

GREAT VALDOSTA UNITED WAY

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Valdosta, Georgia 31602

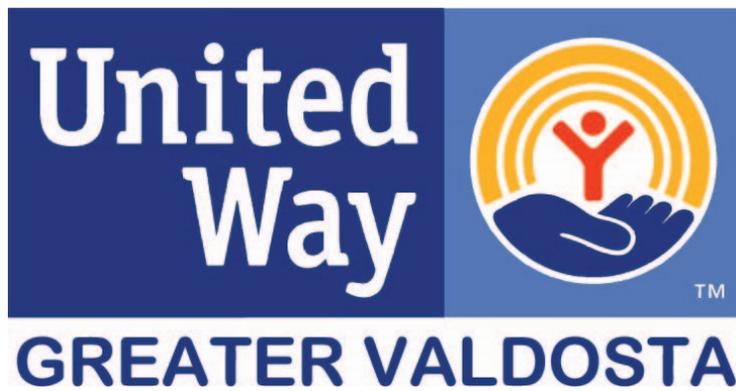


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ABOUT YOUR HANDBOOK

This handbook will provide information about your employment with Greater Valdosta United Way (“United Way”). Use it to look up basic information about United Way policies and procedures.

The United Way may make changes as business demands change. If there is a change in the law, the United Way must change too. Therefore, the material on the policies, practices and procedures may change as required by law or by requirements instituted by the United Way.

Every employee is expected to be familiar with and follow the practices, policies and procedures of this manual. This is an employee handbook, and it is not a legal binding contract. None of the provisions, policies, or procedures in this handbook shall be considered binding agreements, shall not be considered contracts of employment, and shall not and will not impose binding contractual obligations upon the United Way with respect to any of the provisions in this handbook, including but not limited to the promotion process, the termination process, the benefits process, and vacation pay. In addition, neither this employee handbook, nor any provisions in this employee handbook, shall be considered an “offer” that is “accepted” by the employee by either becoming an employee or remaining in employment with the United Way. Lastly, violation of any of the procedures, practices or policies in this employee handbook will not be actionable as a breach of contract. This employee handbook in no way guarantees your employment for any particular length of time or in any way alters the at-will status of your employment.

CODE OF EMPLOYEE/EMPLOYER RELATIONSHIPS

The United Way intends to implement fair and effective personnel policies and to require all employees to support the organization’s best interest.

1. The goals for employees include the following:
 - A. To provide equal employment opportunities and treatment regardless of race, religion, color, sex, age, sexual orientation, national origin, disability or military status.
 - B. To provide compensation and benefits commensurate with the work performed.
 - C. To establish reasonable hours of work based on the United Way’s needs.
 - D. To monitor and comply with applicable federal, state and local laws and regulations concerning employee safety.
 - E. To be receptive to constructive suggestions which relate to the job, working conditions, or personnel policies.
 - F. To establish appropriate means for employees to discuss matters of interest or concern with their immediate supervisor or department head.

2. The United Way expects all employees:
 - A. To deal with the public, customers, including donors and agencies in an appropriate and professional manner.
 - B. To perform assigned tasks in an efficient manner.
 - C. To be punctual.
 - D. To demonstrate a considerate, friendly and constructive attitude toward fellow employees.
 - E. To adhere to the policies adopted by the United Way.
3. The United Way retains the sole discretion to exercise all United Way managerial functions including the following rights:
 - A. To dismiss, assign, supervise and discipline employees.
 - B. To determine and change starting times, quitting times and shifts.
 - C. To transfer employees within departments or into other departments and other classifications.
 - D. To determine and change methods with which its operations are to be carried out.
 - E. To determine and change the size and qualifications of the work force.
 - F. To assign duties to employees in accordance with the United Way's needs and requirements and to carry out all ordinary administrative and management functions.
4. Nothing in this manual should be considered as altering the employment at-will relationship or as creating an expressed or implied contract or promise concerning the policies or practices that the United Way has implemented or will implement in the future. Accordingly, the United Way retains the right to establish, change and abolish policies, practices, rules and regulations at will and as it sees fit.

EMPLOYMENT AT WILL

Employees who do not have a written employment contract with the United Way for a specific fixed term of employment are employed at the will of the United Way for an indefinite period of time and are, therefore, subject to termination at any time for any reason with or without cause or notice.

EQUAL EMPLOYMENT OPPORTUNITY

The United Way will provide equal opportunity employment to all employees and applicants for employment. No person is to be discriminated against in employment because of race, religion, color, sex, age, national origin, disability, sexual orientation or military status.

While overall authority for implementing this policy is assigned to the Executive Director, an effective equal employment opportunity program cannot be achieved without the support of employees at all levels. Any employee who feels they are a victim of discrimination has a responsibility to, and is expected to, immediately report this to the Executive Director.

