

# Franklin Regional Retirement System

## Personnel Policy

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Table of Contents

**Introduction**..... 1

**Administrative Policies and Procedures** ..... 1

    Office Hours..... 1

    Lunch Hours..... 1

    Attendance ..... 1

    Tardiness ..... 2

    Hazardous Weather Conditions ..... 2

    Confidential Information ..... 2

    Job Descriptions..... 2

    Maintenance of Work Areas ..... 2

    Smoking Policy..... 2

    Visitors..... 2

    Dress Code and Personal Appearance ..... 3

    Office Supplies and Equipment ..... 3

    Computer System, Electronic Mail, Internet Access and Voice Mail Systems..... 3

**Definitions**..... 4

    Full-time Employment..... 4

    Part-time Employment..... 4

    Temporary Employment ..... 4

    Rehired Retired Staff ..... 4

    Introductory Period..... **Error! Bookmark not defined.**

    Employee Eligibility for Benefits: ..... 4

**Conditions of Employment/Standards of Conduct**..... 5

    Affirmative Action/ Equal Employment Opportunity Policy..... 5

    Sexual Harassment Policy..... 5

    Drug Free Workplace Policy ..... 6

    Standards of Conduct..... 6

    Employment Practices ..... **Error! Bookmark not defined.**

    Qualifications/Requirements..... 7

    Advertising Vacancies ..... 7

    Recruitment Procedure..... 7

    Performance Evaluation..... 7

    Compensation/Salary Adjustments..... 7

C.O.L.A., Salary Increases.....	7
Performance, Salary Increases .....	7
Reclassification and Promotion .....	8
Discipline .....	8
Termination.....	9
Acts of Misconduct.....	9
Resignation .....	10
Grievance Procedure.....	10
Records .....	11
Employee References.....	11
<b>Compensation, Payroll, Compensatory Time .....</b>	<b>11</b>
Compensation .....	11
Pay Period.....	12
Time sheets .....	12
Payroll Deductions.....	12
Compensatory Time.....	12
<b>Travel Reimbursement.....</b>	<b>13</b>
A. Introduction:.....	13
B. Procedure for Approval of Expenditures: .....	13
C. Standards:.....	13
D. Vendor Sponsored Events:.....	15
E. Payments or Reimbursements for Expenses by Third Parties.....	16
F. Violation of Travel Policy Regulation or PERAC Guidelines: .....	16
<b>Holidays, Leave Time, and Employee Benefits .....</b>	<b>16</b>
Holidays .....	16
Vacations.....	17
Creditable Service Time for Vacation Purposes .....	17
Sick Leave.....	17
TGIF time.....	19
Personal Leave .....	19
Bereavement Leave.....	<b>Error! Bookmark not defined.</b>
Court Service .....	20
Maternity/Paternity Leave .....	20
Military Leave.....	20
Leave Without Pay.....	20

Education Reimbursement .....	18
Group Health and Life Insurance.....	20
COBRA.....	21
Workers Compensation.....	21
Retirement/Pension Benefits.....	21
Deferred Compensation .....	21
Direct Deposit .....	21

## **Introduction**

The purpose of this manual is to acquaint you, as an employee of the Franklin Regional Retirement Board (“Board”) of the Franklin Regional Retirement System (“FRRS”) with the personnel policies, procedures and benefits that are available to you.

The information contained in this manual represents the current personnel policies, procedures and benefits of this office. They are intended for the general safety and well-being of Board employees. The Board will continue to provide these services and benefits as long as business conditions and the best interests of the Board and its employees so warrant.

While the Board believes in the policies, procedures and benefits outlined in this manual, they are not conditions of employment. The Board reserves the right to modify, revoke, suspend, terminate, or change any or all such policies, procedures and benefits, in whole or in part, at any time, with or without notice. The language used in this manual is not intended to create, nor is it to be construed to constitute, a contract between the Board and any of its employees. All personnel are employed on an at-will basis and may be terminated in accordance with this personnel policy and Chapter 34B, Section 19(d) at any time.

It is the responsibility of the Executive Director to monitor the policies, procedures and benefits outlined in this manual, and all questions regarding their implementation should be directed to the Executive Director.

## **Administrative Policies and Procedures**

Employment with the FRRS cannot begin until all paperwork necessary for employment with the FRRS, including, but not limited to IRS forms W-4 and I-9, and Member Application for the retirement system, has been properly completed and received by the FRRS.

### **Office Hours**

The Board office maintains regular office hours from 8:30am to 4:30pm. Depending on staff participation in the TGIF program, the office hours on Mondays through Thursday may be from 8:00 am to 4:30 pm (open an extra half hour) and Fridays would be 8:00 am to 2:00 pm.

### **Lunch Hours**

Lunch hours are staggered between 11.30 a.m. and 1:30 p.m. so that the telephones and the office are properly covered at all times. Employees should take turns covering the phones. The office should work together to determine a shared schedule. If work or personal needs require you to deviate from the schedule, it is your responsibility to find a replacement to ensure that the office is covered at all times. There must always be one Board employee in the office during the 11.30 a.m. and 1:30 p.m. lunch hours.

### **Meal Breaks**

Massachusetts law mandates that all employees (including exempt employees) receive an unpaid, unbroken, thirty-minute meal break after six hours of work. The meal break must be the employee's free time, meaning the employee must be relieved of all duties and free to leave the workplace during that time, otherwise, the time is compensable.

### **Rest Breaks**

There is no requirement to provide rest breaks.

### **Attendance**

The Board and the members of the Franklin Regional Retirement System count on you to be at work every day. When you cannot come to work due to an injury or an illness, you are expected to attempt to make direct contact with the Executive Director as soon as you suspect you might be absent, and also

telephone the main office line by 8:45 a.m. or otherwise as soon as possible. Absences of short duration require you to notify us before or at the start of each missed workday.

Excessive absenteeism, even if unavoidable, may be grounds for discharge.

#### Tardiness

The Board understands that occasions may arise when an employee will be unavoidably late. You must report your tardiness as soon as possible to the Executive Director. In general, we expect you to make up any late time.

Excessive tardiness, even if unavoidable, may be grounds for discharge.

#### Focus and Attention

The Board appreciates having your full attention and focus on retirement system work while employees are “on-the-clock” and the Board expects employees will control distractions and maintain focus.

#### Hazardous Weather Conditions

The Executive Director or his/her designee may close Board work sites due to hazardous weather conditions. A phone tree will be utilized as early as possible to notify employees.

If the office is open, any staff member who cannot make it to work must use personal, compensatory or vacation time for the hours missed. With the approval of the Executive Director, hours worked at home can be counted as regular hours worked.

If the office is closed for the entire day, regular permanent employees will receive pay for their normal hours. If the office is open but closes early, those employees at work will be allowed to show time worked for the hours that the office is closed. Employees who have already elected to take the day off or to leave early must use personal, compensatory, or vacation time as already planned. They may not claim hazardous weather hours. Employees who elect to come to work when the office is closed may accrue compensatory time with the prior approval of the Executive Director.

#### Confidential Information

All work performed in our office is confidential, and it is essential that all personnel use the utmost discretion in divulging information concerning members or other personal information to which you may gain access during your period of employment.

#### Job Descriptions

The Executive Director will make available for the employee’s review, a copy of the Board’s job description for the position for which they are employed. Job descriptions will be maintained in the Board’s files and may be revised, with the board’s approval, from time to time as the requirements for specific positions evolve.

