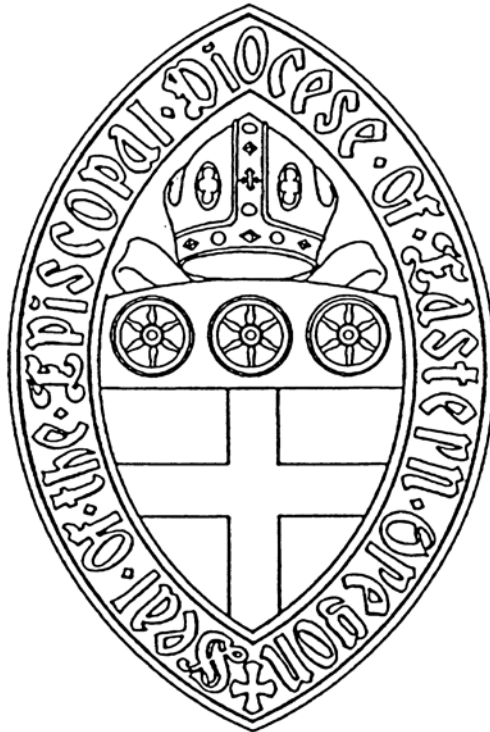


*Episcopal Diocese  
of  
Eastern Oregon*



*Employee Handbook*

*Personnel Policies  
&  
Benefits Summary*

*Approved by Diocesan Council, May 19, 2012*



# Table of Contents

<b>Introduction</b> .....	<b>1</b>
Employment values and guidelines.....	2
<b>Section 1: Employment Relationship</b> .....	<b>4</b>
101 Employment At-Will .....	4
102 Employment and Compensation .....	4
Job Description.....	4
Application and Interview Process.....	4
Employee Classifications .....	5
Definition of Work Week .....	6
Pay Day.....	6
Pay Procedures .....	6
Rest and Meal Periods.....	6
Worship.....	7
Overtime .....	7
Salary Administration .....	7
Social Security and Medicare .....	8
Deductions in Accordance with FLSA.....	8
Attachments and Garnishments .....	10
103 Pension Plans.....	10
104 Insurance Benefits.....	10
105 Expense Reimbursement.....	11
106 Employee Assistance Program.....	12
107 Continuing Education and Sabbatical Leave .....	12
108 Retirement.....	12
109 Termination of Employment.....	13
Return of Employer Property .....	14
Unemployment Benefits .....	14
References.....	14
110 Equal Employment Opportunity .....	14
111 Diocesan Policies.....	15

Protection of Children and Youth.....	15
Sexual Misconduct or Harassment .....	16
Smoke Free Environment.....	16
Reasonable Accommodation for Religion.....	17
Drug Free Workplace .....	17
Anti-Fraud, Dishonest Activity, Whistleblowing.....	20
<b>Section 2: Attendance and Absences .....</b>	<b>23</b>
201 Attendance.....	23
202 Holidays .....	23
203 Vacations .....	23
204 Sick Leave.....	24
205 Personal Leave.....	25
206 Family Leave.....	25
207 Compassionate Leave.....	25
208 Military Leave or Jury Duty .....	26
209 Miscellaneous Legal Leaves.....	26
<b>Section 3: Training and Performance Standards.....</b>	<b>27</b>
301 Orientation Period.....	27
302 Standards of Conduct .....	27
303 Workplace Safety .....	27
Accidents, Injuries and Illnesses.....	27
Occupational Safety and Health Compliance.....	28
Safe Workplace Practices and Rules .....	28
Personal Property.....	30
Searches.....	30
Security .....	30
Weather Related and Other Emergency Closings and Delays .....	30
Inquiries Regarding Use of Buildings, Equipment and Facilities.....	31
Pets in the Workplace .....	31
<b>Section 4: Use of Employer Property .....</b>	<b>33</b>
401 Information and/or Telecommunications.....	33
Confidential or Proprietary Information .....	33
Unauthorized Use .....	33

Disclaimer of Liability for Use of Internet .....	33
Personal Use of Information and/or Telecommunication Systems.....	34
Duty Not to Waste Computer Resources.....	34
No Expectation of Privacy .....	34
Blocking of Inappropriate Content.....	35
Prohibited Activities .....	35
Illegal Copying and Downloading .....	35
Using Personal Computers for Work.....	36
Virus Detection .....	36
Security and Passwords .....	36
Copyrighted Materials .....	36
Protection of the Diocese’s Reputation.....	37
Use of Information and/or Telecommunications Systems While Driving .....	37
Additional Provisions Applicable to Cell Phones.....	37
Liability of Others’ Use of System.....	38
Violations to be Reported.....	38
Employer Equipment .....	38
402 Diocesan and Ascension School Letterhead .....	39
403 Works for Hire .....	39
404 Employer Vehicles.....	39
405 Employer Funds and Assets .....	40
<b>Section 5: Performance Reviews.....</b>	<b>42</b>
501 Purpose .....	42
502 Objectives.....	42
503 Intervals.....	42
504 Process .....	42
505 Discipline.....	43
506 Grievance Review .....	43
<b>Section 6: Employee Records .....</b>	<b>44</b>
601 Record Keeping.....	44
602 Emergency Contacts .....	45
603 Medical Information .....	45
604 Record Retention .....	45

<b>Standards for Hiring.....</b>	<b>47</b>
<b>Supplement to Staff Employment Application.....</b>	<b>49</b>
<b>Consent &amp; Release for Information &amp; Telecommunication Policy .....</b>	<b>51</b>

# ***INTRODUCTION***

## ***PURPOSE***

This Employee Handbook is designed to introduce employees to the Diocese, familiarize them with the Diocese's policies, and to provide general guidelines on work rules, benefits and other issues related to their employment and to help answer many questions which may arise.

The policies and procedures in this manual apply to employees of the bishop's office and all other persons paid through the diocesan office, including Ascension School staff, and clergy employed for parochial and non-parochial diocesan duties, except where countermanded by a separate written employment agreement.

It is the policy of the Diocese that for all positions of employment, fair and equitable schedules of compensation, benefits and working conditions will be implemented.

The policies in this Employee Handbook are only guidelines. This Employee Handbook is not a contract of employment. Nothing contained in this Employee Handbook creates a contract, express or implied, between the Diocese and any employee.

The Diocese reserves the right to change, delete, suspend or discontinue any policy, benefit or provision in this Employee Handbook at any time and for any reason, without prior notice, except as otherwise required by applicable law, with respect to current and future employees. Any change or modification of any policy, benefit or provision in this Employee Handbook must be in writing, adopted by Diocesan Council and approved in writing by the bishop and chair of the diocesan council.

If at any time the Diocese fails to enforce any policy set forth in this Employee Handbook, such failure shall not affect the Diocese's ability to enforce such policy at a later date. If any provision of this Employee Handbook is inconsistent with applicable law, such provision shall be deemed modified to the minimum extent possible to bring it into compliance with such applicable law.

This Employee Handbook supersedes any and all previous Employee Handbooks and any other Diocesan policies, whether written or oral, concerning the topics covered in this Employee Handbook.

It may also be necessary to deviate from customary practices in certain unanticipated circumstances. The Diocese thus reserves the right to make such changes at any time and without prior notice. Our working relationship is based on mutual commitment, satisfaction and understanding. Please read this handbook carefully and keep it for reference. Also refer to *Human Resources Practices for Lay Employees in Episcopal Churches*, a publication of The Church Pension Group, which is available in every parish office and diocesan business office, or may be obtained from the Diocesan Office or The Church Pension Group.

## **EMPLOYMENT VALUES AND GUIDELINES**

The Diocese affirms the intent of the several resolutions passed by recent General Conventions of The Episcopal Church concerning employment practices for both clergy and laity in the Church and has sought to incorporate them in these policies.

The Episcopal Church is committed to fulfill its mission to the world to proclaim and teach gospel values of personal dignity and justice in our common life. The Diocese endeavors to practice those same values in our everyday work environment through the right ordering of relationships by fostering the principles of personal dignity, justice, accountability, and participation. Toward that end, the Diocese recognizes that each employee, according to his/her assigned responsibilities and personal talents, serves the Diocese's mission. Further, all employees are expected to be honest to themselves and others and to treat each other with respect and dignity, regardless of their position in the organizational hierarchy or their job title and responsibilities.

### ***WORKPLACE VALUES IN THE EPISCOPAL CHURCH***

Believing in the call to the Church to strive for justice and peace among all people, and to respect the dignity of every human being, The Episcopal Church seeks to promote professional employment environments that offer opportunity for development and advancement. The Church's commitment to this is summed up in the widely accepted "Golden Rule":

**"In everything, therefore, treat people the same way you want them to treat you...." (Matthew 7:12a)**

Following is a summary of the mutuality of the employer/employee relationship we seek to foster:

#### ***WHAT YOU CAN EXPECT FROM US***

- Fair pay and benefits
- Written employment policies
- A workplace in full compliance with the law
- A workplace free of harassment and violence
- Performance appraisals based on written job descriptions
- Training and development
- A safe workplace

#### ***WHAT WE EXPECT FROM YOU***

- Teamwork
- Performance to your fullest potential
- Observance of the law and these workplace values
- A commitment to quality



- Honesty, truthfulness and integrity
- Support of the mission of the organization

***WHERE TO GO FOR HELP IN RESOLVING AN EMPLOYMENT ISSUE***

Should a workplace conflict arise, it is recommended that these steps be followed:

- Try to resolve the issue with the person directly involved
- If you feel you cannot do this, or if doing so does not bring resolution, contact your supervisor for help
- If the conflict is with your supervisor and cannot be resolved by speaking to him or her, you should seek the help of the person in authority above your supervisor

*Version: August 2005*

*Workplace Values Subcommittee, Executive Council Task Force on Employment Policies  
and Practices in the Episcopal Church*

## **SECTION 1: EMPLOYMENT RELATIONSHIP**

### **101 EMPLOYMENT AT-WILL**

The Diocese is committed to ensuring fair treatment of all employees. This means providing a workplace environment in which all persons are respected, encouraged and supported in performing the tasks they have been assigned.

Employment relationships in the Diocese are based on a mutual covenant between the individual worker and the Diocese. This is a voluntary relationship entered into and continued between the individual and the Diocese. As a mutually voluntary relationship, the employment relationship is of an indefinite duration, but it may be terminated by either the Diocese or by at-will employees, at any time with or without cause for any reason (except an unlawful reason) or no reason, at any time with or without prior notice. Additionally, the Diocese reserves the right to modify employees' employment, including demotion (*e.g.*, a change in title or a decrease in salary or number of hours worked), at any time with or without cause for any reason (except an unlawful reason) or no reason, at any time with or without prior notice. This relationship is defined as employment "at-will."

Employees' "at-will" employment status may only be altered or modified through a written agreement, which specifically states the intention to alter or modify the at-will employment status and is signed by the employee and the bishop or his/her duly authorized designee

### **102 EMPLOYMENT AND COMPENSATION**

#### **A. JOB DESCRIPTION**

The Diocese will endeavor to provide, in writing, a clearly defined general description of each position and its requirements. From time to time, the Diocese may review and, in its discretion, modify a position's job description.

If an employee has any questions about his/her job duties or responsibilities, or believes the job description does not accurately reflect his/her actual duties and responsibilities, the employee should bring these issues to the attention of his/her supervisor.

#### **B. APPLICATION AND INTERVIEW PROCESS**

To apply for a particular position, an applicant will be required to complete an employment application, and may also be required to complete telephone and/or in person interviews. Employment applications and interviews are important phases of the hiring procedure. The employment application and any interview notes become a part of the employee's permanent record. The Diocese relies upon the accuracy of the information contained in the employment application and provided during the interviews, as well as the accuracy of other information presented throughout the hiring process and employment. Information submitted on the application form, during an interview or the hiring process and/or throughout employment may be independently verified.

