstances should these accounts be used for personal purchases.

Non-reimbursable Travel Expenses:

In addition to any specifics noted above, the following items that may be associated with business travel will not be reimbursed by EPA:

- Alcohol
- Airline club memberships.
- Airline upgrades including priority/upgraded seating
- Business class for domestic flights or first class for all flights.
- Child-care, babysitting, house-sitting, or pet-sitting/kennel charges.
- Commuting between home and the primary work location.
- Costs incurred by traveler's failure to cancel travel or hotel reservations in a timely fashion.
- Laundry and dry cleaning.
- Passports, vaccinations and visas when not required as a specific and necessary condition of the travel assignment.
- Personal entertainment expenses, including in-flight movies, headsets, health club facilities, hotel pay-per-view movies, in-theater movies, social activities, resort fees, and related incidental costs.
- Travel accident insurance premiums or purchase of additional travel insurance.
- Other expenses not directly related to the business travel.

C) Volunteer Expense Reimbursements

Policies:

- Volunteers that travel on business shall be reimbursed for necessary, reasonable and documented expenses if approved by the volunteer's Committee Chair or other authorized party. EPA's "Employee Expense Reimbursements" policy applies to all volunteers too.
- Travel by volunteers shall be approved no less than ten (10) working days prior to the date travel is to begin or as soon as the need becomes known if within that period.
- Mileage shall be reimbursed for business travel at the prevailing IRS mileage rate for service to charitable organizations, which is only intended to help defray expenses.

Procedures:

- Travel expenses are documented on a Check Request Form that is signed by the volunteer and approved by the Chair of the Committee or other authorized party.
- Receipts and documentation of mileage must be attached to the Check Request form. Receipts are required for all expenditures, regardless of amount.
- Reimbursement requests are forwarded to the Accounts Payable Associate for payment.

D) Company Credit Card:

- In partnership with the department heads, the CFO and Director of HR shall determine which employees have a business need for a credit card.
- Credit cards shall be used only for business-related purposes including travel, office equipment or program related expenses that fall within the confines of the cardholder's job duties.
 - a. Use of business cards for personal purchases is prohibited.

b. If a personal purchase is inadvertently made, the employee is to reimburse EPA via check within 30 days.

c. Repeat offenders are subject to the card being cancelled.

- Credit card holders shall retain receipts for all purchases.
- Inaccurate or fraudulent charges are to be disputed with AMEX by the cardholder (using the phone # on the card); their supervisor and Accounting should be notified of the pending credit.

Credit Card Approvals:

- Individual statements are emailed to each cardholder for review, with a copy to the staff member's direct supervisor.
- Expenses and related support must meet the criteria outlined in this policy with the necessary pre-approvals and authorizations, receipts/supporting documents; otherwise, the expense is not considered a business expense and must be reimbursed to EPA via check within 30 days.
- Cardholders are required to:
 - Review the charges to confirm legitimacy/accuracy; dispute inappropriate charges directly with credit card statement as noted above.
 - Provide a brief explanation of the charge
 - Advise which budget account the charge should be posted to
 - Obtain supervisor's approval
 - Supervisor is responsible for ensuring all receipts are attached, business purposes are stated/acceptable and expense is legitimate
 - After obtaining supervisor's approval, sign and return the statement within ten business days of receipt

Cash Reimbursements:

- Individuals must complete the "Expense Reimbursement Form" within 45 days of the incurred expenses
- When applicable, individuals must fully complete the "Monthly Travel Log"
- As noted in the policy, mileage is reimbursed net of the employee's normal commuting miles to/from their home. Example, if an employee lives 10 miles from the MRC; their normal commuting miles are 20 miles round trip. If they travel 30 miles for business, the net reimbursed miles is 10. If they travel 15 miles for business, the net reimbursed miles is zero as it's less than their normal commute. If travel is on a non-workday (e.g. weekend or holiday), normal commuting miles do not get deducted.
- Expenses and related support must meet the criteria outlined in this policy with the necessary receipts/supporting documents; otherwise, the expense will not be reimbursed as it is not considered a business expense
- Cell phone costs for Cabinet-level positions or other positions with a business need for such equipment shall be direct billed to the Conference. In certain cases, employees may pay costs directly and request reimbursement.
- The individual must sign the "Expense Reimbursement Form", and is responsible for having their supervisor review and approve the form before submitting to Accounts Payable for payment.
- Reimbursement requests are forwarded to the Accounts Payable Associate for payment.

Procedures:

- Receipts and documentation of mileage must be attached to the reimbursement request. Receipts are required for all expenditures, regardless of amount.

