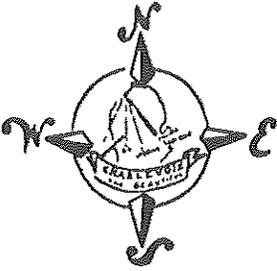


# CHARLEVOIX HOUSING COMMISSION

210 WEST GARFIELD ST.  
CHARLEVOIX, MICHIGAN 49720  
(231) 547-5451



PROJECT  
PINE RIVER PLACE

## REGULAR MEETING CHARLEVOIX HOUSING COMMISSION

TUESDAY, NOVEMBER 17, 2015  
2:00 P.M.

PINE RIVER PLACE COMMUNITY ROOM

### AGENDA:

Call to Order/Roll Call

Approval of Meeting Minutes and Bills

Executive Director's Report

Old Business:     Executive Director Vacancy  
                          Employee Handbook

New Business:    Capital Fund Budget Revision  
                          Public Participation in Board Meetings Policy  
                          2016 Meeting Schedule

Miscellaneous Business

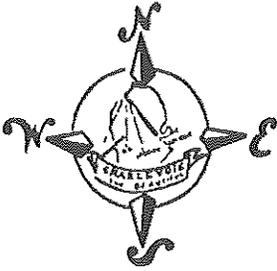
Board Commissioners

Public Comment on subjects unrelated to agenda items

Adjournment

# CHARLEVOIX HOUSING COMMISSION

210 WEST GARFIELD ST.  
CHARLEVOIX, MICHIGAN 49720  
(231) 547-5451



PROJECT  
PINE RIVER PLACE

## Regular Meeting Minutes October 20, 2015

A Regular Meeting of the Charlevoix Housing Commission was called to order by Vice-President Buday at 2:00 pm at Pine River Place, 210 West Garfield, Charlevoix, Michigan.

PRESENT: Buday, Left, Stephan, Olach

ABSENT: Stevens

OTHER: Julie Waterman, Interim Executive Director

Brad Waterman, Maintenance Supervisor

Residents of Pine River Place – Marilyn Gibbons, Marianne Coppens, Rantz Peters,  
Nedina Stark

### Approval of Meeting Minutes and Bills:

Vice-President Buday asked if there were any corrections or additions to the minutes from the September meeting or questions on the September bills. There was a question of why there are bills from two attorneys. Julie Waterman explained that a legal issue was being handled by one attorney and due to scheduling conflicts he was no longer able to continue with the case and another attorney was brought in to finish. A motion to approve the minutes from the September 15th meeting and the September bills was made by Lillian Left and seconded by Joni Olach.

Yes: Left, Olach, Stephan, Buday

No:

Abstentions:

Absent: Stevens

**Executive Directors Report:** Interim Executive Director Julie Waterman presented the September financial statements. At this time we are 100% occupied. The heat sensors that are a part of the fire suppression system are starting to reach the end of their life and are needing to be replaced at an increased rate. We have a quote to replace them and will need to address this in the coming months. The fire alarm panel replacement is on order and will be installed in the near future. The Detroit office of HUD is requiring a letter with a "plan" detailing how the Commission plans to correct the deficiency in operating reserves as found in the FYE 2015 financial audit. Julie will respond within the timeframe required. New cameras have been installed in the lobby and east side of the building to replace the ones that quit working. They are less expensive and have higher resolution than the previous cameras. A very nice wheelchair was donated to the Commission by the family of Elizabeth Ford. New handicap parking signs

have been installed. A draft copy of the Employee Handbook has been delivered and will be presented to the Board for review at the next Board meeting.

**Old Business:**

**Executive Director Vacancy:**

The board wanted to discuss performance and salary of the Interim Executive Director, Julie Waterman. Julie Waterman requested a closed session to discuss these items. Lillian Left made a motion to go into closed session to discuss performance and salary of the Interim Executive Director. Joni Olach seconded the motion.

Yes: Left, Stephan, Olach, Buday

No:

Abstentions:

Absent: Stevens

The Board went into closed session at 2:20pm. At 2:40pm the Board came back into open session. After deliberation, Julie Waterman will continue as Interim Executive Director.

**New Business:**

**Heating System Component Repair/Replacement:**

Brad Waterman described the problems with a component of the heating system and the need to have it replaced or repaired. The board discussed the work needed and reviewed proposals from two service companies. Lillian Left made a motion to replace the heating component in question with a new one and to contract with Great Lakes Energy to perform the installation. Joni Olach seconded the motion.

Yes: Left, Stephan, Olach, Buday

No:

Abstentions:

Absent: Stevens

**Property/Storage Building at 207 W. Garfield:**

Discussion occurred concerning the sale of the storage building at 207 W. Garfield. Lillian Left made a motion to put the property up for sale using Real Estate One and agent Bill Dietrich. Paul Stephan seconded the motion.

Yes: Left, Stephan, Olach, Buday

No:

Abstentions:

Absent: Stevens

**Fair Market Rents:**

Julie Waterman described Fair Market Rents and read the proposed resolution. Discussion occurred on why this is done and the impact on the residents of Pine River Place. Joni Olach made a motion to approve resolution 2015-08 setting the Flat Rent Schedule for fiscal year 2016

at the Fair Market Rent amounts as proposed for Charlevoix County by the Fair Market Calculation Methodology. Lillian Left seconded the motion.

Yes: Left, Stephan, Olach, Buday

No:

Abstentions:

Absent: Stevens

**Office Hours:**

Discussion occurred concerning proposed changes to the office hours of the Charlevoix Housing Commission. The new hours would be Monday through Thursday 1:00pm to 4:00pm. The need to increase productivity, increase privacy for residents' appointments, and the safety/security of the office staff being the primary reasons for the change. The change would take effect Monday, November 2, 2015. Lillian Left made a motion to change the office hours as recommended. Joni Olach seconded the motion.

Yes: Left, Stephan, Olach, Buday

No:

Abstentions:

Absent: Stevens

**Miscellaneous Business:** None

**Board Commissioners:** None

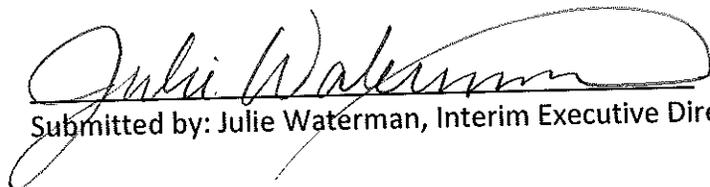
**Public Comment:** Vice-President Buday asked if there were any public comments.

Marilyn Gibbons brought up issues she is having with another resident and her concern over vehicles being driven on the east side lawn.

Marianne Coppens had questions about the building which she will discuss with the Executive Director

With no further comments, Vice-President Buday closed the meeting to public comments.

**Adjournment:** The meeting adjourned at 2:34 pm. The next Regular Meeting will be held Tuesday, November 17, 2015 at 2:00 pm in the Pine River Place Community Room located at 210 W. Garfield in Charlevoix. Telephone 231-547-5451. Email info@chvxhousing.org.



Submitted by: Julie Waterman, Interim Executive Director

November 4, 2015

\_\_\_\_\_  
Approved by: Gregory Stevens, Board President

Date: 11/12/2015  
Time: 14:43:11

Charlevoix Housing Commission  
**Check Register Summary Report**  
Operational Budget  
From: 10/01/2015 To: 10/31/2015

Date	Ref Num	Payee	Payment	Deposit	Balance	Memo
10/01/2015	DEP	CFP		2,826.10	17,988.84	
10/02/2015	DEP	MSVP		374.00	18,362.84	
10/05/2015	DEP	Rent ACH		11,002.00	29,364.84	monthly electronic banking fee
10/05/2015	ADJUST	E-Connect Fee	69.40		29,295.44	October Operating Subsidy
10/05/2015	DEP	OFND		4,647.00	33,942.44	October Operating Subsidy
10/06/2015	EFT	Paychex of New York LLC	161.61		33,780.83	State of Michigan employee garnishment Remittance Identifier: 910026726
10/06/2015	EFT	Paychex of New York LLC	2,796.62		30,984.21	payroll for 9/19/2015 to 10/02/15
10/06/2015	DEP	Rent		2,549.54	33,533.75	
10/06/2015	DEP	Rent		5,114.00	38,647.75	
10/06/2015	013889	American Waste / Walloon Lake	244.00		38,403.75	Regular trash removal for October
10/06/2015	013890	American Tenant Screen, Inc.	13.59		38,390.16	Applicant screening
10/06/2015	013891	ACE Hardware	102.42		38,287.74	paint supplies, hose fitting, varnish, propane, plumbing supplies, carpet cleaner
10/06/2015	013892	DTE Energy	664.85		37,622.89	gas through 9/29/2015
10/06/2015	013893	Brady's Carpet Cleaning	1,150.00		36,472.89	Window cleaning
10/06/2015	013894	Housing Authority Accounting S	373.24		36,099.65	Accounting service for September 2015
10/06/2015	013895	AT & T Mobility	88.26		36,011.39	Mobile service through 9/16/2015.
10/06/2015	013896	Charter Communications	1,377.62		34,633.77	Bulk rate cable tv & cable internet service through 10/30/2015
10/06/2015	013897	SimplexGrinnell LP	1,541.25		33,092.52	repair labor and testing for alarm and detection system
10/07/2015	EFT	Paychex of New York LLC	30.60		33,061.92	costs for payroll services
10/07/2015	EFT	Paychex of New York LLC	960.43		32,101.49	Federal Withholding Taxes
10/07/2015	DEP	Rent & Security Deposit		205.20	32,306.69	
10/07/2015	DEP	Blue Cross/ Blue Shield		20.94	32,327.63	refund
10/08/2015	013898	Estate of Elizabeth Ford	403.00		31,924.63	Refund Security Deposit
10/13/2015	DEP	WASH Income		579.95	32,504.58	collection for 57 days
10/13/2015	DEP	Rent & Security Deposit		319.39	32,823.97	
10/13/2015	013899	Sam's Club / GEMB	211.31		32,612.66	coffee, bleach, paper towels, office supplies, copy paper, batteries, cutting board for community room

