



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

EMPLOYEE HANDBOOK

**Tuscarawas County YMCA
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GENERAL INFORMATION

This Employee Handbook has been established by the Executive Committee of the Tuscarawas County Young Men's Christian Association (YMCA or Tuscarawas County YMCA) and approved by the Board of Directors in order to describe the personnel practices of the YMCA and its relationship with its employees.

It is the belief of the Executive Committee and the Board of Directors that these practices are in harmony with the spirit of the YMCA's Christian heritage and values.

This Employee Handbook will be reviewed on a regular basis by the Executive Committee and revisions suggested to the Board of Directors for their approval.

The Board of Directors is the official governing body of the YMCA in accordance with the Constitution and By-Laws of the YMCA. The Board of Trustees of the Tuscarawas County Y.M.C.A. Foundation, Inc. manage the Endowment Fund which benefits the YMCA and also hold title to all real estate upon which the YMCA operates.

The CEO (Executive Director) administers the programs of the YMCA, manages its day-to-day operations and all employees are under his/her supervision.

The Mission of the Tuscarawas County YMCA: To put Christian principles into practice through programs that build healthy spirit, mind, and body for all.

STATEMENT OF POLICY

This Employee Handbook has been authorized and established by the Board of Directors of the YMCA. It defines and regulates the conditions and methods of employment and the relationships and responsibilities of all staff as approved by the Executive Committee of the YMCA. This Employee Handbook was originally written by the staff and approved by the Executive Committee on April 11, 2025, and by the Board of Directors on April 21, 2025. This version of the Employee Handbook is effective immediately and rescinds all prior versions.

Employment with the YMCA is employment at will. "Employment at will" means that employees may end their employment at any time for any reason, and that the employer (YMCA) may terminate an employee at any time for any reason, with or without cause.

INTERPRETATION OF THE PERSONNEL POLICIES

In case of any misunderstanding or doubt regarding the interpretation of this Employee Handbook, the decision of the Executive Committee shall be final.

LEGAL INTENTIONS

It is the intention of the YMCA to administer these personnel policies and benefits in a manner which fully complies with the letter and spirit of all federal, state, and local regulations. In the case where those regulations conflict with these personnel policies, the regulations always take precedence.

The personnel policies and benefits outlined herein do not and shall not alter the "employment at will" relationship by and between the YMCA and every employee employed thereby. This

document shall not create nor evidence any employment relationship other than an “employment at will” relationship, contractual or otherwise.

These personnel policies and benefits are provided for the personal use of the employees of the YMCA. The receipt of this document is not to be construed as an employee contract. All full and part time employees are employed under the “employment at will” principle.

EQUAL OPPORTUNITY EMPLOYMENT STATEMENT

The YMCA is an Equal Opportunity Employer. It is the policy of the YMCA from recruitment through employment and promotion, to provide equal opportunity at all times without regard to race, color, religion, sex, marital status, gender, age, handicap, disability, veteran status, genetics, national origin or any other status or condition protected by state or federal law.

REASONABLE ACCOMODATIONS

The Tuscarawas County YMCA is committed to the goal of ensuring equal employment opportunities to all individuals and that includes making reasonable accommodations (changes to the way things are normally done at work) to applicants and employees who need them due to a disability, pregnancy, childbirth or related medical condition or because of religion, as required by law.

Below is some helpful information in the event you need a change in the work environment or the way things are customarily done due to disability, pregnancy, childbirth, and related medical conditions, or due to sincerely held religious beliefs or practices. In all cases, please contact your Director if you need to request such a change.

Disability

Some of our team members may suffer from a disability that prevents them from performing the essential functions of their job. If you need accommodation because of a disability, please let your director know so we can explore whether there are any reasonable accommodation we can provide without causing an undue hardship on Tuscarawas County YMCA or creating a significant risk of substantial harm to you, your co-workers or others.

A reasonable accommodation may take many forms. In general, it is any change in the workplace or the way things are customarily done that provides an equal employment opportunity to an individual with a disability. Depending on the circumstances, a broad range of measures that would enable an individual to apply for a job, perform a job, or have equal access to the workplace and associated benefits may be reasonable accommodation. Common types of accommodations include: making changes in the physical work environment, providing or permitting the use of certain equipment, aids or services, making changes in workplace policies, modifying work schedules, granting breaks, removing and/or substituting marginal job functions, providing a reassignment to another vacant job which an individual is qualified to perform if accommodation within the current position would pose an undue hardship, and/or granting time off work due to a flare up of a disability or granting a leave of absence (including extending the duration of leaves of absence provided under Tuscarawas County YMCA’s leave policies). Reasonable accommodation does not include providing personal use items (such as eyeglasses, hearing aids, wheelchairs and other items that are used on and off the job), or removal of an essential job function.

If you need reasonable accommodation, you should present a request for accommodation to your Director. The Tuscarawas County YMCA will work with you to understand your limitations

and help identify potential reasonable accommodations that could overcome those limitations. We may also request you provide medical documentation to obtain further information regarding these matters. Cooperating with Tuscarawas County YMCA by returning requested information in a timely fashion is required.

Pregnancy, Childbirth and Related Medical Conditions and Lactation Breaks

Tuscarawas County YMCA provides reasonable accommodations to applicants and employees who have limitations due to pregnancy, childbirth, and related medical conditions, unless it imposes an undue hardship on Tuscarawas County YMCA to do so. Reasonable accommodation may take many forms. Examples of potential accommodations include but are not limited to things such as the ability to carry or keep water near and drink, as needed; allowing an employee additional restroom breaks; allowing an employee whose work requires standing to sit and whose work requires sitting to stand; allowing an employee breaks, as needed, to eat and drink; accommodations related to lactation; time off to recover from childbirth; modification of equipment; appropriate seating; temporary transfer to a different position that you are able to perform; restructuring job duties; light duty; or a modified work schedule. Tuscarawas County YMCA will work with you to determine what accommodation is appropriate for you, given your unique circumstances, which doesn't impose an undue hardship on Tuscarawas County YMCA. Depending on the circumstances, Tuscarawas County YMCA may require supporting documentation.

Tuscarawas County YMCA also provides our employees with breaks and a private space (other than a bathroom) to express breast milk. If you need breaks and a private space to express breast milk, or you need accommodation due to pregnancy, childbirth, or related medical condition, please contact your Director.

Sincerely Held Religious Beliefs

Tuscarawas County YMCA provides reasonable accommodations to employees who's sincerely held religious beliefs, practices and observances conflict with a work requirement, unless providing the accommodation would create an undue hardship. Religious accommodation is an adjustment to the work environment or policies and practices that will allow the employee to comply with their religious beliefs. Tuscarawas County YMCA may ask for additional information to better understand the request and what accommodation may be workable. If you need religious accommodation, please contact your Director.

If you have any questions about accommodation or concerns about how your request for accommodation was handled, please promptly contact the Business Office or CEO.