Name of Employee:

Signature:

Date:



UNITED METHODISTS
OF EASTERN PENNSYLVANIA

EPA employees through their work help fulfill our mission: recruit and develop transformational leaders to make disciples and grow vital congregations to transform the world. EPA values as an organization and in its employees:

- *innovation and risk taking*
- *excellence in its ministry and service*
- *compassionate and just service*
- *diversity*
- *collaboration*

United Methodists of Eastern Pennsylvania view all employees as leaders who are critical to the mission, capable of growth and valued.

Professional Development and Reimbursement Proposal

Date:

Name:

Position Title:

Supervisor:

Professional Development Name/Type:

Date(s) of the Program:

Cost of the Program:

Description of the Program:

How does this program enhance the work you do and is in line with EPA's mission?

Approved by: _____

Date: _____

Quarterly Self-Assessment

EPA employees through their work help fulfill our mission: recruit and develop transformational leaders to make disciples and grow vital congregations to transform the world. EPA values as an organization and in its employees

- *innovation and risk taking*
- *excellence in its ministry and service*
- *compassionate and just service*
- *diversity*
- *collaboration*

United Methodists of Eastern Pennsylvania view all employees as leaders who are critical to the mission, capable of growth and valued.

Name of Employee	
Title	
Classification	
Band Description	
Supervisor, Name & Title	
Date of Review	Click or tap to enter a date
Period of Review	8/1/2022 To 8/1/2022

This self-assessment tool is to help hold yourself accountable to the mission and your work by focusing on how you work in a way that impacts others and the mission.

Capability: Do you feel a sense of urgency and obligation to be as skilled as you can in order to be more helpful to those we serve, your team and the EPA Staff?

3. I have all of the necessary capabilities to succeed in this essential function.
2. With training I could become a 3 in this essential function.
1. I cannot reasonably become a 3 in this essential function.

Impact: Do you hold yourself accountable for doing your work in ways that it makes it easier for others to succeed in their work and for the mission to succeed?

- A. I have a positive impact on others.
- B. I have a mixed impact on others.
- C. I have a negative impact on others.

Effort: Do you put in the effort that is required to achieve the results for which you are responsible?

- + On a scale of 1-10, I give a 9 or 10 when I do this essential function.
- My effort falls 8 or below.

Essential Function	Cap-ability	Impact	Effort	Action Plan	Supervisor's Feedback
	Choose an item.	Choose an item.	Choose an item.	Click here to enter text.	Click here to enter text.
	Choose an item.	Choose an item.	Choose an item.	Click here to enter text.	Click here to enter text.
	Choose an item.	Choose an item.	Choose an item.	Click here to enter text.	Click here to enter text.
	Choose an item.	Choose an item.	Choose an item.	Click here to enter text.	Click here to enter text.
	Choose an item.	Choose an item.	Choose an item.	Click here to enter text.	Click here to enter text.
	Choose an item.	Choose an item.	Choose an item.	Click here to enter text.	Click here to enter text.
	Choose an item.	Choose an item.	Choose an item.	Click here to enter text.	Click here to enter text.

Employee Name	Click here to enter text.	Signature	Click here to enter text.
Supervisor Name	Click here to enter text.	Signature	Click here to enter text.

Mid-Year Performance Appraisal Template

EPA employees through their work help fulfill our mission: recruit and develop transformational leaders to make disciples and grow vital congregations to transform the world. EPA values as an organization and in its employees

- *innovation and risk taking*
- *excellence in its ministry and service*
- *compassionate and just service*
- *diversity*
- *collaboration*

United Methodists of Eastern Pennsylvania view all employees as leaders who are critical to the mission, capable of growth and valued.

Name of Employee	
Title	
Classification	
Band Description	
Supervisor, Name & Title	
Date of Review	
Period of Review	

Position Summary

Essential Functions	(SA) Strongly Agree (A) Agree (NY) Not Yet	Comments
Organization Responsibilities	(SA) Strongly Agree (A) Agree (NY) Not Yet	Comments

Core Competencies	(SA) Strongly Agree (A) Agree (NY) Not Yet	Comments
Goals	(SA) Strongly Agree (A) Agree (NY) Not Yet	Comments
(Team Goal)		
(Missional Goal)		
(Professional Goal)		

Overall Competency Levels

Developing: A person performing at Developing Level functions at or above entry level requirements and performs work tasks with competence, understanding and knowledge. This employee can grow further to achieve greater results.

Advancing: A person performing at Advancing Level performs virtually all work with little or no supervision. They identify what needs to be done, is fully knowledgeable about their job function and may be involved in coaching/mentoring and teaching others.

Mastering: A person performing at Mastering Level is a functional expert in the position. This employee can perform the most complex and technically demanding work, displays thoughtful leadership, is involved in improving programs and work processes and makes decisions that have greater scope and impact.