#### Maintenance of Work Areas

Members may visit the Board’s offices at any time, and the Board expects each employee to maintain a neat and professional work area. This includes appropriate filing and storage of papers and files, etc., and helping to maintain clean and uncluttered hallways, bathrooms, copy rooms and so on.

#### Smoking Policy

Smoking is not permitted in the Board’s offices.

#### Visitors

Please limit visits from personal guests.

### Dress Code and Personal Appearance

You are expected to dress and groom yourself in accordance with accepted social and business standards, particularly as your job involves dealing with members or visitors in person.

A neat, tasteful appearance contributes to the positive impression you make on our members and others. You are expected to be suitably attired and groomed during working hours or when representing the Franklin Regional Retirement System. A good, clean appearance bolsters your own poise and self-confidence and greatly enhances your own as well as the Retirement System's image.

Personal appearance should be a matter of concern for each employee. If the Executive Director feels your attire and/or grooming is out of place, you may be asked to leave your workplace until you are properly attired and/or groomed. Employees who violate dress code expectations may be subject to appropriate disciplinary action.

At times during the year, the Executive Director may declare certain days as "dress-down" days. On such days dress code may be relaxed or be more casual than normal, however grooming and appearance standards are expected to be maintained.

Examples of, but not limited to, inappropriate attire are:

1. Clothing articles which are worn, faded, soiled, torn or not properly fitted
2. Jogging Suits
3. Sweatsuits
4. Yoga pants or Leggings without a skirt to cover
5. Shorts or cutoffs
6. Tank Tops
7. Printed T-shirts

### Office Supplies and Equipment

Please assist the Board to make sure that office supplies remain in supply in the office. If you notice that consumable supplies (pencils, tape, binder clips, etc.) are low or out of stock, please alert the Executive Director or the Executive Director's designee, who will place the order with the Board's vendor. Purchases will be made by the Executive Director or the Executive Director's designee only. No other personnel are authorized to order supplies or outside services.

Each employee is responsible for the care and maintenance of his/her equipment. All requests for outside repair services must be directed to the Executive Director or the Executive Director's designee. Typewriters, computers, etc., must be turned off at night, unless otherwise instructed.

Telephones, computers, electronic devices, postage meters, fax machines, photocopiers and other equipment are intended for all Board-related work. Personal use of retirement system property and equipment is not allowed; however, the Board will allow employees minimal use of retirement system telephones for emergency calls, and minimal personal use of photocopiers and printers, and small items, e.g. staplers, tape, etc. with the permission of the Executive Director.

### Computer System, Electronic Mail, Internet Access and Voice Mail Systems

The computer, electronic mail ("email"), internet access and voice mail systems employees use at the Board offices are intended for business purposes only. Personal use of these retirement system systems is not allowed. Also, under absolutely no circumstances is any Board property to be utilized to solicit, harass, or otherwise offend or for any unlawful purpose, such as accessing illegally or legally distributed materials which are sexually explicit or otherwise inappropriate or unlawful.

Please note that e-mail, voice mail or other similar systems record all messages, whether personal or business. An employee's deletion of materials from a computer does not cause the elimination of such materials from the network system. Any materials received or sent via e-mail, voice mail and other similar systems at the Board offices constitutes your consent to the company's recording and monitoring of such messages. The Board reserves the right to monitor or review any information stored or transmitted on its equipment. These systems should not be considered completely secure, so please use discretion when sending and storing highly sensitive or confidential information. Message content should be prepared in a professional manner, similar to that used for hard copy written communications from the Board.

### **Definitions**

#### **Full-time Employment**

When an employee's workweek totals 37.5 hours. A regular workday usually consists of 7.5 hours with a 30 minute unpaid break for lunch. The specifics of scheduling may be arranged between the employee and the Executive Director.

#### **Part-time Employment**

When an employee works less than 37.5 hours in a regular workweek.

#### **Temporary Employment**

When an employee is hired either part-time or full-time for a specified limited period.

#### **Rehired Retired Staff**

A staff member who returns as an employee of this office – will be subject to post-retirement earnings limitations, and their schedule and duties will be subject to the needs of the office, as determined by the Executive Director. Hourly wages will be commensurate with the position from which they retired. They will not accrue leave time, nor receive holiday pay, nor will they be subject to performance review.

#### **Exempt and Non-Exempt Employees**

Status is determined pursuant to the job responsibility and qualification standards outlined by the Fair Labor Standards Act (FLSA) of 1938 as amended and Title 29: Part 541 CFR. See the **Compensation, Payroll, Compensatory Time** section of this policy for determination of which employee positions are exempt or non-exempt.

#### **Probationary Period**

It is the policy of the Board that all new employees and all present employees transferred or promoted to a new job are to be carefully monitored for a probationary period of six months. During the probationary period, employees shall be evaluated immediately following 30 calendar days of employment, and again at the conclusion of six months. After satisfactory completion of the probationary period, employees will be evaluated annually in December each year. New employees will not be eligible to take work-from-home equipment during the probationary period except in extreme circumstances subject to determination by the Executive Director.

#### **Employee Eligibility for Benefits:**

Full Time employees and Part Time employees who work 20 hours or more a week on a regular basis are eligible for group insurance.

Full-time and Part-time employees are eligible to use accrued sick leave and personal leave, as well as bereavement leave and court service leave.

Full-time and part-time (who are eligible) employees, who have successfully completed a probationary



period, are eligible to use accrued vacation time.

Temporary employees are ineligible for group insurance or leave time.

### **Conditions of Employment/Standards of Conduct**

#### **Affirmative Action/ Equal Employment Opportunity Policy**

The Board, recognizing the right of an individual to work and to advance on the basis of merit, ability and potential without regard to race, gender, sexual orientation, color, handicap, religion, national origin, national ancestry or age, resolves to take Affirmative Action measures to ensure equal opportunity in the areas of hiring, promotion or transfer, recruitment, layoff or termination, rate of compensation, in-service or apprenticeship training programs, and all terms and conditions of employment.

Non-discrimination and equal opportunity are the policies of the Board in all of its programs and activities. To that end, all Board employees shall rigorously take affirmative steps to ensure equality of opportunity in the internal affairs of the organization, as well as in their relations with the public, including those persons and organizations doing business with the Board. The Board, in discharging its statutory responsibilities, shall consider the likely effects that its decisions, programs and activities shall have in meeting the goal of equality of opportunity.

Affirmative action requires more than vigilance in the elimination of discriminatory barriers on the grounds of race, color, disability, creed, national origin, national ancestry, age, gender or sexual orientation. It must also entail positive and aggressive measures to ensure equal opportunity in internal personnel practices and in those programs which can affect persons outside of government. This affirmative action shall include efforts necessary to remedy the effects of present and past discriminatory patterns and any action necessary to guarantee equal opportunity for all people.

#### **Sexual Harassment Policy**

All employees have the right to work in an environment free from all forms of discrimination and harassment. The Board recognizes that sexual harassment is a form of misconduct, which undermines the integrity of the employment relationship and demeans both genders. The Board expects all employees to conduct themselves in a professional manner with concern and respect for their colleagues and members of the public.