EMPLOYEE CLASSIFICATIONS

1. Full Time Employees are those persons who are regularly scheduled on a continuous basis to work 36 or more hours each week and are eligible for benefits as provided in this policy, except that employees who average 30 or more hours per work for the appropriate time period shall be considered full time for purpose of health care benefits.
2. Part Time Employees are those persons who are regularly scheduled on a regular basis to work less than 36 hours per week. They are not eligible for benefits except as specifically provided for in this policy, except that employees who average 30 or more hours per work for the appropriate time period shall be considered full time for the purpose of health care benefits.

3. Seasonal or Temporary Employees are those people whose assignment is short-term; usually not continuing beyond 3 months (i.e. – summer camp counselors). They may or may not work 35 or more hours per week and are not eligible for benefits except as specifically provided for in this policy, except that employees who average 36 or more hours per week for the appropriate time period shall be considered full time for the purpose of health care benefits.

FAIR LABOR STANDARDS ACT (FLSA) CLASSIFICATION

1. Exempt Employees are those people whose positions meet specific tests established by the FLSA and state law and who are exempt from overtime pay requirements
2. Non-Exempt Employees are those people whose positions do not meet FLSA tests and who are paid one- and one-half times their regular pay for overtime, as required by federal and state law.

FULL TIME EMPLOYMENT PROCEDURES

1. When a full-time vacancy occurs, the following procedure will be followed:
 - a. The position will be posted with the YMCA of the USA.
 - b. Resumes will be accepted from qualified applicants.
 - c. It is recommended that at least three qualified candidates be interviewed for a full-time position.
2. Individuals invited to a full-time employment interview will be reimbursed for travel and /or lodging expenses by the YMCA. These expenses are subject to the discretion and approval of the CEO and the Chair of the Executive Committee.
3. Relatives of full-time employees can be employed with the approval of both the Executive Committee and the CEO.
4. A satisfactory criminal background check shall be a condition of employment.
5. Expenses involved in moving a full-time employee, his/her family, and household goods to may be a part of the employment agreement.
6. A copy of this Employee Handbook will be furnished to each new employee as indicated by a receipt kept in their employee file.
7. New full-time employees will be reviewed after 90 days of employment for job performance and/or salary by the CEO.

PART TIME EMPLOYMENT PROCEDURES

1. Before filling a part-time vacancy, the Department Head and the CEO will make a careful analysis of the job and prepare a specific job description and announcement for publication.
2. Part-time vacancies will be announced both within the YMCA and locally through mass media announcements.
3. The hiring of all part-time employees will be approved by the CEO.
4. A satisfactory criminal background check shall be a condition of employment.
5. No part-time employee will be permitted to begin work until payroll, employment information, and CEO approval are completed.

BACKGROUND SCREENINGS/CONVICTIONS

Satisfactory completion of a background screening is a condition of employment and may also be used for volunteers or contractors. The YMCA reserves the right to require a background screening, alcohol test, and drug testing at the following times: pre-employment, post-

accident, reasonable suspicion and random. Failure to comply with the required background screening is subject to disciplinary action, up to and including termination of employment.

Applicants for employment with the YMCA are expected to provide complete and accurate information regarding their background, employment history, credentials, and qualifications for employment. If, following employment, the YMCA learns that an employee provided false or misleading information or omitted pertinent information regarding essential background, employment history, credentials, or qualifications for employment, or criminal background, the YMCA may discipline the employee, up to and including termination, regardless of the time elapsed before the discovery.

Employees who are arrested for (including cited or charged), or who are convicted of (including no contest or guilty plea) a crime, during employment, must inform their supervisor or CEO of the arrest and any conviction as soon as possible but in no event later than 24 hours after the earlier of the arrest or conviction. Failure to report the arrest and conviction will subject the employee to discipline up to and including termination.

REQUIRED STAFF TRAININGS

All employees shall attend a new employee orientation within the first 60 days of their employment. Notice of available dates and times will be sent to new employees once they have been placed on payroll. All employees must complete a Praesidium Child Abuse Prevention and Bloodborne Pathogen training course within 60 days of employment and then every year while still employed. All employees will complete a YMCA First Aid and CPR training course within their first 60 days of employment and then renew every other year.

STAFF DEVELOPMENT AND TRAINING

Though professional development is the primary responsibility of the individual, the CEO shall be responsible for providing such opportunities for the staff, as a part of his/her management duties.

The YMCA recognizes that the quality of its work is directly related to the continuing career growth and training opportunities for employees, based upon the YMCA's goals and an individual's career plans and job responsibilities, as well as the financial situation of the YMCA at the time.

Expenses related to career development and other training may be paid in full by the YMCA when such requests are submitted in advance and approved by the employee's supervisor and the CEO. Included in these types of training experiences for which the YMCA will pay are: the YMCA Leadership Development Program, workshops, seminars, conferences, and formal education (undergraduate and /or graduate level courses in an area beneficial to the long-term betterment of the YMCA) based on the financial situation of the YMCA at the time.

EXPENSES AND ALLOWANCES

Reasonable and necessary expenses incurred while on YMCA business may be reimbursed by the YMCA. The following may be recognized as reasonable and necessary when approved by your supervisor prior to incurring the expense. The Board of Directors will have the responsibility of "prior approval" for expenses of the CEO.

- A. The cost of meals while on YMCA business.
- B. Business use of a personal automobile may be reimbursed at the current rate established by the Finance Committee. Adequate insurance must be maintained on personal vehicles (minimum \$100,000/\$300,000 coverage).
- C. Expenses for attendance at business meetings, conferences, and seminars, including meals, transportation, lodging, and registration fees with prior approval of the CEO.
- D. Travel expenses for conference attendance may be reimbursed at a rate not to exceed coach airfare. Employees are expected to seek the lowest possible airfare. Lodging is to be on a shared, double room basis when practical and possible.
- E. Membership fees in professional societies (Association of YMCA Professionals - AYP) may be paid by the YMCA.
- F. Membership dues and related expenses for other professional organizations, service clubs, or Community organizations which are deemed advantageous to the YMCA and where prior supervisor approval has been granted.

FULL TIME STAFF EVALUATIONS

- 1. Each full-time employee, including the CEO, will be evaluated on an annual basis.
- 2. The evaluation of the CEO shall be completed in joint session by the President of the Board of Directors, the President of the Board of Trustees, the Executive Committee, and the Treasurers of both Boards.
- 3. The evaluation of the CEO will be presented to the CEO by the President of the Board of Directors, the Chair of the Executive Committee, and the President of the Board of Trustees.

PART TIME STAFF EVALUATIONS

- 1. Each part time employee will be evaluated on the anniversary of his or her hiring date each year.
- 2. Each evaluation will be completed by the employee's supervisor with the approval of the CEO.
- 3. The evaluation will be shared with the employee to provide guidance for the continued improvement of the staff member's performance.

STAFF SALARIES

- 1. Full-time employee salary review and salary adjustments are recommended by the CEO to the Executive Committee for approval. Any salary adjustments must be within the budget of the Board of Directors. Salaries are to be reviewed at least once each year following staff evaluations.
- 2. The following points will provide guidelines to determine the recommendations for full-time salary adjustments:
 - a. The degree of responsibility the position carries.
 - b. The productivity of the employee.
 - c. The capacity for growth exhibited.
 - d. Length of YMCA service.
 - e. Advanced academic and YMCA training completed.
 - f. The cost of living determined by the consumer price index.
 - g. Performance based upon standards agreed to by the employee and their supervisor.