Date: 11/12/2015  
Time: 14:43:11

Charlevoix Housing Commission  
**Check Register Summary Report**  
Operational Budget  
From: 10/01/2015 To: 10/31/2015

Date	Ref Num	Payee	Payment	Deposit	Balance	Memo
10/13/2015	013900	AT&T	137.40		32,475.26	Telephone service through 10/04/2015 kitchen
10/13/2015	013901	Business Card	2,137.05		30,338.21	meals & rooms for conference, meals & parking for HUD training, battery for lawnmower, microphone and extension cord, new vacuum cleaner and repair and parts of older two vacuums, belts for carpet scrubber, replacement wheels for shopping carts, replacement wheels for 3 dumpsters.
10/13/2015	013902	Brad Waterman	126.50		30,211.71	mileage through 10/13/2015
10/13/2015	013903	City Of Charlevoix	5,666.83		24,544.88	Water, sewer & electric through 10/7/15
10/15/2015	DEP	Rent		524.00	25,068.88	
10/15/2015	013904	Jeff's Garage	624.00		24,444.88	repairwelding/parts for 3 dumpsters
10/16/2015	EFT	Paychex of New York LLC	755.25		23,689.63	costs HR services
10/19/2015	013905	Delta Dental	268.78		23,420.85	Dental Insurance
10/20/2015	EFT	Paychex of New York LLC	161.61		23,259.24	State of Michigan employee garnishment Remittance Identifier: 910026726
10/20/2015	EFT	Paychex of New York LLC	2,923.68		20,335.56	payroll for 10/03/2015 to 10/16/15
10/21/2015	EFT	Paychex of New York LLC	30.60		20,304.96	costs for payroll services
10/21/2015	EFT	Paychex of New York LLC	984.37		19,320.59	Federal Withholding Taxes
10/21/2015	013906	Great Lakes Plumbing Heating & AC	5,000.00		14,320.59	contract costs
10/22/2015	013907	SimplexGrinnell LP	1,651.32		12,669.27	materials for replacing of fire alarm panel
10/26/2015	013908	Critical Signal Technologies	645.00		12,024.27	October monitoring charge for call to aid system.
10/26/2015	013909	Blue Cross/ Blue Shield	2,118.59		9,905.68	Medical Insurance through 12/09/2015
10/27/2015	013910	AT & T Mobility	122.31		9,783.37	Mobile service through 10/16/2015.
10/27/2015	013911	Lautner Irrigation, Inc.	165.00		9,618.37	winterized irrigation system.
10/27/2015	013912	HD Supply Facilities Maintenance	154.48		9,463.89	light bulbs, thermostat guards
<b>Total:</b>					33,860.97	28,162.12

**Charlevoix Housing Commission  
Low Rent Public Housing  
Balance Sheet  
As of October 31, 2015**

**ASSETS**

**CURRENT ASSETS**

**Cash**

1111.1 - General Fund	\$ 9,463.89
1162.1 - Money Mkt Acct 9391	<u>67,788.67</u>
<b>Total Cash</b>	<b>77,252.56</b>

**Receivables**

1122 - Tenants	<u>61.00</u>
<b>Total Receivables</b>	<b>61.00</b>

**Investments**

<b>Total Investments</b>	<b>0.00</b>
--------------------------	-------------

**Deferred Charges**

1211 - Prepaid Insurance	<u>16,947.65</u>
<b>Total Deferred Charges</b>	<b>16,947.65</b>

**Total Current Assets**

94,261.21

**Fixed Assets**

1400.6 - Land	267,602.26
1400.61 - Land Improvements	243,775.56
1400.7 - Buildings	1,817,692.87
1400.71 - Building Improvements	1,444,703.49
1400.72 - Non-dwelling Structures	237,109.51
1400.8 - Furn., Equip., Mach.-Dwellings	44,760.08
1400.9 - Furn., Equip., Mach.-Admin	96,606.61
1495 - Accumulated Depreciation	<u>(3,322,654.42)</u>
<b>Total Fixed Assets</b>	<b>829,595.96</b>

**TOTAL ASSETS**

\$ 923,857.17

**Charlevoix Housing Commission  
 Low Rent Public Housing  
 Balance Sheet  
 As of October 31, 2015**

**LIABILITIES AND EQUITY**

**LIABILITIES**

**Current Liabilities**

2111 - Vendors and Contractors	\$	2,965.01
2114 - Tenant Security Deposits		15,612.00
2117.11 - Medicare Withheld		0.02
2135 - Salaries and Wages		2,528.25
2135.1 - Accrued Absences-Current		2,751.53
2136 - Accrued Liabilities-Other		1,981.82
2137 - Payments In Lieu of Taxes		<u>10,010.00</u>
<b>Total Current Liabilities</b>		<b>35,848.63</b>

**Noncurrent Liabilities**

2135.2 - Accrued Absences-Long Term		<u>543.63</u>
<b>Total Noncurrent Liabilities</b>		<b>543.63</b>

**TOTAL LIABILITIES** 36,392.26

**EQUITY**

2802.1 - Invested in Capital Assets, Net of Debt' 928,388.88

**Unrestricted Net Assets**

2806 - Unrestricted Net Assets		80,638.99
Current Year Profit/Loss		<u>(121,562.96)</u>
<b>Total Unrestricted Net Assets</b>		<b>(40,923.97)</b>

**TOTAL EQUITY** 887,464.91

**TOTAL LIABILITIES/EQUITY** \$ 923,857.17

**Charlevoix Housing Commission**  
**Public Housing**  
**Statement of Operating Receipts & Expenditures**  
**For the 7 Months Ended October 31, 2015**

	Ideal Percentage- 58.34%		1 Month Ended		7 Months Ended	
	ANNUAL BUDGET		October 31, 2015		October 31, 2015	% Budget Used    *(OVER)/UNDER
<b>Operating Income</b>						
<b>Rental Income</b>						
3110 - Dwelling Rental	\$ 219,730		18,250.99		\$ 128,945.65	58.68%    90,784.35
<b>Total Rental Income</b>	219,730		18,250.99		128,945.65	58.68%    90,784.35
<b>Revenues - HUD PHA Grants</b>						
3401.2 - Operating Subsidy	59,000		4,647.00		33,735.00	57.18%    25,265.00
<b>Total HUD PHA Grants</b>	59,000		4,647.00		33,735.00	57.18%    25,265.00
<b>Nonrental Income</b>						
3610 - Interest Income-Gen. Fund	250		8.35		72.62	29.05%    177.38
3690 - Tenant Income	1,000		9.00		59.50	5.95%    940.50
3690.1 - Non-Tenant Income	19,400		1,200.89		8,646.01	44.57%    10,753.99
3690.3 - (Gain)/Loss on Sale of Equipment	0		0.00		4,575.00	0.00%    (4,575.00)
3690.4 - Tenant Income-Cable	12,450		1,269.60		8,811.38	70.77%    3,638.62
<b>Total Nonrental Income</b>	33,100		2,487.84		22,164.51	66.96%    10,935.49
<b>Total Operating Income</b>	311,830		25,385.83		184,845.16	59.28%    126,984.84
<b>Operating Expenses</b>						
<b>Routine Expense</b>						
<b>Administration</b>						
4110 - Administrative Salaries	50,600		3,588.36		26,689.42	52.75%    23,910.58
4130 - Legal Expense	0		0.00		7,271.86	0.00%    (7,271.86)
4140 - Staff Training	2,000		(144.75)		1,140.25	57.01%    859.75
4150 - Travel Expense	2,500		880.39		2,377.89	95.12%    122.11
4170 - Accounting Fees	5,610		373.24		3,683.37	65.66%    1,926.63
4171 - Auditing	3,700		0.00		4,200.00	113.51%    (500.00)
4182 - Employee Benefits - Admin	13,800		286.53		2,187.22	15.85%    11,612.78
4185 - Telephone	4,000		439.97		2,714.49	67.86%    1,285.51
4190.1 - Publications	100		0.00		0.00	0.00%    100.00
4190.2 - Membership Dues and Fees	680		0.00		485.00	71.32%    195.00
4190.3 - Admin Service Contracts	3,790		61.20		6,552.12	172.88%    (2,762.12)
4190.4 - Office Supplies	2,000		62.70		932.77	46.64%    1,067.23
4190.5 - Other Sundry Expense	3,000		(1,778.83)		3,062.07	102.07%    (62.07)
4190.51 - Advertising and Marketing	100		0.00		117.40	117.40%    (17.40)
<b>Total Administration</b>	91,880		3,768.81		61,413.86	66.84%    30,466.14
<b>Tenant Services</b>						
4220 - Rec., Publ. & Other Svcs.	400		0.00		0.00	0.00%    400.00
4230 - Contract Costs-Cable/Monitoring	20,040		1,930.62		14,051.02	70.11%    5,988.98
<b>Total Tenant Services</b>	20,440		1,930.62		14,051.02	68.74%    6,388.98

See Accountants' Compilation Report

**Charlevoix Housing Commission**  
**Public Housing**  
**Statement of Operating Receipts & Expenditures**  
**For the 7 Months Ended October 31, 2015**

