****

**Employee**

*Training Through Experience, Customization & Innovation*

**Handbook**

Table of Contents

[Welcome 3](#_Toc132032624)

[Section 1: Employment Policies 4](#_Toc132032625)

[1.1 Nature of Employment/Employment At-Will 4](#_Toc132032626)

[1.2 Open Door Policy 4](#_Toc132032627)

[1.3 Policy Against Harassment and Discrimination 4](#_Toc132032628)

[1.4 Immigration Law Compliance 5](#_Toc132032629)

[1.5 Illegal Use of Drugs; Alcohol Abuse 6](#_Toc132032630)

[1.6 Standards of Conduct 6](#_Toc132032631)

[1.7 Ethical Conduct 7](#_Toc132032632)

[1.8 Access to Personnel Files 9](#_Toc132032633)

[1.9 Use of Electronic Property/Systems 9](#_Toc132032634)

[1.10 Accidents/Injuries 11](#_Toc132032635)

[1.11 Privacy and Confidential Information 12](#_Toc132032636)

[1.12 Other Employment Related Policies 12](#_Toc132032637)

[Section 2: Compensation and Benefits 14](#_Toc132032638)

[2.1 Employment Classifications 14](#_Toc132032639)

[2.2 Job Performance and Compensation 14](#_Toc132032640)

[2.3 Work Schedule 15](#_Toc132032641)

[2.4 Holiday Schedule 17](#_Toc132032642)

[2.5 Vacation 17](#_Toc132032643)

[2.6 Sick Leave 18](#_Toc132032644)

[2.7 Personal Leave 19](#_Toc132032645)

[2.8 Other Leave Absence 20](#_Toc132032646)

[2.9 Medical, Dental & Vision Coverage 22](#_Toc132032647)

[2.10 Section 125 Plans 23](#_Toc132032648)

[2.11 Short and Long Term Disability Programs 23](#_Toc132032649)

[2.12 Life Insurance 24](#_Toc132032650)

[2.13 Voluntary Employee Paid Benefits 24](#_Toc132032651)

[2.14 Simple IRA Retirement Plan 24](#_Toc132032652)

[Section 3: Travel and Expense Policy & Reimbursement 25](#_Toc132032653)

[3.1 Travel and Expense Policy 25](#_Toc132032654)

# Welcome

Welcome! We believe that each employee contributes directly to our growth and success, and we hope that you will take pride in being a member of our team. This Employee Handbook was developed to describe some of the expectations of our employees and to outline the policies, programs, and benefits available to eligible employees. Employees should familiarize themselves with the contents of the Employee Handbook as soon as possible, for it may answer many questions about your employment. Of course, in addition to the provisions of the Handbook, all employment-related laws and regulations apply.

**This handbook is neither an express nor an implied contract, but rather a general guide and may be changed from time to time.**

We have always believed in promoting an atmosphere of open communication and cooperation among all of our personnel. This Employee Handbook reflects that thinking. The plans, policies and procedures as described herein supersede all other employee handbooks, manuals, statements of policies and all written representations concerning the subject matter addressed in this Handbook, and no one other than the President & CEO has any authority to change any provision of this Handbook. We reserve the right to unilaterally modify, revoke, suspend or change any or all of the plans, policies and procedures set forth in this Handbook. Generally, you will be informed about any changes, but changes can also be made without notice.

**This Handbook does not constitute a guarantee that your employment will continue for any specified period of time or end only under certain conditions. The provisions of this Handbook do not and are not intended to create any contractual rights or obligations between us and you. Although we hope that your employment here will be mutually satisfactory, because you are an at-will employee, both you and we retain the right to end the employment relationship at any time and for any or no reason, with or without cause or notice.**

No one except the President & CEO has the authority to enter into any agreement with you for employment for any specified period or to make any promises or commitments contrary to the foregoing.

We wish you success in your position and hope that your employment relationship with us will be a rewarding experience.

# Section 1: Employment Policies

## Nature of Employment/Employment At-Will

We have set forth high standards of performance, contribution, and behavior for all employees and, therefore, are committed to hiring people with the expertise, experience, and attitude to be high performers.

While it is hoped the employee’s employment relationship with us will be mutually rewarding and long term, employment is at-will and either the employee or we may terminate the relationship at any time and for any or no reason(s). In no way shall the hiring or retention of an employee be considered as creating anything other than an at-will employment relationship between the employee and us. Only the President & CEO is authorized to enter into any written employment contract or arrangement contrary to this policy.

## Open Door Policy

Open communication between all our employees facilitates ideas, creativity, and innovation. From time to time, issues or concerns may arise between two employees or an employee may just have feedback he or she wishes to discuss or share with his or her supervisor.

Employees are encouraged to discuss the matter confidentially and in private with the supervisor. Establish an appropriate time and place to discuss the concern. Depending on the nature of the concern, the supervisor may ask the employee to put the details into a written document. Having a full understanding of the situation and what the employee' s ideas are for achieving a desired condition will help resolve the situation.

This open door policy is solely for the convenience of employees and no employee or supervisor is required to use it before taking some other action, such as disciplining or terminating an employee for misconduct.

## Policy Against Harassment and Discrimination

Harassment on the basis of any legally protected category, such as gender, race, religion, disability or age, which either results in the creation of a hostile, offensive or intimidating environment, or in the promise of benefit or threat of harm in exchange for sexual favors is illegal and prohibited. Claims of unlawful harassment will be promptly and thoroughly investigated and appropriate remedial action, including termination, calculated to stop the harassment will be taken against any employee found to have engaged in any form of unlawful harassment.

**WHAT IS HARASSMENT?**

Unlawful harassment is conduct of a physical or verbal nature which results in either adverse action against an employee or the creation of a hostile working environment and is based on a legally protected category such as gender, race, age, religion, or disability.

Unlawful sexual harassment is defined by the U.S. Equal Employment Opportunity Commission as follows: unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when (1) submission to such conduct is made either explicitly or implicitly a term or condition of an individual' s employment, (2) submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual, or (3) such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

Harassment does not have to be of a sexual nature, however, and can include offensive remarks about a person's sex. For example, it is illegal to harass a woman by making offensive comments about women in general. Both the victim and the harasser can be either a woman or a man, and the victim and harasser can be the same sex.

Although the law doesn't prohibit simple teasing, offhand comments, or isolated incidents that are not very serious, harassment is illegal when it is so frequent or severe that it creates a hostile or offensive work environment or when it results in an adverse employment decision (such as the victim being fired or demoted).

The harasser can be the victim's supervisor, a supervisor in another area, a co-worker, or someone who is not an employee of the employer, such as a client or customer.

**REPORTING**

Any employee, who becomes aware of an incident of harassment or discrimination, whether by witnessing the incident or being told of it, should report it Failing to report unlawful harassment or discrimination, whether as a victim or witness, could result in a loss of legal protections to you or could result in a finding that no such harassment or discrimination took place.