Developing (Progressing, Proficient, Accomplished)

SA – Strongly Agree **A** – Agree **NY** – Not Yet

- _____ Understands their role and responsibilities
- _____ Arrives and starts work on time
- _____ Knows the mission, values, and goals of EPA and through their work is helping to achieve all of them
- _____ Understands the culture of the EPA staff and vital mission partners and is a good fit
- _____ Develops healthy relationships with one's team, partners and vendors and EPA's staff, leaders, pastors, and congregational leaders
- _____ Listens to learn and consistently learns to improve
- _____ Practices the concepts from the book, "Switch" which teaches to be on the same page with the emotional (elephant) and rational (rider) side to create a well-prepared path to bring on positive cultural changes
- _____ Practices leader/leader concepts from "Turn the Ship Around" including I intend statements, developing one's own competency and creating clarity
- _____ Is highly engaged in their work and during slow periods seeks out work to do or looks to see how to assist others
- _____ Initiates ideas and is a self-starter
- _____ Plans and organizes work to create better efficiencies and effectiveness for accomplishing the Work
- _____ Demonstrates transparency and authenticity
- _____ Puts in the necessary effort and energy to achieve excellent results
- _____ Has excellent skills in written and oral communication, organization, planning and implementation
- _____ Meets all expectations, deadlines and key accountabilities of their position description

The individual has attained the: _____ **Progressing** _____ **Proficient** _____ **Accomplished Level**

Advancing (Progressing, Proficient, Accomplished)

SA – Strongly Agree **A** – Agree **NY** – Not Yet

- _____ Practices all the functions of the Developing Level
- _____ Achieves desired results in all aspects of their essential functions found in the job description
- _____ Performs well and needs little supervision
- _____ Grows their leadership
- _____ Continually learns how to improve their results and innovates successful ideas and strategies to improve team work, results and the mission
- _____ Is efficient and effective in leading and using processes and practices of EPA which includes using the data base system, planning processes, project management and any other processes and practices of EPA.
- _____ Has effectively demonstrated all the core competencies of the position found in the job description
- _____ Does more than what is described in their position description
- _____ Adjusts easily to change and is encouraging and supportive of others during change
- _____ Maintains a non-anxious presence during challenging situations
- _____ Anticipates and resolves issues before they interrupt the program and/or mission
- _____ Consistently exceeds expectations

The individual has attained the: _____ **Progressing** _____ **Proficient** _____ **Accomplished Level**

Mastering (Progressing, Proficient, Accomplished)

SA – Strongly Agree **A** – Agree **NY** – Not Yet

- _____ Practices all the functions of the Developing and Advancing Levels
- _____ Successfully self-supervises so that deeper thought and work emerges
- _____ Learns and grows their ability, and helps others grow
- _____ Is clear thinking, clarifies issues, and helps others understand.
- _____ Supports others, helps them build on their strengths, and appreciates others.
- _____ Has vision, innovates and initiates ideas that improves and furthers the work, team and mission
- _____ Is respected as a leader in the organization, not because of their position, but because of how they serve and lead, others want to be on this person's team.
- _____ Is an expert in their field and others outside EPA staff and even the organization seek their advice, consultation and ideas

The individual has attained the: _____ **Progressing** _____ **Proficient** _____ **Accomplished Level**

**** Overall Competency Level ****

___Developing	(___Progressing,___Proficient,___Accomplished)
___Advancing	(___Progressing,___Proficient,___Accomplished)
___Mastering	(___Progressing,___Proficient,___Accomplished)

Comments by the Supervisor

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Employee's Performance Factors	Agree mark with "x"	Not Yet mark with "x"
My essential functions accurately reflect my work		
I feel I have the autonomy to do my work		
I feel I have been given opportunity to master my work		
I feel my work is aligned and important to the mission of EPA		
I regularly use the I intend statements		
I have clarity about my work and role		
I have about the right amount of work most of the time		
I receive the necessary feedback and support to excel in my position		

Comments by the Employee, especially for the items checked "Not Yet"

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Employee's Signature	
Date	

Supervisor's Signature	
Date	

Acknowledgment and Receipt of EPA Employee Handbook

This Employee Handbook does not constitute an express or implied employment contract. Although this handbook describes the general guidelines of EPA rules and policies, it is not binding on EPA, and can be changed at any time without notice. I have received my copy of the EPA Employee Handbook.

The Employee Handbook describes important information about Eastern Pennsylvania (EPA) and I understand that I should consult the Human Resources Coordinator regarding any questions not answered in the handbook. I have entered into my employment relationship with EPA voluntarily and acknowledge that there is no specified length of employment. **Accordingly, either I or EPA can terminate the relationship at will, with or without cause, at any time.**

I understand and agree that other than the Bishop, Treasurer/Director of Administrative Service or designated representative of the company, no manager, supervisor, or representative of EPA has any authority to enter into any agreement for employment other than at-will; only the Bishop or Treasurer/Director of Administrative Service has the authority to make any such agreement and then only in writing signed by the Bishop or Treasurer/Director of Administrative Service.