PRODUCTIVE WORK ENVIRONMENT/SEXUAL HARASSMENT POLICY

Every attempt will be made to provide a productive work environment for all employees. The United Way will not tolerate verbal abuse or physical contact by any employee that harasses, disrupts or interferes with another's work performance or that creates an intimidating, offensive or hostile environment. All employees are expected to maintain a productive work environment that is free from harassing or disruptive activity. No form of harassment will be tolerated including harassment for the following reasons: race, national origin, religion, disability, pregnancy, age, sexual orientation, military status or sex.

It is the policy of the United Way to maintain a working environment free from all forms of sexual harassment or intimidation. This policy applies to all United Way personnel as well as vendors and visitors to the United Way.

Sexual harassment is broadly defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- A. Submission to the conduct is explicitly or implicitly made a term or condition of employment;
- B. Submission to or rejection of this conduct is used as a basis for employment decisions; or
- C. The conduct has the purpose or effect of substantially interfering with an individual's work performance or creates an intimidating, hostile, or offensive work environment.

Any individual who believes that he or she is being subjected to sexual harassment or intimidation or who knows about its happening to others should, without fear of reprisal, promptly report the matter to the Executive Director or Chairman of the Board. The Executive Director will carefully investigate each complaint of sexual harassment and take corrective action where appropriate. All such complaints will be treated in the highest confidence possible, and any retaliation against the complainant is strictly forbidden. Any employee, supervisor, or Executive Director who is found to have violated the harassment policy will be subject to termination. The United Way prohibits any form of retaliation against employees for bringing forth bonafide complaints or providing information about harassment. Furthermore, sexual harassment (See pg. 16 of the handbook) by third parties, in the work place, is also prohibited, and will not be tolerated.

In such instance, the Executive Director should be notified of all such harassment immediately, so the Executive Director may take appropriate action.

Failure to comply with this policy may result in disciplinary action up to and including discharge. Please join us in ensuring that we all work in an environment in which sexual harassment is not tolerated.

HIRING

The United Way is an equal opportunity employer and will hire individuals based solely on the basis of their qualifications and ability to do the job to be filled. Every effort to develop and use the talents and abilities of current employees to the fullest extent will be made. When job openings arise, qualified internal candidates will be given full consideration in filling those openings. If candidates from outside the United Way are to be considered for job openings, the Executive Director will be responsible for recruiting the candidates following the procedure set forth in the United Way employment guidelines. The United Way may supplement the regular work force as needed with temporary or part time employees or other forms of flexible staffing. Former employees who left the United Way in good standing may be considered for hire as long as certain qualifications are met. Employment with the United Way does not guarantee that a current employee will be placed in a job when the job opening occurs.

ORIENTATION AND TRAINING

The United Way will provide orientation programs for new employees and conduct or support training programs as deemed appropriate. Employee participation in continuing education and/or special training programs, either in-house or external, may also be recommended or required by the United Way.

INTRODUCTORY PERIOD

All new employees and all present employees transferred or promoted to a new job are to be carefully monitored and evaluated for an initial introductory period of 120 days. During this time, the employee will be carefully observed and given feedback on their performance by the Executive Director and/or their supervisor. After satisfactory completion of the introductory period, those employees will be evaluated as provided for in the performance appraisals policy. A newly hired employee can be terminated at any time. New employees are also not generally eligible for employee benefits until they have received a satisfactory initial evaluation. Transferred or promoted employees who are unable to perform satisfactorily in their new jobs may be returned to their original jobs if a vacancy exists or may be terminated.

OUTSIDE EMPLOYMENT

Employees are allowed to engage in outside work or hold other jobs subject to certain restrictions. The outside work must not compete with or conflict with the United Way's interest and must not adversely affect job performance. Outside work that adversely affects the United Way's image will not be permitted. An

employee's request for permission to accept outside employment should be submitted in writing to the Executive Director. Full-time employees are not encouraged to engage in outside employment without the consent of the UW Board of Directors.

TERMINATION OF EMPLOYMENT

All employees are at-will employees of the United Way. In the absence of a specific written agreement, employees are free to resign at any time and for any reason, and the United Way reserves the right to terminate an employee at any time and for any reason. Managerial employees (Executive Director) are required to give four weeks written notice, and all other employees are required to give two weeks written notice of their intent to resign. Failure to give two weeks written notice may result in the forfeiture of any accrued employee benefits and ineligibility for re-employment.

Employees who are absent from work for three consecutive days without having been excused or without having given prior notice will be considered as having voluntarily quit. All information regarding an involuntary termination will be handled discreetly and confidentially. Terminated employees may be eligible for future employment, if recommended by their supervisor and approved by the Executive Director. All terminated employees will receive their final pay on the payday following termination.