Verbal or physical behavior towards an employee of the Board or other individual addressed by the policy, which constitutes unsolicited and unwelcome sexual overtures or conduct is unlawful and is forbidden by the Board. Sexual harassment includes unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature when submission to such conduct or communication is either an explicit or implicit term or condition of employment, and/or when rejection of such conduct or communication is used as a basis for making employment decisions. Additionally, any such unwelcome conduct or communications which have the purpose or effect of interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment is likewise prohibited. A key to understanding what constitutes sexual harassment lies in the word "unwelcome". Sexual harassment can take the form of verbal abuse, such as sexual insults, suggestive comments, demands for sex and dirty jokes. It may entail physical touching and "horseplay". It may also take the form of displaying visual materials such as cartoons, pictures or photographs.

Employees or other individuals addressed by this policy who believe they are the victim of sexual harassment have the right to file a complaint and may do so by contacting the Executive Director. This may be done in writing or orally. The Executive Director shall act as the Sexual Harassment Officer, shall be responsible for promoting awareness of the Board sexual harassment policy and related issues, and shall be available to all staff to receive reports of sexual harassment and to help facilitate pursuant investigations. The Board may appoint another individual as the sexual harassment officer. If the

Executive Director is the source of the alleged harassment the individual should report the problems to the Chair of the Board, for consideration by the Board.

All reports of sexual harassment will be investigated promptly and in an impartial and as confidential a manner as possible, under the supervision of the sexual harassment officer, to ensure prompt and appropriate action. Any employee who is found, after appropriate investigation, to have engaged in sexual harassment of another employee, prospective employee, or of any other individual who might have dealings with the employee in the course of that employee's duties will be subject to disciplinary action as determined by Board policy, up to and including recommendation of termination of employment to the full Board, depending on the circumstances. If an employee is not satisfied with the handling of a report or action taken, the employee may then file a written grievance with the Board as outlined in Step 3 of the Grievance Procedures of this Personnel Policy.

In addition to the above, if you believe you have been subjected to sexual harassment, you may file a formal complaint with either or both of the government agencies set forth below. Using the Board's complaint process does not prohibit you from filing a complaint with these agencies. Each of the agencies has a short time period for filing a claim. (EEOC – 180 days; MCAD – 6 months)

The United States Equal Employment Opportunity Commission (“EEOC”)  
John F. Kennedy Federal Building  
475 Government Center  
Boston, MA 02203  
1 (800) 669-4000

The Massachusetts Commission Against Discrimination (“MCAD”)  
One Ashburton Place, Room 601  
Boston, Massachusetts 02108  
(617) 994-6000

#### Drug Free Workplace Policy

The Franklin Regional Retirement System seeks to ensure a safe, healthy and productive work environment for all employees. Evidence clearly indicates that alcohol and other drug abuse by employees' results in low productivity, high absenteeism, excessive use of medical benefits and a risk to personal safety as well as that of co-workers. In a good faith effort to comply with the Drug-Free Workplace Act of 1988, the Board prohibits the use of alcohol and/or illegal drugs/controlled substances on the Board premises. It is prohibited for any employee of the Board to unlawfully manufacture, distribute, dispense, possess, or use controlled substances at the workplace or on other premises while conducting Board business. Controlled substances are defined for the purposes of this policy as those groups of drugs whose use is limited or prohibited by federal and/or state law.

All reports of drug abuse in the work place will be investigated promptly and in an impartial and as confidential a manner as possible by the Executive Director, or designee, to ensure prompt and appropriate action. Any employee who is found, after appropriate investigation, to have violated the drug free workplace policy may be required to participate in a drug rehabilitation program and/or will face disciplinary action up to and including termination.

If an employee is not satisfied with the handling of a report, or action taken, the employee may then file a written grievance with the Board as outlined in Section 3 (section 3?).

#### Standards of Conduct

Employees of the Board are subject to M.G.L., c.268A, Section 23 Conflict of Interest Law. Accordingly, employees of the Board are prohibited from using or attempting to use their official positions to secure for themselves or others unwarranted privileges of substantial value that are not properly available to

similarly situated individuals. Substantial value has been set by the courts and the Ethics Commission. Employees of the Board must avoid conduct that creates a reasonable impression that any person can improperly influence or unduly enjoy their official favor, or that they are likely to act (or fail to act) because of kinship, rank, position or undue influence by any party or person. A reasonable impression of favoritism or bias may arise when a public official acts on matters affecting the financial interests of a friend, a business associate or relative.

Section 23 of the conflict law prohibits both actual exertion of undue influence and also the appearance of acting in anything but a completely objective manner. Therefore, persons in supervisory positions cannot ask their subordinates to work for them in a private capacity nor can they ask subordinates to contribute to any private interest or organization.

#### Employment Practices

The authority to hire and to terminate the Executive Director and the Assistant Director rests with the Board. The hiring and termination of all other employees will be the responsibility of the Board Chair, Executive Director, and the Assistant Director working in concert.

#### Qualifications/Requirements

For each position on the staff of the Board, there shall be established minimum requirements as to the experience, education, licensing or other abilities and/or qualities considered necessary for satisfactory performance of the essential duties of the position.

#### Advertising Vacancies

A vacancy announcement specifying position title, starting salary range, hours per week, qualifications, responsibilities and application process, shall be developed in accordance with the personnel policies and will be authorized by the Board, who may set standards from time to time regarding distribution of hiring announcements.

#### Recruitment Procedure

Resume screening and interview procedures shall comply with all Federal and State laws. Evaluation of candidates will follow the criteria established by postings, advertisements and job descriptions.

Recruitment procedures will strive to promote equal opportunity and achievement of affirmative action plan goals.

#### Performance Evaluation

Performance evaluations are designed to serve the needs of both the employee and employer. The goals of a performance evaluation are to:

1. Improve employee satisfaction and potentially reduce employee absenteeism, turnover and grievance;
2. Serve as a motivational tool and improve quality of job performance;
3. Base personnel actions on objective, accurate and fair performance appraisals;
4. Monitor the performance of introductory period employees on a timely basis.

To achieve these goals performance reviews will be used as follows:

Upon completion of an employee's probationary period (see "definitions") the supervisor will complete with the employee a written performance evaluation. A written performance evaluation of each employee will be completed annually between December 1st and December 30th as follows.

Supervisor will provide employee with a list of the current year's goals prior to meeting. This will allow the employee an opportunity to review the year's work in order for a productive conversation to take place. A simple form will be used that initiates conversation and documents goals, successes and concerns. The current form has the following topic titles:

1. Current year's goals
2. Update on goals not accomplished
3. Goals for coming year
4. Areas of additional training/learning needed or requested
5. How do you feel things are going
6. Comments

Both parties will sign the evaluation form. Employees who disagree with the performance review may meet with the next higher-level supervisor. Employees supervised by the Chair who disagree with their performance review may follow the Grievance Procedure outlined in Section 3. Employees may grieve the substance of his/her performance review where such review results in a negative action such as the denial of a pay raise. Employees should follow the grievance procedures outlined in Section 3.

Supervisors will furnish Board members with a copy of the evaluation, which will be returned after review by the Board member and shredded. The Chair will receive a copy of all performance reviews. Originals will be placed in the employee's permanent personnel file.

Supervisors may, at their discretion, conduct performance reviews more frequently than once a year.