Normally, an occurrence of unlawful harassment should be reported to one's immediate supervisor, and the person responsible for Human Resources matters should also be informed. However, if for any reason you are reluctant to report unlawful harassment or discrimination to your immediate supervisor (for example, if the supervisor is the one engaged in harassment), then report the matter to the President & CEO.

We will promptly and thoroughly investigate all complaints of unlawful harassment (even if a complainant or victim requests us not to), and if unlawful harassment has been found to have occurred, we will take prompt and effective remedial action designed to put an end to the unlawful harassment. An investigation will follow any complaint to ensure the facts of the event (s) are gathered and appropriate action taken. All reports will be investigated with due regard for the privacy of everyone involved. We will attempt to honor a person's request for confidentiality; however, confidentiality cannot always be guaranteed. We will not retaliate against any individual who makes a complaint, provides information, participates in any sort of investigation or proceeding, or otherwise exercises any legal right. An employee found to have harassed a fellow employee, subordinate, or superior, or found to have filed a false complaint in bad faith or given false information (with knowledge of its falsity) will be subject to severe disciplinary action up to and including termination.

## 1.4 Immigration Law Compliance

We are bound by the Immigration Reform and Control Act of 1986 to employ only United States citizens and aliens who are authorized to work in the United States.

As a condition of employment, each new employee must sign and date the first section of the Immigration and Naturalization Service Form 1-9. Employees will not start work until these requirements have been satisfied.

## 1.5 Illegal Use of Drugs; Alcohol Abuse

Employees are expected to be in a suitable mental and physical condition at work, performing their jobs satisfactorily and behaving appropriately. Failure of employees to meet these basic expectations will result in disciplinary action up to and including termination.

The possession, transfer, sale, or use of alcohol, illegal drugs or legal drugs that may be intoxicating while on our premises or during work hours or meal breaks (whether or not on our premises) will be subject to the procedures specified in this Handbook, up to and including termination and possibly pursuing legal prosecution.

Except for moderate, controlled consumption of alcoholic beverages at company or client sponsored events, being in possession of, or under the influence of, alcohol during work is strictly prohibited.

## 1.6 Standards of Conduct

We expect each employee to always act in a mature and responsible way. Generally speaking, standards of conduct provide a basis for what is deemed acceptable and unacceptable workplace behavior (s) [conduct. At a minimum, all employees are expected to be competent and proficient at what they do; to be reliable and dependent; and to conduct themselves in a professional manner. Therefore, incompetency, unreliability and misconduct may be grounds for discipline or termination. In addition, some behaviors or activities may be so serious that engaging in them will result in immediate termination of employment. If you have any questions, please see your supervisor or the President & CEO.

**UNACCEPTABLE ACTIVITIES**

Occurrences of the following activities, as well as violations of any of our rules or policies, may be subject to disciplinary action, up to and including termination of employment. This list is not all-inclusive and, notwithstanding this list, all employees remain employed "at will." Occurrences of certain violations may result in immediate termination of employment following an investigation (as applicable):

1. Poor performance; incompetency;
2. Unusual, or excessive absenteeism or tardiness
3. Willful, intentional, or negligent misconduct
4. Illegal or unethical activity (e.g., illegal use of drugs, intoxication unlawful harassment or discrimination, conflict of interest)
5. Violations of our rules or policies
6. Threats or violence (which may include purely verbal threats or violence, even those made "in jest")
7. Dishonesty, theft, conversion and/or destruction of property (whether one' s own, another' s or the Association' s)
8. Falsification or misrepresentation on your application for employment or other work records including timesheets or hours worked; misuse of sick or personal leave; falsifying reason for a leave of absence or other data requested by us; alteration of Association records or any other Association documents; in all cases of the foregoing, regardless of when the misconduct was discovered.
9. Insubordination refusal to help out on a special assignment.
10. Violating any non-disclosure agreement; giving confidential or proprietary information to competitors or other organizations or to unauthorized employees; working for a competing business while an employee; breach of confidentiality of personnel information.

**DISCIPLINARY ACTIONS**

Unacceptable behavior — whether specifically mentioned herein or not may be dealt with in a progressive way as it occurs. This may include verbal or written warnings. However, any actions or conduct deemed serious may result in immediate termination.

In most cases, before a written warning is issued, an employee will be made aware of behavior that is non-productive, interferes with job performance, or is in violation of Association policy. The employee will be expected to make every effort to modify their behavior or actions immediately. Failure to do so may result in further disciplinary action up to and including termination of employment.

**WRITTEN WARNING**

Written warnings will include the reasons for the warning and available supporting evidence. A copy of any written warning(s) will be placed in the employee's personnel file.

## 1.7 Ethical Conduct

We have worked successfully to establish ourselves as a respected source in a highly competitive industry due in part to the professional competence and integrity of our employees. Our future success depends on maintaining and enhancing this reality.

Our primary goal is to respect and respond to the needs of our members; therefore, the interests of the member are always to be protected. Employees may not divulge confidential information about the products, practices, and strategies of our members to competitive members, the media, or any individual or group without the prior consent of the member. Any indication that confidential information about the products, practices and strategies of a member has been divulged to third parties without authorization is grounds for immediate termination.

Our employees must not act in a manner that would be detrimental to our integrity or reputation. In addition, our premises, name, material, or other property will not be used for work or outside purposes other than those specifically related to the business of the organization. This policy also means that employees should not conduct personal business or outside employment activities during their working hours.

**BUSINESS GIFTS**

To avoid the appearance of any conflict of interest, employees who receive tickets, meals, favors, gifts or other benefits worth more than a nominal amount from clients or our vendors are expected to report such items to the President & CEO. The failure to report receipt of such items may result in disciplinary action.

**USE OF COMPANY NAME, LETTERHEAD, etc.**

Our reputation is on the line any time our name is used. For this reason, it is important that our business name, stationery, and other imprints of our name be reserved solely for authorized business uses. In addition, no employee may speak to the media or post on the internet as our representative, bind us to any contract or financial obligation or take any position on our behalf which has not been expressly authorized by the President & CEO.

**PROPERTY**

Supplies and equipment are intended primarily for business use. Unauthorized and/or excessive personal use of phones, postage, copiers, computers, e-mail, fax machines and other property may result in discipline, up to and including termination. What constitutes excessive shall be determined at our sole discretion.

Employees have no privacy rights relating to information stored at the office and/or on any system belonging to us. Employees should also understand that any information, whether personal or business, maintained in our computers, word processing, electronic mail or other storage equipment, including furniture, is our property and is subject to monitoring, copying and/or inspection by us with or without notice.