	ANNUAL BUDGET	1 Month Ended	7 Months Ended	% Budget Used	*OVER/UNDER
		October 31, 2015	October 31, 2015		
<b>Utilities</b>					
4310 - Water	12,100	2,454.96	8,232.87	68.04%	3,867.13
4320 - Electricity	20,100	3,211.87	11,796.75	58.69%	8,303.25
4330 - Gas	21,600	664.85	5,685.84	26.32%	15,914.16
<b>Total Utilities</b>	53,800	6,331.68	25,715.46	47.80%	28,084.54
<b>Ordinary Maint. &amp; Operation</b>					
4410 - Labor, Maintenance	58,800	4,370.59	33,112.66	56.31%	25,687.34
4420 - Materials	14,500	1,124.44	13,794.85	95.14%	705.15
4430.02 - Heating & Cooling Contracts	500	0.00	342.00	68.40%	158.00
4430.04 - Elevator Maintenance Contracts	5,500	0.00	3,283.94	59.71%	2,216.06
4430.05 - Landscape & Grounds Contracts	3,800	165.00	1,396.79	36.76%	2,403.21
4430.06 - Unit Turnaround Contracts	1,000	0.00	6,307.98	630.80%	(5,307.98)
4430.07 - Electrical Contracts	500	0.00	0.00	0.00%	500.00
4430.08 - Plumbing Contracts	300	0.00	0.00	0.00%	300.00
4430.09 - Extermination Contracts	500	0.00	0.00	0.00%	500.00
4430.10 - Janitorial Contracts	1,150	0.00	0.00	0.00%	1,150.00
4430.11 - Routine Maintenance Contracts	4,000	2,691.25	4,795.21	119.88%	(795.21)
4430.12 - Miscellaneous Contracts	2,000	624.00	859.80	42.99%	1,140.20
4431 - Garbage Removal	3,100	244.00	1,923.00	62.03%	1,177.00
4433 - Employee Benefits - Maint.	24,620	2,130.21	15,179.85	61.66%	9,440.15
<b>Total Ordinary Maint. &amp; Oper.</b>	120,270	11,349.49	80,996.08	67.35%	39,273.92
<b>Protective Services</b>					
<b>Total Protective Services</b>	0	0.00	0.00	0.00%	0.00
<b>General Expense</b>					
4510 - Insurance	17,700	1,547.00	10,432.04	58.94%	7,267.96
4511 - Insurance-Wk Comp	3,010	250.92	1,711.44	56.86%	1,298.56
4520 - Payment in Lieu of Taxes	16,590	1,430.00	10,010.00	60.34%	6,580.00
<b>Total General Expense</b>	37,300	3,227.92	22,153.48	59.39%	15,146.52
<b>Total Routine Expense</b>	323,690	26,608.52	204,329.90	63.13%	119,360.10
<b>Non-Routine Expense</b>					
<b>Extraordinary Maintenance</b>					
4610.2 - Materials	0	0.00	852.23	0.00%	(852.23)
4610.3 - Contract Costs	0	0.00	181.80	0.00%	(181.80)
<b>Total Extraordinary Maint.</b>	0	0.00	1,034.03	0.00%	(1,034.03)
<b>Casualty Losses-Not Cap.</b>					
<b>Total Casualty Losses</b>	0	0.00	0.00	0.00%	0.00
<b>Total Non-Routine Expense</b>	0	0.00	1,034.03	0.00%	(1,034.03)
<b>Total Operating Expenses</b>	323,690	26,608.52	205,363.93	63.44%	118,326.07
<b>Operating Income (Loss)</b>	(11,860)	(1,222.69)	(20,518.77)	173.01%	8,658.77

See Accountants' Compilation Report

**Charlevoix Housing Commission  
Public Housing  
Statement of Operating Receipts & Expenditures  
For the 7 Months Ended October 31, 2015**

		1 Month Ended	7 Months Ended		
	ANNUAL BUDGET	<u>October 31, 2015</u>	<u>October 31, 2015</u>	<u>% Budget Used</u>	<u>*OVER/UNDER</u>
<b>Surplus Credits and Charges</b>					
<b>Total Surplus Credits and Char</b>	0	0.00	0.00	0.00%	0.00
<b>Capital Expenditures</b>					
7520 - Replacement of Equipment	0	599.95	599.95	0.00%	(599.95)
7540 - Betterments and Additions	7,500	0.00	0.00	0.00%	7,500.00
7590 - Operating Expenditures-Contra	<u>(7,500)</u>	<u>(599.95)</u>	<u>(599.95)</u>	<u>8.00%</u>	<u>(6,900.05)</u>
<b>Total Capital Expenditures</b>	0	0.00	0.00	0.00%	0.00
<b>Other Financial Items</b>					
8010 - Operating Transfer In	<u>20,000</u>	<u>0.00</u>	<u>5,000.00</u>	<u>25.00%</u>	<u>15,000.00</u>
<b>Total Other Financial Items</b>	20,000	0.00	5,000.00	25.00%	15,000.00
<b>Reserve Net Income (Loss)</b>	<u>\$ 640</u>	<u>(1,822.64)</u>	<u>\$ (20,693.72)</u>	<u>(3,233.39)%</u>	<u>\$ 21,333.72</u>

See Accountants' Compilation Report

**CHARLEVOIX HOUSING  
COMMISSION  
EMPLOYEE HANDBOOK**

**All of the policies contained in our Employee Handbook database and set forth in the English language are reviewed semiannually for compliance with applicable state and federal statutes and regulations as of the date of review, by the law firm of Fisher & Phillips, LLP. Paychex understands that clients occasionally may decide to further customize their Employee Handbook, or to ask Paychex to translate some or all of the policies into Spanish. However, please be aware that if you elect to substantively alter the policies that are offered, include your own original policies in your Employee Handbook, or ask that Paychex translate policies into Spanish (collectively the "Changed Policies"), the "Changed Policies" will not be reviewed for compliance with applicable law. This also extends to any additional outside-the-database policies that you may elect to include in future updates of your Employee Handbook. Moreover, Paychex is unable to support these "Changed Policies" outside of our database with our ongoing semiannual compliance reviews or resulting policy updates.**

APPROVAL

## **Welcome to Charlevoix Housing Commission!**

Starting a new job is exciting, but at times can be overwhelming. This Employee Handbook has been developed to help you become acquainted with our company and answer many of your initial questions.

As an employee of Charlevoix Housing Commission, you are very important. Your contribution cannot be overstated. Our goal is to provide the finest-quality services to our clients and to do so more efficiently and economically than our competitors. By satisfying our clients' needs, we ensure they will continue to do business with us and will recommend us to others.

You are an important part of this process because your work directly influences our company's reputation.

We are glad you have joined us, and we hope you will find your work to be both challenging and rewarding.

Approval: [Signature]

## Table of Contents

### **Section 1: The Way We Work**

A Word About This Handbook .....	1
Building for the Future.....	3
Equal Employment Opportunity .....	4
A Word About our Employee Relations Philosophy.....	5
No Harassment .....	6
Categories of Employment.....	9
Anniversary Date.....	10
Driver's License/Driving Record.....	10
Certification, Licensing and Other Requirements .....	11
Immigration Reform and Control Act.....	11
New Employee Orientation .....	12
Talk to Us .....	13

### **Section 2: Your Pay and Progress**

Recording Your Time .....	1
Payday .....	1
Paycheck Deductions .....	2
Garnishment/Child Support.....	3
Direct Deposit.....	4
Performance Reviews .....	4
Pay Advances .....	4
Overtime.....	5

### **Section 3: Time Away From Work and Other Benefits**

Employee Benefits .....	1
Holidays .....	2
Paid Time Off (PTO) .....	3
Personal Days .....	4
Jury Duty .....	5
Military Leave .....	6
Witness Leave.....	7
Bereavement Leave.....	7
Leave of Absence .....	8
Victims of Crime Leave .....	9
Medical Insurance .....	10
Dental Insurance .....	11
Social Security .....	11
Unemployment Insurance .....	12
Workers' Compensation.....	12
401(k) Qualified Retirement Plan.....	13

### **Section 4: On the Job**

Confidentiality of Client Matters .....	1
Discussions with Clients .....	1
Social Security Number Privacy and Protection of Personal Information .....	1
Attendance and Punctuality .....	3
Meal Time .....	3
Work Assignments .....	4
Contact with the Company.....	4
On The Job Training .....	5
Standards of Conduct .....	5
Access to Personnel Files.....	7
Client and Public Relations .....	7
Non-Solicitation .....	8
Distribution .....	9
Changes in Personal Data .....	9

Care of Equipment .....	10
Company Vehicles .....	11
Personal Property .....	11
Personal Telephone Calls .....	12
Acceptable Use of Electronic Communications .....	12
Social Media.....	17
Security of Electronic Devices .....	19
Dress Policy .....	20
Personal Hygiene.....	20
Protecting Company Information .....	21
Conflict of Interest/Code of Ethics.....	22
If You Must Leave Us.....	23

**Section 5: Safety in the Workplace**

Each Employee's Responsibility .....	1
Workplace Violence .....	3
Workplace Searches .....	4
Good Housekeeping .....	5
Smoking in the Workplace .....	5
No Weapons in the Workplace .....	6
In An Emergency.....	7
Substance Abuse .....	8

**The Way We Work**

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## A Word About This Handbook

This Employee Handbook contains information about the employment policies and practices of the company. We expect each employee to read this Employee Handbook carefully, as it is a valuable reference for understanding your job and the company. The policies outlined in this Employee Handbook should be regarded as management guidelines only, which in a developing business will require changes from time to time. The company retains the right to make decisions involving employment as needed in order to conduct its work in a manner that is beneficial to the employees and the company. This Employee Handbook supersedes and replaces any and all prior Employee Handbooks and any inconsistent verbal or written policy statements.