If an applicant misrepresents or falsifies any information, or omits any material fact, during the application, interview or hiring process or during employment, this is cause to exclude the applicant from further consideration or, if already hired, to terminate employment.

In its discretion, the Diocese may make a job offer contingent upon: successful completion of a reference, background and/or other check; a negative result on a post-offer drug test; verification of any required licenses, certifications, degrees and/or transcripts; successful completion of any required post-offer health, psychological screenings and/or other screenings, examinations, or immunization requirements; and/or any other lawful requirement imposed by the Diocese.

U.S. immigration law requires that any employee who is hired or recruited for a fee after November 6, 1986, be subject to a document inspection process. The requirement applies to U.S. citizens as well as to non-citizens. The verification process must take place within 3 business days of the date on which the individual starts work. As part of this verification process, the applicant must complete and sign Section 1 of the U.S. Citizenship and Immigration Services Employment Eligibility Verification (Form I-9). By completing such form, the applicant will be testifying that he/she is:

- a) A citizen or national of the United States; or
- b) An alien lawfully admitted for permanent residence; or
- c) An alien authorized to work in the United States.

Each employee also must present documents to prove his/her identity and employment eligibility, consistent with federal law. The Diocese will physically examine these documents and complete Section 2 of the Form I-9, and a copy of each such document will be attached to the employee's I-9 and maintained, in confidence, in the employee's personnel file.

### **C. EMPLOYEE CLASSIFICATIONS**

Each employee shall be classified into one of the categories listed below.

#### **1. Regularly Scheduled**

a. Full time. These are employees hired to work 40 hours per week and who are expected to continue their employment indefinitely (hereafter "full time employees"). These employees are entitled to the full range of benefits outlined in this manual.

Exempt. These are employees designated as exempt from over-time and compensatory time rules according to guidelines in the Fair Labor Standards Act.

Non-exempt. These are employees not exempt from over-time and compensatory time rules and to whom such rules apply.

b. Part time. These are employees hired to work less than 40 hours per week and expected to continue their employment indefinitely (hereafter “part time employees”). Employees who work 1000 or more hours per year are entitled to benefits as described in this manual.

## **2. Temporary**

These are employees hired to work for a specific period of time less than six months in duration. They shall sign an employment agreement stipulating the complete terms of employment including duration, compensation, hours, place of work, job or project description, and supervisor identity. These employees are not entitled to benefits.

### **D. DEFINITION OF WORK WEEK**

A normal work week consists of 40 hours, i.e., five 8-hour days.

The Diocese’s standard work hours vary by job position.

With the specific approval of the supervisor, the working period of an employee may vary from normal office hours for good and proper reason.

### **E. PAY DAY**

All employees are paid once a month on the 30<sup>th</sup> day of the month. If a regularly scheduled payday falls on a national, state, or Diocesan observed holiday, employees will receive their pay on the day preceding such holiday.

The paycheck will include earnings for all work performed through the end of the previous payroll period.

### **F. PAY PROCEDURES**

An employee may choose to either receive a paper check or to have his/her pay directly deposited into his/her bank account. To receive a direct deposit, the employee must provide advance written authorization to the staff member who performs payroll and/or human resources functions. Employees who elect direct deposit of their pay will receive a paper and/or electronic receipt.

Each employee needs to review her/his paycheck or direct deposit information for errors. If a mistake is found, please report it immediately to staff member who performs payroll and/or human resources functions so that necessary steps may be taken to correct any error.

### **G. REST AND MEAL PERIODS**

In accordance with Oregon workplace law, paid rest periods of at least 10 minutes are provided during each four-hour work period. A meal period of not less than 30 minutes will be provided to non-exempt employees who work six or more hours in one work period.

The Diocese provides a 60 minute lunch break for diocesan office staff.

## **H. WORSHIP**

Worship services will be conducted as scheduled. Employee attendance and leadership participation are voluntary, with the exception of Ascension School camp program and resident staff for whom duties include worship during camp sessions.

## **I. OVERTIME**

1. Overtime compensation is required to be paid to all non-exempt employees working in excess of 40 hours per week. It is to be paid at one and one half times the employee's normal hourly pay rate. Only hours worked in excess of 40 hours in the normal workweek are paid at the overtime rate. Only hours actually worked will be counted. Hours paid but not worked, such as vacation, holiday or sick pay, will not be included in overtime calculations. Time off in lieu of overtime compensation will not be granted for non-exempt employees. Employees may not voluntarily elect out of overtime compensation.

2. Employees may be required to work overtime because of the workload. The supervisor will give as much advance notice as possible when this occurs. Employees may not work overtime hours without advance approval from their supervisor.

When the nature of a regularly scheduled exempt employee's work, as dictated by their employment agreement and job description, requires hours of work outside the normal work-week, the employee shall receive equivalent hours of time-off. Those hours of compensatory time will be taken within the week following the overtime work unless specific approval of the supervisor allows for variance from that scheduling.

## **J. SALARY ADMINISTRATION**

### **1. Salary Ranges**

A salary range shall be established for each position and subject to annual adjustments recommended by the bishop and/or Diocesan Council, and approved as part of the annual budget by Diocesan Convention. The Bishop and Diocesan Council will consider such factors as work load, prevailing wages in the community for similar occupations, merit, and cost of living increases.

### **2. Salary Determination**

a. The salary of the bishop is approved, as part of the annual budget, by the Diocesan Convention upon recommendation of the Diocesan Council.

b. The salaries of Ascension School staff are determined by the bishop and approved as part of the annual Ascension School budget by the Ascension School Board and Diocesan Council.

- c. The salaries of all other employees of the Diocese shall be approved by the Diocesan Convention, as part of the annual budget, upon the recommendation of the bishop and the Diocesan Council.
- d. Each employee will be advised annually as to determinations affecting his/her salary.
- e. All permanent employees shall be paid on a monthly pro-rated basis.

#### **K. SOCIAL SECURITY AND MEDICARE**

In accordance with applicable law, the Diocese will make mandatory deductions to lay employees' compensation for Social Security and Medicare, and will pay the Diocese's portion of such taxes. "Ministers" who are "performing ministry" are generally treated as self-employed for purposes of Social Security and Medicare. Episcopal clergy should consult their tax advisor and discuss their Social Security and Medicare tax status with the Diocese.

#### **L. DEDUCTIONS FROM PAY IN ACCORDANCE WITH FLSA**

##### **1. Permissible and impermissible deductions from pay under FLSA**

Subject to the exceptions listed below, an exempt employee who is required to be paid on a salary basis must receive his/her full salary for any workweek in which he or she performs any work, regardless of the number of days or hours worked.

##### **a. Permissible Deductions**

Deductions from an exempt employee's pay are permissible under the FLSA in the following limited circumstances:

- When an exempt employee is absent from work for one or more full days for personal reasons, other than sickness or disability (if an exempt employee works any part of a day, the employee must be paid in full for such day).
- For absences of one or more full days due to sickness or disability if the deduction is made in accordance with a bona fide plan, policy, or practice of providing compensation for salary lost due to the sickness or disability (if an exempt employee works any part of a day, the employee must be paid in full for such day). For example, if an employer maintains a short-term disability plan providing salary replacement for 12 weeks starting on the fourth day of absence, the employer may make deductions from pay for the 3 days of absence before the employee qualifies for benefits under the plan; for the 12 weeks in which the employee receives salary replacement under the plan; and for absences after the employee has exhausted the 12 weeks of salary replacement benefits.
- To offset any amounts received by an exempt employee as jury or witness fees, or for military pay.

- For penalties imposed in good faith for infractions of safety rules of major significance. Such rules include those relating to the prevention of serious danger in the workplace or to other employees, such as rules prohibiting smoking in explosive plants, oil refineries, and coal mines.
- For unpaid disciplinary suspensions of one or more full days imposed in good faith for violation of workplace conduct rules. Such suspensions must be imposed pursuant to a written policy applicable to all employees. For example, an employer may suspend an exempt employee without pay for three days for violating a generally applicable written policy prohibiting sexual harassment. Similarly, an employer may suspend an exempt employee without pay for twelve days for violating a generally applicable written policy prohibiting workplace violence.
- Deductions made during the first and last week of employment if the exempt employee only worked a portion of such weeks.
- The Diocese complies with the requirements of the Oregon Family Leave Act (OFLA) (ORS 659A.150-659A.186), which addresses the potential need for extended leave due to eligible serious health conditions beyond the times stated in these policies, for employees who have worked an average of at least 25 hours per week during the 180 calendar days immediately preceding the beginning of the OFLA leave. A request for leave covered by OFLA should be presented to the bishop as soon as the need is known.

**b. Impermissible Deductions**

In all other circumstances, it is impermissible to make deductions from the pay of exempt employees required to be paid on a salary basis. For example, an employer may not make deductions from an exempt employee's predetermined salary for absences occasioned by the employer or because of the operating requirements of the business. If the employee is ready, willing and able to work, deductions may not be made for time when work is not available. Other examples of impermissible deductions include deductions in pay resulting from absences due to jury duty, attendance as a witness and temporary military leave.

**2. Employer Policy**

It is the Diocese's policy to comply with the salary basis requirement of the FLSA. The Diocese prohibits all managers and supervisors from making any improper deduction from the salaries of exempt employees.

**3. Complaint Procedure**

If an exempt employee believes that an improper deduction has been made to her/his salary, she/he should immediately report this information to the staff person who performs human resources functions. The Diocese will

promptly investigate reports of improper deductions. If the Diocese determines that an improper deduction was made, the affected employee(s) will be promptly reimbursed for such improper deduction.

#### **M. ATTACHMENTS AND GARNISHMENTS**

The Diocese will comply with any valid attachment, garnishment, child support order, or other legally enforceable claim against an employee's wages.

If an employee has any questions about a deduction made to his/her wages in accordance with this Policy, please contact the bishop or staff member who performs payroll and/or human resources functions.

#### **103. PENSION PLANS**

All Clergy, regardless of hours, and all Lay Employees who work more than 1000 hours/year are entitled to participation in the Pension and Retirement Programs as outlined by the Church Pension Group. Employees should contact the Diocesan Office for information about benefits and enrollment.

#### **104. INSURANCE BENEFITS**

A. A \$50,000 term life insurance policy is provided to each full time employee. Premiums are fully paid by the Diocese. Coverage begins on the date of employment and ends on the date of termination of employment.

B. A medical insurance plan is available to employees working at least 1000 hours per year. The Diocese shall pay for employees' coverage beginning on the date of employment, according to guidelines set by Diocesan Council.

1. Full time lay employees are eligible for individual medical insurance coverage and coverage of one dependent when the dependent meets the following criteria:

a. a non-working spouse

b. a working spouse with income less than the diocesan employee and without employer-provided medical insurance.

c. employee's child who meets age and any other eligibility requirements as defined by law and who does not have medical insurance elsewhere.

2. The Diocese will not provide insurance for any lay employee (or lay employee's dependent) who has medical insurance coverage elsewhere. However, such an employee is eligible to receive reimbursement from the Diocese, upon providing appropriate proof, for out-of-pocket expenses for the employee incurred as a result of either the deductible or the co-insurance requirements of the employee's policy. The eligible expenses for reimbursement must fall within those services and expenses that would be covered by the Medical Trust plan for which the employee is eligible. Such reimbursement in any one year will not be made in excess of the premium amount for the individual coverage under the diocesan medical plan currently in effect.