**CONFLICTS OF INTEREST/OUTSIDE EMPLOYMENT**

We require employees to devote their efforts and loyalty to our interests and to refrain from any activity which would conflict with our interests and/or our members. Your private life is very much your own, and your personal decisions are guided by your own needs and goals. There may, however, be a conflict of interest if you become involved in activities that compete with or adversely affect us. For this reason, we require that you follow these guidelines:

* Employees are not permitted to work as an employee, consultant, advisor or volunteer for any organization that is engaged in the same or similar business as us or that is or could be a member of or vendor.
* Employees are not permitted to solicit business or customers on their own behalf while working for us.
* Employees are not permitted to provide information to a competitor that is confidential to us, to our members or to our vendors.

To ensure that outside employment does not present a conflict of interest or otherwise interfere with our best interests, employees are required to notify us if presently employed or planning to engage in any type of work or employment outside the organization. The employee is required to provide information regarding the nature of work and names of the parties involved.

Any employee who violates this policy will be subject to disciplinary action, up to and including possible termination.

**COMPUTER SOFTWARE**

All employees shall use software only in accordance with its license agreement. Unless otherwise provided in the license, any duplication of copyrighted software, except for backup and archival purposes, is prohibited. Any unauthorized duplication of copyrighted computer software violates the law and is contrary to the organization's standards of conduct.

## 1.8 Access to Personnel Files

We maintain a personnel file on each employee. The personnel file includes such information as the employee's job application, resume, records of training, documentation of performance appraisals and salary increases, and other employment records.

Personnel files are our property, and access to the information they contain is restricted. Generally, only the President & CEO and the Human Resources professional have access to the information in any files.

With reasonable advance notice, employees may review their own personnel files in our offices and in the presence of an individual appointed by us to maintain the files. However, we may withhold certain information, such as information given with a promise or expectation of privacy; information related to an investigation of unlawful harassment, discrimination or retaliation, or information that pertains to a third party. Employees will not be provided with copies of any document in the personnel files, provided that any employee located in Wisconsin shall have the rights granted under Wisconsin law.

## 1.9 Use of Electronic Property/Systems

Access to the Internet through our network is a privilege and carries responsibilities reflecting responsible and ethical use. Use of the Internet through our network constitutes the individual's acceptance of this policy.

Employee-users are expected to be knowledgeable of these policies. Care must be taken by all employee-users to ensure that accessing the Internet does not jeopardize members’ interests. Violations of this or any other policy subjects the employee-user to immediate revocation of system privileges and may result in further disciplinary action, up to and including termination.

**AUTHENTICATION PROCESS AND USE**

The employee-user must first be authenticated through an assigned network username and password. The username and password is the responsibility of the individual to whom it is assigned. Employees may not give user names or passwords to any other individual, including family members. Violations of Use of Electronic Property/Systems Policy and any other policy through the authorized use of the username and password subjects the individual to whom it is assigned to disciplinary action, up to and including termination of employment.

Employees should not expect that transmissions made through the network are confidential. Although employee will be given a username and password, this does not insulate transmissions from employer review for business purposes.

Limited personal use of the Internet may be necessary on an occasional or limited basis. However, the employee-user is reminded that use of any and all property is primarily for the purpose of our business. Any personal use of the Internet is expected to be on the user's own time and is not to interfere with the person' s job responsibilities.

**ETHICAL USE OF THE INTERNET**

At any time and without prior notice, we management reserve the right to examine e-mail, personal file directories, and other information stored on our computers. This examination helps to ensure compliance with internal policies, supports the performance of internal investigations, and assists the management of information systems. As such, we may monitor access to the Internet. Use of the Internet constitutes acceptance of such monitoring.

This policy should be read and interpreted in conjunction with all other policies including but not limited to policies prohibiting harassment, discrimination, offensive conduct or inappropriate behavior. Employee-users are prohibited from accessing the Internet for any unethical purposes, including pornography, violence, gambling, racism, harassment, or any illegal activity. Employee-users are forbidden from using profanity or vulgarity when posting electronic mail via the Internet or postings to public newsgroups must fall within these ethical standards.

In particular, but without limiting the generality of the foregoing, employees should be aware that anything they post on social network sites such as Twitter, Facebook, personal blogs or websites, etc., is essentially public information accessible by anyone. If it comes to our attention that an employee has posted confidential, defamatory, derogatory or disparaging information about us, its products, services, officers, directors, members, employees or others, the employee may be subject to disciplinary action, including termination.

The employee-user must abide by all federal and state laws with regard to information sent through the Internet. This policy strictly prohibits unauthorized release or disclosure of any member information though the Internet or through any other means. Organization trade secrets and confidential information should not be transmitted over the Internet.

Employee-users are also prohibited from using Internet access through our systems for any other business or profit-making activities.

In general, employees should exercise the same restraint and caution in drafting and transmitting messages over the Internet as they would when writing a memorandum and should assume that their message will be saved and reviewed by someone other than the intended recipients.

**USE OF ELECTRONIC MAIL (E-MAIL)**

We provide employees with electronic mail communications. The primary purpose of the electronic mail system is to expedite necessary business communications between two or more individuals. As such, the use of electronic mail is for business activities. Use of e-mail is a privilege and may be revoked at any time. Use of e-mail constitutes acceptance of this policy.

From time to time employees may receive unwanted or unsolicited email from unknown or unfamiliar sources. Care and caution should be exercised when opening this type of mail for it may contain questionable or inappropriate content. The best remedy is to delete such mail. If the content is inappropriate a supervisor should be notified immediately.

Employee-users are expected to be knowledgeable of these and all policies. Any questions should be directed to the Manager, Finance and Administration. Violations of this or any other policy subjects the employee-user to immediate revocation of system privileges and may result in disciplinary action, up to and including termination. Any information included in email communications becomes the our property and is subject to monitoring for compliance with all policies by the Manager, Finance and Administration.

**DOWNLOADING SOFTWARE**

Employee-users are prohibited from downloading software from the Internet without prior written management approval. Downloading of games from the Internet is prohibited. Downloading of any executable files or programs that change the configuration of the system by anyone other than the Information System personnel is prohibited. The employee-user should take extreme caution when downloading software or files from the Internet. All files or software should be passed through virus protection programs prior to use. Failure to detect viruses could result in corruption or damage to files and/or unauthorized entry into our network. It is mandatory that employees comply with copyright and trademark laws when downloading material from the Internet.

If the employee-user finds that any damage occurred because of downloading software or files, the incident should be reported immediately to the Network Administrator. Employee-users may not install other on-line services to access the Internet on our computers, such as America Online, CompuServe, Earthlink, etc.

**PROPER AND ETHICAL USE OF ELECTRONIC MAIL**

At any time and without prior notice, our management reserves the right to examine e-mail, personal file directories, and other information stored on our computers. This examination helps to ensure compliance with internal policies, supports the performance of internal investigations, and assists with the management of our information systems. As such, we may monitor the content of electronic mail. Use of the Electronic Mail system constitutes acceptance of such monitoring.