Request for employment references should be made in writing to the Executive Director and should include an authorization from the employee for the requested information. Without this authorization, the United Way will generally not release information other than the verification of the employee's position and dates of employment with the United Way.

GRIEVANCE PROCEDURE

Because we work as a team, open and honest communication is vital to our continued success. Therefore, employees are encouraged to make any concerns, ideas, suggestions, or questions known to the United Way. Additionally, all employees should have an opportunity to present their work-related complaints and to appeal management decisions through a dispute resolution or grievance procedure. The United Way will attempt to promptly resolve all grievances that are appropriate for handling under this policy.

An appropriate grievance is defined as an employee's expressed dissatisfaction concerning any interpretations or applications of work-related policy or policies by management, the employee's supervisor, or other employees. Employees who feel that they have an appropriate grievance should submit the grievance in writing within five working days to the Executive Director. The Executive Director will investigate the grievance and attempt to resolve it and give a decision to the employee within five working days.

A decision becomes binding on all parties whenever the employee does not file a timely appeal or a decision is made in the final step and the right of appeal no longer exists. Information concerning an employee's grievance is to be held in confidence and no employee will be penalized for proper use of the grievance procedure.

SCHEDULING INFORMATION

Hours of Work

The United Way will establish the time and duration of working hours as required by workload and campaign needs. The normal work week is Monday through Friday and consists of forty hours. GVUW office hours are 8:30 a.m. to 4:30 p.m., Monday – Friday. Certain responsibilities will require time worked outside published office hours including weekends. In the event an agency supported event occurs outside of normal office hours, re-scheduling shall occur to hedge overtime. Rest breaks are considered as time worked. Each employee will be notified by the Executive Director of the employee's schedule, including meal periods, rest breaks, and any overtime when necessary.

All employees, except the Executive Director, are required to keep a daily time sheet to be turned into the Executive Director at the end of each week. Falsification of any timekeeping information will be considered grounds for disciplinary action up to and including termination.

In the event an agency supported event occurs outside of normal office hours, suggested flexibility shall occur to relieve overtime

Meal Breaks

Full-time employees or part-time employees scheduled to work more than five consecutive hours during any work day may receive a meal break which consists of thirty minutes near the middle of the work day. Employees required to work more than ten hours in any work day will be allowed a second meal break no later than six hours after returning from the first meal break. Employees must clock out for meal breaks and may either use the lounge provided or leave the United Way's premises during this time. Employees will be subject to discipline if tardy in returning from these meal breaks.

Rest Breaks

The Executive Director should schedule and employees should receive, unless job conditions do not permit, a rest break of ten minutes at approximately the middle of every four hours of work not interrupted by a meal. This time will be compensated as working time and employees are not required to clock out and in. However, punctuality should be observed. As employees are not permitted to leave the United Way's premises during this break, rest breaks should be taken in the employee lounge or in other designated work areas

SALARY AND BENEFIT INFORMATION

Salary Administration

The Executive Director evaluates each job and assigns an appropriate job grade and salary range. New employees generally will be hired at the starting rate assigned to their job rate. However, higher or lower starting rates may be applicable depending on the applicant's experience or skill level. Each employee will receive a compensation review in conjunction with a performance review in January of each year. The United Way will not be required to give a performance review, but may do so at its option. The United Way is not required to increase an employee's rate, but such determination will be made on an individual basis. The factors influencing compensation decisions include performance, length of service and budget considerations. Salary information is confidential and should not be shared with other employees. Discussion of salary can result in disciplinary action up to and including termination of employment.

Compensation for the Executive Director

Compensation for the Executive Director shall be determined by the Executive Committee subject to the approval of the Board of Directors. Any compensation adjustments shall be based on qualifications, performance, and budget. The Executive Director position is a salaried exempt (non overtime-eligible) position.

Pay Procedures

The United Way will pay the Executive Director and all staff on a bi-weekly basis. Each employee will receive his or her pay in the form of direct deposit to employee's checking account. Only deductions for local, state, federal and social security taxes will be deducted automatically. All employees, except those that are considered to be exempt employees under the Fair Labor Standards Act, will be paid overtime compensation at the rate of one and one-half times the regular hourly rate for work in excess of forty hours during the normal workweek. Employees are not permitted to work overtime without the prior approval of the Executive Director or the Chairman of the Board. Any mistake in the monetary compensation must be brought to the attention of the Executive Director immediately so that the error may be remedied. The Executive Committee may amend the payroll rate subject to the agenda of the Board of Directors.

Disclosure of Benefits

The United Way may provide its employees with various benefits and routine communications intended to explain these benefits. Any and all benefits may be modified, amended, or terminated at the discretion of the United Way. The United Way may provide benefits such as Vacation Pay, Personal Leave Pay, Holiday Pay, and an insurance package, which provides for health and life insurance.