#### Compensation/Salary Adjustments

It is the policy of the Board to provide compensation that is nondiscriminatory and competitive. However, all compensation policy decisions must take into consideration the overall financial condition of the Board.

C.O.L.A., Salary Increases - At each January 1<sup>st</sup>, employees may receive a base increase Cost of Living Adjustment (COLA) equal to the average 12-month percentage change of the CPI (Consumer Price Index) for the twelve months from July of the prior year to June of the last most current year, as promulgated by the Bureau of Labor Statistics for the Northeast region. The COLA shall be used to adjust the salary schedule/range. This adjustment shall be made prior to the calculation of any pay increases resulting from the employee's evaluation.

Performance, Salary Increases - Beginning January 1<sup>st</sup> of each year, employees may be eligible to receive an increase as determined by the Board. To the extent possible, if an employee receives a performance review indicating work improvements are needed, he/she may be counseled by his/her supervisor in the specific areas that need improvement. After a ninety (90) day period the employee may request (with 30-day notice to their supervisor) a re-evaluation to determine if an improved rating has been achieved.

#### Reclassification and Promotion

If the nature of an employee's duties changes significantly in scope or level of responsibility, that employee may request a reclassification or promotion by consulting first with the Executive Director. The request will be reviewed by the Executive Director and presented to the full Board. The full Board will vote on all reclassifications and promotions.

#### Discipline

The Executive Director is responsible for disciplinary actions involving Board employee misconduct. Depending on circumstances, the Executive Director will apply discipline progressively as follows:

- Verbal Reprimand
- Written Reprimand
- Suspension
- Recommend Termination

Disciplinary procedures are cumulative and can advance with any additional misconduct. Employees are on probation starting with the application of any step in the disciplinary process. Probation will be lifted at the conclusion of one year's time after the application of the most recent disciplinary step.

Notwithstanding the foregoing, the Executive Director has the discretion to bypass any initial or intermediate stage of progressive discipline if the facts and circumstances of the infraction so warrant. If an employee is aggrieved by any disciplinary action taken by the Executive Director, the employee may challenge the disciplinary action by following the grievance procedure.

In the absence of an Executive Director the Board may designate a Board member as responsible for overall disciplinary actions involving Board employees.

### Termination

Board employees are at-will employees and may only be terminated as per the provisions described in the “Employment Practices” paragraph in this personnel policy. Employees may be terminated for any reason or for no reason, so long as said termination does not violate the Board’s Affirmative Action / Equal Opportunity Policy. In addition to the foregoing, an act of misconduct as more fully defined below may form the basis of immediate termination.

### Acts of Misconduct

The following is a list of examples of conduct that constitute “misconduct” as that term is used in this manual. This list is not intended to be exhaustive and conduct not listed here may nevertheless rise to the level of “misconduct” under the terms of this personnel policy.

- Personal use of retirement system property, equipment, and systems without permission of the Executive Director.
- Storing, removing or attempting to remove from the Board premises anything that does not belong to you without the authorization of the Board.
- Carelessly or willfully destroying or damaging property belonging to the Board, another employee, vendor or member.
- Possessing, consuming or being under the influence of alcohol or illegal drugs while on the Board’s premises.
- Gambling while on the job and/or premises.
- Failing to report to work for three consecutive workdays without calling in each day to the Executive Director and providing adequate justification for your inability to work.
- Willfully falsifying the Board’s records or forms, including time cards, employment applications, accounting reports and records, etc.
- Failing to carry out a reasonable assignment pertaining to your position or another position. (If the Executive Director requests that you do something and you disagree, follow the instructions at that time and then discuss it later when both you and the Executive Director are out of hearing range from other employees or members.
- Engaging in disorderly conduct, including fighting; physically or verbally harassing another employee, vendor, member or guest; or using obscene language or gestures in the office.
- Possessing any type of fireworks, explosives or weapons on the premises.
- Leaving the premises while on duty without permission from the Executive Director or the Executive Director’s designee.
- Being convicted of a felony occurring while employed by the Board.
- Tampering with any alarm system.
- Harassing, intimidating or interfering with the rights of any fellow employee, vendor or member.
- Being negligent, resulting in the loss of Board assets of substantial value.
- Engaging in conduct that has a significant adverse effect upon the operation or reputation of the Board, including gross lack of courtesy toward a fellow employee or member.

### Resignation

It is hoped that all employees will be professionally responsible by giving enough resignation notice so that the smooth functioning of the Board and/or completion of their assigned tasks is not jeopardized. Generally employees at or above the managerial level are requested to give notice of 30 calendar days in advance of the intended termination date. In the case of employees below the managerial level, it is requested that notice be given 14 calendar days in advance of the intended termination date.

### Grievance Procedure

The Grievance Procedure is established by the Board to allow employees a formal process for resolving issues with job classifications, performance reviews or working conditions. The Grievance Procedure may be altered by majority vote of the full Board.

#### STEP 1 Informal Resolution – Verbal Discussion

An employee of the Board (hereafter referred to as the complainant) who feels aggrieved by any ruling, action or failure to act directly affecting him or her should discuss the problem first with the Executive Director. The Executive Director shall provide a response to the complainant no later than seven (7) calendar days after receiving the complaint. If the employee is still aggrieved, they may further pursue the matter under STEP 2 of these procedures.

#### Informal Resolution Alternative Procedures: Discrimination, Sexual and other Harassment

A. If the complainant alleges discrimination, sexual or other harassment prohibited under Board policies, he or she may make his or her complaint to the Executive Director who shall act as Board Affirmative Action/Equal Opportunity Officer (hereinafter referred to as the AA/EEO Officer), and as the sexual harassment officer. The Executive Director may delegate investigative responsibilities as appropriate; or, in the case of a sexual harassment complaint in particular, to a person of the same gender who has been designated by the Executive Director to receive such complaints. A harassment or discrimination complaint brought against the Executive Director shall be filed with the Board Chair.

B. Making every effort to protect the confidentiality of the parties involved, the Executive Director (or Board member as noted above) or his/her designee shall investigate the complaint to attempt an informal resolution. The complainant shall receive an answer to the complaint no later than seven (7) calendar days after giving any notice. The Executive Director (or Board member) shall inform the complainant that he or she has the right to pursue the complaint with the Massachusetts Commission Against Discrimination or the courts at any time and shall provide the addresses and phone numbers of such agencies. Nothing in any grievance procedure shall limit disciplinary remedies available to the Board.

C. If informal resolution is not possible, a formal written grievance may be filed under STEP 3.

#### STEP 2 Informal Resolution – Written Response

If not satisfied with the answer, the complainant should so indicate in writing to the Executive Director within three (3) calendar days and request a second conference with the Executive Director who, shall schedule the conference within seven (7) calendar days of the request and shall provide a written response to the complainant no later than seven (7) calendar days after the conference. If informal resolution is ineffective, the complainant may file a formal written grievance under STEP 3.

#### STEP 3. Formal Resolution – Grievance Panel

If the complainant is not satisfied with the result of the informal resolution process, he or she may file, within seven (7) calendar days of receipt of the final answer provided in STEP 2 above, a formal written grievance with the Executive Director who shall convene a hearing for the complainant with a Grievance Panel, consisting of the Executive Director and two members of the FRRS board. The hearing shall occur within fourteen (14) calendar days after the receipt of the formal written grievance. The Grievance Panel

shall issue a written response to the complainant no later than seven (7) calendar days after the hearing. A record of such formal response shall be filed in the main office of the Board.