This policy should be read and interpreted in conjunction with all other policies including but limited to policies prohibiting harassment, discrimination, offensive conduct, or inappropriate behavior. Employee-users are prohibited from using electronic mail for any unethical purposes, including but not limited to pornography, violence, gambling, racism, harassment, or any illegal activity. Employee-users are forbidden from using profanity or vulgarity when posting electronic mail.

Employee-users are also prohibited from using electronic mail through our systems for any other business or profit-making activities. Disclosure of any confidential information through electronic mail to any party not entitled to the information is prohibited.

In general, employee-users should exercise the same restraint and caution in drafting and transmitting messages over the electronic mail as they would when writing a memorandum and should assume that their message will be saved and reviewed by someone other than the intended recipients.

## 1.10 Accidents/Injuries

We maintain worker's compensation insurance for job-related accidents and injuries. All medical emergencies, workplace injuries and accidents, security breaches or damage to property must be reported immediately, and no later than the day after the occurrence, to the Manager, Finance and Administration. Injured employees and employees who observe an accident may be asked to write up a description of the incident, whether or not a claim is made or will be made under our worker' s compensation policy.

As a rule, neither we nor the insurance carrier will be liable for the payment of workers' compensation benefits for injuries that occur during the employee' s voluntary participation in any off-duty recreational, social, or athletic activity we sponsored. Nonetheless, any such injury should still be reported.

## 1.11 Privacy and Confidential Information

Employment with us assumes an obligation to maintain confidentiality, even after you leave our employ. Any violation of confidentiality seriously injures our reputation and effectiveness. Therefore, please do not discuss business with anyone who does not work for us, and never discuss business transactions with anyone who does not have a direct Association with the transaction.

Employees are not permitted to remove or make copies of any records, reports, or documents without prior management approval. Disclosure of confidential information could lead to termination of employment.

If someone questions you outside the organization or your department and you are concerned about the appropriateness of giving them certain information, remember that you are not required to answer. Instead, as politely as possible, obtain contact information from the individual and then refer the request to your supervisor or to the President & CEO.

## 1.12 Other Employment Related Policies

**OFFICE HOURS**

Regular work days are Monday through Friday. Regular office hours are 9:00 a.m. to 5:00 p.m.

**RESIGNATION**

While we hope employees will enjoy a long and mutually beneficial employment relationship with us, we realize that employees will leave for different or new career pursuits from time to time. If employees accept another position or anticipate leaving, please provide the professional courtesy of two (2) weeks' notice in advance of the termination date. The purpose of this notice period is to ensure that the transition of work is as smooth as possible. Vacation time will not be paid in lieu of actively working through the notice period.

**EXIT INTERVIEWS**

In instances where an employee voluntarily leaves our employ, our management would like to discuss the reasons for leaving and any other impressions that employee may have about us. An exit interview will provide valuable feedback to the management team.

**VERIFICATION OF EMPLOYMENT**

In the event an employee leaves our employment, references provided to future employers will include dates of employment, last position held, and final salary. Such information will only be provided if the requestor has the employee's social security number.

**REFERENCES**

We have a neutral reference policy which means that any requests for a reference on a current or past employee will be provided with only the following information: name, dates of employment, position and confirmation of final salary. No other information on the employee' s performance or character will be released unless approved by the President & CEO and requested in writing by the employee. An exception is made where data is required by government agencies or as part of a legal proceeding. This excludes recommendations for current employees for the purpose of membership in organizations, Associations, boards or other organizations with a specific business purpose.

**RETURN OF COMPANY PROPERTY**

Any property issued to an employee must be returned to us at the time of termination or resignation, or whenever a member of management requests it. Employees are responsible for paying for any lost or damaged items. As permitted by law, the value of any property issued and not returned in working order may be deducted from the employee's final paycheck.

# Section 2: Compensation and Benefits

## 2.1 Employment Classifications

At the time employees are hired, they are classified as full-time or part-time and informed of their eligibility for overtime pay. Unless otherwise specified, the benefits programs described in this Handbook apply to full-time employees.

**FULL TIME REGULAR EMPLOYEES**

Full-time employees are those employees who work a standard 35-hour work week.

**PART-TIME REGULAR EMPLOYEES**

Part-time employees are those employees who typically work less than a standard 35-hour work week on a consistent and continual basis. Their schedule is characterized, for example, by a schedule of 20-25 hours per week worked throughout the year.

**EXEMPT STATUS**

The federal Fair Labor Standards Act exempts certain employees from being paid overtime. Among such "exempt employees" are supervisors, administrators, professionals, certain "creative" or "artistic" jobs, highly paid employees ($100,000 or more), outside sales people, and certain computer professionals. Exempt employees are paid on a salary basis which means, with certain statutory exceptions, that they receive the same amount of compensation per workweek regardless of the quantity or quality of work performed.

**EXEMPT AND NON-EXEMPT STATUS**

All employees are classified into "exempt" and "non-exempt" categories for purposes of establishing eligibility for overtime pay in compliance with the Federal Wage and Hour Laws, including the Fair Labor Standards Act. "Non-Exempt" employees are paid at the rates outlined later in this Handbook for all overtime hours worked. "Exempt" employees are paid for work performed, not by the hour, and are not eligible for overtime pay.

Overtime compensation is paid to all nonexempt employees in accordance with federal and state wages and hour restrictions. Non-exempt employees are eligible for overtime pay at the rate of time and one half for actual hours worked in excess of 40 per work week and at regular pay (time) for hours worked in excess of 35 but less than 40 per work week. We require an employee to obtain advance approval from one's supervisor or the President & CEO in order to work overtime. Failure to request advance approval, working more hours than approved, or falsification of time records may result in disciplinary action, up to and including termination. Overtime may be required when business needs warrant.

## 2.2 Job Performance and Compensation

**JOB PERFORMANCE**

Supervisors are continuously seeking opportunities to teach and coach employees how to be most effective in their respective positions. Day-to-day interaction between employee and supervisor should give the employee a sense of the strengths and opportunities in their job performance. Performance reviews will be conducted at least annually. New employees may be reviewed on a different schedule during their first year of employment. A review may also be conducted in the event of a promotion or change in duties and responsibilities.

The primary reason for performance reviews is to measure, maintain and improve job performance. This is an opportunity for both employee and supervisor to engage in an open discussion and feedback exchange in a more formal way than occurs day to day. This is a good time to discuss employee interests and future goals allowing an opportunity to recommend further training or other challenging opportunities.