This handbook and the guidelines, policies and procedures contained herein supersede any and all prior practices, oral or written representations, or statements regarding the terms and conditions of your employment with EPA. By distributing this handbook, EPA expressly revokes any and all previous guidelines, guidelines, and procedures which are inconsistent with those contained herein.

I understand that, except for employment at-will status, any and all guidelines, policies and practices may be changed at any time by EPA, and EPA reserves the right to change my hours, wages and working conditions at any time.

EPA, by action of the Bishop or CFO/Treasurer, reserves the right to interpret, apply, alter, amend, modify, or discontinue any or all of the benefits provided employees at its sole and absolute discretion. EPA will attempt to inform employees as promptly as possible of any changes in benefits; however, this is not always practical or possible and, where this is the case, EPA reserves its right, in its sole and absolute discretion, to make changes in employee benefits without prior notice.

I understand and agree that nothing in the Employee Handbook creates, or is intended to create, a contract as to any provision in the handbook, or a promise or representation of continued employment, and that my employment with EPA is employment at-will, which may be terminated at the will of either EPA or myself. I acknowledge that this handbook is neither a contract of employment nor a legal document. I understand and agree that employment and compensation may be terminated with or without cause and with or without notice at any time by EPA or myself.

I have received the handbook, and I understand that it is my responsibility to read and comply with the policies and guidelines contained in this handbook and any revisions made to it.

Name (print) _____

Employee Signature _____ Date _____

Employment Arbitration Agreement

As a condition of my employment, I agree to waive my right to a jury trial in any action or proceeding related to my employment with the Eastern Pennsylvania Annual Conference.

I understand that I am waiving my right to a jury trial voluntarily and knowingly, and free from duress or coercion. I understand that I have a right to consult with a person of my choosing, including an attorney, before signing this document.

I agree that all disputes relating to my employment with the Eastern Pennsylvania Annual Conference or termination thereof, if not handled exclusively under The Book or Discipline, shall be decided by an arbitration administered by the American Arbitration Association under its national rules for the resolution of employment disputes and judgment upon the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof.

Therefore, if not handled exclusively under The Book of Discipline, arbitration is required for all disputes including but not limited to all legal claims under any federal, state, or local statute regulation or common law doctrine regarding or relating to employment discrimination, termination, terms and conditions of employment or termination of employment.

I understand that the provisions of this handbook are guidelines, except for the provisions of the Employment Arbitration Agreement, and do not establish a contract or any particular terms of employment.

This does not affect Eastern Pennsylvania Annual Conference's right to terminate an employee at any time, or for any reason that does not violate a clearly established public policy of this state.

Name (print) _____

Employee Signature _____ Date _____

Name (print) _____

Supervisor Signature _____ Date _____

Code of Ethics Policy Acknowledgment

EPA is firmly committed to complying with its legal and ethical obligations under all state and federal laws. As a result, we expect all employees, at every level within EPA to comply strictly with all legal and ethical obligations.

Our philosophy can be implemented only if our employees recognize their responsibility to treat everyone in an honest and fair manner. Accordingly, an employee's failure to fulfill their responsibilities under this policy may result in disciplinary action, up to and including immediate termination.

EPA holds all employees responsible for carrying out and monitoring compliance with this commitment. If any employee becomes aware of any violation of a legal or ethical obligation, or any improper treatment of a fellow employee or customer, the employee must report the matter to a member of leadership team as quickly as is reasonably possible so that it can be investigated right away.

This policy is intended to cover, but it is not limited to concerns such as financial fraud, unlawful or improper financial reporting or proper use of technology. We will take all necessary steps to investigate any potential violations of our policy and will take appropriate action to correct any violations or perceptions that are found to exist. By making it the responsibility of all employees to ensure compliance with our Code of Ethics, we can continue to maintain our outstanding reputation in the community. All funds and property received and administered by the EPA are entrusted to them by God through the faithful financial support of church members.

Therefore, the highest degree of Christian stewardship and fiduciary responsibility is expected of all directors, non-director committee members and staff in matters relating to the receiving, reporting, and use of such funds and property.

Ethical, moral, and legal conduct are critical components of Christian stewardship. Fiduciary responsibility also includes loyalty to the objectives and purposes for which funds have been allocated, prudence and care in the administration of entrusted funds and property, and personal commitment to the highest standard of fiscal responsibility.

Therefore, I agree to abide by the highest ethical and moral standards and practices, and all applicable laws and regulations (e.g., civil, criminal, and Disciplinary), in all actions that I take on behalf of EPA.

Name (print) _____

Employee Signature _____ Date _____

Name (print) _____

Supervisor Signature _____ Date _____