3. Part-time salaries will be increased to a level not to exceed the guidelines established by the Executive Committee and granted after a satisfactory evaluation of the employee. Wage increases must be within the approved budget of the Board of Directors.
4. The following points will provide guidelines to determine recommendations for part-time wage increases:
 - a. The degree of responsibility the position carries.
 - b. The productivity of the employee.
 - c. The capability for growth exhibited.
 - d. Length of YMCA service.
 - e. Advanced academic and YMCA training.
 - f. Cost of living as determined by the consumer price index.
5. All part-time wage increases must receive the approval of the CEO.

HOLIDAYS

The following paid holidays shall be observed by the YMCA for all full-time employees (where practical and when no programs are scheduled): New Year's Day, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas Eve, Christmas Day, and the employee's Birthday (within the pay period).

VACATIONS

We believe that paid vacations are important to both you and the YMCA as a time for you to relax, be away from work and enjoy personal or family activities. The vacation calendar is maintained on a calendar year basis, from January 1 through December 31 each year.

Full Time Exempt Employees

After one (1) year - eligible for 3 weeks (15 days) of vacation with pay.

After five (5) years - eligible for 4 weeks (20 days) of vacation with pay.

After twenty (20) years - eligible for 5 weeks (25 days) of vacation with pay.

Full Time Non-Exempt Employees

After one year - eligible for 2 weeks (10 days) of vacation with pay.

After five years - eligible for 3 weeks (15 days) of vacation with pay.

Vacation time is granted and must be used in the calendar year that it is earned. Unused vacation days cannot be accumulated or carried over and cash settlements will not be made, including but not limited to in the event of retirement, resignation, or termination of employment.

In addition, each full-time employee, after one year of service, is granted two (2) days of personal leave to attend to personal business and matters on an annual basis.

All vacations and personal days are granted by the CEO after consultation with the employee. Length of service has priority in scheduling.

SICK LEAVE

Full-time employees accumulate sick leave at the rate of one day for each month of service to a maximum of 90 working days. This time may be used for personal or family emergencies such

as illness or accidents, prescheduled medical and/or dental appointments, provided such leaves are subject to the preapproval of the employee's supervisor. For purposes of this provision, family is interpreted to be spouse, son or daughter, or parent.

Prior to taking any sick leave, if possible, the supervisor shall be notified no later than the beginning of the employee's workday. A physician's statement may be requested by the supervisor prior to approval for paid leave and/or upon return from certain types of leave.

Employees are encouraged to conserve their sick leave to build up a reserve for any long-term illness or injury. For employees who have exhausted their accrued sick leave, additional absence due to illness or injury may be charged to vacation, considered an absence or, if approved by the CEO, taken as leave without pay. Unused sick leave will not be reimbursed, including but not limited to upon termination, resignation, or retirement from the YMCA.

FAMILY AND MEDICAL LEAVE

At present, the YMCA is not required to provide benefits afforded by the Family and Medical Leave Act of 1993 (the FMLA). Nonetheless, the YMCA may provide its employees the medical leave benefits that are similar to those afforded under the FMLA, except that the YMCA does not assume liability for any violations of the FMLA by voluntarily providing such benefits.

FUNERAL LEAVE

The YMCA recognizes that a staff member will normally request absence from work in the event of a death in the family. In the case of the death in the immediate family, full time employees may be granted up to three (3) days of special leave with pay by the CEO. The immediate family is defined as spouse, children, parents, grandparents, siblings, or in-laws.

MILITARY LEAVE

When an employee is called or recalled into active duty in the military, the YMCA will grant an official leave of absence without pay. Re-employment rights correspond with the existing applicable laws.

Employees who are completing their military in the Armed Forces Reserves or National Guard may use their vacation time for such training. Upon being informed of a military obligation, the employee should make every effort to contact their supervisor immediately.

SECURITY/BENEFITS PROVISION

It shall be the policy of the YMCA, at the Board of Directors' discretion, to encourage all employees to provide for their future security and to make available for them, on a participating basis, certain insurance coverage to protect them during their employment. The YMCA is a participating organization for health insurance and to accomplish this policy, the following is the current coverage:

1. All full-time employees shall automatically participate in the YMCA Retirement Fund after two years of employment and upon reaching age 21. Part-time employees who have accumulated 1,000 hours of service in a given two (2) years employment (need not be consecutive), and are 21 years of age, shall automatically participate in the YMCA Retirement Fund. The YMCA may pay the full 10% of the employees' earnings into this fund.

2. All other employees have the option and are encouraged to participate in the tax-deferred savings plan by opening a 403 (b) Smart Account or Roth Savings Account beginning with the first day of employment, regardless of the hours worked.
3. All full-time employees shall automatically have 1 1/2 times his or her annual salary in life insurance. The YMCA may pay the full cost of this life insurance.
4. The YMCA may provide policies of health insurance for all full-time employees according to the terms and conditions provided by the YMCA's insurance carrier. Each participating employee will pay a percentage of monthly premiums, determined on an annual basis, by the Board of Directors. To the extent that it is permitted by and/or available from the YMCA's insurance carrier, the YMCA will offer the opportunity for full-time employees to acquire family coverage at the employee's sole cost.
5. The YMCA shall participate in all federal and state mandated benefits as prescribed by law.
6. The YMCA will provide memberships to retired YMCA employees living in our service area.
7. Full-time employees, directors, and coordinators shall receive a family membership to the YMCA for the duration of their employment. All employees averaging 5 or more hours per pay are eligible for an upgrade up to a family membership at no cost. All part-time employees are given an adult membership. This does not include the membership privileges of years of continuous membership. Part-time employees averaging less than 5 hours per pay can upgrade their membership by paying the difference between the adult membership and family rate.
8. Notwithstanding anything in this Employee Handbook, the benefits set forth herein are at all times subject to change and shall be governed exclusively by the terms of the applicable plan documents issued for each plan.

BREAKS AND MEAL PERIODS

Break periods of short durations, from 5-20 minutes, are counted towards hours worked. The general rule is usually 15 minutes for every four (4) consecutive hours worked as long as the break does not interfere with the quality of customer service or the safety of children. Meal breaks of 20 minutes or less are compensable. It must be realized that such breaks are not automatic and workloads on a given day may eliminate the break. Unused breaks may not be saved or accumulated to be used later in conjunction with lunch periods, nor may they be used to leave earlier than the scheduled departure time for the day. Staff who leave the premises to take a break must clock out prior to leaving. For employees under the age of eighteen (18), breaks and work hours will be in accordance with the Child and Federal Labor Laws.

ATTENDANCE POLICY

To maintain a safe and productive work environment, the YMCA expects employees to be reliable and punctual in reporting for scheduled work. As a service to the organization, the YMCA relies on its employees to maintain its reputation for customer service. Poor attendance will not be tolerated and may reflect negatively on the annual performance review. Excessive absenteeism and tardiness, including failure to notify your supervisor of any absence will be subject to disciplinary action up to and including termination of employment.

Guidelines

1. An employee who has not scheduled time off and who is going to be absent from or late to work must notify his or her supervisor, or appropriate member of the management

staff, at least 2 hours prior to the beginning of his or her shift when possible.