The company complies with federal and state law and this handbook generally reflects those laws. The company also complies with any applicable local laws, even though there may not be an express written policy contained in the handbook.

Except for the policy of at-will employment, the company reserves the right to revise, delete and add to the provisions of this Employee Handbook at any time without further notice. All such revisions, deletions or additions to the Employee Handbook must be in writing and must be signed by the executive director of the company. No oral statements or representations can change the provisions of this Employee Handbook.

The provisions of this Employee Handbook are not intended to create contractual obligations with respect to any matters it covers. Nor is this Employee Handbook intended to create a contract guaranteeing that you will be employed for any specific time period. Any agreement to employment for a specified period of time

will be put into writing and signed by the executive director of the company.

Nothing in this Employee Handbook is intended to unlawfully restrict an employee's right to engage in any of the rights guaranteed them by Section 7 of the National Labor Relations Act, including but not limited to, the right to engage in concerted protected activity for the purposes of their mutual aid and/or protection. Nothing in this Employee Handbook will be interpreted, applied or enforced to interfere with, restrain or coerce employees in the exercise of Section 7 rights.

**OUR COMPANY IS AN AT-WILL EMPLOYER. THIS MEANS THAT REGARDLESS OF ANY PROVISION IN THIS EMPLOYEE HANDBOOK, EITHER YOU OR THE COMPANY MAY TERMINATE THE EMPLOYMENT RELATIONSHIP AT ANY TIME, FOR ANY REASON, WITH OR WITHOUT CAUSE OR NOTICE. NOTHING IN THIS EMPLOYEE HANDBOOK OR IN ANY DOCUMENT OR STATEMENT, WRITTEN OR ORAL, SHALL LIMIT THE RIGHT TO TERMINATE EMPLOYMENT AT-WILL. NO OFFICER, EMPLOYEE OR REPRESENTATIVE OF THE COMPANY IS AUTHORIZED TO ENTER INTO AN AGREEMENT—EXPRESS OR IMPLIED—WITH ANY EMPLOYEE FOR EMPLOYMENT FOR A SPECIFIED PERIOD OF TIME UNLESS SUCH AN AGREEMENT IS IN A WRITTEN CONTRACT SIGNED BY THE EXECUTIVE DIRECTOR OF THE COMPANY.**

This Employee Handbook refers to current benefit plans maintained by the company. Refer to the actual plan documents and summary plan descriptions if you have specific questions regarding the benefit plan. Those documents are controlling.

Likewise, if a written contract is inconsistent with the Employee Handbook, the written contract is controlling.

## Building for the Future

As with any business, revenues are an absolute necessity for maintaining jobs and building for the future. Rather than look at generating sales and revenue as an "undesirable task", we look at it as a "must" situation. How do we continue to generate revenues to ensure a secure future and continued opportunities for all employees? With teamwork. Together we must meet the challenges we face on a daily basis.

In general, we have mentioned benefits, responsibilities and operations. We have saved the most crucial component of this business for last -- You.

At all times, you represent the company, and it is up to each one of you to take this responsibility seriously. Our company exists with your joint efforts. Don't underestimate your contribution to it. A great many people outside the business who invest their time, money and faith in us are part of that equation. They are our clients. They will determine how fast we grow, how many people we will employ, how much service we render and the profit we make. In order to retain these clients, we want to ensure that our good service continues by always giving our clients the best possible value and quality. Working together and working well provides us with a bright future and with the most important commodity, a good reputation.



## **Equal Employment Opportunity**

Our company is committed to equal employment opportunity. We will not discriminate against employees or applicants for employment on any legally-recognized basis ["protected class"] including, but not limited to: race; color; religion; genetic information; national origin; sex; pregnancy, childbirth, or related medical conditions; age; disability; citizenship status; uniform servicemember status; or any other protected class under federal, state, or local law.

In Michigan, the following also are a protected class: disability; religion; race; color; national origin; age; sex; pregnancy, childbirth or related medical condition [that does not include nontherapeutic abortion not intended to save the life of the mother]; height; weight; marital status; and genetic information.

You may discuss equal employment opportunity related questions with the executive director or any other designated member of management.

## **A Word About our Employee Relations Philosophy**

We are committed to providing the best possible climate for maximum development and goal achievement for all employees. Our practice is to treat each employee as an individual. We seek to develop a spirit of teamwork; individuals working together to attain a common goal.

In order to maintain an atmosphere where these goals can be accomplished, we provide a comfortable and progressive workplace. Most importantly, we have a workplace where communication is open and problems can be discussed and resolved in a mutually respectful atmosphere. We take into account individual circumstances and the individual employee.

We firmly believe that with direct communication, we can continue to resolve any difficulties that may arise and develop a mutually beneficial relationship.



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## **No Harassment**

We prohibit harassment of one employee by another employee, supervisor or third party for any reason based upon an individual's race; color; religion; genetic information; national origin; sex (including same sex); pregnancy, childbirth, or related medical conditions; age; disability; or any other category protected under federal, state, or local law ("protected class").

In Michigan, the following also are a protected class: disability; religion; race; color; national origin; age; sex; pregnancy, childbirth or related medical condition [that does not include nontherapeutic abortion not intended to save the life of the mother]; height; weight; marital status; and genetic information.

**Violation of this policy will result in disciplinary action, up to and including immediate discharge.**

If you have any questions about what constitutes harassing behavior or what conduct is prohibited by this policy, please discuss the questions with a member of management or one of the contacts listed in this policy. At a minimum, the term "harassment" as used in this policy includes any of the following activities pertaining to an individual's protected class:

- Offensive remarks, comments, jokes, slurs, threats, or verbal conduct.
  
- Offensive pictures, drawings, photographs, figurines, writings, or other graphic images, conduct, or communications, including text messages, instant messages, websites, voicemails, social media postings, e-mails, faxes, and copies.

- Offensive sexual remarks, sexual advances, or requests for sexual favors regardless of the gender of the individuals involved; and
- Offensive physical conduct, including touching and gestures, regardless of the gender of the individuals involved.



We also absolutely prohibit retaliation, which includes: threatening an individual or taking any adverse action against an individual for (1) reporting a possible violation of this policy, or (2) participating in an investigation conducted under this policy.

All members of management are covered by this policy and are prohibited from engaging in any form of harassing, discriminatory, or retaliatory conduct. No member of management has the authority to suggest to any applicant or employee that employment or advancement will be affected by the individual entering into (or refusing to enter into) a personal relationship with any member of management, or for tolerating (or refusing to tolerate) conduct or communication that might violate this policy. Such conduct is a direct violation of this policy.

Even non-employees are covered by this policy. We prohibit harassment, discrimination, or retaliation of our employees in connection with their work by non-employees. Immediately report any harassing or discriminating behavior by non-employees, including vendors, clients, employees of contractors or subcontractors. Any employee who experiences or observes harassment, discrimination, or retaliation should report it using the steps listed below.

**If you have any concern that our No Harassment policy may have been violated by anyone, you must immediately report the matter. Due to the very**

**serious nature of harassment, discrimination and retaliation, you must report your concerns to (one of) the individual(s) listed below:**

1. Julie Waterman, Executive Director at (231) 547-5451 or 210 W Garfield Charlevoix, MI 49720.

If an employee makes a report to any person listed above and that person either does not respond or does not respond in a manner the employee deems satisfactory or consistent with this policy, the employee is required to report the situation to one of the other persons on the list above to receive complaints.

**You should report any actions that you believe may violate our policy no matter how slight the actions may seem.**

We will investigate the report and then take prompt, appropriate remedial action. The company will protect the confidentiality of employees reporting suspected violations to the extent possible consistent with our investigation.

**You will not be penalized or retaliated against for reporting improper conduct, harassment, discrimination, retaliation, or other actions that you believe may violate this policy.**

We are serious about enforcing our policy against harassment. Persons who violate this or any other company policy are subject to discipline, up to and including discharge. We cannot resolve a potential policy violation unless we know about it. You are responsible for reporting possible policy violations to us so that we can take appropriate actions to address your concerns.

## Categories of Employment

**INTRODUCTORY PERIOD:** Full-time and part-time employees are on an introductory period during their first 90 days of employment.

During this time, you will be able to determine if your new job is suitable for you and the executive director will have an opportunity to evaluate your work performance. However, the completion of the introductory period does not guarantee employment for any period of time since you are an at-will employee both during and after your introductory period.

For purposes of this handbook, **FULL-TIME EMPLOYEES** regularly work at least a 30-hour workweek. For other purposes, such as eligibility for health care benefits, the definition of **FULL-TIME EMPLOYEES** may be different.

**PART-TIME EMPLOYEES** work less than 30 hours each week.

In addition to the preceding categories, employees are also categorized as "exempt" or "non-exempt."

**NON-EXEMPT EMPLOYEES** are entitled to overtime pay as required by applicable federal and state law.

**EXEMPT EMPLOYEES** are not entitled to overtime pay and may also be exempt from minimum wage requirements pursuant to applicable federal and state laws.

Upon hire, the executive director will notify you of your employment classification.

At the end of each quarter of the year the company will take an average of your weekly hours over that period to determine if you still meet the criteria for full-time employment and full-time benefits. If it is found that your hours average less than 30 hours you will be moved to part-time status and your benefits will be adjusted accordingly.

### **Anniversary Date**

The first day you report to work will be recorded in company records as your anniversary date. This date may be used to calculate many different company benefits. If you have any questions regarding your anniversary date, please see the executive director.