C. A dental insurance plan is available, at the employee's expense, to each employee working at least 1000 hours per year, provided that premiums are paid in advance by the employee to the Diocese, as established by the Diocesan business office practices.

D. After retirement at age 65 or older while employed by the Diocese, full-time lay employees who choose to enroll in a Medicare supplement will be eligible to receive a monetary benefit towards such supplement. The amount of the benefit shall be equal to the amount paid by the diocese to the Medical Trust of the Church Pension Group for clergy Medicare supplement and will be based upon years of service in the diocese (2 years of paid benefits for each 1 year of service) .

Full-time lay employees who retire at age 62-65, who are not yet eligible for Medicare may purchase at their own expense regular (non-Medicare supplement) medical insurance through the diocesan plan, subject to the eligibility requirements as established by the Church Medical Trust, provided that the premiums are paid in advance by the individual to the diocese, as established by the Diocesan business office practices.

Full-time lay employees who retire at age 62-65, who are not yet eligible for Medicare may purchase at their own expense regular (non-Medicare supplement) medical insurance for a spouse or one eligible dependent through the diocesan plan, subject to the eligibility requirements as established by the Church Medical Trust, provided that the premiums are paid in advance by the individual to the diocese, as established by the Diocesan business office practices.

E. In accordance with applicable law, all employees are covered for job related injuries or illness by a State of Oregon approved workers' compensation plan. Each employee is individually responsible for promptly informing his/her supervisor of any such injury or illness.

F. All employees are covered under the State of Oregon's unemployment insurance plan.

NOTE: Further details on insurance programs are available from the Diocesan Office.

## **105. EXPENSE REIMBURSEMENT**

With the prior approval of the supervisor, the Diocese may reimburse an employee for any reasonable and necessary job-related expenses (i.e., travel, meals, etc.). The employee must submit appropriate documentation to the Diocesan Business Manager.

Reimbursement for travel expenses is defined in the separate "Travel Expense Reimbursement Policy" which is available from the Diocesan Office or the staff member who performs payroll and/or human resources functions.

## **106. EMPLOYEE ASSISTANCE PROGRAM**

Employee assistance to support employees experiencing substance abuse will be provided. The job of an individual undergoing recommended treatment will be held for a reasonable length of time during treatment.

Employees may utilize EAP services outside of work hours or during work hours by using available leave time, as provided in Section 2 of this Handbook. When using EAP services during work hours, employees need only state that they need leave time for an EAP appointment.

An employee refusing treatment may be disciplined up to and including dismissal.

All employees and their family members who are covered under the Medical Trust insurance plan are eligible to participate in the Medical Trust's employee assistance program (the "EAP") in accordance with this policy and the terms of the EAP. Eligible employees or family members may refer themselves to the EAP, and the Diocese may refer an employee.

Employees may obtain additional information from the staff member who performs human resources function. Those covered by Church Medical Insurance may obtain additional information by accessing the Church Medical Trust website, [www.cpg.org](http://www.cpg.org) (click on appropriate links to health insurance, Employee Assistance Program), or by calling Cigna Behavioral Health, 866-395-7794, seven days a week, 24 hours a day.

## **107. CONTINUING EDUCATION AND SABBATICAL LEAVE**

A. Employees are encouraged to attend meetings, institutes and seminars for their professional growth. Upon prior approval of the supervisor or the bishop, employees will be allowed time for such meetings and classes.

B. Requests for registration fees and/or other expenses for such continuing education require the approval of the employee's supervisor or the bishop and shall be processed through the diocesan continuing education program in accordance with its guidelines.

C. Attendance by staff at meetings, conferences, seminars or continuing education, if related to the employee's job, or if required by the supervisor, is considered normal working hours, and is compensated accordingly.

D. The Diocesan Professional Development policy is applicable to full-time diocesan employees, both clergy and lay. Employees may request sabbatical leave following five (5) years of service. See the "Policy for Extended Ministry Development Leave".

## **108. RETIREMENT**

A. Permanent lay employees shall receive a retirement benefit according to the policy determined by Diocesan Council and approved by Diocesan Convention.

B. Clergy retirement benefits are provided through the Church Pension Fund.

C. The normal retirement age for employees of the Diocese is considered to be 65 years.

If a lay employee is previously retired from service with the Episcopal Church, or any entity affiliated with it, and is presently receiving pension benefits from the Episcopal Church Lay Employees' Retirement Plan, those pension benefits may be affected by employment with the Diocese.

If an employee is receiving pension benefits from these plans, she/he should contact the Church Pension Fund to determine whether retirement benefits will be suspended as a result of employment with the Diocese.

## **109 TERMINATION OF EMPLOYMENT**

As specified in Section 1 ("Employment At-Will"), if an employee is employed "at-will," that employee may resign at any time for any reason (or for no reason), with or without notice, and the Diocese may terminate employment at any time for any legal reason (or for no reason) with or without notice.

In general, the Diocese will strive to give to the employee its reason for ending the employment relationship to help ensure the Diocese has acted in a fair, dignified and just manner. The Diocese will not routinely end all employment relationships upon the change of the bishop. Further, in accordance with resolutions of the General Convention, when an employment relationship ends:

- Whenever possible, if the Diocese or the employee seeks to end the employment relationship, the party seeking to end the relationship is encouraged (but not required) to provide adequate notice to the other party of such termination;
- Whenever possible, if the Diocese seeks to terminate employment for performance-related reasons, the Diocese shall provide the employee with a brief written statement stating the performance-related employment reasons for such termination;
- Whenever possible, both the Diocese and the employee shall give the other party appropriate assistance for continuing ministry;
- The Diocese and the employee shall respect the dignity of all parties and, whenever possible, should mutually agree upon the manner in which the affected community will mark the end of the employment relationship; and
- Upon the end of the employment relationship for any reason, the Diocese shall pay the employee his/her final compensation immediately, or within 5 weekdays of the date of termination if there is less than 48 hours notice of resignation.

*\*Nothing contained in this Handbook, including the above guidelines, is intended to, nor should be read to alter or modify, the at-will employment relationship (as explained in more detail in Section 101 of this Handbook), which the Diocese maintains with all employees except clergy as otherwise provided for by internal church constitutions, canons, resolutions, policy or practice (whether issued by*

*General Convention or Diocesan Convention). While the above guidelines of General Convention are to be followed whenever possible, such guidelines are not intended to alter the employment at-will doctrine under the law.*

#### **A. RETURN OF EMPLOYER PROPERTY**

Upon separation from employment with the Diocese, the former employee must return all Diocesan property, including identification cards, keys, security cards, credit cards, cellular phones, PDA/Treo/BlackBerry-like devices, computers, equipment, vehicles, Diocesan records and other documentation (in paper and electronic format), and any other Diocesan property.

#### **B. UNEMPLOYMENT BENEFITS**

Employees covered by unemployment laws will receive unemployment benefits when they satisfy applicable eligibility criteria. The Diocese will notify employees on termination of possible eligibility.

#### **C. REFERENCES**

Upon request, the Diocese may provide an employment or other reference for an individual concerning his/her Diocesan employment and work for the Diocese. The bishop or his/her designee will have sole discretion and control over the content of all employment or other references.

The Diocese will require an individual to sign a consent, waiver and release, in the form provided by the Diocese prior to providing an employment or other reference. If an individual refuses to sign such consent, waiver and release, the Diocese will respond to the reference request by providing a copy of this policy and by stating that the individual refused to provide the consent, waiver and release required by Diocesan policy.

Only the bishop or his/her designee is authorized to provide employment or other references.

If anyone advises an employee that he/she intends to make an inquiry of the Diocese concerning that employee, or contacts an employee for employment or any other reference for any current or former employee, all such inquiries must be directed to the bishop or staff member who performs human resources functions.

### **110 EQUAL EMPLOYMENT OPPORTUNITY**

The Diocese is committed to and fully supports the principle of equal employment opportunity.

A. In accordance with General Convention Resolution D032: 76<sup>th</sup> General Convention, 2009, the Diocese will not discriminate in lay employment on the basis of an individual's race, color, sex, national origin, age, familial status, disability, sexual orientation, general identity, or gender expression.

Classifications protected by General Convention Resolution D032 (or any other internal Church canons, resolutions, policy or practice (whether issued by General Convention or Diocesan Convention)) are not, and will not be,

considered in any decision regarding recruitment, hiring, training, promotion, transfer, lay off, termination, classification, compensation, benefits or other employment action.

All employees are responsible for supporting the concept of equal employment opportunity and diversity and assisting the Diocese in meeting its objectives.

*\*\*\*\*Nothing contained in this Policy is intended to create a legal right where none would have existed in the absence of this Policy or General Convention Resolution D032: 76<sup>th</sup> General Convention, 2009 (or any other internal Church canons, resolutions, policy or practice (whether issued by General Convention or Diocesan Convention)), nor does the Diocese concede that it is covered by or subject to any federal, state or local laws.*

*\*\*\*Nothing contained in this Policy is intended to alter the Diocese's right to make employment decisions with respect to clergy and other individuals who fall within the ministerial exemption under applicable law(s).*

The Diocese is committed to complying with all applicable laws that prohibit discrimination in employment of qualified individuals with disabilities. Reasonable accommodation for employees with disabilities may be required. Further, in accordance with General Convention Resolution A081: 76<sup>th</sup> General Convention, 2009, the Diocese will make those reasonable accommodations necessary for the full participation of employees or volunteers with disabilities who attend conferences or meetings on behalf of the Diocese.

Employees are encouraged to inform the staff member who performs human resources functions of any physical or mental disability that may require a reasonable accommodation to allow the employee to perform the essential functions of their position, and to suggest reasonable accommodations. Similarly, in accordance with General Convention Resolution A081: 76<sup>th</sup> General Convention, 2009, disabled employees or volunteers who attend conferences or meetings on behalf of the Church should contact the staff member who performs human resources functions if they need a reasonable accommodation in order to fully participate in such conferences or meetings. Medical documentation will be required to assist in this process. Any information obtained by the Diocese that relates to employees' physical and mental disabilities will be treated as confidential medical information and will be maintained pursuant to Section 603. Any medical information obtained that relates to volunteers will similarly be treated as confidential.

It is also our policy to protect employees and applicants from any coercion, retaliation, or discrimination for filing a complaint or assisting in any investigation pursuant to the equal opportunity laws.

## **111. DIOCESAN POLICIES**

### **A. PROTECTION OF CHILDREN AND YOUTH**

In the interest of lessening the possibility of assigning a person with an inappropriate background, paid or volunteer, to a position which will or may

result in unsupervised access to children under 16 years of age or developmentally disabled persons, supplementary application procedures will be followed. These procedures shall include the following:

1. Applicant shall complete the supplementary employment application form, Appendix A to this manual.
2. In such positions, the scope of the employee's employment must be clearly stated, especially in regard to duties involving children.
3. References shall be required and checked. In addition, references shall be obtained from people in areas where the employee has last resided. The request for information from references shall state the nature of the duties the employee is to perform and that the duties involve dealing with children. Employees shall receive copies of the Diocesan Sexual Conduct Policies. Signed acceptance of and compliance with the policies are required. Completion of a background check and training in abuse and harassment prevention and reporting are required by these policies.

Further, if an employee is a mandated child abuse reporter (i.e., the job position or credentials/license requires report of child abuse and/or neglect), the employee must make all such reports as required by law.

If an employee has any questions concerning his/her duties and obligations under this policy, please contact the staff member who performs human resources functions.

Failure to comply with this policy may subject the employee to disciplinary action, up to and including immediate termination from employment.