Vacation Benefits

Employees are eligible for one week (five working days) vacation after completing one full year of continuous service. Employees are eligible for two weeks (ten working days) vacation after completing three full years of continuous service. Employees are eligible for three weeks (fifteen working days) vacation after completing ten full years of continuous service. Employees must use their available vacation

days before the beginning of the annual campaign. Any request for special exception shall be forwarded in writing to the Executive Director. If the Executive Director supports the request for special exception, the request shall be forwarded to the Executive Committee for approval. The decision of the Executive Committee shall be final and binding.

Vacation days cannot be carried over and taken during the following year.

Using the above as a guideline, vacation eligibility for the Executive Director shall be determined by the Executive Committee subject to the approval of the Board of Directors.

Personal Leave Benefits

Paid personal leave shall be granted at the rate of one day per month and may accrue up to a maximum of twelve (12) days/96 hours. Personal leave is a privilege, not an entitlement. If an employee develops a pattern of absences suggesting an abuse of the personal leave privilege, the Executive Director shall meet with the employee and resolve the issue and inform the Executive Committee of such action and resolution.

Holidays

United Way employees will be allowed to celebrate widely observed holidays. Holiday pay is eight hours. The United Way will observe the following holidays.

| | | |
|----------------------|-------------------|------------------|
| New Year's Day* | Independence Day* | Thanksgiving Day |
| M. L. King, Jr. Day* | Labor Day* | Christmas Day |
| President's Day* | Columbus Day* | |
| Memorial Day* | Veterans Day* | |

A recognized holiday that falls on a Saturday will be observed on the preceding Friday. A recognized holiday that falls on a Sunday will be observed on the following Monday.

In the case where it is not convenient to miss a day of work, such as an upcoming event, meeting, etc. those holidays marked with an * may be worked and taken off at later time.

If a recognized holiday falls during an eligible employee's paid absence (such as vacation or personal leave), holiday pay will be provided instead of the paid time off benefit that would otherwise have applied.

Paid time off for holidays **will not be counted** as hours worked for the purposes of determining overtime.

Bereavement Leave

Regular full-time employees may take off up to three days for the death of an immediate family member defined as: spouse, parent, child, sister, brother - natural, adopted or step, as well as any person living

within the same household. Extra time may be given on a case by case basis depending on factors such as distance and complexity of arrangements. One day will be granted for all other family members. Regular part-time employees are not eligible for paid bereavement leave. An employee should notify the Executive Director as soon as they learn of the need for absence, but no later than one half hour prior to the start of the scheduled workday.

Maternity Leave

The United Way will pay all acquired Personal leave and vacation leave for an employee taking Maternity Leave. The United Way will then follow the Family Leave Act allowing unpaid leave up to 12 weeks for any employee in need of such absence.

Travel Expense Reimbursement

The United Way shall reimburse all employees of reasonable out-of-pocket expenses incurred while traveling on authorized United Way assignments or while engaged in authorized United Way business. Lowest fares and rates should always be used. The most common reimbursable expenditures include: room, meals, transportation expenses, personal car allowance, tolls, parking fees and automobile rentals. The United Way policy for reimbursable travel expenditures covers travel and ordinary living expenses incurred both while the employee is out of town on United Way business and expenses incurred near the United Way's place of business that are not part of normal living cost, entertainment expenses are not covered.

The Executive Director will receive a monthly car allowance to cover expenses while using a personal car for United Way business. All other employees using personal cars on the United Way business will be reimbursed at the rate of approved Federal mileage rating, when the Executive Director approves this use. An expense report form must be completed by the employee showing authorized expenses and must be submitted to the Executive Director within one month of the time the expenses were actually incurred.

PERFORMANCE APPRAISALS AND MANAGEMENT

The Executive Committee shall establish annual performance goals and objectives for the Executive Director subject to the approval of the Board of Directors. The Executive Committee shall conduct an annual performance evaluation of the Executive Director in order to measure annual performance results against the established performance goals and objectives. The Executive Committee may also conduct quarterly performance evaluations of the Executive Director. A summary of the annual performance evaluation shall be forwarded to the Board of Directors.

The Executive Director shall establish annual performance goals and objectives for each employee subject to the approval of the Executive Committee. The Executive Director shall conduct an annual performance evaluation of each employee in order to measure annual performance results against the established performance goals and objectives. The Executive Director may also conduct quarterly performance

evaluations of each employee. A summary of each employee's annual performance evaluation shall be forwarded to the Executive Committee.