### **Driver's License/Driving Record**

Employees in positions where the operation of a motor vehicle is an essential duty of the position must present and maintain a valid driver's license and acceptable driving record to our insurer. Changes in your driving record must be reported to the executive director immediately. Violations of this policy may result in immediate termination of your employment.

## **Certification, Licensing and Other Requirements**

You will be informed by the executive director if there are any licensing, certification or testing requirements for your job. Failure to qualify or to maintain a certification or license may be sufficient cause for discharge.



## **Immigration Reform and Control Act**

In compliance with the federal Immigration Reform and Control Act of 1986 (IRCA), as amended, and any state law requirements, if applicable, our company is committed to employing only individuals who are authorized to work in the United States.

Each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility.

If an employee is authorized to work in this country for a limited time period, the individual will be required to submit proof of renewed employment eligibility prior to expiration of that period to remain employed by the company.

## **New Employee Orientation**

Upon joining our company, you were given this copy of our Employee Handbook. After reading this Employee Handbook please sign the receipt page and return it to the executive director. You will be asked to complete personnel, payroll and if applicable, benefit forms.

If you lose your copy of the Employee Handbook, or if it becomes damaged in any way, please notify the executive director as soon as possible to obtain a replacement copy.

The operations of your department are the responsibility of your supervisor. (S)he is a good source of information about the company and your job.

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## Talk to Us

We encourage you to bring your questions, suggestions and complaints to our attention. We will carefully consider each of these in our continuing effort to improve operations.

If you feel you have a problem, present the situation to your supervisor so that the problem can be settled by examination and discussion of the facts. We hope that your supervisor will be able to satisfactorily resolve most matters.

If you still have questions after meeting with your supervisor or if you would like further clarification on the matter, request a meeting with the board of directors. (S)he will review the issues and meet with you to discuss possible solutions.

Your suggestions and comments on any subject are important, and we encourage you to take every opportunity to discuss them with us. Your job will not be adversely affected in any way because you choose to use this procedure.

If at any time you do not feel comfortable speaking with your supervisor or the next level of management, discuss your concern with any other member of management with whom you feel comfortable.



**Your Pay and Progress**

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## **Recording Your Time**

Non-exempt employees must record their hours on a time clock. Record your time at the beginning and end of your shift and for your meal break. Do not perform any work more than one minute before the beginning or after the end of your shift. You are expected to work until the end of your shift. Do not record the time of another employee under any circumstances.

Exempt employees may be required to accurately record their time worked in accordance with federal and state wage and hour law.

All employees subject to this policy are required to accurately record all time worked.

The workweek starts on Saturday and ends on Friday.

## **Payday**

You will be paid biweekly on Wednesday for the period that ends on the previous Friday.

When our payday is a holiday, you normally will be paid on the first working day after the holiday.

Please review your paycheck for errors. If you find a mistake, report it to the executive director immediately. The executive director will assist you in taking the steps necessary to correct the error.

2

## Paycheck Deductions

The company is required by law to make certain deductions from your paycheck each pay period. Such deductions typically include federal and state taxes and Social Security (FICA) taxes. Depending on the state in which you are employed and the benefits you choose, there may be additional deductions. All deductions and the amount of the deductions are listed on your pay stub. These deductions are totaled each year for you on your Form W-2, Wage and Tax Statement.

It is the policy of the company that exempt employees' pay will not be "docked," or subject to deductions, in violation of salary pay rules issued by the United States Department of Labor and any corresponding rules issued by the state government, as applicable. However, the company may make deductions from employees' salaries in a way that is permitted under federal and state wage and hour rules. Employees will be reimbursed in full for any isolated, inadvertent, or improper deductions, as defined by law.

Thus, exempt employees may be subject to the following salary deductions, except where prohibited by state law, but only for the following reasons:

- Absences of one or more full days for personal reasons, other than sickness or disability; or
- Absences of one or more full days due to sickness or disability, if there is a plan, policy, or practice providing replacement compensation for such absences; or
- Absences of one or more full days before eligibility under such a plan, policy, or practice or after replacement compensation for such absences has been exhausted; or

- Suspensions of one or more full days for violations of safety rules of major significance; or
- Suspensions of one or more full days for violations of written workplace conduct rules, such as rules against sexual harassment and workplace violence; or
- Payment of actual time worked in the first and last weeks of employment, resulting in a proportional rate of an employee's full salary; or
- Any unpaid leave taken under the Family and Medical Leave Act; or
- Negative paid-time-off balances, in whole-day increments only.

The company will not make deductions which are prohibited by the Fair Labor Standards Act or state laws from its exempt employees' pay.

If questions or concerns about any pay deductions arise, discuss and resolve them with the executive director. If an error is found, you will receive an immediate adjustment which will be paid no later than on the next regular payday.

### **Garnishment/Child Support**

When an employee's wages are garnished by a court order, our company is legally bound to withhold the amount indicated in the garnishment order from the employee's paycheck. Our company will, however, honor applicable federal and state guidelines that protect a certain amount of an employee's income from being subject to garnishment.



## **Direct Deposit**

You have the option of receiving your pay in a payroll check or having your pay deposited into your bank account through our direct deposit program.

Where permitted by state law, the company may require you to use direct deposit.

## **Performance Reviews**

Your performance is important to our company. Once each year, generally in December, your supervisor will review your job progress within our company and help you set new job performance plans.

New employees will generally be reviewed at the end of their introductory period.

Our performance review program provides the basis for better understanding between you and your supervisor, with respect to your job performance, potential and development within the company.

## **Pay Advances**

Pay advances will not be granted to employees.

## Overtime

There may be times when you will need to work overtime so that we may meet the needs of our clients. Although you will be given advance notice when feasible, this is not always possible. If you are a non-exempt employee, you must have all overtime approved in advance by your supervisor.

Non-exempt employees will be paid at a rate of time and one-half their regular rate of pay for hours worked in excess of 40 hours in a workweek, unless state law provides a greater benefit in which case, we will comply with the state law.

Only actual hours worked count toward computing weekly overtime.

If you have any questions concerning overtime pay, check with the executive director.



Approval Only 10-9-15

Time Away From Work and Other Benefits

Approval Copy 10-9-15

3

## Employee Benefits

Our company has developed a comprehensive set of employee benefit programs to supplement our employees' regular wages. Our benefits represent a hidden value of additional income to our employees.

This Employee Handbook describes the current benefit plans maintained by the company. Refer to the actual plan documents and summary plan descriptions if you have specific questions regarding the benefit plan. Those documents are controlling.

The company reserves the right to modify and/or terminate its benefits at any time. We will keep you informed of any changes.

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## Holidays

Our company normally observes the following holidays during the year:

New Year's Day  
Martin Luther King Jr Day  
President's Day  
Good Friday  
Memorial Day  
Independence Day  
Labor Day  
Columbus Day  
Veterans Day  
Thanksgiving Day  
Friday After Thanksgiving  
Christmas Eve  
Christmas Day  
New Year's Eve

If one of the above holidays falls on Saturday, it normally is observed on the preceding Friday. If a holiday falls on Sunday, it normally is observed on the following Monday.

Full-time employees are eligible for paid holidays after completing their introductory period.

Exempt employees will receive holiday pay in compliance with state and federal wage and hour laws.

## **Paid Time Off (PTO)**

Full-time employees are eligible for Paid Time Off (PTO).

PTO is calculated according to your anniversary date as follows:

After 1 full anniversary year, you shall be entitled to ten days of PTO annually.

After 4 full anniversary years, you shall be entitled to fifteen days of PTO annually.

After 8 full anniversary years, you shall be entitled to twenty days of PTO annually.

After 12 full anniversary years, you shall be entitled to twenty-five days of PTO annually.

After 16 full anniversary years, and each year thereafter, you shall be entitled to thirty days of PTO annually.

Exempt employees will receive sick pay in compliance with state and federal wage and hour laws.

Submit PTO requests in writing as soon as possible to your supervisor. When possible, PTO requests are granted, taking into account operating requirements. Length of employment may determine priority in scheduling PTO times.

PTO can be used as vacation time, sick time or to take care of personal matters.

You may use accrued PTO to care for a child who is sick.



Pay is not granted in lieu of taking the actual time off. However, PTO time can be carried over until the point where an employee's PTO balance reaches 2x their annual allotment of PTO.

PTO should be taken in blocks of eight hours at a time.

At the end of employment, eligible employees will be paid for earned but unused PTO.

## **Personal Days**

Full-time employees are eligible for paid personal days each year. Eligible employees earn four hours for each hour worked during the year, up to a maximum of thirty days. These personal days may be taken after completion of your introductory period.

Personal days can be used as vacation time, sick time or to take care of personal matters.

Requests for planned personal days must be given to your supervisor for approval.

Employees are not paid for any unused personal days. However, if you do not use your personal days during the year, you can carry them into the following year, up to a maximum of thirty personal days.

Employees who are involuntarily discharged will not be paid for earned, but unused personal days, unless state law dictates otherwise. All other employees will be paid for earned, but unused personal days at the end of employment.

## **Jury Duty**

Employees summoned for jury duty are granted an unpaid leave in order to serve.

Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

We reserve the right to request proof of jury service issued by the Court upon return.

Make arrangements with the executive director as soon as you receive your summons.

When permitted by state law, we expect you to return to your job if you are excused from jury duty during your regular working hours.

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3

## **Military Leave**

Employees who are required to fulfill military obligations in any branch of the Armed Forces of the United States or in state military service will be given the necessary time off and reinstated in accordance with federal and state law.