Messages left with co-workers or other staff members are not acceptable.

2. Some situations may require that staff members who are going to be absent find qualified staff substitutes to cover their job responsibilities. Each department may have specific procedures for finding a substitute. An employee who fails to find a substitute may still be required to fill the scheduled shift. Failure to fill a scheduled shift may result in disciplinary action. An unexcused absence is defined as an unscheduled or unapproved absence from work on any scheduled workday due to such circumstances as sickness or personal emergency absences.
3. Employees who are absent two (2) workdays without notifying their supervisor (a no-call/no-show) will be considered to have voluntarily resigned.
4. An employee who has two (2) or more unscheduled absences from work due to illness may be asked by their supervisor to provide medical documentation from their physician for the absence.
5. Any staff member whose absenteeism and/or tardiness become problematic, and it not covered by the FMLA or similar leave laws, will be subject to appropriate disciplinary action, up to and including termination to the YMCA.

FAIR DISCIPLINE POLICY

The YMCA works with its employees when problems arise. The CEO is responsible for analyzing the problem and determining the appropriate course of action. This action may include termination or progressive discipline. The manner and extent of any discipline, including whether to engage in progressive discipline, is within the sole discretion of the CEO.

Immediate termination – Behavior that, in the sole discretion of the CEO, creates a disruption or impairs the conduct of the YMCA may result in immediate termination of employment. These actions include but are not limited to: willfully or maliciously damaging YMCA property or information, failing to perform assigned duties, unheeded reprimands, failure of (or refusal to submit to) any drug or alcohol test, conviction of any crime involving violence, indecent behavior, theft or involving children and recurrent performance problems.

Progressive discipline – In the case where an employee's behavior does not warrant immediate dismissal in the sole discretion of the CEO and the employee and his direct supervisor, with the notification of the CEO, will work following the progressive discipline program.

Step 1 Documented Counseling – The supervisor and the employee will meet to discuss the problem. The employee will be informed of the specific action that should be taken to correct the problem. A memo outlining the discussion shall be created, signed by the employee, and placed in the personnel file (12-month file/removal).

Step 2 Written Warning – If there is no improvement, a second discussion will be held. An employee warning notice should be completed outlining the problem and expected corrections, signed by the employee, and placed in the personnel file (12-month file/removal).

Step 3 Final Written Warning – If there is no improvement, the employee will be placed on probation. Continued discussion between the supervisor and the employee will be summarized in writing. A reasonable time period in which to correct the problem will be set. Specific corrective action that the employee is expected to take will be outlined in writing. If the problem

becomes more serious during the progressive discipline process, it may become necessary to immediately terminate the employee.

Step 4 Termination – Unfortunately, the preceding steps do not always produce the desired result. In some instances, it is recognized that it serves no useful purpose for either the employee or the YMCA to continue an unsatisfactory relationship, and termination may be necessary, with or without completing any of the preceding steps.

MOTOR VEHICLE POLICY

The purpose of this policy is to ensure the safety of those who drive YMCA vehicles or personal vehicles while performing business for the YMCA. Vehicle accidents are costly to the YMCA, but more importantly, they may result in injury to employees and participants. It is the driver's responsibility to operate the vehicle in a safe manner and to drive defensively to prevent injuries and property damage. As such, the YMCA endorses all applicable state motor vehicle regulations relating to driving responsibility. The YMCA expects each driver to drive in a safe and courteous manner pursuant to the following safety rules. The attitude you take when behind the wheel is the single most important factor in driving safety.

Guidelines

- YMCA owned or rented vehicles are to be driven by authorized employees only.
- All accidents involving a YMCA vehicle or personal vehicle while on YMCA business, regardless of severity, must be reported to the police and to immediate supervisors. Failing to stop after an accident and/or failure to report an accident may result in disciplinary action up to and including termination.
- Drivers must immediately report all court summons received for moving violations during the operation of a YMCA vehicle or personal vehicle while on YMCA business.
- All employees who will be transporting program participants and guests in YMCA vehicles will be subject to drug and alcohol evaluations including but not limited to confidential random drug screening procedures.
- If an employee is transporting children, the employee must be at least 21 years of age.
- Motor Vehicle Records will be ordered at a minimum of once per year to assess employees' driving records. An unfavorable record determined by the YMCA's insurance carrier will result in a loss of privileges of driving a YMCA owned vehicle and rented or personal vehicles used for YMCA business.
- Some individuals who are placed on a driving status may be terminated from employment should their position require driving as a primary function (bus driver, property manager, etc.)
- At all times while driving all traffic laws must be obeyed, no texting is permitted and no cell phone use absent hands-free technology. Seat belts must be worn by all individuals in the vehicle at all times.

Notification Requirements

An employee who is required to drive while conducting authorized YMCA business is required to inform their supervisor within 24 hours of receipt of any violations of law including without limitation any of the following:

- Receiving a citation for operating a vehicle while under the influence of alcohol or any controlled substance**
- Receiving a citation for leaving the scene of an accident**
- Receiving a citation for driving while under suspension or revocation of any driver's license**
- Receiving a citation for reckless operation of a motor vehicle resulting in bodily injury or property damage.**

Failure to report such occurrences may result in disciplinary action up to and including termination.

APPEALS PROCEDURE

It is the YMCA's policy to resolve an employee's job-related problem in an equitable manner consistent with the personnel policies. When a disagreement arises, the employee is responsible for meeting with his supervisor (within three (3) days). The objective of this discussion should be to evaluate the problem and achieve agreement or acceptance of one point of view that is to be followed.

If the employee and his supervisor cannot reach an agreement, then the employee may request a meeting (within three (3) days) with the employee, his supervisor, and the CEO. The objective of this meeting should be to discuss the problem and achieve agreement or acceptance of one point of view that is to be followed.

If the problem or question is not resolved through internal procedures, the employee may request a hearing before the Executive Committee. Such a request shall be in writing, initiated within five (5) days of the meeting with the CEO, and must address the nature and the reasons for the complaint. The request should be addressed to the Chair of the Executive Committee and must be copied to the CEO.

The Executive Committee will have the right to hear or not hear the complaint or grievance. Generally, the Chair will not convene the Committee for issues that are capricious or minor in nature that involve management decisions unless they appear contrary to policy, or those that are malicious or vindictive in nature. In the event the Chair decides not to hear the complaint, the employee will be notified in writing.

If the committee convenes to resolve the complaint, representatives from each point of view will have the opportunity to present their positions. The CEO will attend the meeting as a resource person but will not vote as a member of the Committee.

The Executive Committee will forward its recommendations to the Board of Directors and a summary of its report will be provided for the employee. The Executive Committee will serve as the final step for that employee. The Board of Directors may accept or reject the report of the Executive Committee.

SEPARATIONS

The term “separation” shall refer to any and all terminations of the relationship between an employee, regardless of the job classification, and the YMCA, as employer. Separated employees will be paid all wages/salary earned.

Employment with the YMCA is employment at will. “Employment at Will” means that employees may end their employment at any time and for any reason, and the employer (YMCA) may terminate an employee at any time for any reason, with or without cause.