## **B. SEXUAL MISCONDUCT OR HARASSMENT**

In the Diocese of Eastern Oregon, sexual misconduct in any form is unacceptable behavior for any cleric, member, volunteer or employee. The Diocese reaffirms the principle that employees as well as members have the right to be free from sexual misconduct including sexual harassment. Any behavior determined to be sexual misconduct will result in appropriate disciplinary action which may include termination of employment, and deposition for clerics.

Allegations of misconduct may be reported to the Bishop or to individuals designated by the Bishop as Report Persons.

The complete Diocesan Sexual Conduct Policy will be given to employees at the time of hire and orientation. Training in prevention and identification of harassment and abuse is mandatory.

## **C. SMOKE FREE ENVIRONMENT**

Smoking is not permitted anywhere in, or on Diocesan property. *Oregon's Smokefree Workplace Law ORS 433.835-433.990*

## **D. REASONABLE ACCOMMODATION FOR RELIGION**

The Diocese is committed to complying with all applicable laws that require employers to reasonably accommodate an employee or prospective employee whose sincerely held religious belief, practice and/or observance conflicts with a work requirement.

If an employee has a conflict with a work requirement due to a sincerely held religious belief, practice, and/or observance, that employee should promptly inform the supervisor. Each employee requesting a religious accommodation must cooperate with the Diocese's efforts to determine whether a reasonable accommodation can be granted. The Diocese will review and individually assess each request for a religious accommodation, in accordance with applicable law.

See also "Worship", Section 102.H

## **E. DRUG FREE WORKPLACE**

### **1. Purpose and Goal of Policy**

The Diocese is committed to protecting the safety, health and well-being of all employees and other individuals in the Diocese's workplace and, toward that end, the Diocese is committed to maintaining a drug-free workplace. The Diocese encourages employees to voluntarily seek help with drug and alcohol problems.

For purposes of this policy, the following terms shall have the following meanings.

- a. The term "Diocesan Work or Activities" means:
  - i. Work for the Diocese at any location;
  - ii. At any time on the Diocesan premises;
  - iii. At any Diocesan function or sponsored event;
  - iv. At any function or event attended by employees as representatives of the Diocese or any other Episcopal or professional organization;
  - v. At any time traveling to and from any Diocesan location, event or work specified in subparagraphs (c) & (d) above; and
  - vi. At any time in Diocesan vehicles (whether owned, leased or rented).
- b. The term "illegal drug" means drugs and controlled substances, the possession or use of which is unlawful, pursuant to any federal, state and local laws and regulations in the United States. Drugs and controlled substances that are not legally obtainable, or that are legally obtainable but have not been legally obtained, are considered to be illegal drugs. Examples include street drugs such as cocaine, heroin, marijuana, and other controlled substances such as stimulants, depressants and hallucinogenic products.

All employees must comply with the Diocese's drug-free workplace policy. As a condition of continued employment with the Diocese each employee must abide by this policy.

## **2. PROHIBITED BEHAVIOR**

### **a. Illegal Drugs**

The Diocese strictly prohibits at any time (whether during or before or after working hours) the manufacture, distribution, dispensation, use, sale, possession, purchase, trade, transfer, and/or offer for sale of illegal drugs by employees.

### **b. Prescription & Over-the-Counter Drugs**

Prescription and over-the-counter drugs are not prohibited when taken in standard dosage and/or according to a physician's prescription. Any employee taking prescribed or over-the-counter medications will be responsible for consulting with the prescribing physician and/or pharmacist to ascertain whether the medication may interfere with safe performance of his/her job. If the use of a medication could compromise the safety of the employee, fellow employees or the public, it is the employee's responsibility to use appropriate personnel procedures (e.g., call in sick, use leave, request change of duty, notify supervisor) to avoid unsafe workplace practices.

The illegal or unauthorized use of prescription drugs is prohibited. It is a violation of the Diocese's drug-free workplace policy to intentionally misuse and/or abuse prescription medications.

### **c. Alcohol**

During Diocesan Work or Activities, all employees shall refrain from using alcohol except for sacramental wine used as part of a religious service. The Diocese may, however, permit the responsible use of alcohol at social events regardless of the location. For purposes of this policy, "responsible use of alcohol" shall mean that, at all times, the employee:

- Remains sober;
- Does not operate a vehicle or other machinery while under the influence of any alcohol;
- Conducts him/herself professionally, in accordance with general standards of decency and, as applicable, Diocesan policies; and
- Makes certain his/her behavior does not compromise his/her ability to perform his/her job.

If an employee has any doubts about whether he/she can comply with these requirements if he/she drinks socially, the employee must refrain from using alcohol.



### **3. NOTIFICATION OF CONVICTIONS**

Any employee who is convicted of a criminal drug or alcohol violation occurring in connection with Diocesan Work or Activities must notify the bishop and staff member who performs human resources functions in writing within 5 calendar days of the conviction.

### **4. CONSEQUENCES**

One of the goals of the Diocese's drug-free workplace program is to encourage employees to voluntarily seek help with alcohol and/or drug problems. If, however, an employee violates the policy, the consequences are serious. If an employee violates the policy, he or she may be subject to disciplinary action in a manner consistent with applicable law, up to and including immediate termination from employment.

In addition to the foregoing, the Diocese may initiate appropriate disciplinary action against any employee so convicted within thirty (30) days of a conviction of a criminal drug violation occurring in the workplace or during any employment-related activity or event, in a manner consistent with any applicable law, up to and including immediate termination from employment, or the Diocese may require the employee's satisfactory participation in a controlled substance abuse assistance or rehabilitation program, approved for such purposes by a federal, state or local health, law enforcement or other appropriate agency.

This provision in no way limits the Diocese's right to discipline an employee under the other provisions of this Handbook.

### **5. ASSISTANCE**

The Diocese recognizes that early intervention and support improve the success of rehabilitation for alcohol and drug abuse and addiction. Whenever feasible, and subject to the limitations described in this policy, the Diocese will assist employees in overcoming alcohol and drug abuse and addiction. To support its employees, the Diocese's drug-free workplace policy:

- Encourages employees to seek help if they are concerned that they or their family members may have a drug and/or alcohol problem.
- Offers employees and their covered family members assistance with alcohol and drug problems through the Employee Assistance Program (EAP) (see Policy No. 106 ("Employee Assistance Program")). To the extent possible, assistance is provided on a confidential basis. In certain circumstances, certain information may need to be shared with the Diocese such as, for example, as required to process benefits or leaves. The Diocese is not provided with, nor does it request, any notification of a voluntary request for assistance or treatment by any employee. If, however, the Diocese refers an employee for EAP services, the Diocese

may receive notification from EAP about the employee's use and cooperation with such EAP referral.

Treatment for alcoholism and/or other drug use disorders may be covered by Diocesan provided health insurance. However, the ultimate financial responsibility for recommended treatment belongs to the employee.

## **6. CONFIDENTIALITY**

The Diocese will treat and maintain as confidential all information received by the organization through the drug-free workplace program. Access to this information is limited to those who have a legitimate need to know in compliance with relevant laws and Diocesan policies.

## **7. EMPLOYEES' RESPONSIBILITY**

All employees are prohibited from reporting to work or duty while their ability to perform job duties is impaired due to on- or off-duty use of alcohol, illegal drugs, or other prescription or over-the-counter drugs.

In addition, employees are encouraged to:

- Be concerned about working in a safe environment;
- Support fellow employees in seeking help;
- Use the Employee Assistance Program, if available (see Policy No. 106 ("Employee Assistance Program when appropriate; and
- Report dangerous or unsafe behavior to the bishop or supervisor.

## **8. COMMUNICATION**

Communicating the Diocese's drug-free workplace policy to employees is critical to the Diocese's success. To ensure all employees are aware of their role in supporting our drug-free workplace program, all employees will receive a written copy of the policy.

## **F. ANTI-FRAUD, DISHONEST ACTIVITY, WHISTLEBLOWING**

The Diocese is committed to doing business in an environment of honesty and integrity in accordance with applicable federal, state, and local laws. Therefore, the Diocese will not tolerate any illegal, dishonest and/or fraudulent activities by any of the Diocese's employees, consultants, agents, vendors, contractors, volunteers, and any other outside third parties. Employees are required to promptly report any allegations involving possible illegal activities, dishonest activities and/or fraud in matters relating to the Diocese to the bishop and/or president of diocesan standing committee. If the allegation involves clergy, the report should be made to the Diocesan Chancellor and the bishop.

For the purposes of this policy, "fraud" is defined as the deliberate practice of deception in order to receive unfair or unlawful gain. Examples of illegal, dishonest, and/or fraudulent activities include, but are not limited to:

- Forgery, falsification, or alteration of documents (for example: receipts submitted for expense account reimbursement, cash receipts, checks, vendor agreements, purchase orders, other financial documents, electronic files);
- Misapplication and/or misappropriation of the Diocese's funds, supplies, property, or other assets;
- Impropriety in the handling or reporting of money or financial transactions relating to the Diocese
- Profiteering as a result of insider knowledge of the Diocese's plans and activities;
- Unauthorized disclosure of the Diocese's confidential and proprietary information to outside parties;
- Employees or members of their Family<sup>1</sup> receiving any gratuities, gifts of money, property or service, discounts or other like favors which exceed courtesies customarily accepted as business practices, which might place, or be construed as placing, an employee under any obligation to act on behalf of the Diocese in a manner that conflicts with the Diocese's Conflict of Interest policy and Code of Ethics;
- Destruction, removal, or inappropriate use of the Diocese's records, furniture, fixtures, and equipment; and/or
- Actions related to concealing or perpetrating the above-mentioned activities.

It is the policy of the Diocese to establish and maintain controls and procedures intended to provide reasonable assurance that illegal, dishonest, or fraudulent acts, by employees or outside third parties, are prevented or promptly detected. To that end, employees have an obligation to promptly report any and all suspected illegal, dishonest, and/or fraudulent acts to the bishop and/or president of the diocesan standing committee.

The bishop in consultation with the diocesan chancellor shall jointly appoint the individual(s) responsible for investigating any allegations involving possible illegal, dishonest, and/or fraudulent activities in matters relating to the Diocese. To the extent possible, all investigations will be conducted in a confidential manner; provided, however, that disclosure may be necessary in order to thoroughly investigate the matter.

If required by law or where deemed appropriate by the Diocese, the Diocese shall report cases of alleged illegal, dishonest, and/or fraudulent activities to the appropriate law enforcement authorities. The Diocese will fully cooperate with

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<sup>1</sup> For purposes of this policy: the term "Family" is defined as an individual's Spouse, children, step-children, parents, step-parents, grandparents, grandchildren, siblings, nieces or nephews, any person who lives with the individual or is otherwise considered part of the individual's immediate family, and/or persons related to an individual's Spouse in the above listed ways; the term "Spouse" is defined as an individual's husband, wife, or domestic partner.

law enforcement authorities in any investigation and/or prosecution of such cases.

Violations of this policy may subject employees to disciplinary action, up to and including immediate termination from employment. Violations of this policy by any other individual or organization may result in termination of such individual or organization's business or other relationship with the Diocese. As appropriate, the Diocese may report such violations to applicable law enforcement authorities.

The Diocese will not retaliate (including, without limitation, terminate, demote, withdraw benefits, or take other adverse employment action) against any employee or other individual who, in good faith, raises concerns regarding alleged violations of this policy. Any employee who raises concerns without any good faith basis may be subject to disciplinary action, up to and including immediate termination from employment. If any other individual or organization raises concerns without any good faith basis, the Diocese may terminate its business or other relationship with such individual or organization.

## SECTION 2: *ATTENDANCE AND ABSENCES*

### **201 ATTENDANCE**

Because each job is important to the daily operation of the Diocese, regular attendance and punctuality are essential. The Diocese recognizes that certain absences due to illness, medical appointments or other personal business may be unavoidable.