The Executive Director will evaluate each employee in January of each year. The performance appraisal is to be completed by the Executive Director and then reviewed and discussed with the employee. Employees will be allowed the opportunity to include any comments in the appropriate section of the form. Completion of a performance appraisal does not, in itself, automatically warrant a salary adjustment or change in employment status, nor is the conducting of an appraisal to be interpreted as a guarantee of future employment with the United Way. Furthermore, this policy does not require the United Way to conduct a performance appraisal on any particular employee, but said performance appraisal is done solely for the benefit of the United Way.

Employee Safety

The United Way will comply with all applicable federal, state and local health and safety regulations and provide a work environment as free as practical from recognized hazards. Employees are expected to comply with all safety and health requirements whether established by the United Way or by federal, state or local law. This includes reporting and helping to correct any unsafe and unhealthy working conditions or potential hazards, actively cooperating in safety training, participating in fire drills and disaster drills, and observing posted safety notices and "No Smoking" policies.

Personal Property

The United Way recognizes that employees may need to bring certain personal items to work. However, personal property that is not related to the employee's job performance may be disruptive to the workflow or may pose a safety risk to other employees. The United Way is not responsible for the loss, damage, or theft of personal belongings and employees are advised not to carry unnecessary amounts of cash or other valuables with them when they come to work. To maintain security and protect against theft, the United Way reserves the right to inspect all personal property brought on United Way premises or the contents of storage areas, desks or vehicles at any time.

Solicitation and Distribution

The United Way limits solicitations and distributions on its premises. When left unrestricted, such activities can interfere with the normal efficient operations of the organization. Solicitation and/or the passing out of literature or products by any non-employee are not allowed at any time on United Way property.

Smoking

The United Way will provide a work environment that promotes productivity and the well being of its employees. Accordingly, smoking is prohibited inside any United Way facility. Further, as an employer providing partial funding of employee health benefits, the employer and employee both are impacted by

increased premiums due to health care costs associated with smoking. For accepted breaks, refer to page 9 of this policy manual to the section entitled “**Rest Breaks.**”

Jury Duty

Jury Duty is a civic responsibility of all citizens and is not chargeable to leave. However, employees called for jury duty during the annual campaign shall seek to be deferred to another period not in conflict with the campaign.

PERSONAL CONDUCT

Behavior of Employees

In order to guarantee the efficient operations of the United Way and for the benefit and safety of all employees, certain rules and regulations regarding employee behavior are necessary. Conduct that interferes with United Way operations that discredit the United Way, or that is offensive to the public or coworkers will not be tolerated. Such conduct includes:

- A. Failure to report to work punctually.
- B. Failure to give proper advance notice whenever unable to work or report on time.
- C. Failure to comply with all United Way safety and security regulations.
- D. Failure to observe “No Smoking” regulations.
- E. Failure to wear appropriate personal attire.
- F. Failure to eat meals only during meal periods and only in designated areas.
- G. Failure to maintain work area cleanliness and orderliness.
- H. Failure to treat all individuals in a courteous manner.
- I. Failure to refrain from offensive or undesirable conduct.
- J. Failure to maintain efficiency and quality standards.
- K. Failure to report security concerns to the Executive Director.
- L. Failure to comply with United Way investigations.

The following conduct is prohibited and will subject the individual involved to disciplinary action up to and including termination:

- A. Reporting to work under the influence of alcohol or illegal drugs or the possession of alcoholic beverages and/or illegal drugs on the United Way premises.
- B. The use of profane or abusive language.
- C. Insubordination.
- D. Fighting with or assaulting a coworker or the public.
- E. Misuse of United Way property, another employee’s property or the public’s property.
- F. Gambling on United Way property.
- G. Falsification of documentation for United Way purposes.
- H. Threats or intimidation of other individuals.
- I. Unauthorized smoking.

- J. Horseplay.
- K. Improper attire or inappropriate personal appearance.
- L. Sexual harassment.
- M. Violation of solicitation/distribution policies.
- N. Improper disclosure of confidential information.
- O. Excessive absence from work, to be determined by the Executive Committee.

Agency and Public Relations

The public comes first in this organization. Therefore, all employees are required to treat the public, agencies, and donors in a courteous manner at all times. Employees should be prepared to listen carefully to inquiries and complaints and then deal with them in a responsive professional manner. Courtesy and thoughtfulness are particularly important when using the telephone in order to maintain good will and valuable relationships. This includes using a pleasant tone of voice, identifying yourself when answering the phone, offering the caller the option to be placed on hold, preventing calls on hold from being over extended by taking thorough messages, and ensuring their timely delivery to the appropriate individual.