1. Resignations

Resignation is a voluntary choice, freely made by the employee for whatever reason. An exempt employee is expected to give a minimum of four (4) weeks’ notice of resignation. Non-exempt and part-time employees are expected to give a minimum of two (2) weeks’ notice of resignation.

2. Reduction in Work Force

Separation of an employee because of the discontinuation of a position or retrenchment in budget, or for other circumstances arising through no fault of the employee, is at the discretion of the employer. Four (4) weeks’ written notice of such a reduction in work force will be provided for full-time exempt employees and two (2) weeks for full-time non-exempt employees.

3. Retirement

Rules and regulations of the YMCA Retirement Fund govern normal and early retirement options.

4. Death in Service

In the event of the death of an employee, earned salary to the date of death will be paid to the deceased employee’s estate.

5. Dismissal

The Executive Committee and the CEO have the power to terminate employment of exempt full-time employees. The CEO has the power to terminate the employment of full-time non-exempt and part-time employees.

CODE OF CONDUCT AND ETHICS

In keeping with the policy of maintaining the highest standards of conduct and ethics, the YMCA will investigate any suspected fraudulent or dishonest use or misuse of the YMCA’s resources or property by staff, board members, consultants, or volunteers. Staff, board members, consultants, and volunteers are encouraged to report suspected fraudulent or dishonest conduct (i.e., to act as “whistleblower”), pursuant to the procedures set forth below.

Reporting

A person’s reasonable concerns about possible fraudulent or dishonest use or misuse of resources or property should be reported to his or her supervisor or, if suspected by a volunteer, to the staff member supporting the volunteer’s work. If, for any reason, a person finds it difficult to report his or her concerns to a supervisor or staff member supporting the volunteer’s work, the person may report the concerns directly to the CEO. Alternately, to facilitate reporting of suspected violations where the reporter wishes to remain anonymous, a written statement may be submitted to one of the individuals listed above.

Definitions

Baseless Allegations: Allegations made with knowledge of, or with reckless disregard for, their truth or falsity or knowingly false allegations. Individuals making such allegations may be subject to disciplinary action by the YMCA, and/or legal claims by individuals accused of such conduct.

Fraudulent or Dishonest Conduct: A deliberate act or failure to act with the intention of obtaining an unauthorized benefit. Examples of such conduct include:

- Forgery or alteration of documents.
- Unauthorized alteration or manipulation of computer files.
- Fraudulent financial reporting.
- Pursuit of a benefit or advantage in violation of the YMCA's Conflict-of-Interest Policy.
- Misappropriation or misuse of YMCA resources, such as funds, supplies, or other assets.
- Authorizing or receiving compensation for goods not received or services not performed.
- Authorizing or receiving compensation for hours not worked.

Whistleblower: An employee, consultant, or volunteer who informs a supervisor or the CEO about an activity relating to the YMCA which that person reasonably believes to be fraudulent or dishonest.

Rights and Responsibilities

Supervisors

Supervisors are required to report reasonably suspected fraudulent or dishonest conduct to the CEO. Reasonable care should be taken in dealing with suspected misconduct to avoid matters such as:

- Baseless allegations.
- Premature notice to persons suspected of misconduct and/or disclosure of suspected misconduct to others not involved with the investigation, or to persons without a legitimate need to know such information.
- Violations of a person's rights under law.

Due to the important yet sensitive nature of the suspected violations, effective professional follow-up is critical. Supervisors, while appropriately concerned about "getting to the bottom" of such issues, should not in any circumstances perform any investigative or other follow-up steps on their own. Accordingly, a supervisor who becomes aware of suspected misconduct

- Should not contact the suspected person to further investigate the matter or demand restitution.
- Should not discuss the case with attorneys, the media, or anyone other than the chief executive.
- Should not report the case to an authorized law enforcement officer without first discussing the case with the chief executive.

Investigation

All relevant matters, including suspected but unproved matters, will be reviewed, and analyzed by appropriate YMCA personnel, with documentation of the receipt, retention, investigation, and treatment of the complaint. Appropriate corrective action will be taken, if

necessary, and findings will be communicated to the reporting person and his or her supervisor. Investigations may warrant investigation by independent persons such as auditors and/or attorneys.

Whistleblower Protection

The YMCA will protect whistleblowers as stated below:

- YMCA will use its best reasonable efforts to protect whistleblowers against retaliation. Whistleblowing complaints will be handled with appropriate sensitivity, discretion, and confidentiality, to the extent reasonably allowed by the circumstances and the law. Generally, this means that whistleblower complaints will only be shared with those who have a legitimate need to know such information, so that the YMCA can conduct an effective investigation, determine what action to take based on the results of any such investigation, and in appropriate cases, with law enforcement personnel. (Should disciplinary or legal action be taken against a person or persons as a result of a whistleblower complaint, such persons may also have the right to know the identity of the whistleblower.)
- Employees, consultants, and volunteers of the YMCA may not retaliate against a whistleblower for informing management about an activity which that person reasonably believes to be fraudulent or dishonest with the intent or effect of adversely affecting the terms or conditions of the whistleblower's employment, including but not limited to, threats of physical harm, loss of job, punitive work assignments, or adverse impact on salary or fees. Whistleblowers who believe that they have been retaliated against may file a written complaint with the CEO or President of the Board of Directors. Any complaint of retaliation will be promptly investigated and appropriate corrective measures taken if allegations of retaliation are substantiated. This protection from retaliation is not intended to prohibit supervisors from taking action, including disciplinary action, in the usual scope of their duties and based on valid conduct or performance-related factors.

Whistleblowers must be cautious to avoid baseless allegations (as described earlier in the definitions section of this policy).

SOCIAL MEDIA POLICY

The YMCA Social Media Policy encompasses websites, and all internet activity related to both YMCA business social media sites such as association Facebook, Instagram, and Twitter pages, and individual social media sites such as personal Facebook pages, Instagram, Twitter, Snapchat, TikTok and others. Managed appropriately, the YMCA believes in online communities and acknowledges them as a valuable component of shared media.

Personal Social Media Conduct

This policy has been developed for employees who maintain personal sites (i.e. Facebook, Twitter, Instagram, Snapchat, TikTok, etc.) that may contain postings about YMCA's business, programs, fellow employees and the work they do, and the content that violates the YMCA personnel policy, or code of conduct. Many staff members may have or write blogs or post to sites. Although individuals have the right to express themselves as they deem fit, certain

social media activities may lead to discipline, up to and including termination from employment. Also, employees should be aware that under some circumstances, they will be individually responsible for their actions.

When an employee chooses to post information for the public via a social media site, the employee is legally responsible for everything posted. Individuals can be held personally liable for posting any comments or media deemed to be defamatory, obscene, proprietary, or libelous (whether pertaining to the YMCA, individuals, or any other entity). For these reasons, employees should exercise caution regarding exaggeration, colorful language, speculation, obscenity, copyrighted materials, legal conclusions and derogatory remarks or characterizations. Outside parties can pursue legal action against the employee for postings.