Wage and salary increases are based on job performance, what the current job market is paying for particular skills, and our financial resources. A performance review does not necessarily mean that an employee will be given an increase. Any wage or salary increases will appear in the pay period ending after the dates they are granted. Wage and salary increases may be retroactive at the sole discretion of the President & CEO.

**COMPENSATION**

We have developed policies to ensure wages and salaries comparable to those of other employees with similar jobs or in our industry. Our wage and salary policy is designed to attract and retain the best-qualified people available.

To carry out this policy, we periodically compare our wage and salary policy with community rates for similar positions using appropriate published information from sources like statewide business organizations, local chambers of commerce, state and national organizations, various management reports, and various local, state and federal agencies.

**MEETINGS**

On occasion, we may request that employee attend a company-sponsored meeting. If this is scheduled during the employee's regular working hours, employee attendance may be required. If it is held during employee non-working hours and the employee decides to attend, nonexempt employees will be paid for the time the employee spends traveling to and from the meeting as well as for time spent at the meeting, in accord with the FLSA regulations on payment for travel time and attendance at lectures, meetings and seminars. Overtime rules will apply for all hours worked in excess of 40.

**PAYMENT OF WAGES**

The payroll schedule is currently on a monthly basis on the 1ST day of the month. In the event a payday falls on a non-business day, payment will be made on the business day immediately preceding the pay date. Employees wishing to utilize direct deposit must provide us with written authorization and proper bank information.

## 2.3 Work Schedule

The standard workweek consists of five (5) days, eight (8) hours long, with one unpaid hour for lunch, Monday through Friday.

Benefits provided for Vacation, (Section 2.5), Sick Leave (Section 2.6), Personal Leave (Section

2.7) and 401 (k) hours of service (Section 2.14) are calculated based on an 8-hour day.

**ABSENCE OR LATENESS**

From time to time, it may be necessary for an employee to be absent from work. We are aware that emergencies, illnesses, or pressing personal business that cannot be scheduled outside employer work hours may arise. Sick days, vacation time, and personal days have been provided to use for this purpose.

If an employee is unable to report to work, or if an employee expects to arrive late to work, they must contact their supervisor or the Manager, Finance and Administration immediately and provide as much notice as practicable. In all cases in which notice is required, the burden is on the employee to make sure that notice was in fact received; it will not be an excuse, for example, to say that one left a voice mail, had someone else call on his/her behalf, or sent a fax or e-mail if we have no record of the notice ever having been received. Contacting a supervisor after the start of the scheduled workday is not acceptable, except in the case of extreme emergencies. If an employee knows in advance that the employee will need to be absent or late, the employee is required to notify a supervisor or the Manager, Finance and Administration in advance. He or she will determine if their absence will interfere with business needs before granting approval.

When an employee calls in to inform us of an unexpected absence or late arrival, they must speak to their supervisor or the Manager, Finance and Administration directly. The employee may leave the information on a supervisor's or the Manager, Finance and Administration's voice mail if the call is made prior to office hours. For late arrivals, please indicate the expected late arrival time so work duties may be adjusted or reassigned, as applicable. Notifying a fellow employee is not sufficient. If an employee is unable to call in due to serious illness, emergency or for some other reason, someone must contact us on the employee's behalf.

Absence from work for three (3) consecutive days without notifying a supervisor or the Manager, Finance and Administration will be considered job abandonment and a voluntary resignation of employment.

**EXCESSIVE ABSENTEEISM OR LATENESS**

In general, five (5) absences in a 90-day period, or a consistent pattern of absence, will be considered excessive, and the reasons for the absences will be reviewed. Be aware that excessive absenteeism, lateness or leaving early may lead to disciplinary action, including possible termination. A supervisor will make a note of any absence or lateness, and the reason. Employee attendance records will be considered when evaluating requests for promotions and additional paid time off.

**RECORD OF ABSENCE OR LATENESS**

If an employee is absent because of illness for three (3) or more successive days, a supervisor may require the employee submit written documentation from their doctor regarding the absence.

**INCLEMENT WEATHER**

We follow the federal government policy in terms of inclement weather for the Alexandria office. If the federal government announces that it is closed, our office will also be closed. If the federal government announces liberal leave, the same policy is in effect for us. Under liberal leave, employees are expected to report to the office; however, an employee may instead utilize vacation leave, as long as this decision is communicated to the employee's supervisor.

If severe weather conditions exist and the President & CEO (or designated representative) decides to close the office for the remainder of the day, employees will be notified as soon as possible by the President & CEO or the Manager, Finance and Administration. Employees will be able to go home at that time without any leave time or pay being deducted.

## 2.4 Holiday Schedule

Full-time employees are eligible for holiday pay. The President & CEO reserves the right to modify the holiday schedule from time to time with advance notice to employees.

The following holidays are recognized as paid holidays:

|  |  |
| --- | --- |
| New Year's Eve Day | Columbus Day |
| New Year's Day | Veterans Day |
| Martin Luther King Day | Thanksgiving Day |
| Presidents Day | Day after Thanksgiving |
| Memorial Day | Christmas Eve Day |
| Independence Day (July 4th)  Labor Day | Christmas Day |

Employees may take time off to observe their religious holidays, providing that doing so does not create an undue burden FFICEPRO. If available, a full day of unused personal leave or a vacation day may be used for this purpose; otherwise the time off is without pay. Employees must notify their supervisor at least a week in advance of the date to be taken. Again, the burden is on the employee to be able to prove that notice was in fact given and received.

We schedule all national holidays on the day designated by common business practice. Where a holiday falls on a Saturday or Sunday, Monday will be the day off. If a holiday occurs during an employee-scheduled vacation, the employee will be paid holiday pay and permitted to take an extra day of vacation. Employees are not eligible to receive holiday pay when on an unpaid leave of absence.

## 2.5 Vacation

Vacation is a time for employees to rest, relax, and pursue special interests. We provide paid vacation as one of the many ways in which we show our appreciation for employees. Only regular full-time employees are eligible to accrue paid vacation.

**AMOUNT OF VACATION**

|  |  |  |
| --- | --- | --- |
| Years of Employment | Monthly Accrual  Rate (In Hours) | Annual Accrual  Rate (In Hours)) |
| Less than three (3) | 6.66 | 80.00 |
| Three (3) but less than six (6) | 10.00 | 120.00 |
| Six (6) or more | 13.33 | 160.00 |

**VACATION POLICIES**

Every effort will be made to grant employees vacation at the time desired. However, vacations cannot interfere with business operations and therefore must be approved by a supervisor in advance. If any conflicts arise in requests for vacation time, preference will be given to the employee with the most seniority.

For those long service employees who are eligible for 120 or 160 hours of vacation per year, they may take only two (2) weeks at one time unless used in conjunction with a medical or family leave of absence.

If an employee is on an approved leave of absence for less than thirty (30) days, vacation accrual/eligibility will not be affected; should the leave extend beyond thirty (30) days, vacation time will not continue to accrue.