The time off will be unpaid, except where state law dictates otherwise. Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

Accrued paid time off (PTO) (if any) may be used for this leave if the employee chooses, but the company will not require the employee to use paid time off (PTO). Military orders should be presented to the executive director and arrangements for leave made as early as possible before departure. Employees are required to give advance notice of their service obligations to the company unless military necessity makes this impossible. You must notify the executive director of your intent to return to employment based on requirements of the law. Your benefits may continue to accrue during the period of leave in accordance with state and federal law.

Additional information regarding military leaves may be obtained from the executive director.

## **Witness Leave**

Employees are given the necessary time off without pay to attend or participate in a court proceeding in accordance with state law. We ask that you notify the executive director of the need to take witness leave as far in advance as is possible.

Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

## **Bereavement Leave**

Full-time employees who have completed their introductory period are eligible for three paid days for the death of an immediate family member. Members of the immediate family include spouses, domestic partners, parents, brothers, sisters, children, children of domestic partners, grandchildren, grandparents, parents-in-law and parents of domestic partners.

Exempt employees may be provided paid time off with pay when necessary to comply with state and federal wage and hour laws.

Requests for bereavement leave should be made to the executive director as soon as possible. Our company reserves the right to request written verification of an employee's familial relationship to the deceased and his or her attendance at the funeral service as a condition of the bereavement pay.



## **Leave of Absence**

Under special circumstances, full-time employees who have completed their introductory period may be granted a leave of absence without pay. The granting of this type of leave is normally for compelling reasons and is dependent upon the written approval of the executive director.

Leaves may not exceed 30 days. Leaves of absence are granted only after earned PTO is exhausted.

To the extent allowed by the insurance contract, we will continue to provide medical insurance and dental insurance coverage for employees on an authorized leave of absence, up to a maximum of one month. During this time you will be responsible for paying your portion of the monthly premium(s).

We will make reasonable efforts to return you to the same or similar job you held prior to the leave of absence, subject to our staffing and business requirements.

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### **Victims of Crime Leave**

The company will grant reasonable and necessary leave from work, without pay, to employees who are victims of a crime or employees who are representatives of victims of a crime to attend or participate in legal proceedings pertaining to the crime. Affected employees must give the company reasonable notice that leave under this policy is required.

Exempt employees may be provided time off with pay when necessary to comply with state and federal wage and hour laws.

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3

## **Medical Insurance**

Eligible full-time employees may enroll in a single, a single plus one dependent, or a family contract after ninety days of employment. Eligibility may be defined by state law and/or by the insurance contract.

Information and enrollment forms may be obtained from the executive director.

To assist you with the cost of this insurance, our company pays a portion of a single, a single plus one dependent, or a family contract. You are responsible for paying the balance through payroll deduction.

Participating employees are also covered under our medical insurance plan's prescription drug program.

A booklet containing the details of the plan and eligibility requirements may be obtained from the executive director.

Refer to the actual plan document and summary plan description if you have specific questions regarding your eligibility for coverage or other aspects of this benefit plan. Those documents are controlling.

At the end of employment you may be entitled to continuation or conversion of the group medical insurance plan in accordance with the terms of the policy and/or applicable state and federal law. For more information, contact the executive director.

## **Dental Insurance**

Eligible full-time employees may enroll in a single, a single plus one dependent or a family contract after ninety days of employment.

Information and enrollment forms may be obtained from the executive director.

To assist you with the cost of this insurance, our company pays a portion of a single, a single plus one dependent or a family contract. You are responsible for paying the balance through payroll deduction.

A booklet containing the details of the plan and the eligibility requirements may be obtained from the executive director.

Refer to the actual plan document and summary plan description if you have specific questions regarding this benefit plan. Those documents are controlling.

At the end of employment you may be entitled to continuation or conversion of the group dental insurance plan in accordance with the terms of the policy and/or applicable state and federal law. For more information, contact the executive director.

## **Social Security**

During your employment, you and the company both contribute funds to the federal government to support the Social Security program. This program is intended to provide you with retirement benefit payments and medical coverage once you reach retirement age.

## **Unemployment Insurance**

Upon separation from employment, you may be entitled to state and federal unemployment insurance benefits. Information about unemployment insurance can be obtained from the executive director.

## **Workers' Compensation**

On-the-job injuries are covered by our Workers' Compensation insurance policy. This insurance is provided at no cost to you. If you are injured on the job, no matter how slightly, report the incident immediately to the executive director. Consistent with applicable state law, failure to report an injury within a reasonable period of time could jeopardize your claim. We ask for your assistance in alerting management to any condition that could lead to or contribute to an employee accident.

### **401(k) Qualified Retirement Plan**

Our company provides eligible employees with a 401(k) Qualified Retirement plan which is an excellent means of long-term savings for your retirement. The company's contribution, if any, is determined by the employer on an annual basis.

You can obtain a copy of the Summary Plan Description which contains the details of the plan including eligibility and benefit provisions from the executive director. In the event of any conflict in the description of any plan, the official plan documents, which are available for your review, shall govern. If you have any questions regarding this plan, see the plan administrator.

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3

**On the Job**

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4

## **Confidentiality of Client Matters**

Our professional ethics require that each employee maintain the highest degree of confidentiality when handling client matters.

To maintain this professional confidence, no employee shall disclose client information to other clients, friends, or members of one's own family.

Questions concerning client confidentiality may be addressed with your supervisor.

## **Discussions with Clients**

When working with a client, you may be asked to offer specific suggestions or comments regarding his or her practices.

Prior to discussing any suggestions with a client, your recommendations must first be approved by your supervisor.

## **Social Security Number Privacy and Protection of Personal Information**

To ensure to the extent practicable the confidentiality of our employees' Social Security Numbers (SSNs), no employee may acquire, disclose, transfer or unlawfully use the SSN of any employee except in accordance with this policy. The release of employee SSNs to external parties is prohibited except where required by law.



Internal access to employee SSNs is restricted to employees with a legitimate business need for the information.

Except where permitted by state or federal law, we will not: 1) publicly display all or more than four sequential digits of an employee's SSN; 2) use all or more than four sequential digits of an employee's SSN as the primary account number for an individual; 3) visibly print all or more than four sequential digits of an employee's SSN on any identification badge or card; 4) require an individual to use or transmit all or more than four sequential digits of their SSN to gain access to an Internet web site or computer system or network unless the connection is secure, the transmission is encrypted, or a password or unique PIN is also required to gain access; 5) include all or more than four sequential digits of an employee's SSN in or on any document or information mailed or otherwise sent to an individual if it is visible on or without manipulation from outside the envelope or packaging; or 6) include all or more than four sequential digits of an employee's SSN in any document or information mailed to a person.

Employee SSNs may be collected in the ordinary course of business for the purpose of identity verification or to administer benefits and in accordance with state and federal laws.

Any documents, that include employee SSNs and are discarded, must be shredded.

Any violation of this policy will result in disciplinary action up to and including discharge.

This policy will not be enforced to prevent employees from discussing their wages or other terms of employment with each other or third parties.

For more information about this policy, please contact your supervisor.

### **Attendance and Punctuality**

Attendance and punctuality are important factors for your success within our company. We work as a team and this requires that each person be in the right place at the right time.

If you are going to be late for work or absent, notify your supervisor as far in advance as is feasible under the circumstances, but before the start of your workday.

Personal issues requiring time away from your work, such as doctor's appointments or other matters, should be scheduled during your nonworking hours if possible.

If you are absent for three days without notifying the company, it is assumed that you have voluntarily abandoned your position with the company, and you will be removed from the payroll.

### **Meal Time**

You may be either given the option for or scheduled for a lunch break depending on your department/position. Please see your supervisor with any questions.



## **Work Assignments**

Work assignments will be distributed by your supervisor. When possible, you will be advised of future assignments in advance, so you will have ample time to prepare for the assignment.

Once you have begun an assignment you will report directly to your supervisor for all matters relating to its completion.

## **Contact with the Company**

The company should know your location at all times during business hours. Your supervisor will keep a record of your assignments, and (s)he should be notified of your whereabouts outside the company during working hours.

Approval C 10-9-15

## **On The Job Training**

The initiation of all on-the-job training for employees within your department is the responsibility of your supervisor. This may include safety training, participation in off-site training and continuing education when necessary for job safety and work performance. Training will be conducted during regular working hours whenever possible.

The company will pay for any required training programs. Employees may be tested from time to time to evaluate the effectiveness of the training program.

If you have any questions regarding training, please see your supervisor.

## **Standards of Conduct**

Each employee has an obligation to observe and follow the company's policies and to maintain proper standards of conduct at all times. Failure to adhere to the company's policies will result in corrective disciplinary measures.

Disciplinary action may include a verbal warning, written warning, suspension with or without pay, and/or discharge. The appropriate disciplinary action imposed will be determined by the company. The company does not guarantee that one form of action will necessarily precede another.

Among other things, the following may result in disciplinary action, up to and including discharge: violation of the company's policies or safety rules; failing



to work in a cooperative manner with management, co-workers, clients and others who do business with the company; unauthorized or illegal possession, use or sale of alcohol or controlled substances on work premises or during working hours, while engaged in company activities or in company vehicles; unauthorized possession, use or sale of weapons, firearms or explosives on work premises; theft or dishonesty; inappropriate or violent physical contact; harassment; discrimination or retaliation in violation of the company's EEO and No Harassment policies; performing outside work or use of company property, equipment or facilities in connection with outside work while on company time; poor attendance or poor performance. These examples are not all inclusive. We emphasize that discharge decisions will be based on an assessment of all relevant factors.

Nothing in this policy is designed to limit an employee's rights under Section 7 of the National Labor Relations Act.

Nothing in this policy is designed to modify our employment-at-will policy.