Staff that post to websites must be aware that, although some sites offer privacy settings, the Internet is a public domain and all the information you publish can be accessible to the public. Posting information on these pages is conceptually similar to sending a letter to the editor. You are advised to be mindful that the information you post on the internet will likely be seen by members of the YMCA community and could reflect poorly upon your character or upon the YMCA. As an organization that holds personal character in the highest regard, the YMCA is obligated to take actions to preserve its core values. When posting, it is important that employees follow these guidelines inside and outside the YMCA and both on or off duty: If you choose to discuss YMCA matters, you should identify yourself and your role at the YMCA but make it clear that you are speaking for yourself (by using first person) and not on behalf of the YMCA. It is a violation of this policy to make any false, unsubstantiated, or defamatory statements about the YMCA. An employee could add a content disclaimer such as “unless otherwise noted, the views expressed here are mine alone and not those of my employer.” If an employee chooses to participate in public social media activity, they must ensure that their profiles and online behavior are consistent with the YMCA Employee Handbook’s Code of Conduct as well as the Child Abuse Prevention Code of Conduct. All behavior must demonstrate the YMCA’s core values of respect, caring, honesty, and responsibility and be consistent in presentation to colleagues, donors, volunteers, co-workers, members, and leadership.

It is recommended that you choose the highest security/privacy settings on social media pages such as Facebook, Twitter, Tik Tok, Snap Chat, and Instagram so that only those you have carefully selected as friend connections can view your content. It is your responsibility to monitor your page diligently. Should content or an image be posted without your consent by a “friend” that is not in keeping with YMCA core values, it is your responsibility to remove it from your page.

Be mindful of copyright laws when copying content and quoting others. Always use caution in connection with posting content (text, images, videos, or any other copyrightable works). Do not post the Tuscarawas County YMCA logo or any other logo belonging to the YMCA to your personal website, blog, or any other social computing platform without first receiving written authorization from your supervisor.

Protect the confidential and proprietary information belonging to the YMCA, its partners, suppliers, employees, members, volunteers, or other people or companies on any online social computing platform.

Do not post pictures of members or guests enrolled in YMCA programs or participating in activities at the YMCA, especially those of children. Using cell phones or other devices to record and photograph on YMCA property without the approval of the CEO is prohibited.

Report unsanctioned contact – you have agreed to no contact with YMCA-related children apart from YMCA programs. If you receive email, text messages, social media requests, or blog entries from any children whom you know from YMCA programming, you should contact your supervisor immediately. Any response to them is in violation of your no-contact promise to the YMCA. If you do receive such communication, you should determine how the child got your information, and you should correct the deficiency and block further correspondence.

Postings may generate media coverage. If a member of the media contacts you about a YMCA-related post or requests YMCA information of any kind, do not respond and contact the CEO. You should also contact your direct supervisor for clarification on whether specific information has been publicly disclosed before you respond to it.

YMCA Business Social Media Standards

The YMCA recognizes the value of social media in marketing its vision and mission, programs and in communicating special events. Our YMCA maintains both an Association Facebook page. These pages are designed only to announce happenings at our Y's and to accept "fans," but not to connect with individuals directly or communicate privately with others. When managing the YMCA social media sites for business purposes, it is important that employees follow these guidelines:

Do not cite or reference members, children, guests, partners, employees, or suppliers without the prior written approval from the individual being referenced and/or the supplier. A written release must be obtained by a parent or guardian for those under age 18. A child under the age of 18 years old cannot give approval to be contacted or communicated about.

Do not post pictures or videos of members or guests enrolled in YMCA programs or participating in activities at the YMCA, especially those of children, unless prior written approval by that individual or guardian has been given and your supervisor has authorized the posting. A written release must be obtained by a parent or guardian for those under age 18. A child under the age of 18 years old cannot give approval.

Protect the confidential and proprietary information belonging to the YMCA, its partners, suppliers, employees, members, volunteers, or other people or companies on any online social computing platform.

Use good judgment. It is asked that all employees assist in monitoring the internet for information that may reflect negatively on the YMCA. If information seems questionable or makes you feel uncomfortable, discuss the content with your manager. Violation of this policy is a serious offense and may lead to discipline or discharge.

CONFLICT OF INTEREST

No staff member shall engage in activities contrary to the interest or inconsistent with the responsibilities entrusted to them. In general, conflict exists wherever a staff member achieves personal gain or incurs obligation to others at the expense of the YMCA. Such personal gain need not be direct but might include gain by family members, friends, or relatives.

The following list includes areas where a conflict might occur, but is not meant to limit the areas where staff members should exercise discretion:

- Personal benefit from any corporate transaction; sale, purchase, rent, lease of property, staff member services or supplying products.
- Receiving gifts, special payments, or favors greater than a nominal value from an individual or organization that is providing goods or services to the YMCA or receiving goods or services from the YMCA.
- Use of YMCA personnel in an individual venture or in conjunction with any business outside that of the YMCA
- Misuse of inside information or confidential information not available to the public for personal or others' gain, to include membership, contributor or staff member mailing lists or any use of such information to the YMCA's disadvantage or the staff member's or others' improper advantage.

Employees shall bring each potential conflict of interest situation to the attention of their supervisors, making full disclosure of all facts. It is the obligation of supervisors to report the facts of any potential conflict of interest situation to the CEO. After disclosure, the CEO and Board of Directors or Executive Committee can decide whether a conflict does indeed exist.

OTHER GENERAL INFORMATION

Directors will complete a conflict-of-interest disclosure form annually and should bring any intervening conflicts to the attention of the CEO or Board of Directors immediately. After disclosure, the Board of Directors can decide whether a conflict does indeed exist. If it is determined that a conflict exists, the person with the conflict cannot be present during a discussion of, or vote on, the transaction, although he/she can provide information that is.

Employee Personnel Files: The information in the personnel file of each employee is considered confidential and will be so treated. Each employee has the right to see the information contained in their file in the privacy of the Business Office. No documents may be removed or added by the employee.

Solicitation: Solicitation of employees by other employees or external solicitors for purposes other than YMCA sponsored events is prohibited on the YMCA premises.

Personal Appearance: All employees are expected to present and keep themselves in a neat and orderly appearance. If job responsibilities require the use or wearing of special clothing or equipment for safety or other purposes, any employee not suitably dressed or conditioned may be sent home without pay until such time the employee presents himself properly attired to

perform his job. More specific expectations related to each department's appearance are found in the dress code policy and will be discussed by the immediate supervisor and in the orientation program.

Jury Duty: Full-time employees who are called for jury duty will receive their pay during such time of service and may retain any fees paid to them for their duty. Jury duty shall not affect an employee's vacation allowance. The employee must notify their supervisor as soon as they are called for jury duty and provide documentation of jury duty in order to be paid.

Voluntary Contributions: All employees are given the opportunity and are encouraged to support the YMCA's philanthropic interests, such as United Way and the YMCA Annual Campaign.

Personal Expression on Public Issues: Employees are free to exercise their full liberties as citizens, including their right to express their personal convictions on issues such as social, economic, religious, and political subjects. Such expressions must be done in an appropriate time, place, and manner and must refrain from giving the impression that views expressed are those of the YMCA.

Outside Employment: If an employee chooses to work outside the YMCA, they may do so, as long as it does not interfere with their work schedule or performance at the Tuscarawas County YMCA.