If an employee is going to be late or absent from work he/she must notify the supervisor promptly. Any absence for a reason other than accident or illness requires prior approval from the supervisor.

### **202 HOLIDAYS**

The Diocese of Eastern Oregon recognizes the following holidays and authorized time off:

- New Year's Day
- Martin Luther King Jr. Day
- President's Day
- Good Friday & Easter Monday
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day & the Friday after Thanksgiving Day
- Christmas Eve & Christmas Day

If a holiday falls on a Saturday or Sunday, the bishop shall designate either the Friday before or the Monday after as a holiday.

A schedule of specific dates shall be approved by the bishop each year according to the guidelines set forth above. The bishop may approve additional holiday time, at his/her discretion, particularly between Christmas and New Year's.

Because of the nature of the Diocese's business, in some instances certain employees may be required to work on certain holidays. Therefore, on a case-by-case basis, the Diocese will decide the dates on which such employees will observe the holiday on which they were required to work.

For non-exempt employees, paid holiday hours are not counted toward hours worked for purposes of calculating overtime. Part time employees will receive pay for that part of the holiday that would have normally been worked.

### **203 VACATIONS**

Regularly scheduled employees are entitled to annual vacation with pay. The hours of vacation pay are equal to the number of scheduled hours per week. (If the employee does not have a schedule, the hours will equal the average of the hours worked per week in the preceding twelve [12] months.)

1. Clergy employees shall receive four (4) weeks of vacation, including five (5) Sundays, vested on the date of employment and renewed each year on the anniversary date of employment.

2. Lay employees shall receive two (2) weeks of vacation per year for the first two years of employment. Vacation time, pro-rated from date of employment shall be vested on the date of employment, with a full year's vacation time renewed on January 1 of each succeeding year of employment. After the second (2<sup>nd</sup>) anniversary of employment, employees shall receive three (3) weeks of vacation annually, and four (4) weeks of vacation after the fourth (4<sup>th</sup>) anniversary of employment.

Regularly scheduled employees are eligible to take a half-year's accrued vacation time upon completion of six months of employment.

Staff will coordinate vacation leave so that duties will be covered as necessary. The immediate supervisor must approve scheduling of vacation time. Vacation time will be coordinated and calendared through the Diocesan Office for all permanent employees, including Ascension School staff.

Holidays falling within an employee's scheduled vacation will not be charged as vacation.

Should an employee become ill for at least three consecutive days during a scheduled vacation period, the days of illness may be charged as sick leave. Presentation of a doctor's certificate may be required.

Vacation days may not be accumulated or transferred from one year to the next. Following a minimum of six months employment, pay for unused accrued vacation time to date of termination will be paid to the employee upon termination.

## **204 SICK LEAVE**

Paid sick leave is intended to minimize the economic effect of illness or accident of the employee or member of the employee's immediate family. Despite the provision of sick leave, employees whose health does not permit them to attend work regularly may be terminated for irregular attendance if absences unduly affect job performance or diocesan mission objectives.

A. Sick leave accumulates from the first day of employment for all permanent employees at one day per month of employment.

B. Full time employees receive twelve (12) days of sick leave per year and may accumulate a maximum of 60 days of sick leave.

C. For part time employees, the days of sick leave and maximum accumulation of sick leave shall be prorated according to the amount of time worked per year.

D. In the case of part time employees, either sick leave or make-up of hours on another day may be granted, but not both for any one day of illness. That is, no part time employee shall receive more than the employee's regular part time week's pay as a result of an illness.

E. A sick employee is expected to notify his/her supervisor at the beginning of the work day.

F. Up to two (2) days of sick leave per year may be taken as “mental health days” for the reduction of stress.

G. Holidays falling within an absence for illness will not be charged against sick leave.

H. Accumulated unused sick leave will not be paid upon termination or retirement

## **205 PERSONAL LEAVE**

Employees may request personal leave for time off when no other leave is appropriate, and this leave shall be arranged with and approved by the employee’s supervisor. Up to two (2) days of sick leave may be used for personal leave. Any additional personal leave will be unpaid. Employees do not have to disclose the reason for requesting personal days.

## **206 FAMILY LEAVE**

Leave of absence for pregnancy, birth of a child or adoption will be granted up to ninety (90) days. An employee with a minimum of one (1) year continuous service may take up to three (3) weeks leave with pay immediately following the birth or adoption of a child. If available to the employee, vacation time and sick leave may be used until exhausted. Time taken in excess of sick leave and/or accumulated vacation will be treated as Leave Without Pay. Continuance of leave beyond ninety (90) days is at the discretion of the supervisor. During the time of leave the individual may return, at his/her discretion, to work on a part-time or temporary basis, being paid for the time worked.

## **207 COMPASSIONATE LEAVE**

1. Full time employees are eligible for compassionate leave and funeral attendance leave with pay. The bishop will determine within the following provisions the amount of time to be granted:

a. In the case of the death of a member of the employee’s immediate family (parent, sister, brother, spouse, child, step-relative, grandparent, grandchild, mother-in-law or father-in-law), up to a maximum of five working days.

b. In the case of the death of a close relative (aunt, uncle, niece, nephew, cousin, sister-in-law or brother-in-law), up to one day to attend a funeral with no overnight travel or up to three days to attend a funeral requiring overnight travel.

2. If the employee wishes additional time other than authorized above, the employee may request personal leave without pay or vacation.

3. The bishop or immediate supervisor may grant funeral leave for the purpose of an employee attending the funeral of other than listed above, up to one-half day normally and, in exceptional cases, up to a full day.

4. Compassionate leave for other than funerals may be granted at the discretion of the bishop.

## **208 MILITARY LEAVE OR JURY DUTY**

Time off with pay for jury duty or military service is granted by the supervisor as circumstances dictate.

## **209 MISCELLANEOUS LEGAL LEAVES**

The Diocese acknowledges that the provisions of this Handbook do not address all situations in which an employee might be entitled to leave. Therefore, the Diocese reaffirms its commitment to providing employees with all leaves to which they are entitled under applicable federal, state, and/or local law.



## SECTION 3: *TRAINING AND PERFORMANCE STANDARDS*

### **301 ORIENTATION PERIOD**

Orientation gives the employee an opportunity to learn about and adjust to the job. It is also a time for the supervisor to evaluate the employee's performance.

The first three months of employment with the Diocese are an orientation period. Orientation is a time to introduce the employee to the organization, employment values and co-workers.

During the orientation (or as soon as they are offered) a new employee must attend training in, Safeguarding God's Children, Safeguarding God's People and anti-racism training. The Diocese periodically offers these programs at no cost to the employee. Safeguarding Online may be substituted for Safeguarding God's Children at the supervisor's discretion. The nature of an employee's duties may indicate a requirement for any of these trainings prior to beginning duties. Time taken to attend training is considered regular work time.

### **302 STANDARDS OF CONDUCT**

To ensure a positive work environment and orderly operations consistent with the Diocese's mission, goals, and religious culture, the Diocese expects employees to abide by its established standards of conduct. The Diocese retains exclusive discretion to determine whether employees have abided by such standards.

In specific, the Diocese requires that all employees:

1. Respect the tenets of the Episcopal faith, including the doctrine, discipline, and worship of The Episcopal Church, and conduct themselves professionally in a way that does not undermine such tenets;
2. Refrain from behavior that embarrasses or discredits the Diocese and/or is disruptive to the workplace; and
3. Abide by all Diocesan policies and procedures, including but not limited to the policies specified in this Handbook.

Employees who are unsure whether conduct is appropriate shall refrain from such conduct. Employees who have questions about the applicable standards of conduct should contact their supervisor, the bishop, or the staff member responsible for human resources functions.

Employees who violate this policy may be subject to disciplinary action, up to and including immediate termination from employment.

### **303 WORKPLACE SAFETY**

#### **A. ACCIDENTS, INJURIES AND ILLNESSES**

When an accident, injury or illness occurs at the workplace and/or in the scope of employment, it must be reported immediately to the supervisor and the staff member who performs human resources functions regardless of its nature or severity and even if the affected employee(s) request(s) that the accident, injury,

or illness not be reported. The Diocese will provide the proper forms for reporting job-related accidents, injuries, and illnesses. All incidents must be documented as soon as possible in writing by the supervisor and the employee who suffers a work-related accident, injury or illness. Whenever possible, written witness statements should also be obtained.

Each employee is responsible for promptly reporting any workplace accidents, injuries, and illnesses of which he/she is aware and the Diocese will not retaliate against an employee for reporting such occurrences. Any employee failing to comply with the terms of this policy may be subject to disciplinary action, up to and including immediate termination from employment.

## **B. OCCUPATIONAL SAFETY & HEALTH ADMINISTRATION (“OSHA”) COMPLIANCE**

The Diocese is committed to providing a safe working environment for all its employees. Toward that end, the Diocese will comply with the Occupational Safety and Health Act of 1970 (“OSHA”) and the Oregon Occupational Safety and Health Division.

The Diocese will not retaliate against any employee who, in good faith, raises a complaint regarding compliance with the requirements of the Occupational Safety and Health Act of 1970 (“OSHA”).

## **C. SAFE WORKPLACE PRACTICES AND RULES**

The importance of safety cannot be overemphasized. Using safe workplace practices is the responsibility of every employee. Therefore, for the protection and well-being of all employees, every employee must abide by the Diocese’s workplace safety rules. The following are general safe workplace practices and rules:

1. In accordance with Policy No. 107.C (“Smoke Free Environment”) smoking and the use of tobacco products are not permitted at any time on any premises owned by, leased by, operated by, borrowed by, used by, or otherwise under the Diocese’s jurisdiction (including but not limited to vehicles, parish halls, office space, Diocesan offices, camps and conference centers, seminaries, schools, or any other location at which Diocesan employees perform services). If the Ascension School Camp and Conference Center chooses to establish a “Designated Smoking Area” (such as, for example, an outdoor location located away from building entrances or an employee’s residential quarters not used for work purposes), all employees are required to restrict their smoking and tobacco use to such designated area.
2. Materials or equipment must not block passageways, fire-fighting equipment, first aid equipment or exits. Employees must not cover or hang anything on fire fighting or first aid equipment.

3. Employees must drive carefully on Diocesan property, and all vehicles must observe driving rules established by the Diocese as well as traffic laws (see also Section 404 (“Employer Vehicles”).
4. No horseplay or practical jokes are permitted on Diocesan property.
5. Employees shall not run indoors on the premises in areas not specifically designed for such physical activity.
6. Employees shall keep their work area in a clean and orderly condition.
7. Employees shall obey safety instructions, rules, policies and procedures. Whenever required, employees shall use safety and personal protective equipment provided. Employees shall make proper use of caution signs during housekeeping.
8. Before using any equipment or materials, employees shall read carefully any instructions or warnings labels. Any questions should be directed to the supervisor.
9. Employees shall immediately report any unsafe conditions or safety hazards to the supervisor.
10. Employees must notify the supervisor and the staff member who performs human resources or operations functions immediately of any accident, injury or illness, whether or not medical treatment is required (see Policy No. 203.A (“Accidents, Injuries & Illnesses”).
11. Employees must notify the supervisor immediately if they observe any unfamiliar or suspicious person in working areas. All visitors/non-employees must check in with the staff member who performs receptionist functions upon arrival and must comply with all safety requirements for the area(s) being visited.
12. Employees must use care when lifting and be sure to lift properly. Employees should get their power from their legs, not their back. If special trucks or hoists are provided, employees shall use them.
13. Computer users should adjust their workspace, including keyboard, display, seating, and lighting, in order to minimize the possibility of body and eye strains. Frequent users should schedule other types of work during the day as a break from computer use.
14. Employees must properly dispose of all hazardous materials in an acceptable and lawful manner. The supervisor can advise about the required disposal method and practice.