**ACCUMULATION RIGHTS**

Vacation time in excess of 120 hours may not be carried over past the end of the calendar year.

**TERMINATION OR PAYMENT IN LEIU OF VACATION**

Payment will not be made in lieu of taking time off from work. In the event an employee leaves our employ, he or she will be paid for accrued but unused vacation (subject to the maximum accrual permitted under the accumulation rights policy).

## 2.6 Sick Leave

Sick leave may be used for the purpose of visiting doctors, dentists or other practitioners in their offices. This time may also be used for tending to a serious illness suffered by a member of the employee's immediate family (parent, spouse, domestic partner, child, or other legal dependent living in the employee's home) in the event the illness requires the employee' s assistance. Only regular full-time employees are eligible to accrue paid sick leave.

**AMOUNT OF SICK LEAVE**

Full-time employees are eligible to accrue sick leave at a rate of 4 hours per month for each calendar month of service from the official anniversary date. December hours can be rolled over to January the following year.

**SICK LEAVE POLICIES**

If an employee must be absent from work because of a personal illness, the employee is eligible to use paid sick leave. Sick time may be used in whole day or hourly increments. Notification procedures are consistent with either the lateness or absenteeism policy or to be requested in advance (for example for minor surgeries) consistent with the vacation policy.

Documentation required regarding the absence is consistent with the absenteeism policy in the Employee Responsibilities section of this Handbook.

If an employee is required to take a disability leave of absence, any accrued sick leave will first be utilized and paid at the time the leave commences; should the leave extend beyond thirty (30) days, sick leave will not continue to accrue. Sick leave time does not apply to personal leaves of absence.

In the event of an illness or injury qualifies under worker' s compensation, this sick leave policy will not apply, but will defer to state statutes and employer obligations under applicable worker' s compensation laws. If there is an unpaid waiting period for eligibility of worker' s compensation payments, sick leave or accrued but unused vacation time may be applied to cover the waiting period only.

**ACCUMULATION RIGHTS**

Sick leave not used may be carried over past the end of the calendar year.

**TERMINATION**

In the event an employee leaves our employ, he or she will not be paid for accrued but unused sick leave.

## 2.7 Personal Leave

Personal leave time is intended to be used to accomplish personal business that cannot be accomplished during time other than your normal working hours.

**AMOUNT OF PERSONAL LEAVE**

Full-time employees are eligible to take up to 40 hours of paid personal leave during each calendar year. During your first calendar year of your employment, the earned personal leave time is pro-rated.

**PERSONAL LEAVE POLICIES**

You may use your personal leave in units of one hour at any one time. You are required to request personal leave time from your manager in advance and obtain his or her approval.

Personal leave is not additional vacation time and may not be used to extend vacations or lengthen holiday weekends. Please do not abuse personal leave by using it for these purposes.

Employees going on unpaid required military leave of absence may apply their personal leave at the time the leave commences if they wish.

If you are on an approved leave of absence for less than thirty (30) days, your personal leave eligibility will not be affected; should the leave extend beyond thirty calendar days, personal leave time will not continue to accrue.

This personal leave policy does not apply if personal leave is needed as a result of self-inflicted injury, illegal substance abuse or alcohol abuse, or illness or injury incurred while in the act of committing a felony.

In the event of an illness or injury which is covered by worker's compensation insurance, this personal leave policy will not apply.

**ACCUMULATION RIGHTS**

Personal leave may not be carried over or accumulated from year to year. Personal leave not used will be forfeited.

**TERMINATION**

In the event an employee leaves our employ, he or she will not be paid for accrued but unused personal leave.

## 2.8 Other Leave Absence

**FUNERAL (BEREAVEMENT) LEAVE**

Employees are entitled to take up to a maximum of three (3) workdays with pay to attend the funeral and take care of personal matters related to the death of an immediate family member (parent, spouse, domestic partner, child, or other legal dependent living in the employee' s home). One (1) day of paid funeral leave will be granted in the case of the death of a grandparent, spouse' s grandparent, or sibling, other close friends or relatives or in-laws. If additional time off is required, vacation time may be used.

If the death occurs at a time when work is not scheduled, payment will not be made. If a holiday or vacation occurs on any of the days of absence, employee may not receive holiday or vacation pay in addition to paid funeral leave. An excused absence for family death may not be retroactive, postponed or split.

**JURY DUTY**

It is an employee’s civic duty as a citizen to report for jury duty when called from time to time. If an employee is summoned for jury duty, we will permit the employee to take some time away from work and offset any financial loss that could occur for a period of two weeks. We will pay a maximum of 10 business days for jury duty leaves of absence.

Employees must notify their supervisor within forty-eight (48) hours of receipt of the jury summons. In order to receive jury duty pay, a copy of the notice to serve must be submitted for the personnel file and attendance record purposes.

If the jury duty falls at a time when the employee cannot be away from work, we may request that the court allow the employee to choose a more convenient time to serve if he/she makes a request in accordance with the court's procedures. The employee must cooperate with this request.

On any day or half-day an employee is not required to serve, the employee will be expected to return to work.

In order to receive jury duty pay, the employee must present a statement of jury service and pay to their supervisor. The court issues this document. Payment by the court for travel expenses may be retained by the employee.

**PARENTAL LEAVE**

Employees are entitled to take up to a maximum of ten (10) workdays with pay related to pregnancy or the care of a new child. This leave is available following the first ten (10) workdays of absence from work related to the pregnancy or the care of a new child.

**MILIATRY LEAVE OF ABSENCE**

We comply with the Uniformed Services Employment and Reemployment Rights Act (USERRA). USERRA is a Federal law that provides reemployment rights for members of a uniformed service, including members of the National Guard and Reserve, following qualifying military service. It also prohibits employer discrimination against any person on the basis of that person' s past military service, current military obligations or intent to join one of the uniformed services.

**DISABILITY LEAVES OF ABSENCE**

We grant disability leaves of absence for medical conditions related to pregnancy or childbirth, for an employee' s own serious health condition, or to enable an employee to care for a parent, spouse or child with a serious health condition. To be eligible for such leave, an employee must have worked for us for the previous 12 months and must have worked at least 1,250 hours in that preceding 12 months. The employee may be required to provide notice and submit documentation in order to obtain the leave. Leave is unpaid and for a maximum of 12 weeks.

In any case in which the need for disability leave is foreseeable (e.g., scheduled surgery; delivery date) please inform your supervisor as soon as possible of the date the employee and their physician anticipates the leave will commence. At the time the disability leave begins, any accrued personal leave or sick leave will be applied to days out of work until exhausted. Vacation time previously earned (but not used) at that time will also be paid if the employee so desires. This policy applies to all employees. Employer group insurance coverage will continue during a leave of absence, provided the employee' s share of the premiums are submitted on a monthly basis, however; other paid leave (vacation, sick, personal time) will not continue to accrue after the first thirty (30) days of the leave.