Full-time employees are expected to consider the YMCA to be their primary employer. Outside employment that affects an employee's attendance, work performance, productivity, or conduct, either directly or indirectly, or that creates a conflict of interest of any kind, is strictly prohibited. The YMCA relies on the best efforts of all our employees; therefore, special considerations or schedule adjustments may not be made for employees who have outside employment.

If considering outside employment, the employee must consult with his supervisor and CEO to determine whether a conflict of interest could arise. The employee may be asked to refrain from accepting the outside employment, if it is determined that there is a conflict of interest.

SUBSTANCE ABUSE

The YMCA recognizes that its employees are its most valuable resource, and for that their health and safety are a significant concern. The YMCA cannot tolerate any drug or alcohol abuse which it believes imperils the health, safety, and wellbeing of its employees, members, participants, and/or its operations. It is further recognized that a YMCA employee represents the YMCA in the community 24 hours a day and therefore must control himself in such a manner as to adhere to the values and mission of the YMCA. The YMCA reserves the right to require mandatory drug testing subject to any and all legal requirements.

Prohibitions

The YMCA's policy prohibits the following:

1. Use, possession, manufacture, distribution, storage, dispensation, or sale of illegal drugs.

2. Use, possession, manufacture, distribution, storage, dispensation, or sale of a controlled substance.
3. Being under the influence, or suffering from the effect of a controlled substance, illegal drug, or alcohol.
4. The abuse of alcohol in any situation will not be tolerated.

Sanctions

A violation by an employee of any of these prohibitions will result in sanctions against the employee up to and including immediate termination.

POLICY AGAINST UNLAWFUL HARASSMENT

The ongoing policy of the YMCA is to provide our employees with a work environment free from all forms of unlawful harassment or discrimination. This policy includes any unlawful harassment or discrimination based upon race, ancestry, color, religion, national origin, disability or handicap, age, or sex.

Sexual harassment deserves special mention. According to guidelines published by the Equal Employment Opportunity Commission, unlawful sexual harassment includes unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, when:

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

Unlawful harassment may include, without limitation, verbal slurs, negative stereotyping, hostile or demeaning acts (including jokes or teasing) and written or graphic material, that show animosity, aversion, or disparagement toward an individual or group based upon race, color, religion, national origin, disability or handicap, age, sex, or any other status or condition protected by state or federal law.

The YMCA will not permit or condone unlawful harassment of or by any employee of the YMCA on YMCA property, business, or activity, or in connection with YMCA employment.

Any employee found to have engaged in unlawful harassment of another employee, or of any other person on YMCA property, time, business, or activity, or in connection with YMCA employment, will receive prompt and appropriate disciplinary action, up to and including discharge. Appropriate disciplinary action also will be taken against any employee found to have willfully falsified any such claim of unlawful harassment. It is the policy of the YMCA to investigate all complaints of unlawful harassment thoroughly and promptly, and to keep such complaints and the terms of their resolution confidential, to the extent reasonably practicable.

No reprisal, retaliation, or other adverse action will be taken by the YMCA against any employee because he or she, in good faith and without proven falsification, claims to be a victim of, or to

have observed or heard, unlawful harassment on or in connection with the job, or because such employee assists in the investigation of any such matter.

An employee who feels that he or she has been subjected to, or falsely accused of, unlawful harassment, while on YMCA property, time, business or activity, or in connection with YMCA employment, and who is unable to resolve such matter promptly and satisfactorily with the offending party, should submit detailed verbal and written reports to his or her immediate supervisor, or to the immediate supervisor of the harassing or falsely accusing employee. Then, if the matter still has not been satisfactorily resolved, the complaining employee should promptly submit a detailed written report of the offensive behavior to the CEO, or, if more appropriate, to the President of the Board of Directors.

CODE OF ETHICAL PRACTICE AND RELATIONSHIPS

The YMCA will be bound by the code of ethical practices and relationships of the Association of Professional Directors of the YMCA of the USA. The issues of appropriate behavior among employees and participants are as important as it has ever been. Given increasing awareness of child abuse and concern for potential sexual harassment among employees and participants, the following are guidelines for employee conduct and behavior:

1. During YMCA programs, staff members and volunteers should never be alone with a single child, out-of-sight or unobserved by other staff.
2. When counseling children, an observer (staff or volunteer) should join with the counseling employee or volunteer. If this is not possible, keep the counseling session (conversation) in the open where it can be viewed by others.
3. Employees and volunteers are to refrain from the use of offensive language, innuendoes, physical contact, or behavior, including sexual harassment or intimidation, to members, fellow employees, volunteers, or other participants in YMCA programs or activities.
4. Staff may not be alone with children they meet in YMCA programs outside of the YMCA. This includes babysitting, sleepovers, and inviting children to your home unless one of the following conditions exists.
 - a. You and the child's family or guardians have a relationship that predates your employment or volunteer position at the YMCA.
 - b. You and the child's family or guardians have a relationship that predates the child's enrollment in a YMCA program.
 - c. You and the child or child's family or guardians are related.
5. Staff shall not interact with children under the age of 18, whom they have become acquainted with through YMCA programs and activities, through, but not limited to, online services such as Facebook, LinkedIn, Twitter, or other similar chatrooms or interactive services.
6. Anyone observing any inappropriate behavior, conduct, or abuse as noted above, or which they believe to be inappropriate, should report it to their supervisor and/or the CEO/Executive Director.

Sanctions

A violation by an employee or volunteer of any of these guidelines will result in sanctions against said employee or volunteer up to and including immediate termination.

Acceptable Forms of Nonverbal Communication

In working with children, the following, under appropriate conditions, may be permissible forms of nonverbal communication.

- | | |
|-----------------------------|---|
| 1. Hand to Shoulder Contact | 5. Thumbs up |
| 2. "High Five's" | 6. Rustling of Hair or Pats on the Head |
| 3. Side by Side Hugs | 7. Handshakes |
| 4. Smiles | 8. Fist bumps |

DOCUMENT RETENTION POLICY FOR STAFF

The corporate records of the YMCA are important assets. Corporate records include essentially all records you produce as an employee, whether paper or electronic. A record may be as obvious as a memorandum, an e-mail, a contract, or a case study, or something not as obvious such as a computerized desk calendar, an appointment book, or an expense record.

The law requires the YMCA to maintain certain types of corporate records, usually for a specified period of time. Failure to retain those records for those minimum periods could subject you and the YMCA to penalties and fines, cause the loss of rights, obstruct justice, spoil potential evidence in a lawsuit, place the YMCA in contempt of court, or seriously disadvantage the YMCA in litigation.

The YMCA expects all employees to fully comply with any published YMCA records retention or destruction policies and schedules, provided that all employees should note the following general exception to any stated destruction schedule: *If you believe, or the YMCA informs you, that YMCA records are relevant to litigation or potential litigation (i.e., a dispute that could result in litigation), then you must preserve those records until YMCA legal counsel determines the records are no longer needed.* That exception supersedes any previously or subsequently established schedule for those records. If you believe that an exception may apply, or if you have any questions regarding the possible applicability of an exception, please contact the CEO.