#### STEP 4. Appeal to Full Board

A. If the complainant is not satisfied with the formal response in STEP 3, he or she may file a written request with the Executive Director for a hearing with the full Board.

B. The request for a hearing must be made within seven (7) calendar days of the transmittal of the written response under STEP 3. Such hearing shall be held not later than fourteen (14) calendar days after the receipt of the request.

C. Procedures of the hearing shall be at the discretion of the Board. A written decision will be issued on behalf of the Board to the complainant and other parties as appropriate no later than ten (10) calendar days after the hearing. If the vote of the Board is not unanimous; a minority report may be included in the decision.

#### Records

A personnel record of all Board employees shall contain the employee's application for employment and any other pertinent data. Upon the submission of a written request to the Executive Director, the employee may review or be furnished with a copy of his/her personnel file. If the employee disagrees with any information contained in the personnel record, he/she may submit a written statement explaining his/her position, which shall become a part of the permanent record. All personnel files are the property of the Board and no part of them may be removed from the office without authorization.

It is important that the Board's confidential personnel records contain accurate and up-to-date personal information about each employee. Each employee is requested to notify the Executive Director or the Executive Director's designee regarding any change in name, address, telephone number, marital status, beneficiary or dependents that may be named in insurance policies, pension and profit sharing plans, number of dependents for tax purposes and persons to notify in case of an accident. This can be most important in the event of an emergency and also for such things as social security, withholding taxes and group life insurance.

The Commonwealth of Massachusetts Freedom of Information Act requires release of certain information to others on appropriate request, including certain information contained in employee personnel files. All such requests will be forwarded to the Executive Director, who shall, after consultation with Legal Counsel, respond in writing.

All Board representatives shall make every reasonable effort to protect the privacy of employees regarding personnel actions taken and documentation contained in personnel files. All questions concerning personnel files should be directed to the Executive Director.

#### Employee References

The Board's policy is to provide only the following information regarding former employees to prospective employers: dates of employment with the Board, job title (s) and length of tenure in each position. This information will be disclosed by the Executive Director, to the prospective employers, with or without the former employee's consent.

### **Compensation, Payroll, Compensatory Time**

#### Compensation

The Board shall annually establish a classification and compensation plan. Employees may obtain a copy of this from the Executive Director.

### Pay Period

The pay period is currently two weeks but may be subject to change at the discretion of the Board.

### Time sheets

Each employee shall submit a bi-weekly time sheet to his or her supervisor. This time sheet shall specify the number of hours worked each day and any leave time taken, as well as an explanation of any compensatory time earned. The employee and the Executive Director shall sign the time sheet. The Executive Director shall review and approve payroll prior to processing.

### Payroll Deductions

All earnings and deductions are reflected on the payroll stub. The FRRS is required to withhold the following deductions from wages: (M.G.L. Chapter 149, Section 150A)

Federal Income Tax

Massachusetts Income Tax

Retirement Plan

Medicare Portion only of Federal Insurance Contributions Act (FICA)

Wage Garnishments

Deferred Compensation if the employee is not eligible for membership in the FRRS.

### Compensatory Time

Employees may accrue compensatory time for hours worked in excess of their regular workweek. The calculation of compensatory time includes hours actually worked but excludes sick, vacation, personal, and holiday leave hours. Compensatory time may be accumulated to 50 hours. All compensatory time must be used within 90 days of being earned. Compensatory time may be reduced or bought-down by a cash payment subject to appropriation and normal payroll deductions. Unused compensatory time will be paid as part of a termination or severance at the average regular rate of pay for the final three years of employment or the final regular rate received by the employee, whichever is higher.

The Executive Director is responsible for the control and authorization of compensatory time. The Executive Director must approve in advance, all work that would result in compensatory time.

Anybody called to the office for the alarm system ringing after regular work hours will be compensated for a minimum of 3 hours compensatory time.

The Fair Labor Standards Act (FLSA) of 1938 as amended, and Title 29 part 541 CFR require that non-exempt employees be given compensatory time equal to one and one-half for actual hours worked over 40 hours. The positions of Assistant Director, Member Services Accountant, and Administrative Assistant are all non-exempt positions. The position of Executive Director is an exempt position.

#### Non-Exempt Employees:

Pursuant to the FLSA of 1938, as amended, for approved time worked above and beyond the normal workweek, employees may accrue compensatory time at a rate of 1 hour earned for every hour worked up to 40 hours and 1.5 hours earned for each hour worked over 40 hours. All positions other than the Assistant Director and the Executive Director have been determined by the FRRS Board to be hourly, non-exempt employees.

#### Exempt Employees:

FLSA exempt employees are not eligible to accrue compensatory time. The Board has determined that the Executive Director, and the Assistant Director positions are exempt, salaried employees and are not required to keep timesheets but are still granted the benefits listed in the **Holidays, Leave Time, and Employee Benefits** section of this policy.



## Travel Reimbursement

### A. Introduction:

In order to ensure an orderly procedure to comply with G.L. Chapter 32 section 20(5)(b) to provide for the payment of Board members and Board Staff expenses for travel and other related expenditures and to meet, comply with and maintain the fiduciary responsibilities and standards of the Board members and Board staff and, further recognizing that the continuing education and training of the Board members and Board staff are essential to meet these fiduciary responsibilities and obligations, the Board hereby adopts the following regulation governing travel and related expenditures.

### B. Procedure for Approval of Expenditures:

In the event a retirement Board member or Board staff; wishes to be reimbursed for any expenses for travel or related expenditures such as meals, mileage, tolls, air fare, taxis, registration fees, hotel charges or loss of wages for attendance at any meeting, seminar, conference or similar function, the Board member or Board staff must request, at least thirty days prior to the meeting, seminar or conference at a Board meeting, to be paid or reimbursed for said expenses or wages. This request shall be accompanied by a meeting, seminar or conference agenda, if available.

Travel not exceeding one day by Board members or Board staff via automobile to and from a relevant retirement Board function will not require prior Board approval. Reimbursement shall be limited to mileage, parking, tolls and, for travel taking more than 4 hours, one meal (with foodservice gratuity not to exceed 20%).

Where advance notice and approval of attendance at a meeting, seminar or conference may be impractical due to the Board's scheduled meeting date, notice shall be provided to the Executive Director and to the Board members as soon as possible. In such case, the Executive Director shall poll the Board members individually for approval and shall convey the results of said poll to the Board member or Board staff making the request in a timely manner. At the next scheduled meeting thereafter, the Board members shall vote on the member's or staff request. For all requests, the Board shall vote in an open meeting and the minutes shall reflect the Board's action and extent of the authorization.

Within thirty days following the conclusion of the conference, meeting, seminar or similar function, the Board member or Board staff shall complete and submit to the Executive Director a travel reimbursement form. The Board member or Board staff shall list and certify under the pains and penalties of perjury on said form all expenditures for which reimbursement is sought and include as attachments all original receipts for all expenses incurred and for which reimbursement is sought. Any travel expenses for which receipts are unavailable such as gratuities must be fully described and reimbursed based on the Board members certification that the expenses were necessary and incidental to the approved travel. Reimbursement may be made only to the person who made payment for the expense.