Other safety practices and/or rules may apply to a particular job assignment or work area. The employee is responsible for familiarizing his/herself with any special safety requirements and should consult with the supervisor if there are any questions.

Violations of safe workplace practices and/or rules may result in disciplinary action, up to and including immediate termination from employment.

#### **D. PERSONAL PROPERTY**

The Diocese does not assume responsibility for the loss or theft of personal belongings. An employee is expected to exercise caution and common sense when carrying cash or other personal valuables. Never leave purses, cash or valuables unattended and visible on desktops or in other public areas.

#### **E. SEARCHES**

The Diocese respects and is committed to the safety of its employees, as well as other individuals who use the Diocese's services and/or facilities. Accordingly, the Diocese has adopted this policy for the purpose of assuring employees' compliance with work and safety rules.

The Diocese reserves the right, at any time, without notice, to search employees, their work areas, lockers, desks, file cabinets, vehicles parked on Diocesan property, and other personal items at the workplace or work events. Additionally, the Diocese reserves the right to search a Diocesan vehicle that is primarily used by an employee, regardless of whether the vehicle is located on Diocesan property at the time. These rights are in addition to the rights reserved by the Diocese under Sample Policy No. 401 ("Information & Telecommunications").

Searches may be conducted, with or without the employee being present, by Diocesan representatives and/or by law enforcement authorized by the Diocese to be on its property.

If a search is requested, the Diocese appreciates the employee's cooperation and reminds that such action by the Diocese is part of an investigation designed to protect the employee and colleagues, and those served by the Diocese.

Refusal to cooperate with a search at the time requested may result in disciplinary action, up to and including immediate termination from employment.

#### **F. SECURITY**

Security is the responsibility of every employee. If an unfamiliar person is observed in working areas or any other suspicious activity anywhere on Diocesan premises or at Diocesan functions, please notify a supervisor immediately. Employees are required to comply with all Diocesan security procedures. Employees who fail to do so may be subject to disciplinary action, up to and including immediate termination from employment.

#### **G. WEATHER RELATED AND OTHER EMERGENCY CLOSINGS AND DELAYS**

At times, severe weather, fires, floods, power failures, earthquakes, or other emergencies may disrupt the Diocese's operations. In extreme cases, the Diocese's offices/facilities may temporarily close or have an early closing or

delayed opening, and employees will be notified of these instances by means appropriate to the location and season. Notification may be by phone call, by electronic message, or by message left on the Diocese's or other facility's main phone lines.

Keep in mind that safety is the Diocese's main concern. Even if the Diocesan offices/facilities are open, please use best judgment about safe commuting conditions. If an employee believes it is unsafe to commute to work or necessary to leave early, that employee shall report the lateness or absence in accordance with Section 201("Attendance").

#### **H. INQUIRIES REGARDING USE OF BUILDINGS, EQUIPMENT, AND FACILITIES**

Individuals or other organizations may contact Diocesan staff asking for information concerning use of Diocesan buildings and/or other facilities. No employee may respond to an inquiry regarding use of Diocesan buildings and/or other facilities without the prior written approval of the bishop or his/her designee. Any employee contacted about use of Diocesan buildings on the Diocesan Office campus or other diocesan buildings and facilities must refer the individual or organization to the bishop or Bishop's Executive Secretary. Refer individual or organization inquiring about use of Ascension School Camp and Conference Center buildings and facilities to the Executive Director or Hospitality Manager. Such requests shall be evaluated in accordance with Diocesan policy, after taking into account legal, tax and liability considerations. Any violations of this policy may result in disciplinary action, up to and including immediate termination from employment.

#### **I. PETS IN THE WORKPLACE**

The Diocese respects and cherishes all of God's creatures and recognizes that there may be instances where employees may need or desire to bring their pets to, or keep their pets at, work. Toward that end, an employee is permitted to bring his/her pet to work only if such employee receives the prior written approval of their supervisor. Any such approval shall specify the terms and conditions upon which a pet may be brought to the premises. At a minimum:

- The pet must not interfere with the employee's ability to perform his/her job;
- The pet must not be disruptive to other employees, volunteers, or individuals who use the Diocese's facilities;
- The employee is solely responsible for caring for, feeding, cleaning up after, and controlling the pet at all times;
- The employee must promptly remove the pet from the premises if directed to do so any time (and time spent removing the pet will be charged to the employee's accrued vacation or personal leave); and

- Pets will be removed from Diocesan premises and will not be permitted to return if they:
  - Display dangerous or mean propensities at any time while on Diocesan premises;
  - Are disruptive or interfere with the ability of employees to work; or
  - Create a tense or fearful atmosphere.

Further, the Diocese reserves the right to rescind approval at any time for any reason. [This policy does not prohibit employees from bringing pets to the Diocese's premises in connection with a St. Francis Day service or other services or events for which the general public is invited to bring pets.]

Employees who have concerns or questions about another employee's pet in the workplace should contact the staff member who performs human resources functions.

For purposes of this policy, the term "pets" refers to any animal, domestic or wild. "Service animals" (i.e., animals trained to perform tasks for people with disabilities) are not considered pets.

Violations of this policy may lead to disciplinary action, up to and including immediate termination from employment.

## SECTION 4: *USE OF EMPLOYER PROPERTY*

### **401 INFORMATION AND/OR TELECOMMUNICATIONS**

The Diocese is committed to having its “Information and/or Telecommunications Systems” (including, but not limited to, computers, networks, Internet access, [Intranet access,] e-mail accounts, telephones, voice mail, Diocese issued or owned cellular phones, PDA/Treo/BlackBerry-like devices and/or any other means of communication known or hereafter developed, and Diocese provided cellular phone service, PDA/Treo/BlackBerry-like service and/or any other communication service known or hereafter developed) used in a responsible, efficient, ethical, and legal manner, and to safeguarding its information assets. At the same time, the Diocese is committed to making certain that, to the extent possible, confidential information shared in a pastoral or similar communication is kept confidential. In furtherance of these goals, the Diocese has adopted this Information & Telecommunications Policy, which governs all employees’ use of the Diocese’s Information and/or Telecommunication Systems.

Use of the Diocese’s Information and/or Telecommunications Systems constitutes consent by the user to the terms and conditions of this policy. Any questions about this policy should be directed to the staff member who performs human resources functions.

Violation of this policy may subject employees to civil and criminal liability and/or disciplinary action, including loss of the privilege to use the Diocese’s Information and/or Telecommunications Systems and/or immediate termination from employment.

#### **A. CONFIDENTIAL AND/OR PROPRIETARY INFORMATION**

All data on the Diocese’s Information and/or Telecommunication Systems is classified as confidential and/or proprietary information.

#### **B. UNAUTHORIZED USE, DESTRUCTION & MODIFICATION PROHIBITED**

Unauthorized use, destruction and/or modification of the Diocese’s Information and/or Telecommunications Systems are strictly prohibited.

#### **C. DISCLAIMER OF LIABILITY FOR USE OF INTERNET**

The Internet is a worldwide network of computers that contains millions of pages of information. Users are cautioned that many of these pages contain offensive, sexually explicit, or otherwise inappropriate material. In general, it is difficult to avoid at least some contact with this material while using the Internet. Even innocuous search requests may lead to sites with offensive content. In addition, having an e-mail address on the Internet may lead to receipt of unsolicited e-mail containing offensive content. Users accessing the Internet do so at their own risk. The Diocese is not responsible for material viewed or downloaded from the Internet by employees.

#### **D. PERSONAL USE OF INFORMATION AND/OR TELECOMMUNICATION SYSTEMS**

The Diocese's Information and/or Telecommunications Systems are provided to employees for official Diocesan business. While these resources are to be used primarily for business, employees may use these resources for incidental personal use, provided such use does not interfere with employee productivity and/or the Diocese's operations and is consistent with the Diocese's policies and all applicable laws. The following activities are strictly prohibited by the Diocese:

1. In general, employees may not use the Diocese's Information and/or Telecommunications Systems to conduct any business activities unrelated to the Diocese's business.
2. The Diocese's Information and/or Telecommunications Systems may not be used for any solicitations, including but not limited to political causes, commercial enterprises and/or outside organizations.
3. Employees may not send non business-related, unsolicited e-mails (commonly referred to as SPAM). This includes the forwarding of e-mails received from outside, non-business-related sources, as well as e-mails initiated by Diocesan employees. If an employee receives SPAM or other unsolicited e-mails, the employee should contact the staff member who performs human resources functions.

#### **E. DUTY NOT TO WASTE COMPUTER RESOURCES**

Employees must not deliberately perform acts that waste the Diocese's Information and/or Telecommunications Systems or unfairly monopolize such systems to the exclusion of others. These acts include, but are not limited to, sending mass-mailings or chain letters, spending excessive amounts of time on the Internet, playing games, engaging in online chat groups, or otherwise creating unnecessary network traffic. Audio, video and graphics files (including games or other entertainment software) may not be downloaded, uploaded, streamed, or viewed unless they are directly related to Diocesan business.

#### **F. NO EXPECTATION OF PRIVACY & MONITORING USAGE**

Employees do not have an expectation of privacy in anything they create, store, access, send, or receive on the Information and/or Telecommunications Systems (including, but not limited to, documents, voicemail messages, text or video messages, e-mail messages, instant messages, blogging, photo messaging, pod casts/videocasts/vlogs, social networking activities, and any other means of communication known or hereafter developed, whether of a business or personal nature) (collectively, referred to as "Electronic Communications"). The Diocese has the right, but not the duty, to monitor any and all of the aspects of its Information and/or Telecommunications Systems to the extent such monitoring is not inconsistent with applicable laws. An employee's use of the Diocese's Information and/or Telecommunications Systems is deemed consent to such



monitoring by the Diocese, without further notice. Failure to provide formal acknowledgement of this policy in the form required by the Diocese will result in the employee being denied access to the Diocese's Information and/or Telecommunications Systems and may result in other disciplinary action, up to and including immediate termination from employment. The Diocese's Information and/or Telecommunications Systems may create back up Electronic Communications and these Electronic Communications may be retrieved and accessed by the Diocese. Employees shall be responsible for their activities on the Diocese's Information and/or Telecommunications Systems.

#### **G. BLOCKING OF INAPPROPRIATE CONTENT**

The Diocese reserves the right to use software to identify any Internet site(s) that it, in its sole discretion, deems is (are) inappropriate, illegal, sexually explicit, or violates applicable equal employment opportunity principles and any Diocesan policies against harassment and other discrimination. Such sites may be blocked from access by the Diocese's networks. If an employee encounters a blocked website that he/she needs to access for legitimate business-related purposes, he/she shall contact the staff person responsible for IT management for access. In the event an employee encounters any inappropriate material while browsing the Internet that is not otherwise related to a legitimate business related purpose, then such employee must immediately disconnect from the site, regardless of whether the site was subject to blocking software. If an employee believes that a "cookie" or other "phishing" software has compromised his/her computer, the employee should contact the staff person responsible for IT management.

#### **H. PROHIBITED ACTIVITIES**

Material that is fraudulent, harassing, embarrassing, profane, obscene, sexually explicit, intimidating, defamatory or otherwise unlawful, inappropriate, offensive (including offensive material concerning race, color, religion and protected activity, age, sex, sexual orientation, military status, national origin, disability, marital status, genetic predisposition or carrier status or any other classification protected by federal, state, or local law), or in violation of the Diocese's equal employment opportunity policy and its policies against illegal harassment and other discrimination may not be downloaded from the Internet or displayed or stored on the Diocese's Information and/or Telecommunications Systems.