Drug Free Work Place

The United Way will maintain a work place that is free from the effects of drug and alcohol abuse. Therefore, in order to become and stay a United Way employee, you cannot use, distribute, sell or possess any controlled substance or alcohol on United Way time or property. In addition, the United Way prohibits these activities off premises when those activities adversely affect job performance, job safety, or the United Way's reputation in the community. Therefore, **all applicants must pass a pre-employment drug screen** and employees may be asked to take a test at any time to determine the presence of drugs, narcotics, or alcohol in their system. **Any employee found to test positive for drugs or alcohol will be terminated. A refusal to take a drug or alcohol test shall be taken as a positive result for drug or alcohol use and will result in termination.** An employee who receives a positive confirmed test result has the right to contest or explain the result to the employer within five (5) working days after written notification of the test result.

Employees, their possessions, and United Way property are subject to search and surveillance at all times while on United Way premises or while conducting United Way business. Employees subject to the Drug Free Work Place Act, who are convicted of any criminal drug violation, must report the conviction to the Executive Director within five days. Any employee who is abusing drugs or alcohol or who is experiencing work related or personal problems resulting from drugs or alcohol, may request or be required to take a leave of absence or seek counseling help.

Arrest Notification

Any United Way employee who is arrested for any violation must notify the Executive Director within 24 hours of arrest. Disciplinary action will be determined by the Executive Director and the Executive Board members. An arrest may lead to disciplinary action up to and including termination.

Disciplinary Procedure

Under normal circumstances, the United Way endorses a policy of progressive discipline in which it attempts to provide employees with notice of deficiencies and an opportunity to improve. It does, however, retain the right to administer discipline in any manner it sees fit. If an employee is not meeting the United Way's standards of behavior or performance, the first action to be taken will be a meeting with the Executive Director to discuss the matter. A disciplinary action form will be completed during this initial meeting. On the second occurrence, the employee will be issued a written reprimand. On subsequent occurrences, the employee may either be issued a written reprimand or warning, suspended without pay for up to three days, or terminated. In cases involving serious misconduct, the procedures contained in this policy may be disregarded and the employee may be initially suspended or terminated.

Personal Appearance

Maintaining a professional business-like appearance is important to the success of the United Way. The image the United Way projects must demonstrate that it is the most professional, productive, thorough, and reliable provider of service in its chosen market. Employees are expected to dress in a business-like manner and maintain a well-groomed appearance. Special emphasis should be placed on hair, makeup, and neatly trimmed mustaches and beards.

Handling of Funds

All funds received must be deposited in a bank when received and will be disbursed by check only with exception to the following which will be made through EFT payments: Payroll checks, monthly bills, GVUW agency allocation checks, and approved reimbursement expenses. These expenses include cell phone and gas reimbursement for the director and medical reimbursement for office personnel. These payments will be made by the Executive Director. This form will be kept on file in the GVUW office and also with the accountant.

Document Retention

The GVUW will maintain records for the suggested number of years listed below as record of account:

| | | | |
|----------------------------|-----------|---|-----------|
| Auditor's Report | Permanent | General ledger | Permanent |
| Bank Deposit Slips | 3 | Internal work orders | 3 |
| Bank Statements | 7 | Inventory lists | 3 |
| Budgets | 3 | Invoices | 3 |
| General Checks | 7 | Purchase (merchandise) | 3 |
| Payroll Checks | 7 | Purchase (permanent assets) | 3+ |
| Taxes (Payroll Related) | 7 | IRS approval letter | Permanent |
| Taxes (Income) | Permanent | Petty cash vouchers | 3 |
| Cash Disbursements Journal | Permanent | Subsidiary ledgers (accounts receivable, payable, etc.) | 7 |

| | | | |
|---------------------------------|-----------|--------------------------------|-----------|
| Cash Projections | 3 | Timecards | 3 |
| Cash receipts Journal | Permanent | Articles of Incorporation | Permanent |
| Contracts – Purchase & sales | 7+ | Bylaws | Permanent |
| Credit memos | 3 | Capital stock and bond records | Permanent |
| Depreciation records | 3+ | Legal correspondence | Permanent |
| Employee expense reports | 7 | Minutes | Permanent |
| Employee payroll records | 15 | Personnel files | Permanent |
| Annual financial statements | Permanent | Accident Reports | 7 |
| Interim statements | 3 | | |
| General journal | Permanent | | |
| Tax returns and canceled checks | Permanent | | |
| Payroll tax returns | Permanent | | |

TECHNOLOGY POLICY

The use of technology is important to the efficiency of our work. To assure we have reliable equipment and to use it properly, you must follow the following policy:

Equipment

- The electronic equipment [computers, tablets, copiers, telephone system, etc.] is sensitive. Only those trained and assigned may engage in repair work or authorize service to any Greater Valdosta United Way equipment.
- No equipment may leave Greater Valdosta United Way property without specific approval from your immediate Supervisor. Non-employees may be given access or use Greater Valdosta United Way equipment that is in the home of an employee.
- No software may be loaded onto computers that has not been authorized and is not work-related.
- No employee may copy computer programs or other files from the Greater Valdosta United Way equipment for personal use, or to be transmitted to an unauthorized third party. This includes correspondence, price lists, employee files, databases, formulae, customer files, and custom or commercial computer software.
- Unauthorized duplication of computer records will be considered theft and may cause termination and/or prosecution.
- Tampering with, damaging or disabling equipment is forbidden, and may result in termination or prosecution for illegal acts.