### C. Standards:

If a majority of the Board present and voting determines at a duly called meeting that the attendance at the meeting, seminar or conference by the Board member or Board staff is a necessary expenditure in service on or to the Board, the Board shall authorize the payment or reimbursement of the necessary and/or lost wages related to attendance at the meeting, seminar or conference in accordance with this policy. Board members and Board Staff are responsible for all expenses related to family members when they join on a business trip. The Board has determined that payment of the following expenses shall be administered as follows:

1. Automobile mileage of a personal automobile when used to travel to and from conferences and all other retirement business shall be reimbursed at the IRS allowed rate. Parking fees and tolls are also

reimbursable expenses. The starting address in determining mileage for employees will be the address of the retirement office; Board members should use their resident address as the starting point.

2. Hotel Accommodations shall be charged at the conference rate. If unavailable, government or business rates shall be used. If a Board member or Board staff upgrades hotel accommodations, the cost of said upgrade shall be the responsibility of the Board member or Board staff. Necessary and reasonable expenses for hotel accommodations shall be considered to be room charges, related taxes, hotel parking, meals (up to one hundred dollars (\$100) per day not including gratuities) and foodservice gratuity (not to exceed 20%). Incidental charges such as gift shop charges, in room movies, or alcoholic beverages shall not be reimbursable expenses.

3. Telephone calls by Board members or Board staff attending educational conferences, programs and seminars, which relate directly to the business of the retirement system, shall be considered necessary and reasonable expenses.

4. Spouses, partners, or children of Board members or Board staff may accompany a Board member or Board staff when attending conferences, and may occupy the same hotel room. If such double occupancy results in an increase cost of the room charge above the rate which would have been charged to the member of a single occupancy room, said additional cost shall be the responsibility of the Board member or Board staff member.

5. The Executive Director shall be responsible for making travel arrangements and for assisting Board members in completing the reimbursement forms and in complying with this regulation.

6. An extended stay of the Retirement Board member or Board staff may be authorized if the net cost to the Board of the travel costs will be lower. For example, if airline fare is lowered by staying an extra day and the cost of accommodations and meals for that extra day results in a net savings to the Board, an extended stay may be authorized by the Retirement Board.

7. All travel should be at the lowest fare available. The source of rental cars shall be a national rental agency. The rental rate shall be negotiated by the Executive Director or Board member responsible for arranging travel. It is the Board member's or Board staff's responsibility to verify that the rate charged is the rate negotiated. The Board member or Board staff must accept optional insurance coverage for rental cars.

8. Airline club memberships shall not be a reimbursable travel expense.

9. Any motor vehicle accidents which occur while using a rental car while on Board approved travel shall be reported as soon as practicable, in writing to the appropriate authorities, with copies of all such reports provided to the Board.

10. The Board member or Board staff is personally responsible for the payment of fines or other expenses incurred as a result of traffic violations while on Board approved travel. These payments shall not be considered reimbursable expenses.

11. In the event a Board member or Board staff seeks reimbursement for business meetings involving meals for others while on Board authorized travel a Board member shall provide in writing the name of each participant, their affiliation and the nature and matters discussed at the meeting. Reimbursement for these expenses shall only be made for meetings that are for a legitimate Retirement Board business purpose.

12. If conference, seminar or meeting registration fees include lodging and meals, reimbursement may be made only for the lodging or meals (with foodservice gratuity not to exceed 20%) not included by the registration fees.

13. No cash advances for Board travel expenses will be made to a Board member or Board staff.

14. The Executive Director and any Board Member/employee so designated by the Board may be provided a company credit card which may be used for the payment of approved travel-related expenses such as transportation, lodging, and meals. Credit card billings shall be issued to the Board office and the user(s) shall be required to provide receipts for all expenses included in the statement. The Executive Director or his/her designee, or authorized Board Member may make reservations regarding Board related transportation and lodging. Personal Use of the credit card is strictly prohibited including personal expenses.

15. Undocumented, unapproved and nonconforming travel or related expenses will be rejected or adjusted in accordance with the documents provided and in compliance with this regulation. The Board member, or Board staff, shall indemnify and pay personally for all personal travel expenses incurred while engaged in any travel pursuant to this policy.

16. Board members and Board Staff are responsible for all expenses related to family members when they join on a business trip.

17. Overnight stays will be limited to circumstances where the location is in excess of 30 miles from the participant's home, and the start of the event is earlier than 8:00 am, or the conclusion of the event, not including parties or social gatherings, is later than 8:00 pm. Overnight stays are not limited to multiple-day events. Other conditions including weather issues can be acceptable reasons for overnight stays with Board approval. Exceptions may be granted on a case by case basis by Board approval.

D. Vendor Sponsored Events:

Expenses for travel and lodging for Board members or Board staff while attending vendor-sponsored event shall be processed in accordance with the above sections. When attending a vendor-sponsored event, Board members or Board staff shall not accept direct or indirect payments or reimbursements from vendors for travel and lodging, nor allow payments by vendors on behalf of a Board member for same. If a Board member or Board staff participates in a legitimate speaking engagement, the Board shall pay all costs and expenses related to such speaking engagement, provided, that the Board member or Board staff complies with all of the Board's travel regulations. The Board may accept reimbursement for such travel related expenses of a Board member or Board staff from the third party, only under the following limited circumstances:

1. A Board Member or Board staff may participate in legitimate speaking engagements in connection with their positions on the Retirement Board or as a member of the Board's staff and the Board may accept reimbursements from third parties necessary to cover travel related costs - for such engagements.
2. Acceptance of an honorarium or any other form of compensation is strictly prohibited.
3. To be considered a legitimate speaking engagement, the presentation must be formally scheduled on the agenda of a convention or conference.
4. The speaking engagement must be scheduled in advance of the Board member's or Board staff arrival at the event.
5. The presentation must be before an organization that would normally have outside speakers address them at such an event.
6. The presentation cannot be perfunctory, but should significantly contribute to the event, taking into account such factors as the length of the speech or presentation, the size of the audience, and the extent to which the speaker is providing substantive or unique information or viewpoints.

- 7. The Board can be reimbursed by a third party for expenses only to the extent necessary for making the speech or presentation.
- 8. Under no circumstances can a Board member or Board staff receive reimbursement or any other payment or compensation from a third party.

E. Payments or Reimbursements for Expenses by Third Parties.

A Board member or Board staff may not provide or receive anything of substantial value from any person, firm, partnership or other entity which may be reasonably expected to seek to do business with or is seeking to do business with or presently is doing business with the Board or any person, firm or other entity that solicits or makes referrals or which may be reasonably expected to solicit or make referrals of any client on behalf of such a person, firm, partnership or other entity. The Board's members or staff may not provide to or receive anything of substantial value from such a person, firm, partnership or other entity indirectly through any person, firm, association, organization or other entity.

F. Violation of Travel Policy Regulation or PERAC Guidelines:

Any person or entity that violates PERAC Guidelines or Board regulations approved by the Commission shall be deemed to have violated the provisions of 840 CMR 17.00 and shall be subject to removal as a qualified investment manager or consultant pursuant to 840 CMR 17.04(10). In addition, the Commission shall not grant an exemption pursuant to 840 CMR 19.02 or a qualification pursuant to 840 CMR 26.04 if any person or entity that has violated PERAC Guidelines or Board regulations adopted pursuant to those Guidelines is the subject of the filing pursuant to those provisions.