Employees who do not return from disability leave at the end of the 12-week period may be terminated. If an employee does not return within three (3) days of release by their doctor or submit additional medical certification for an extension of the leave (up to the 12 week maximum), they will be considered to have voluntarily resigned.

If an employee accepts any employment or goes into business while on a disability leave of absence, the employee will be considered to have voluntarily resigned from employment as of the day on which the leave of absence began. The employee may be required to repay all or a portion of medical premiums or other benefits paid for the employee.

**UNPAID LEAVES OF ABSENCE**

In very special circumstances, such as to care for a newborn child (where the pregnancy does not qualify as a "disability"), or to care for a child placed in foster care or adoption, and where the requested leave does not qualify for leave under any other policy, we may grant a personal unpaid leave of absence for up to thirty (30) days. In considering such a request, the President & CEO will assess whether or not such a leave will interfere with the operations of the department. All requests for personal unpaid leave of absence must be submitted in writing to the appropriate supervisor. This type of leave is an unpaid leave, unless the employee chooses to apply accrued vacation time. Sick leave does not apply and may not be used for this purpose. If the leave is extended for more than thirty (30) days, vacation and other benefits will no longer continue to accrue and the employee's position may not be held open. Failure to return from any leave on the date agreed may result in termination of employment.

Employer group insurance coverage will continue during an unpaid leave of absence, provided the employee's share of the premiums is submitted on a monthly basis. However, other paid leave (vacation, sick, personal time) will not continue to accrue after the first thirty (30) days of the leave.

If an employee accepts any employment or goes into business while on an unpaid leave of absence, the employee will be considered to have voluntarily resigned from employment as of the day on which the leave of absence began. The employee may be required to repay all or a portion of medical premiums or other benefits paid for the employee.

**ELECTION DAY**

We encourage employee to exercise their voting privileges in local, state, and national elections. However, since the polls are open for long periods, employees are encouraged to vote before or after regular working hours. If it should be necessary, an employee may take up to two hours’ time off from work to vote in a governmental election or referendum. Personal leave time or vacation time, if available, may be used for this purpose.

**RETURNING FROM LEAVE OF ABSENCE**

If an employee does not return from a leave of absence on the day indicated in the original application or in any approved extension, the employee will be considered to have voluntarily resigned from employment as of the end date of the leave of absence.

If the leave is due to the serious health condition or disability (including pregnancy as a disability) of the employee, for their own safety and the safety of the work environment, the employee' s treating physician must provide work clearance before the employee returns to work.

## 2.9 Medical, Dental & Vision Coverage

Employees who work 30 or more hours per week are eligible for group health coverage. Details of coverage can be obtained from the plan document or the Summary Plan Description (SPD) provided by the Human Resources department. This coverage becomes effective on the first day of the month that coincides with or follows your date of hire. Employees contribute 10% of the cost towards the cost of their own coverage. Dependent and spouse or partner benefits are optional, and the employee pays 100% of the cost for these additional benefits. The employee's out-of-pocket dependent cost is deducted from the employee's paycheck each pay period (costs adjust annually), provided we have received the employee's appropriate written authorization.

Specific details of these benefits may be found in the individual programs' SPD that are available from Human Resources or from the benefit vendor. In the event of conflict between the information appearing in this section, or in the SPD's, and that appearing in the official master insurance contracts and plan documents, the master contracts and plan documents shall govern in all cases.

**Effective 7/1 /2012:**

For employees that have attained age 65 and are eligible for Medicare coverage and work 30 or more hours per week, the employee may elect to apply for Medicare health insurance coverage or Medicare health insurance coverage and a supplemental Medicare health insurance policy. In such instances, the employee will be reimbursed for the Medicare and Medicare supplemental policy insurance premiums paid by the employee up to the amount that would be paid to provide individual coverage for that employee under the group plan. Such reimbursement only applies to Medicare and Medicare supplemental premiums paid for individual coverage of the employee.

## 2.10 Section 125 Plans

we offer pre-tax benefits contribution options for employees. This concept in employee benefit coverage is known as a Section 125 Plan.

**PREMIUM ONLY PLAN (POP)**

The Premium Only Plan (POP) is a benefit plan that allows you to make contributions toward premiums for medical/dental insurance on a before-tax, rather than an after-tax basis. This means your premium contributions are deducted from your gross pay before income tax and Social Security are calculated.

Your gross pay will be reduced by an amount equal to the cost of your medical/dental insurance. Once you have signed the Section 125 Enrollment Form, you may not make any changes to your medical/dental insurance until the following July 1, unless the change which you elect is a result of a change in family status (such as marriage, divorce, death of a spouse or child, birth or adoption of a child or termination of employment of your spouse). A change in election due to a change in family status will be effective the next pay period.

**FLEXIBILE SPENDING ACCOUNT**

The Flexible Spending Account (FSA) is a benefit plan that allows you to pay for unreimbursed medical costs and child and dependent costs on a before-tax, rather than an after-tax basis. This means your designated contribution amount is deducted from your gross pay before income tax and Social Security is calculated. Employees are eligible to participate in the FSA benefit effective the first day of the month following their month of hire.

The amount of your compensation reduction will be credited to the appropriate reimbursement account for payment of eligible expenses incurred within the plan year (July through June).

Details of coverage for Section 125 Plans can be obtained from the Summary Plan Descriptions (SPD) provided by Human Resources. In the event of conflict between the information appearing in this section, or in the SPD's, and that appearing in the official master contracts and plan documents, the master contracts and plan documents shall govern in all cases.

## 2.11 Short and Long Term Disability Programs

Full-time employees who work 30 or more hours per week are eligible for short and long term disability coverage. Short term disability is generally available after seven (7) days of absence from work due to injury or illness and covers 60% of current earnings. Long term disability generally begins after ninety (90) days and covers 60% of current earnings. Details of coverage can be obtained from the plan document or the Summary Plan Description (SPD) provided by Human Resources.

This coverage becomes effective on the first day of the month that coincides with or follows your date of hire. Employees do not contribute towards the cost of their own coverage.

Specific details of these benefits may be found in the individual programs SPD that are available from Human Resources or from the benefit vendor. In the event of conflict between the information appearing in this section, or in the SPD's, and that appearing in the official master insurance contracts and plan documents, the master contracts and plan documents shall govern in all cases.

## 2.12 Life Insurance

Full-time employees who work 30 hours or more per week are eligible for company paid Life Insurance equal to one times their annual salary up to a maximum benefit of $250,000. A Summary Plan Description (SPD) is available from Human Resources. In the event of conflict between the information appearing in this section, or in the SPD's, and that appearing in the official master insurance contracts and plan documents, the master contracts and plan documents shall govern in all cases.