E-mail and Voicemail

- The E-mail and voicemail systems are provided for efficient conduct of business. They are Greater Valdosta United Way property.
- All compositions and messages sent, or received, on E-mail and voicemail systems are property of the Greater Valdosta United Way.
- The E-mail and voicemail system is solely for Greater Valdosta United Way use.

- No person may use the E-mail or voicemail system for business ventures [except our Greater Valdosta United Way business], or for religious, political or other non-job-related purposes.
- Messages sent through E-mail and voicemail must not be disruptive, defaming or offensive. This includes profanity, racial slurs, disparaging comments about gender, age, sexual orientation, religious beliefs, political affiliation, national origin, disability, accent, manner of dress, or any message that would offend a reasonable person. The Greater Valdosta United Way is committed to a workplace free of hostility and offensive behavior.
- The E-mail and voicemail system may not be used to send or receive copyrighted materials, trade secrets, proprietary financial information, or other unauthorized or illegal documents.
- Passwords will not guarantee confidentiality
- The Greater Valdosta United Way reserves the right to access any computer at any time to see any and all information created, sent, received or stored.
- Erasing files does not guarantee they will not be retrieved.
- Employees may not enter unauthorized files [including E-mail boxes]. When access occurs, whether intentional or not, the information must be treated with confidentiality.
- No employee may create, send, receive or store information using a password that has not been approved by the Greater Valdosta United Way.
- Employees who discover a violation of this policy should notify management.
- Employees who violate the E-mail policy may face severe consequences, including termination or prosecution [for illegal acts].
- All employees must understand and accept that all electronic messages are subject to discovery through the legal process and cooperate with a subpoena.

Internet

- The Greater Valdosta United Way access to the Internet is for business purposes during work hours.
- Employees may access the Internet for personal reasons [to browse, research, buy, educate] during meal periods. No personal purchases may be made and sent to the Greater Valdosta United Way address and nothing may be charged to the Greater Valdosta United Way.
- Whether during work time or on personal time, certain web sites are prohibited. These sites include all of the social networking sites, such as Facebook, or Twitter, professional networking sites, such as LinkedIn, dating sites, YouTube, Hulu, any X-rated site, or any site that may be offensive to a reasonable person. Responsibilities dedicated by job description is the only exception to this rule.
- Under no circumstance may an employee access and/or display a web site that suggests or promotes violence or offensive conduct. This includes sexually oriented sites.
- Printing unauthorized information from web sites is strictly forbidden.
- No employee may create any unauthorized Internet blog that involves the use of the Greater Valdosta United Way's name, employee names, photographs of employees, photographs of Greater Valdosta United Way products or photos of Greater Valdosta United Way sites, this privilege is reserved for employees assigned to perform work that promotes the Greater Valdosta United Way and/or its products and services.
- No employee is authorized to release Greater Valdosta United Way business on the Internet. This includes business plans, customers, products, prices, Greater Valdosta United Way finances, personnel actions, or any other Greater Valdosta United Way business, unless you clearly state you are expressing a personal opinion and the information is not listed as "confidential."
- All employees are expected to be aware that information posted to any Internet site may be viewed by any person who has access to a computer. No information is private. Information will be interpreted by the reader and it is imperative to be aware of the connotations of all Internet posts and the potential to offend

others. Any employee facing legal action as a result of a personal posting at any site on the Internet will not be eligible to be defended by the Greater Valdosta United Way.

- No employee may erase the Internet history from any Greater Valdosta United Way computer.
- Violations of this policy can result in severe consequences, including discharge.

Criminal prosecution may result if illegal acts occur using Greater Valdosta United Way equipment or telephone service or the actions result in harm to an innocent person.

Social Media

Employees use social media for a variety of reasons related to both work and personal lives. It is important to recognize that using social media presents risks and requires the use of responsible behavior. We expect you to use these guidelines to exercise responsible, mature judgment when you use social media.

Social media, as we use the term in this policy, includes all methods of communicating and posting information on the Internet. It includes any web log or blog, journal, diary, personal web site, social network or affinity web site, web bulletin board, chat room or any other form of electronic communication that exists as of the publication of this policy or will be created in the future.