In no event shall these regulations prevent a member of the Board or Board staff from attending any meetings, seminars or conferences at his or her own expense.

**Holidays, Leave Time, and Employee Benefits**

Holidays

Full and part-time employees (working 20 hours or more) are granted paid time off on the following holidays:

New Years Day	January 1
Martin Luther King Day	Third Monday in January
President’s Day	Third Monday in February
Patriot’s Day	Third Monday in April
Memorial Day	Last Monday in May
Juneteenth Day	June 19
Independence Day	July 4
Labor Day	First Monday in September
Columbus Day	Second Monday in October
Veteran’s Day	November 11
Thanksgiving Day	Fourth Thursday in November
Friday after Thanksgiving	Fourth Friday in November
Christmas Day	December 25

In addition, the Retirement Office will close at noon on the last business day before the Christmas Day Holiday.

Holidays which fall on Saturday will be observed on the Friday before. Holidays which fall on Sunday will be observed on the following Monday.

Unless approved otherwise by the Executive Director, holiday time will be used when scheduled.

Part-time employees (20 hours or more) will receive holiday paid time off at the percentage of their regular weekly schedule, as it relates to full-time equivalent of 37.5 hours per week, if regular, or, of the weekly average of the four weeks prior to the holiday week if their regular schedule is variable. Holiday time will be taken during the week of the holiday, with the remaining hours of their weekly schedule to be fulfilled during the remainder of the week.

Holiday paid time off will only be granted during periods of paid wages for worked or benefited hours, and not during unpaid periods, and not appended to the start or end of unpaid periods.

Vacations

All permanent full-time and part-time employees are eligible for vacation leave with pay. Unless approved otherwise by the Executive Director, new employees may not use earned vacation time until their introductory period is over. Vacation leave may be accumulated up to a maximum of 225 hours at any point in time. Any time earned beyond 225 hours will not be credited to the employee.

Employees are required to take at least one week of earned vacation each year unless advance arrangements are approved by the Executive Director. All requests for vacation must be approved by the Executive Director.

Vacation time may be used in hourly units, but all requests for vacation time must be arranged with the Executive Director with at least one week’s notice.

Unused vacation time will be paid upon termination.

Vacation time does not accrue during periods of unpaid leave.

Vacation leave with pay shall be accrued as follows and is prorated for eligible part-time staff:

For example, for full-time employees, the accruals are equivalent to:

For less than 4 years of service	10 days per year
4 years but less than 9 years	15 days per year
9 years and more	20 days per year

Creditable Service Time for Vacation Purposes

New employees of the Board who have prior full-time or part-time employment with any local, regional, or state agency shall be entitled to receive creditable service time with the Board. Credit for prior service granted towards the calculation of vacation benefit will be prorated using the same method used to calculate membership service. Prior service granted towards the calculation of vacation benefit will only be for unbroken service immediately prior to employment with FRRS.

In order to receive such time, barring existing documentation in the retirement files that confirms the time to be given, the new employee must request a letter from their previous employer(s) keeper of the records, written on the organization’s letterhead to be sent directly to the Board. The documentation should include the beginning and ending dates of employment, as well as the number of hours worked weekly.

Sick Leave

Sick leave accrues at the rate of .057471 hours per hour worked (15 days per year for full time employees). Sick leave can be carried forward from year to year. Sick leave may be used by the employee for his/her own health reasons or to care for a sick member of the employee's immediate family. Sick leave may be used in hourly increments. Sick leave will not be advanced before accrual unless approved by the board. When an employee’s required time away from work continues beyond his/her accumulated sick time, the employee may use compensatory, vacation, or personal leave time if

available, and/or, fellow employees may donate their own excess sick leave when needed, with no expectation of return or remuneration. Sick time does not accrue during unpaid leave. Employee must obtain a doctor's note for more than three consecutive days out of work. Sick leave accrual will be capped at 675 hours (based on 37.5 hours per week) with the cap for part-time employees, working less than 37.5 hours per week, to be prorated based on the percentage worked relative to 37.5 hours per week. The Board will pay unused sick leave upon separation of service at a rate of .10\* of the accrued sick leave providing the employee has a minimum of 10 years consecutive service with FRRS.

\*The following employees are grandfathered to receive .20: Dale Kowacki, Deb Frenzoz, Patty Leveille, Pat Hume.

#### Family and Medical Leave Act ( FMLA) (federal)

Employees are entitled to the rights and responsibilities of the FMLA and will be provided notification at the time of employment and whenever changes are made to the FMLA. The Executive Director will follow the procedures outlined in the FMLA with these additional stipulations:

- If FMLA leave is for birth and care, or placement for adoption or foster care, an employee can use FMLA time in hourly increments, half days, a few days a week, or occasionally, as needed and with approval of the Executive Director and/or Board.
- Employees are not required to use benefit time (sick time, compensatory time, personal time, and vacation time) to cover FMLA leave.
- The employee is not entitled to accrue additional benefits during periods of unpaid FMLA leave.
- Holiday paid time-off during FMLA leave will be consistent with Board policy for holiday paid time-off during non-FMLA leave.
- The employee is required to pay their share of health and life insurance premiums while on unpaid FMLA leave. Amounts attributable to each month must be received by the retirement office by the 21<sup>st</sup> of the prior month.
- If the employee fails to return from leave, the employee is required to reimburse the health and life insurance premiums that the employer paid (employer's share) for maintaining coverage for the employee under such group health plan during any period of unpaid leave under the FMLA.
- The employee is required to provide certification from a licensed health care provider that supports the employee's request for leave due to a serious health condition affecting the employee or a covered family member.
- The employee's direct supervisor is not authorized to authenticate or clarify a medical certification of a serious health condition. The Board will fulfill that role, and may require second or third medical opinions (at the FRRS's expense) to authenticate or clarify a medical certification of a serious health condition. The Board may use a health care provider, or a human resource professional, to authenticate or clarify a medical certification of a serious health condition
- The Board will require periodic recertification of a serious health condition.
- The employee is required to provide certification from a licensed health care provider that they are able to resume work when returning from leave for their own serious health condition. This applies to intermittent FMLA leave as well as continuous FMLA leave.

Small Necessities Leave Act (SNLA)

Massachusetts State law allows that a covered employee is also eligible for 24 hours of unpaid leave during any 12-month period, in addition to leave available under the federal FMLA act, to participate in school activities directly related to the educational advancement of a child of the employee, accompany the child to routine medical or dental appointments and/or accompany an elderly relative of the employee to routine medical or dental appointments or other appointments for other professional services related to the elder's care. Elderly relative is defined in the act as any person age 60 or older and related by blood or marriage to the employee. The stipulations related to the FMLA shall also apply to the SNLA.

TGIF time

Fulltime employees are allowed to participate in the TGIF program, where the office hours on Mondays through Thursday may be from 8:00 am to 4:30 pm (open an extra half hour) and Fridays would be 8:00 am to 2:00 pm (shorter by 2 ½ hours). The five days of early starts make up for the 2 ½ hours short on Friday.