#### **I. ILLEGAL COPYING AND DOWNLOADING**

The Diocese prohibits the downloading of software from the Internet, without the prior approval of the staff person responsible for IT management, because of significant risk of infecting the Diocese's Information and/or Telecommunications Systems with a virus, the unreliability of such downloaded software, and the potential for copyright and/or licensing violations. All the Diocese's Information and/or Telecommunications Systems will be subject to periodic inventory and inspection for compliance.

## **J. USING PERSONAL COMPUTERS OR OTHER ELECTRONIC DEVICES FOR WORK & ACCESSING THE INTERNET, INTRANET OR THE EMPLOYER'S E-MAIL**

To ensure security and to avoid the spread of viruses, employees need the approval of the staff person responsible for IT management before using their personal computers or other electronic devices for work purposes. In all instances, employees accessing the Internet, the Diocese's Intranet or e-mail through a computer or other electronic device attached to the Diocese's network must do so through an approved Internet firewall designed for their operating system and any other firewall required by the Diocese. Employees using their personal computers or other electronic devices for work are not permitted to download, use or permit to be used on such computers or other electronic devices any program known to compromise security (e.g., file sharing software and/or software that permits users to search for other users' computers and download desired files) or spread viruses. Any questions should be directed to the staff person responsible for IT management.

## **K. VIRUS DETECTION**

Files obtained from sources outside the Diocese, including (1) personal, non-diocese storage media (e.g., flash drives, portable hard drives, iPods or other music devices, disks, or other storage media known or hereafter developed) ("Storage Media"); (2) files downloaded from the Internet, newsgroups, bulletin boards or other online services; (3) files attached to e-mail; and (4) files provided by vendors may contain dangerous computer viruses that may damage the Diocese's Information and/or Telecommunications Systems. Employees should never download files from the Internet, accept e-mail attachments from outsiders, or use Storage Media from non-diocesan sources without first scanning the material with Diocese-approved virus checking software. If an employee suspects that a virus has been introduced into the Diocese's Information and/or Telecommunications Systems, he/she must notify the staff person responsible for IT management immediately.

## **L. SECURITY & PASSWORDS**

Any attempt to circumvent the Diocese's security procedures is prohibited. Individual passwords and access codes must be kept strictly confidential. No employee should give a username, password, or access code to another person, unless instructed to do so by the staff person responsible for IT management, the bishop, staff member who performs human resources functions, and/or the president of the diocesan standing committee, in which case the employee must immediately provide the requested information.

## **M. COPYRIGHTED MATERIALS**

Users of the Diocese's Information and/or Telecommunications Systems may use only legally obtained, licensed data or software and must comply with applicable licenses or other contracts, as well as copyright, trademark, and other intellectual property laws. Much of what appears on the Internet and/or is

distributed via electronic communication is protected by copyright law, regardless of whether the copyright is expressly noted. Users of the Diocesan Information and/or Telecommunications Systems should generally assume that material is copyrighted unless they know otherwise, and not copy, download, or distribute copyrighted material without permission unless the use does not exceed fair use as defined by the federal Copyright Act of 1976. Protected material may include, among other things, text, published articles, photographs, audio, visual, graphic illustrations, and computer software. If an employee is uncertain about whether certain information is copyrighted, proprietary, or otherwise inappropriate for transfer, he/she should resolve all doubts in favor of not transferring the information and should consult the bishop and/or president of the diocesan standing committee or his/her designee.

#### **N. PROTECTION OF THE DIOCESE'S REPUTATION**

The Diocese prohibits the use of any of the Diocese's Information and/or Telecommunications Systems or the dissemination of information in a manner bringing disrepute, damage, or ill will against the Diocese. Employees are reminded to be courteous to other users of the system and always to conduct themselves in a professional manner. E-mails are sometimes misdirected or forwarded and may be viewed by persons other than the intended recipient. Employees should write e-mail communications and publish/post to blogs with no less care, judgment and responsibility than they would use for letters or internal memoranda written on the Diocesan letterhead. Further, all personal communications or postings must be free of any indication, whether explicit (e.g., "professional signature") or contextual, suggesting the statement and/or opinion is that of the Diocese.

#### **O. USE OF INFORMATION AND/OR TELECOMMUNICATIONS SYSTEMS WHILE DRIVING**

Users of the Diocese's Information and/or Telecommunications Systems must comply with all laws regarding the use of such devices while driving. The Diocese requires that a hands-free device be used whenever an individual: (1) is using a Diocesan owned and/or Diocesan-issued electronic device while driving; (2) is using Diocesan-provided cellular phone or other electronic service; and/or (3) is conducting Diocesan business while driving. Electronic devices should be used only when it is safe to do so under the circumstances and users must be aware that, even with a hands-free device, electronic devices should not be used during adverse weather or difficult traffic conditions.

#### **P. ADDITIONAL PROVISIONS APPLICABLE TO DIOCESE-ISSUED CELLULAR PHONES AND DIOCESE-PROVIDED CELLULAR PHONE SERVICE**

Cellular phones purchased by the Diocese and issued to employees are the property of the Diocese. As set forth in sub-section F of this Section, employees should not have an expectation of privacy in anything they create, store, access, send, or receive using a Diocese-issued cellular phone or Diocese-provided

cellular phone or other electronic service (including but not limited to voice-mail messages, text messages e-mail messages, conversations, etc.).

Individuals assigned cellular phones are responsible for safeguarding them from damage and misuse. Employees must report any damage, loss, unauthorized use or malfunction of a Diocese-issued cellular phone to their supervisor without delay.

The Diocese reserves absolute discretion and control over whether, and if so upon what terms (e.g. minute allotment, personal use, cost to employees, etc.), to issue cellular phones or other electronic devices and/or to provide cellular phone or other electronic service to employees.

#### **Q. LIABILITY FOR OTHERS' USE OF INFORMATION AND/OR TELECOMMUNICATIONS SYSTEM**

An employee shall be responsible for any Diocesan Information and/or Telecommunications Systems provided to the employee as well as the employee's activities on the Diocese's Information and/or Telecommunications Systems.

#### **R. VIOLATIONS TO BE REPORTED**

Any employee who discovers misuse of the e-mail system or Internet, or any violation of this policy, should immediately notify his/her immediate supervisor, bishop, staff member who performs human resources functions, and/or the president of the diocesan standing committee.

#### **S. EMPLOYER EQUIPMENT**

The Diocese provides employees with certain equipment to assist them to carry out their ministry and/or accomplish their job duties. Such equipment may include, for example: telephones, cellular phones, PDA/Treo/BlackBerry-like devices, fax machines, computers, copiers, and tools.

Diocesan equipment is provided to employees for official Diocesan business. While this equipment is to be used primarily for business purposes, employees may use such equipment for incidental personal use, provided such use does not interfere with employee productivity and/or the Diocese's operations, and is consistent with the Diocese's policies and all applicable laws. Notwithstanding the foregoing, if an employee uses Diocesan equipment for personal use, the Diocesan policies concerning the use of such equipment continue to apply. No Diocesan equipment may be removed from the Diocesan premises without prior approval of the supervisor.

When using or operating Diocese equipment, an employee is expected to exercise care, follow all operating instructions and safety standards, and perform required maintenance where appropriate. Please promptly notify a supervisor if any Diocesan equipment appears to be damaged, defective or in need of repair. The prompt reporting of damage, defects, and the need for repair may prevent possible injury to employees and others, and further deterioration of the

equipment. The supervisor can answer any questions about the employee's responsibility for care and maintenance of equipment.

Employee use of Diocesan vehicles is also governed by Section 404 ("Employer Vehicles"). Employee use of Diocesan Information and/or Telecommunications Systems is also governed by Section 401 ("Information & Telecommunications Systems")

#### **402. DIOCESAN AND ASCENSION SCHOOL LETTERHEAD**

Diocesan and Ascension School letterhead is used only for official business. No employee may use Diocesan or Ascension School letterhead for any personal purpose.

Violation of the above policies may result in disciplinary action, up to and including, termination of employment.

#### **403. WORKS FOR HIRE**

It is Diocesan policy that the Diocese shall be deemed the author and the exclusive owner of the copyright in all works of authorship made by a Diocesan employee (a) within the scope of his or her employment, (b) at the Diocese's direction, (c) on Diocesan time, (d) about or relating to the Diocese or its work, or (e) using any Diocesan equipment, supplies, facility, information or other resources (including financial resources).

#### **404. EMPLOYER VEHICLES**

In its discretion, the Diocese may permit an employee to use a Diocesan vehicle for business-related purposes. For purposes of this policy, the term "Diocesan vehicle" means any vehicle (including but not limited to cars, trucks, motorcycles, vans, buses, airplanes, boats, golf carts, helicopters, scooters, segways, bicycles, carriages, and buckboards) owned by, leased by, operated by, borrowed by, used by, or otherwise under the Diocese's control.

Diocesan vehicles must only be used in work-related activities and may not be used for personal business. No Diocesan vehicle may be taken home overnight without prior approval of the staff member who performs human resources functions or operations functions.

The use of Diocesan vehicles is limited to employees, authorized by the bishop or staff member who performs human resources functions or operations functions. To be considered for authorization to drive a Diocesan vehicle, at a minimum, an employee must meet any legal requirements, possess a current driver's license valid for the type of vehicle he/she will be driving and meet the qualifications established by the Diocesan insurance carrier.

Every employee operating a Diocesan vehicle shall:

- Wear a seat belt at all times;

- Require all other occupants to wear a seat belt, or other restraint (e.g., car seat) as applicable, at all times, unless the individual presents an acceptable medical exemption;
- Refrain from smoking in Diocesan vehicles;
- Drive safely and courteously;
- Obey all traffic, vehicle safety and parking laws or regulations;
- Practice defensive driving techniques;
- Only permit on-the-job Diocesan employees and/or other individuals authorized by supervisory staff members to ride in Diocesan vehicles;
- Maintain, at all times, an appropriate and valid driver's license;
- Report immediately to the bishop and the staff member who performs human resources functions:
  - Any and all traffic infractions and accidents for which an employee is ticketed during working or non-working hours;
  - Any and all traffic infractions for which an employee is convicted or pleads guilty or no contest;
  - Any change in driver's license status, including suspension, revocation, or restriction; and
  - Any incident involving the use of a vehicle while working, whether or not it results in any injury to any person or damage to any vehicle or property, and regardless of who is at fault or whether the employee was ticketed. An employee may make an initial report orally, but all oral reports must be followed promptly by a written report in the form specified by the Diocese; and
- Comply with any other rules established by the Diocese. See Policy No. 301 ("Information & Telecommunications")

#### **405. EMPLOYER FUNDS AND ASSETS**

The Diocese recognizes the importance of safeguarding its funds and other assets.

The Diocese shall adopt internal controls to prevent the theft and misuse of Diocese funds and other assets, and to ensure that all financial transactions are accurately documented and approved by authorized Diocese personnel in accordance with the law and, to the extent consistent with applicable law, the standards set forth in the *Manual of Business Methods in Church Affairs*.

Every employee who has access to or control over Diocese funds and other assets is personally accountable for the safekeeping of such funds and assets. Employees shall comply with any policies and/or procedures adopted by the Diocese concerning its funds and other assets. Further, it is the employee's obligation to

promptly report any suspected violation of this policy in accordance with Section 111.F (“Anti-Fraud, Dishonest Activity, & Whistleblowing”) and 101.P (“Expense Reimbursement”).

Any violation of this policy or any other policies and/or procedures adopted by the Diocese with respect to the safeguarding of its funds and assets may subject an employee to disciplinary action, up to and including termination from employment.