This coverage becomes effective on the first day of the month that coincides with or follows your date of hire. Employees do not contribute towards the cost of their own coverage.

## 2.13 Voluntary Employee Paid Benefits

**LONG-TERM DISABILITY**

Employees who work 35 hours or more per week and are under the age of 60 are eligible to apply for voluntary (employee paid) long-term disability insurance. This supplemental disability income policy can be customized to meet the individual needs of the employee and is individually owned and can be taken with you should your employment change. A Summary Plan Description (SPD) is available from the Director of Human Resources. In the event of conflict between the information appearing in this section, or in the SPD, and that appearing in the official master insurance contracts and plan documents, the master contracts and plan documents shall govern in all cases.

## 2.14 Simple IRA Retirement Plan

Employees who work a minimum of 1,000 hours per year and have completed 30 days of service are eligible to participate in the Simple IRA Retirement Plan. Details of the plan, eligibility requirements and coverage may be obtained from the Summary Plan Description (SPD) or from the plan documents themselves. Currently, ***we contributes 3% of an employee's eligible compensation to the plan on behalf of the employee at the employers discretion.*** The employee may also make contributions through salarydeferrals on both a pre-tax and after-tax basis. Employees may defer up to 90% of salary subject to IRS limits on deferrals into qualified plans.

In the event of conflict between the information appearing in this section, or in the SPDs, and that appearing in the official master insurance contracts and plan documents, the master contracts and plan documents shall govern in all cases.

# Section 3: Travel and Expense Policy & Reimbursement

## 3.1 Travel and Expense Policy

We will reimburse an employee for all reasonable and necessary expenses incurred by that employee in transacting business in the our name or for the our benefit. In addition, we will reimburse employees for reasonable travel expenses incurred while conducting Association business. An employee must have a supervisor's authorization prior to incurring a travel or business expense on our behalf.

We have established certain guidelines for expenses, which are as follows:

Employees traveling on business should incur the lowest practical and reasonable expense while completing the travel process in an efficient and timely manner.

**TRANSPORTATION**

We will reimburse for air, rail, or ground transportation. Only coach class tickets, or their equivalent, may be purchased. It is expected that the most economic mode consistent with time constraints will be used. Exceptions must be explained to and approved in writing by the President & CEO.

The use of a rental car must have a business purpose (i.e., shuttle buses are not available or taxis are cost-prohibitive). The traveler should request the smallest size car that is practical. Upgrades are not allowable unless a written explanation of a legitimate need is provided. If you are not otherwise covered through your personal insurance or credit card, you may accept the insurance coverage for a rental car, and we will reimburse for the cost.

Where an employee chooses to drive, we will reimburse for mileage at the current IRS approved mileage rate up to the cost of similar coach air or rail transportation. All employees who elect to use their personal vehicles must maintain automobile liability insurance and provide to us, if requested, proof of adequate automobile liability insurance.

Reimbursement may be claimed for parking charges, shuttle buses, ferry and taxi fares, and bridge, highway, and tunnel tolls. Tips associated with taxi fares are reimbursable, but not to exceed 20% of the fare. Traffic fines, towing, and like expenses are not reimbursable.

Where airfare costs are such that staying over the weekend will result in a lower fare, we will reimburse for the additional lodging and other costs up to the cost of the airfare without the weekend stay.

**LODGING**

Single occupancy accommodation at minimum available rates at a safe and secure business class hotel or motel are reimbursable. If the lodging receipt states multiple occupancy, indicate either the single room rate on the receipt or provide the name(s) of the traveler(s) who shared the lodging.

Personal charges must be paid out-of-pocket at checkout. Such charges (e.g., personal phone calls, movies) are not reimbursable. The cost of health/exercise fees may be reimbursed.

When a master account is set up, only room charges and meeting banquet expenses will be placed on that account. All other charges will be paid by employee, and reimbursed according to this policy.

**MEALS AND ENTERTAINMENT**

Personal meals are individual, everyday meals consumed during business travel. Personal meals associated with overnight travel are reimbursable. A maximum of three personal meals per day is allowable.

Meals associated with same-day travel do not qualify for reimbursement. IRS regulations require that an employee be away from home substantially longer than an ordinary day' s work and during the time away from home, need sleep or rest.

If a spouse or personal guest travels with the employee, the employee may not seek reimbursement of meal costs for the spouse or guest (unless the spouse or guest has a business purpose for attending). When staff members purchase meals for other staff, on the expense report list all employees for whom the meal expense covers.

Business meeting meals or entertainment must have a business purpose and must include two or more persons. Costs should be reasonable and customary for the location. Persons attending and the business purpose for the meal/entertainment must be provided.

Entertainment expenses where there is a direct and established relationship between employee and the parties being entertained may be reimbursed. In most cases, this will require prior approval from the President & CEO.

**OTHER INCIDENTALS**

Tips may be reimbursed if: (1) tip is 20% or less of the cost of the associated goods or services, or (2) the tip is customary and of a reasonable amount in cases where the tip cannot be associated to a specific cost (e.g., a tip to a bellhop).

Phone charges will be reimbursed as follows:

1. Business Calls: Business calls are allowable expenses.
2. Business-Personal Calls: Calls to keep your family advised of your well-being are allowable, but must be kept to a minimum.
3. Personal Calls: All other personal calls are the responsibility of the traveler.

To avoid expensive hotel surcharges, the use of calling cards or cell phones is encouraged.

Internet connection fees are reimbursable if the employee is required to have internet access for business.

Reasonable laundry expenses are reimbursed if the stay exceeds 7 days.

Expenses that are generally outside the scope of ordinary and necessary and may not be reimbursed include but are not limited to, the following:

* Alcoholic beverages outside of the scope of approved entertainment expenses.
* Purchased expenditures not accompanied with a receipt
* Books and magazines purchased while in transit
* In-room movies while at hotels
* Purchase of gifts, personal services, and memorabilia

**EXPENSE REPORTS**

To be reimbursed for all authorized expenses, an employee must submit an expense report accompanied by receipts and approved by the employee's manager. Expense reports should be submitted within ten days of returning to the office from travel or at least monthly for other expenses.

Receipts or records of all expenses are required for Association documentation per Section 274 of the Internal Revenue Code. The employee must substantiate by adequate records or sufficient evidence his or her statement as to the (1) amount, (2) time and place, (3) business purpose and (4) business relationship of a reimbursed expense. An expense reporting form with space to note these items is provided

Receipts should be submitted whenever possible to support your request for reimbursement. For items under $25, a receipt is not required for reimbursement. If a receipt for an item $25 or greater is lost or missing, the employee should try to obtain a replacement copy from the vendor. We, at the discretion of the President & CEO, may reimburse the employee for such undocumented expenses.