From time to time, the YMCA establishes retention or destruction policies or schedules for specific categories of records in order to ensure legal compliance, and also to accomplish other objectives, such as preserving intellectual property and cost management. Several categories of documents that bear special consideration are identified below. While minimum retention periods are suggested, the retention of the documents identified below and of documents not included in the identified categories, should be determined primarily by the application of the general guidelines affecting document retention identified above, as well as other pertinent factors.

- a. **Tax Records.** Tax records include, but may not be limited to, documents concerning payroll, expenses, proof of deductions, business costs, accounting procedures, and other documents concerning the YMCA's revenues. Tax records should be retained for at least seven (7) years from the date of filing the applicable return.
- b. **Employment Records/Personnel Records.** State and federal statutes require the YMCA to keep certain recruitment, employment, and personnel information. The YMCA should also keep personnel files that reflect performance reviews, and any complaints brought against the

YMCA or individual employees under applicable state and federal statutes. The YMCA should also keep all final memoranda and correspondence reflecting performance reviews and actions taken by or against personnel in the employee's personnel file. Employment and personnel records should be retained for seven years after termination of the YMCA employment status of the pertinent employee.

- c. **Board and Board Committee Materials.** Meeting minutes should be retained in perpetuity in the YMCA's minute book. A clean copy of all board and board committee materials should be kept for no less than three (3) years by the YMCA.
- d. **Press Releases/Public Filings.** The YMCA should indefinitely retain copies of all press releases and publicly filed documents under the theory that the YMCA should have its own copy to assess the accuracy of any document a member of the public can theoretically produce against that YMCA.
- e. **Legal Files.** Legal counsel should be consulted to determine the retention period of particular documents, but legal documents should generally be maintained for a period of at least ten (10) years.
- f. **Marketing and Sales Documents.** The YMCA should keep final copies of marketing and sales documents for the same period of time it keeps other corporate files, generally at least three (3) years.
An exception to the three-year policy may be sales invoices, contracts, leases, licenses, and other legal documentation. These documents should be kept for at least seven (7) years beyond the life of the agreement.
- g. **Development/Intellectual Property and Trade Secrets.** Development documents are often subject to intellectual property protection in their final form (e.g., patents and copyrights). The documents detailing the development process are often also of value to the YMCA and are protected as a trade secret where the YMCA:
 - (i) Derives independent economic value from the secrecy of the information; and
 - (ii) The YMCA has taken affirmative steps to keep the information confidential.

The YMCA should keep all documents designated as containing trade secret information for at least the life of the trade secret.

- h. **Contracts.** Final execution copies of all contracts entered into by the YMCA should be retained. The YMCA should retain copies of the final contracts for at least seven (7) years beyond the life of the agreement, and longer in the case of publicly filed contracts.
- i. **Electronic Mail.** E-mail that needs to be saved should be either:
 - (i) Printed in hard copy and kept in the appropriate file; or
 - (ii) Downloaded to a computer file and kept electronically or on disk as a separate file.

The retention period depends upon the subject matter of the e-mail, as covered elsewhere in this policy.

Failure to comply with this Document Retention Policy may result in appropriate disciplinary action against the non-complying employee, including, but not limited to, suspension or termination. Questions about this policy should be referred to the CEO at 330-364-5511 who is in charge of administering, enforcing, and updating this policy.

QUICK REFERENCE GUIDE

File Category	Item	Minimum Retention Period
Corporate Records	Bylaws and Articles of Incorporation	Permanent
	Corporate resolutions	Permanent
	Board and committee meeting agendas and minutes	Permanent
	Conflict-of-interest disclosure forms	7 years
Finance and Administration	Financial statements (audited)	Permanent
	Auditor management letters	Permanent
	Payroll records	Permanent
	Journal entries	Permanent
	Check register and checks	[7 years/ Permanent]
	Bank deposits and statements	7 years
	Charitable organizations registration statements (filed with [State] Attorney General)	7 years
	Chart of accounts	7 years
	Expense reports	7 years
	General ledgers and journals (include bank reconciliations, fund accounting by month, payouts allocation, securities lending, single fund allocation, trust statements)	7 years
	Accounts payable ledger	7 years
	Investment performance reports	7 years
	Investment consultant reports	7 years
	Investment manager correspondence	7 years
	Equipment files and maintenance records	7 years after disposition
	Contracts and agreements	7 years after all obligations end
	Investment manager contracts	7 years after all obligations end
	Correspondence — general	3 years
Insurance Records	Policies — occurrence type	Permanent
	Policies — claims-made type	Permanent
	Accident reports	7 years
	Fire inspection reports	7 years
	Safety (OSHA) reports	7 years
	Claims (after settlement)	7 years

File Category	Item	Minimum Retention Period
	Group disability records	7 years after end of benefits
Real Estate	Deeds	Permanent
	Leases (expired)	7 years after all obligations end
	Mortgages, security agreements	7 years after all obligations end
	Purchase agreements	7 years after disposition requirement
Tax	IRS exemption determination and related correspondence, including Form 1023	Permanent
	IRS Form 990s and 990-Ts	Permanent
	Withholding tax statements	7 years
	Correspondence with legal counsel or accountants, not otherwise listed	7 years after return is filed
	Timecards	7 years
Communications	One set of all communication documents kept on-site, and one set kept off-site	
	Press releases	Permanent
	Annual reports	Permanent (5 copies)
	Other publications	7 years
	Photos	7 years
	Press clippings	7 years
Donor Services	Fund agreements (paper and digital copies)	Permanent
	Correspondence — acknowledgment of gifts and grant requests	Permanent
	Donor fund statements	Permanent
Consulting Services	Consulting contracts/filed	7 years after all obligations end
Human Resources	Employee personnel files	Permanent
	Retirement plan benefits (plan descriptions, plan documents)	Permanent
	Employee medical records	Permanent
	Employee handbooks	Permanent
	Workers comp claims (after settlement)	7 years
	Employee orientation and training materials	7 years after use ends
	Employment offer letter	7 years after all obligations end

File Category	Item	Minimum Retention Period
	Employment applications (for people not hired)	7 years
	IRS Form I-9 (store separate from personnel file)	7 years after end of service
	Résumés (for people not hired)	1 year – 7 years if part of employment application
Technology	Software licenses and support agreements	7 years after all obligations end
Library	Other annual reports	2 years
	Directories and periodicals	2 years
General Administration	Correspondence — chief executive and general	7 years
	Appointment calendars — chief executive	7 years

RECEIPT OF THE EMPLOYEE HANDBOOK FOR STAFF

This receipt acknowledges that I have received the YMCA Employee Handbook for Staff. This receipt will become a part of my personnel file while employed at the YMCA.

I understand that the YMCA is an "Employment at Will" organization as outlined in the Employee Handbook for Staff.

I understand that the Employee Handbook for Staff of the YMCA is intended to be informative only and the policies, procedures and benefits it explains do not constitute an employment contract. YMCA policies, procedures, and benefits may be changed or terminated by the organization at any time with or without notice.

I agree to read the Employee Handbook for Staff and present any questions I have to the CEO.

Employee Handbook for Staff dated _____ supersedes all other personnel policy booklets.

Signature of Employee

Name (please print)

Date