- ❖ This is not mandatory for all staff because some people's morning schedule does not allow for an earlier start. However, time worked between 8:00 to 8:30 am shall be considered TGIF time unless a different agreement has been made or it is approved compensatory time.
- ❖ It can be flexible from day-to-day and week-to-week in that people can do it some days and not others and adjust the time taken on Friday to match the time worked.
- ❖ Extra time accrued for 8:00 am starts cannot be built up and carried over to future weeks. The time accrued needs to be used on Fridays each week. If you are using other benefit time on Friday, TGIF time will be used first, and other benefit time second. If Friday is a holiday, TGIF time will be used on the non-holiday day immediately preceding.
- ❖ Holidays (and vacation, sick, personal days) all count as 7.5 hours (not 8), so the Friday would be 2:30 (or whatever) instead of 2:00.

Personal Leave

Full-time and part-time employees are granted up to three days per year of personal leave so that personal matters may be taken care of during the normal business day. Personal leave is different from vacation leave in that it does not require advance approval; however notice should be given prior to the beginning of the work day in which the personal time is taken. These days may not be carried over to the following year and are not compensable upon termination, resignation or retirement.

On January 1, eligible employees shall receive 22.5 hours of personal leave for use in the year. A new employee whose start date is other than January 1st shall accrue 7.5 hours of personal leave for each four month period of service until the first December 31st and 22.5 hours on every January 1st thereafter.

Part-time employees working 20 hours or more per week shall receive personal leave on the same basis as full-time employees; however, such leave will be pro-rated to whatever percentage of a full-time schedule a part-time employee works.

Temporary employees receive no personal leave time.

Bereavement Leave

In the first two weeks following the death of a family member, employees are entitled to paid leave of up to four days. A family member is defined as follows: spouse, child, parent/step (of either spouse), grandparent, brother/in-law or sister/in-law of employee. All other requests for bereavement leave shall be granted at the discretion of the Executive Director.

Court Service

An employee who is subpoenaed by a Federal Court, State Court or a political subdivision to serve as a juror or witness is granted leave for this purpose. The Board will pay the employee the difference between any compensation received from jury duty and the employee's current salary.

Maternity/Paternity Leave

Following the completion of one year of continuous service, employees become eligible for two weeks paid leave for maternity, paternity or adoption. In this instance "maternity, paternity, or adoption" begins immediately after birth or adoption. The employee shall retain the right under the Family and Medical Leave Act as outlined above, to take an additional ten weeks leave.

Military Leave

A military leave of absence will be granted if an employee is absent in order to serve in the uniformed services of the United States for a period of up to five (5) years (not including certain involuntary extensions of service). Employees who perform and return from service in the Armed Forces, the Military Reserves, the National Guard, or certain Public Health Service positions will retain certain rights with respect to reinstatement and compensation as required by applicable state or federal law.

Employees with one year or more of service will be protected against the loss of income as a result of participation in annual encampment or training duty in the U.S. Military Reserves or the National Guard. In these circumstances, the Board will pay the difference between what an employee earns from the government for military service and what the employee would have earned from normal straight-time pay on the job. This difference will be paid for up to two weeks in a calendar year.

Leave Without Pay

Leave without pay may be granted to employees by the Executive Director for reasons not otherwise addressed in these policies. The request for such leave must be submitted in writing and must clearly state the reason for such request. If approved, notification will be given to the employee and a copy of the request added to the employee's personnel file.

Employees on leave without pay shall not accrue any form of earned leave or be compensated for holidays during the leave period. The period of the unpaid leave will also not count toward figuring creditable service for future vacation time.

Creditable service for the retirement system may be allowed by the retirement Board for a period of continuous absence, which is not in excess of one month. Periods which are in excess of one month shall not be counted as creditable service except as specifically provided for in M.G.L. Chapter 32, Section 4. However, no authorized leave shall be deemed to be a termination of membership from the retirement system. Employees on leave without pay may continue their health insurance and life insurance coverage by paying the full cost of same in advance on a monthly basis.

Education Reimbursement

The Board of the Franklin Regional Retirement System will reimburse staff members 50% of the tuition and fees for completed classes/course work in an accredited college or university if a grade of B or higher has been earned. Classes/course work must be job related and pre-approved by the Executive Director, or the Board if it is the Director requesting reimbursement. Reimbursement will be paid within 60 days after grades are available after each class, course, and/or semester.

Group Health and Life Insurance

Full-time employees and eligible part-time employees (those working 20 hours a week or more) are entitled to health insurance, and \$5,000 basic life insurance (including accidental death and dismemberment) through a group policy held by the Board. The Board pays 75% of the premium, and the employee pays 25% through payments deducted directly from their pay one month in advance of the month of coverage.



Retired employees of the retirement system that have worked ten or more consecutive years for the retirement system immediately prior to their retirement and are receiving, or are approved for, a retirement allowance from the retirement system, are eligible for health insurance and basic life insurance coverage, at any time during retirement, provided they were eligible for insurance with the retirement system at the time of their retirement. Spouses and/or eligible dependents cannot participate in the retirement system's insurance without the retiree participating as well. The board will pay 75% of the cost of insurance for policies offered by the retirement system, including coverage for spouse and eligible dependents while the retiree is receiving, or approved for, a retirement benefit from the system. Upon the death of the retiree, the Board will continue to pay 75% of the insurance premium for the covered spouse and eligible dependents until he/she remarries or dies, regardless of retirement option chosen. The implementation of this policy is subject to any rules, laws, and regulations of any entity that has jurisdiction over matters pertaining to health and life insurances.”

At full retirement age, as defined by the Social Security Administration, a retired employee (or surviving spouse) will be required to enroll in Medicare Parts A & B, if eligible, cancel his/her current insurance policy, and if he/she so chooses, enroll for supplemental coverage as offered by the Franklin Regional Retirement Board.

Temporary employees are ineligible for group insurance.

#### COBRA

The Consolidated Omnibus Budget Reconciliation Act of 1986, as Amended (Pub.L. 99-272, title X, Sec 10002; 100 Stat 227; 29 U.S.C.1161-1168), contains provisions giving certain former employees, spouses and dependent children the right to temporary continuation of health insurance coverage at group rates. This coverage is only available in specific instances, and the complete cost is borne by the employee, spouse or dependent child. If payment for coverage becomes delinquent coverage may end.

Additional information about eligibility for health insurance benefits under COBRA is available on request.

#### Workers Compensation

In compliance with Massachusetts General Law, Chapter 152, Section 69, the Board carries workers compensation insurance for employees.

All reports of workplace injury must be filed immediately with the Executive Director or his/her designee.

#### Retirement/Pension Benefits

Subject to the rules and regulations promulgated by the Board and the Mass. General Laws (MGL), the following may apply. All permanent employees working at least 20 hours per week are required to participate in the System in lieu of the Social Security System. Employees hired on or after July 1, 1996 have 9% of their regular compensation deducted for retirement. In addition, employees hired after January 1, 1979 will have 2% withheld from regular compensation in excess of \$30,000 (as pro-rated for biweekly payroll). Temporary employees and employees working less than 20 hours per week will be enrolled in a deferred compensation plan under MGL Chapter 29 Section 64D.

#### Deferred Compensation

As permitted by the Federal Revenue Act of 1978, a full-time employee or an eligible part-time employee (working 20 hours a week or more) may, as allowed by law, choose to have part of his/her pay withheld and invested in a 457 deferred compensation plan. The entire amount invested, on a bi-weekly basis, is deducted prior to the withholding of both federal and state income taxes.

#### Direct Deposit

Employees will have their full payroll, or a partial amount, deposited directly into specified bank accounts.