You are solely responsible for whatever you post online. If your conduct adversely affects your job performance, the performance of your co-workers or otherwise adversely affects any stakeholder working on behalf of our legitimate business interests, it may result in disciplinary action up to and including termination.

When posting anything related to your employment here, we want you to know what we expect:

- We expect you to be fair and courteous to everyone.
- If anything you post is viewed as malicious, obscene, threatening, intimidating, disparaging to our customers, employees, or suppliers, or could be viewed as harassment or bullying, we will view it as a violation of this policy.
- If it is viewed as intentionally harmful to another person's reputation or may be called a hostile work environment on the basis of race, sex, disability, retaliation, or any other status protected by law or Greater Valdosta United Way policy, we will view it as a violation of this policy and we will not defend you in any legal procedure that results.
- It is your duty to understand that certain information is protected by law.
- Maintain confidentiality of our trade secrets and private information. This includes systems, processes, plans, products, lists, or designs. Do not post internal reports, policies, procedures, or other internal business-related confidential communications. This includes all "privileged" communication.
- Never create a link from your own blog or web site, or any other social networking site, without identifying yourself as an employee of our Greater Valdosta United Way.
- When you express an opinion, you will be expected to clearly state that it is your own personal opinion and you are not speaking on behalf of the Greater Valdosta United Way, other employees of our Greater Valdosta United Way, customers, suppliers or any other stakeholder.
- If you publish a blog or post online, make it clear that you are not speaking on behalf of the Greater Valdosta United Way. We recommend that you post a disclaimer that says, "The postings on this site are my own and do not reflect the views of the Greater Valdosta United Way."

We understand that you have rights under the National Labor Relations Act to express your opinions about your work, and nothing in this policy was written to interfere with them or to infer they are not applicable.

Sexual Harassment

It is the policy of the Company that all employees shall have the opportunity to work in an atmosphere and environment free from any form of harassment or retaliation based on race, color, religion, gender, sex, national origin, age, or disability. Such forms of harassment or retaliation constitute discrimination under various state and federal laws and will not be tolerated by the Company.

Harassment is defined as verbal or physical conduct that denigrates or shows hostility or aversion toward an individual because of his or her race, color, religion, gender, sex, national origin, age, whistle blower status, or disability, or that of his/her relatives, friends, or associates, and that:

1. Has the purpose or effect of creating an intimidating, hostile, or offensive working environment; or
2. Has the purpose or effect of unreasonably interfering with an individual's work performance; or
3. Otherwise adversely affects an individual's employment opportunities.

A. Examples of harassing conduct include, but are not limited to, the following:

1. Epithets, slurs, negative stereotyping, or threatening, intimidating, or hostile acts that relate to race, color, religion, gender, sex, national origin, age, whistle blower status, or disability; and
2. Written or graphic material that denigrates or shows hostility or aversion toward an individual or group because of race, color, religion, gender, sex, national origin, age, whistle blower status, or disability and that is placed on walls, bulletin boards, or elsewhere on the Company's premises, or circulated in the workplace.

B. Similarly, sexual harassment involves:

1. Making, as a condition of employment, unwelcome sexual advances or requests, requests for sexual favors, or other verbal or physical conduct of a sexual nature;
2. Making submission to or rejection of such conduct the basis for employment decisions; or
3. Creating an intimidating, offensive, or hostile work environment by such conduct.

C. The following are examples of sexual harassment:

1. Verbal--sexual innuendo, suggestive comments, insults, threats, jokes about gender-specific traits, or sexual propositions;
2. Nonverbal--making suggestive or insulting noises, leering, whistling, or making obscene gestures;
3. Physical--touching, pinching, brushing the body, coercing sexual intercourse, or assault.

Any employee who feels that he or she has suffered any form of harassment or retaliation should immediately report the alleged conduct to his or her supervisor or manager so that a confidential investigation of the complaint can be undertaken. Alternatively, the employee may report the alleged conduct to the President, to the office manager, or to the human resources manager. Any employee who wishes to discuss the matter with a manager of the same sex will have someone provided to them.

While verbal reports are anticipated, an employee reporting these types of behavior will be asked to make a written report providing as much detail as possible concerning who has engaged in the behavior, when, where, and exactly what was done or said.

Any employee who observes conduct by another employee that he or she believes to be harassing, retaliatory, or discriminatory must report such conduct as outlined above. All complaints of harassment will be treated confidentially and will be investigated promptly and thoroughly.

Any individual found by the Company to have harassed another employee will be subject to appropriate disciplinary action ranging from a written warning in his or her file up to and including termination. Retaliation or discrimination against an employee for reporting or complaining about harassment is prohibited and will result in disciplinary action up to and including termination.

We trust that all employees will continue to act in a responsible and professional manner to establish a pleasant working environment free of discrimination and