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## **Access to Personnel Files**

Upon written request, employees will be allowed to review their personnel records up to two times each year or as otherwise permitted by law, during normal business hours. If a review during normal business hours would require employees to take time off from work, the company must provide some other reasonable time for a review. The record may be copied and a reasonable fee may be charged for duplicating the personnel record. If there is a disagreement as to the information in the record, employees may ask to have it corrected or removed and may submit a statement explaining their position. Such statement becomes part of the file.

For more information, contact the executive director.

## **Client and Public Relations**

Our company's reputation is built on excellent service and quality work. To maintain this reputation requires the active participation of every employee.

The opinions and attitudes that clients have toward our company may be determined for a long period of time by the actions of one employee. It is sometimes easy to take a client for granted, but if we do we run the risk of losing not only that client, but his or her associates, friends or family who may also be clients or prospective clients.

Each employee must be sensitive to the importance of providing courteous treatment in all working relationships.



## **Non-Solicitation**

The company believes employees should have a work environment free from interruptions of a non-work related nature, as work time is for work. When you are to be working you should focus on your duties and not engage in activities that would interfere with your own work or the work of others. For the purpose of this policy, solicitation includes, but is not limited to, for collection of any debt or obligation, for raffles of any kind or chance taking, or for the sale of merchandise or business services, the attempt to sell any product or service (e.g. selling or collecting for Tupperware®, Avon® products, churches, schools, Girl Scout cookies, etc.). Such interruptions can be both detrimental to the quality of work and efficiency, and may not be respectful of others job responsibilities and right not to be interrupted.

Employees may not engage in solicitation for any purpose during his/her work time, which includes the working time of the employee who seeks to solicit and the employee who is being solicited. Although solicitation is not encouraged, it is permitted as long as it is limited to the employee's break and lunch time and kept out of active working areas. Nothing in this policy is intended to restrict an employee's statutory rights, including discussing terms and conditions of employment.

## **Distribution**

Distribution by employees of any type (materials, goods, paper) is prohibited in work areas at any time, whether or not the employees are on working time. Electronic distribution is subject to the company's Electronic Mail and Monitoring Policy, and may not occur during the employee's working time. Non-employees are prohibited from distributing materials to employees on company premises at any time. Literature that violates the company's EEO and No Harassment policies, includes threats of violence, or is knowingly and recklessly false is never permitted. Nothing in this policy is intended to restrict an employee's statutory rights, including discussing terms and conditions of employment.

## **Changes in Personal Data**

To aid you and/or your family in matters of personal emergency, we need to maintain up-to-date information.

Changes in name, address, telephone number, marital status, number of dependents or changes in next of kin and/or beneficiaries should be given to the executive director promptly.



## Care of Equipment

You are expected to demonstrate proper care when using the company's property and equipment. No property may be removed from the premises without the proper authorization of management. If you lose, break or damage any property, report it to your supervisor at once.

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## **Company Vehicles**

Operators of company vehicles are responsible for the safe operation and cleanliness of the vehicle.

Accidents involving a company vehicle must be reported to your supervisor immediately.

Employees are responsible for any moving and parking violations and fines that may result when operating a company vehicle.

Company vehicles should be operated by the employee only. Company vehicles may only be used for job-related travel.

Smoking, including use of e-cigarettes, is prohibited in company vehicles.

The use of seat belts is mandatory for operators and passengers of company vehicles.

Employees are encouraged to take appropriate safety precautions when using their cellular telephone. The use of handheld cellular telephones, including texting, while driving is prohibited. Employees are expected to comply with applicable state laws, including the use of cellular telephones.



## **Personal Property**

The company is not responsible for loss or damage to personal property. Valuable personal items, such as purses and all other valuables should not be left in areas where theft might occur.

## **Personal Telephone Calls**

It is important to keep our telephone lines free for client calls. Although the occasional use of the company's telephones for a personal emergency may be necessary, routine personal calls should be kept to a minimum.

Unless used for business purposes, personal cellular telephones must be turned off or set to a silent alert during working hours while on company premises.

Employees are prohibited from using cellular telephones to text message during working hours while on company premises.

## **Acceptable Use of Electronic Communications**

This policy contains guidelines for Electronic Communications created, sent, received, used, transmitted, or stored using the company's communication systems or equipment and employee provided systems or equipment used either in the workplace, during working time or to accomplish work tasks. "Electronic Communications" include, among other things, messages, images, text data or any other information used in e-mail, instant messages, text messages, voice mail, fax machines, computers, personal digital assistants (including Blackberry, iPhone, iPad or similar devices), pagers, telephones, cellular and mobile phones including those with cameras, Intranet, Internet, back-up storage, information on a memory or flash key or card, jump or zip drive or any other type of internal or external removable storage drives. In the

remainder of this policy, all of these communication devices are collectively referred to as "Systems."

Acceptable Uses of Our Systems: Employees may use our Systems to communicate internally with co-workers or externally with clients and other business acquaintances for business purposes.

Company Control of Systems and Electronic Communications: All Electronic Communications contained in Company Systems are Company records and/or property. Although an employee may have an individual password to access our Systems, the Systems and Electronic Communications belong to the company. The Systems and Electronic Communications are accessible to the company at all times including periodic unannounced inspections. Our Systems and Electronic Communications are subject to use, access, monitoring, review, recording and disclosure without further notice. Employee communications on our system are not confidential or private.

The company's right to use, access, monitor, record and disclose Electronic Communications without further notice applies equally to employee-provided systems or equipment used in the workplace, during working time, or to accomplish work tasks.

Personal Use of Our Systems: Personal communications in our Systems are treated the same as all other Electronic Communications and will be used, accessed, recorded, monitored, and disclosed by the company at any time without further notice. Since all Electronic Communications and Systems can be accessed without advance notice, employees should not use our Systems for communication or information that employees would not want revealed to third parties. Personal use of our System should be limited to non-working time. Personal use of our System must be



conducted in such a manner that it does not affect smooth System operation or use a disproportional amount of the System's functional capacity.

Proprietary Business Information: Proprietary business information means confidential and proprietary information related to the company's trade secrets, business models, business services, sales agreements, pricing information, drawings, designs, blue prints, manufacturing processes, client lists, inventions, recipes, formulas, vendor agreements, patient records, strategic business or marketing plans, expansion plans, contracts, non-public financial performance information and other information that derives economic value by being protected from public consumption or competitors may only be used on Company Systems. Proprietary business information may not be downloaded, saved, or sent to a personal laptop, personal storage device, or personal email account under any circumstances without advance written approval from a member of management. Proprietary business information does not restrict employee rights to discuss their wages, hours or other terms of employment.

Prohibited Uses of Our Systems: Employees may not use Company Systems in a manner that is unlawful, wasteful of Company resources, or unreasonably compromises employee productivity or the overall integrity or stability of the company's systems. These tools are provided to assist employees with the execution of their job duties and should not be abused. Examples of prohibited uses include, among other things, sexually explicit messages, images, cartoons, or jokes; propositions or love letters; ethnic or racial slurs; or any other message or image that may be in violation of Company policies.

In addition, employees may not use our Company Systems:

- To download, save, send or access any discriminatory, obscene, or malicious or knowingly false material;
- To download, save, send or access any music, audio or video file unless business related;
- To download anything from the internet (including shareware or free software) without the advance written permission of the systems supervisor;
- To download, save, send or access any site or content that the company might deem "adult entertainment;"
- To attempt or to gain unauthorized or unlawful access to computers, equipment, networks, or Systems of the company or any other person or entity;
- In connection with any infringement of intellectual property rights, including but not limited to copyrights;
- In connection with the violation or attempted violation of any law; and
- To transmit proprietary business information or client material such as pricing information or trade secrets.

Electronic Forgery: An employee may not misrepresent, disguise, or conceal his or her identity or another's identity in any way while using Electronic Communications; make changes to Electronic Communications without clearly indicating such changes; or use another person's account, mail box, password, etc. without prior written approval of the account owner and without identifying the actual author.

Intellectual Property Rights: Employees must always respect intellectual property rights such as copyrights and trademarks.



System Integrity, Security, and Encryption: All Systems passwords and encryption keys must be available and known to the company. You may not install password or encryption programs without the written permission of the Systems Supervisor. Employees may not use the passwords and encryption keys belonging to others.

Applicable Laws: Numerous state and federal laws apply to Electronic Communications. The company complies with applicable laws. Employees also must comply with applicable laws and should recognize that an employee could be personally liable and/or subject to fine and imprisonment for violation of applicable laws.

Consequences of Policy Violations: Violations of this Policy may result in disciplinary action up to and including immediate termination of an employee's employment as well as possible civil liabilities or criminal prosecution. Where appropriate, the company may advise legal officials or appropriate third parties of policy violations and cooperate with official investigations. We will not, of course, retaliate against anyone who reports possible policy violations or assists with investigations.

If you have questions about the acceptable use of our Systems or the content of Electronic Communications, ask your supervisor for advance clarification.

## **Social Media**

“Social media” includes all means of communicating or posting information or content of any sort on the Internet, including to your own or someone else’s web log or blog, journal or diary, personal web site, social networking or affinity web site, web bulletin board or a chat room, whether or not associated or affiliated with the company.

You are more likely to resolve work related complaints by speaking directly with your co-workers or by utilizing our problem solving policy than by posting complaints to a social media outlet. Nevertheless, if you decide to post complaints or criticism, avoid using statements, photographs, video or audio that reasonably could be viewed as maliciously false, obscene, threatening or intimidating, that defames clients, competitors, vendors or employees or that might constitute harassment or bullying. Examples of such conduct might include posts meant to put someone in fear for their physical safety or psychological well-being; posts designed to cast someone in a false light to the public; posts that invade a person’s reasonable expectation of privacy; or posts that could contribute to a hostile work environment on the basis of race, age, gender, national origin, color, disability, religion or other status protected by federal, state or local law.