## SECTION 5: *PERFORMANCE REVIEWS*

### **501 PURPOSE**

A performance evaluation is a communication process, based upon a current position description, which offers the supervisor and the employee the opportunity to review performance. This process is aimed primarily at furnishing objective feedback to the employee on job performance. All performance evaluations will be based upon goals and objectives which are operative within the Diocese.

### **502 OBJECTIVES**

The objectives of the evaluation process are:

1. to allow the supervisor and the employee to test, identify, and refine their respective roles, relationships, expectations and responsibilities;
2. to allow for discussion of the employee's strengths and weaknesses as demonstrated by past performance;
3. to set direction for future performance;
4. to avoid crisis confrontations.

### **503 INTERVALS**

The first six months of employment will be considered a probationary period, which period may be extended for not more than an additional six months. Normally supervisors will conduct a performance evaluation with each new employee immediately after three months of employment, immediately before six months of employment, after 12 months of employment and at least annually thereafter.

### **504 PROCESS**

There are many methods and forms available to assist supervisors and employees in conducting a performance evaluation. In the absence of a clearly stated Diocesan policy requiring a standard method to be applied in every case, supervisors are expected to accomplish the following steps as a minimum:

1. Meet personally with the employee and review the applicable position description and the employee's performance.
2. Provide an objective overall evaluative rating in appropriate terms, and articulate suggestions for improvement as well as specific objectives or areas of emphasis to be pursued in the future. Receive suggestions from the employee.
3. Write a brief summary of the review, ensuring that a copy is placed in the employee's personnel file. This summary should be signed by both the reviewer and employee with opportunity for the employee to indicate any comments. Refusal of the employee to sign will not affect the validity of the review; the reviewer will ensure that the employee is fully apprised of the results of the review and then will record that fact in writing along with a



statement indicating the employee was given an opportunity to sign but refused.

4. Employ the same method of evaluation for all employees under their supervision.

### **505 DISCIPLINE**

The Diocese reserves the right to discipline employees as it deems appropriate under the circumstances. Disciplinary action, up to and including immediate termination from employment, may result for poor performance (i.e., deficiencies in the quality or quantity of work performed or the inability to perform certain job functions), misconduct (i.e., deficiencies in the manner in which an employee conducts himself/herself while at work or dealing with others), and failure to adhere to Diocesan policies and procedures and standards of conduct.

The Diocese will strive to treat each employee with dignity and respect during the disciplinary process and requests the same from all employees. The bishop or his/her designee, in his/her discretion, shall make the final decision concerning discipline. The Diocese shall keep a record of all discipline in the employees' personnel files (see Section 6 ("Employee Records"))

### **506 GRIEVANCE REVIEW**

The following grievance review process is established.

1. If an employee believes he or she has been subject to unfair treatment and has been unsuccessful in achieving a satisfactory resolution through normal supervisory channels, the employee should request an appointment with the bishop for the purpose of explaining the circumstances and requesting remedial action.
2. The bishop will inquire into the matter and may appoint an individual or committee to investigate and offer recommendations.

## SECTION 6: *EMPLOYEE RECORDS*

### 601 RECORD KEEPING

Records shall be maintained by employees in compliance with applicable laws and as necessary to implement the benefits in this policy. Non-exempt employees shall keep a log of hours worked to be available for review by supervisor upon request.

The Diocese maintains a file for each employee that contains application information, position description, performance evaluations, benefits and payroll administrative records, and other information relevant to employment with the Diocese. Access to personnel files is limited to those persons with a “need to know”. Background check documents are filed separately from the employee’s personnel file, in a secure location. Employees may schedule an appointment to review their personnel file and access will be allowed in accordance with state law.

Personnel records are highly confidential. The Diocese maintains a personnel file for each employee. The Diocese maintains employees’ medical records in a separate, confidential medical file pursuant to Section 603 (“Medical Information”). Employee personnel (and medical record) files are the Diocese’s property.

Unless otherwise required by law, an employee may only review her/his personnel file while employed. Unless required by law, the Diocese will not permit employees access to information confidentially submitted during the hiring process (e.g., references, interview notes, etc.). For an individual employee to review his/her personnel file, he/she must contact the bishop. The Diocese will determine the terms and conditions upon which the employee may review the personnel file (including, without limitation, any required notice, the location where the file may be reviewed, and whether any portions of the file may be copied).

The Diocese will not disclose information from an employee’s personnel file to anyone outside of the Diocese unless that employee has authorized the release, the release is to an authorized governmental agency, or the release is required by law.

Please notify the person responsible for personnel matters if there is change to any of the following:

- Tax Withholding
- Name, address, or telephone number
- Marital status or number of dependents
- Beneficiary for your employee benefits
- Emergency contact information

This information helps the Diocese maintain up to date and accurate records. It can also affect the employee’s insurance coverage and other benefits.

## **602 EMERGENCY CONTACTS**

For the employee's well-being, she/he should provide the Diocese with the name, relationship, phone number and address of an emergency contact. It is the employee's responsibility to make certain that the emergency contact and personal information are current.

The Diocese needs to maintain certain additional information about the employee for compensation, benefits and business purposes. To the extent required by law, such information will be confidential.

## **603 MEDICAL INFORMATION**

The Diocese maintains a separate, confidential file for each employee's medical information. Only employees with a genuine need shall be granted access to information in an employee's confidential medical file, and only to the minimum necessary to accomplish the intended purpose. [Employees have the same access to their confidential medical file as they have to their personnel file. See Section 601 ("Record Keeping").]

## **604 RECORD RETENTION**

The Diocesan recordkeeping and record retention policy, as found in the *Manual of Business Methods in Church Affairs*, governs the maintenance or destruction of all Diocesan records. All employees are required to comply with such policy. If an employee has any questions about recordkeeping or record retention requirements, that employee should contact the staff member who performs human resources functions.



EPISCOPAL DIOCESE OF EASTERN OREGON  
STANDARDS FOR HIRING

Qualified candidates will be sought and considered to fill positions when established or vacated in accordance with the following procedures:

1. General procedures

A. Job openings will be advertised to give exposure to potentially eligible candidates.

B. Position announcements will include current, realistic job descriptions and minimum required qualifications.

2. Interview procedures

A. Qualified applicants will be notified of time, date and place for an interview.

B. Candidates not selected for interview will be notified promptly.

C. Each applicant will be interviewed according to the same format to assure objectivity.

3. Job descriptions

A. Job descriptions are required for every position of employment. They will provide complete and accurate details of the work as well as the responsibility the employee is expected to assume.

B. Using the job description as a guideline, the actual work and employment expectations shall be thoroughly discussed by the new employee and his/her supervisor to minimize later confusion and misunderstanding.

4. Compensation When an offer of employment is made to a potential employee, the offer will include a clear statement of compensation to be paid for the position, and the salary review policy will be thoroughly explained.

5. Supervision Each employee will be informed as to:

A. the immediate supervisor's identity;

B. obligations of supervisor to employee;

C. obligations of employee to supervisor.

6. Child/adult abuse protection In the interest of lessening the possibility of assigning a person with an inappropriate background, paid or volunteer, to a position which will or may result in unsupervised access to children under 16 years of age or developmentally disabled persons, supplementary application procedures will be followed. These procedures shall include the following:

A. Applicant shall complete the supplementary employment application form, Appendix A to the Personnel Policy Manual.

B. In such positions, the scope of the employee's employment must be clearly stated, especially in regard to duties involving children.

C. References shall be required and checked. In addition, references shall be obtained from people in areas where the employee has last resided. The request for information from references shall state the nature of the duties the employee is to perform and that the duties involve dealing with children.

D. A background check shall be required. Background checks will be completed following current procedures approved by Diocesan leadership and the Chancellor. Contact the Diocesan Office to initiate a background check or with any questions pertaining to background checks.

E. Employees shall receive copies of the Diocesan Sexual Conduct Policies. Signed acceptance of the policies is required. Training in abuse and harassment prevention and reporting is required.



THE EPISCOPAL DIOCESE OF EASTERN OREGON

The Diocesan Office  
601 Union Street -- P.O. Box 1548  
The Dalles, OR 97058

Appendix A  
**SUPPLEMENT TO STAFF EMPLOYMENT APPLICATION**

Full Legal Name \_\_\_\_\_ Social Security No. \_\_\_\_\_

Alias/Maiden Name \_\_\_\_\_ Driver License No./State \_\_\_\_\_

1. Have you ever been convicted of a crime against person(s)? (A crime against persons includes any of the following offenses: Homicide in any degree; assault and related offenses in any degree; kidnapping or custodial interference in any degree; coercion, rape, sodomy or sexual abuse in any degree; contributing to the sexual delinquency of a minor; sexual misconduct or public indecency; incest, child neglect or any other crime involving the sexual abuse of a child.)

\_\_\_\_\_ Yes \_\_\_\_\_ No

2. Have you ever been convicted of a crime against property? (A crime against property includes any of the following offenses: Theft in any degree; burglary in any degree; arson in any degree; robbery in any degree; forgery in any degree.)

\_\_\_\_\_ Yes \_\_\_\_\_ No

3. Have you ever been found to have sexually assaulted or exploited a minor, or to have sexually abused a minor, in a Dependency Action, or a Domestic Relations Proceeding, or a Disciplinary Board Final Action?

\_\_\_\_\_ Yes \_\_\_\_\_ No

If your answer is yes to any of the questions above, please provide details:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(use extra pages if necessary)

I certify that the above information is correct. I understand that the Episcopal Diocese of Eastern Oregon or its agents may investigate any statements made herein. I also understand that untrue, misleading or omitted information herein may result in immediate dismissal.

Signature \_\_\_\_\_ Date \_\_\_\_\_



**Consent & Release for  
Information & Telecommunications Policy**

I have received the Diocese’s Information & Telecommunications Policy (the “Policy”). I acknowledge that I have read and understand the Policy, and I agree to comply with the terms of the Policy.

For purposes of this Consent & Release, the term “Information and/or Telecommunications Systems” includes, but is not necessarily limited to, computers, networks, Internet access, Intranet access, e-mail accounts, telephones, voice mail, Diocese-issued or owned cellular phones, PDA/Treo/Blackberry-like devices and/or any other means of communication known or hereafter developed, and Diocese provided cellular phone service, PDA/Treo/Blackberry-like service and/or any other communication service known or hereafter developed.

I understand that I have no expectation of privacy in anything that I create, store, access, send, or receive on the Diocese’s Information and/or Telecommunications Systems (including, but not limited to, documents, voicemail messages, text or video messages, e-mail messages, instant messages, blogging, photo messaging, pod casts/vid casts/vlogs, social working activities, and any other means of communication known or hereafter developed, whether of a business or personal nature (collectively referred to herein as “Electronic Communications”)). I understand that the Diocese’s Information and/or Telecommunications Systems may back up my Electronic Communications and, as such, “deleted” Electronic Communications may be retrieved and accessed.

I understand that I shall be held responsible for any Diocese Information and/or Telecommunications System provided to me and my activities on the Diocese’s Information and/or Telecommunications Systems

I understand that the Diocese has the right, but not the duty, to monitor any and all of the aspects of its Information and/or Telecommunications Systems to the extent such monitoring is not inconsistent with applicable laws. I hereby consent to such monitoring by the Diocese, without further notice.

I hereby release and hold harmless the Diocese and its affiliates, and their officers, directors, employees and agents, from any and all liability arising from or related to my use of the Diocese’s Information and/or Telecommunications Systems, and/or the monitoring of my, or anyone else’s, activities on such systems.

I acknowledge that I have read, I understand, and I agree to comply with the terms of this Consent & Release.

By: \_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

Please sign and date one copy of this notice and return it to the staff member who performs human resources functions. It will be placed in your personnel file. Retain a second copy for your reference.