Make sure you are always truthful and accurate when posting information or news. If you make a mistake, correct it quickly. Be open about any previous posts you have altered. Use privacy settings when appropriate. Remember that the Internet archives almost everything; therefore, even deleted postings can be searched. The Internet is immediate; nothing that is posted ever truly “expires.” Never post any information or rumors that you know to be false about the company, fellow employees,



clients, and people working on behalf of the company or competitors.

Do not create a link from your blog, website or other social networking site to the company's website without identifying yourself as a company employee. Express only your personal opinions. Never represent yourself as a spokesperson for the company or make knowingly false representations about your credentials or your work. If the company is a subject of the content you are creating, be clear and open about the fact that you are an employee and make it clear that your views do not represent those of the company. It is best to include a statement such as "The postings on this site are my own and do not necessarily reflect the views of the company." You must refrain from using social media while on working time.

Employees are encouraged to report violations of this policy. The Company prohibits retaliation against any employee for reporting a possible deviation from this policy or for cooperating in an investigation.

Where applicable, the company complies with state laws concerning access to an employee's personal social networking account, including restrictions concerning employer requests for an employee's username and/or password.

Nothing in this policy is designed to limit an employee's right under Section 7 of the National Labor Relations Act, including discussing wages or other terms of employment.

If you have questions or need further guidance, please contact your supervisor.

## Security of Electronic Devices

Each employee provided with a laptop computer, iPad, iPhone, smart phone, tablet or similar device is responsible for the physical security of that device. All devices acquired for or on behalf of the company are company property. The device must be locked up and stored in a secure location when it is not in the immediate possession of the authorized user. In addition, the user must return the device immediately upon request of the company. You must notify the executive director immediately if the device is lost, stolen, misplaced, or damaged. All work created or performed on the device is company property. The device is subject to inspection by the company at any time without further advance notice. The device must be used in a manner that complies with all company policies including the Acceptable Use of Electronic Communications, Equal Employment Opportunity, No Harassment, Confidentiality of Client Matters, and Protecting Company Information.

Violations of this policy may be grounds for disciplinary action up to and including discharge.

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## **Dress Policy**

Employees are expected to maintain the highest standards of personal cleanliness and present a neat, professional appearance at all times.

Our clients' satisfaction represents the most important and challenging aspect of our business. Whether or not your job responsibilities place you in direct client contact, you represent the company with your appearance as well as your actions. The properly-attired individual helps to create a favorable image for the company, to the public and fellow employees.

The company maintains a business casual environment. All employees should use discretion in wearing attire that is appropriate for their job.

## **Personal Hygiene**

Maintaining a professional, business-like appearance is very important to the success of our company. Part of the impression you make on others depends on your choice of dress, personal hygiene and courteous behavior. A daily regimen of good grooming and hygiene is expected of everyone. Please ensure that you maintain good personal hygiene habits. While at work, you are required to be clean, dressed appropriately and well groomed.

## Protecting Company Information

Protecting our company's information is the responsibility of every employee. Do not discuss the company's confidential business or proprietary business matters, or share confidential, personal employee information (such as social security numbers, personal banking or medical information) with anyone who does not work for us such as friends, family members, members of the media, or other business entities. You may be required to sign a nondisclosure agreement as a condition of your employment, in accordance with state and federal law.

Confidential information does not include information pertaining to the terms and conditions of an employee's employment, including wages. Nothing in this policy is designed to limit an employee's rights under Section 7 of the National Labor Relations Act.

All telephone calls regarding a current or former employee's position/compensation with our company must be forwarded to the executive director.

The company's address shall not be used for the receipt of personal mail.



## **Conflict of Interest/Code of Ethics**

A company's reputation for integrity is its most valuable asset and is directly related to the conduct of its officers and other employees. Therefore, employees must never use their positions with the company, or any of its clients, for private financial gain, to advance personal financial interests, to obtain favors or benefits for themselves, members of their families or any other individuals, corporations or business entities, or engage in activities, investments or associations that compete with the company, interferes with an employee's business judgment concerning the company's best interests, or exploits an employee's position with the company for personal gain.

The company adheres to the highest legal and ethical standards applicable in our business. The company's business is conducted in strict observance of both the letter and spirit of all applicable laws and the integrity of each employee is of utmost importance.

Employees of the company shall conduct their personal affairs such that their duties and responsibilities to the company are not jeopardized and/or legal questions do not arise with respect to their association or work with the company.

This policy will not be enforced to prevent employees from discussing their wages or other terms of employment.

## If You Must Leave Us

Should you decide to leave your employment with us, we ask that you provide your supervisor with at least two weeks' advance written notice. Your thoughtfulness is appreciated and will be noted favorably should you ever wish to reapply for employment with the company.

Generally, we will confirm upon request our employees' dates of employment, salary history, and job title.

Additionally, all resigning employees should complete a brief exit interview prior to leaving. All company property, including this Employee Handbook, must be returned at the end of employment. Otherwise, the company may take action to recoup any replacement costs and/or seek the return of company property through appropriate legal recourse.

You should notify the company if your address changes during the calendar year in which discharge occurs so that your tax information will be sent to the proper address.



**Safety in the Workplace**

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Approval Copy 10-9-15



## Each Employee's Responsibility

Safety can only be achieved through teamwork at our company. Each employee, supervisor and manager must practice safety awareness by thinking defensively, anticipating unsafe situations and reporting unsafe conditions immediately.

Please observe the following precautions:

1. Notify your supervisor of any emergency situation. If you are injured or become sick at work, no matter how slightly, you must inform your supervisor immediately.
2. The use of alcoholic beverages or illegal substances during working hours will not be tolerated. The possession of alcoholic beverages or illegal substances on the company's property is forbidden.
3. Use, adjust and repair machines and equipment only if you are trained and qualified.
4. Know the proper lifting procedures. Get help when lifting or pushing heavy objects.
5. Understand your job fully and follow instructions. If you are not sure of the safe procedure, don't guess; just ask your supervisor.
6. Know the locations, contents and use of first aid and fire-fighting equipment.
7. Wear personal protective equipment in accordance with the job you are performing.



8. Comply with OSHA standards and/or applicable state job safety and health standards as written in our safety procedures manual.

A violation of a safety precaution is in itself an unsafe act. A violation may lead to disciplinary action, up to and including discharge.

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## **Workplace Violence**

Violence by an employee or anyone else against an employee, supervisor or member of management will not be tolerated. The purpose of this policy is to minimize the potential risk of personal injuries to employees at work and to reduce the possibility of damage to company property in the event someone, for whatever reason, may be unhappy with a company decision or action by an employee or member of management.

If you receive or overhear any threatening communications from an employee or outside third party, report it to your supervisor at once. Do not engage in either physical or verbal confrontation with a potentially violent individual. If you encounter an individual who is threatening immediate harm to an employee or visitor to our premises, contact an emergency agency (such as 911) immediately.

All reports of work-related threats will be kept confidential to the extent possible, investigated and documented. Employees are expected to report and participate in an investigation of any suspected or actual cases of workplace violence and will not be subjected to disciplinary consequences for such reports or cooperation.

Violations of this policy, including your failure to report or fully cooperate in the company's investigation, may result in disciplinary action, up to and including discharge.



## **Workplace Searches**

To protect the property and to ensure the safety of all employees, clients and the company, the company reserves the right to conduct personal searches consistent with state law, and to inspect any packages, parcels, purses, handbags, brief cases, lunch boxes or any other possessions or articles carried to and from the company's property. In addition, the company reserves the right to search any employee's office, desk, files, locker, equipment or any other area or article on our premises. In this regard, it should be noted that all offices, desks, files, lockers, equipment, etc. are the property of the company, and are issued for the use of employees only during their employment. Inspection may be conducted at any time at the discretion of the company.

Persons entering the premises who refuse to cooperate in an inspection conducted pursuant to this policy may not be permitted to enter the premises. Employees working on or entering or leaving the premises who refuse to cooperate in an inspection, as well as employees who after the inspection are believed to be in possession of stolen property or illegal substances, will be subject to disciplinary action, up to and including discharge, if upon investigation they are found to be in violation of the company's security procedures or any other company rules and regulations.

## **Good Housekeeping**

Good work habits and a neat place to work are essential for job safety and efficiency. You are expected to keep your place of work organized and materials in good order at all times. Report anything that needs repair or replacement to your supervisor.

## **Smoking in the Workplace**

Our company is committed to providing a safe and healthy environment for employees and visitors. Smoking, including the use of e-cigarettes, is not permitted.

Violations of this policy may result in disciplinary action, up to and including discharge.

Approval Only 10-9-15



## **No Weapons in the Workplace**

Possession, use or sale of weapons, firearms or explosives on work premises, while operating company machinery, equipment or vehicles for work-related purposes or while engaged in company business off premises is forbidden except where expressly authorized by the company and permitted by state and local laws. This policy applies to all employees, including but not limited to, those who have a valid permit to carry a firearm.

If you are aware of violations or threats of violations of this policy, you are required to report such violations or threats of violations to your supervisor immediately.

Violations of this policy will result in disciplinary action, up to and including discharge.

Approval Copy 10/15

## **In An Emergency**

Your supervisor should be notified immediately when an emergency occurs. Emergencies include all accidents, medical situations, bomb threats, other threats of violence, and the smell of smoke. In the absence of your supervisor, contact the nearest company official.

Should an emergency result in the need to communicate information to employees outside of business hours, your supervisor will contact you. Therefore, it is important that employees keep their personal emergency contact information up to date. Notify your supervisor when this information changes.

When events warrant an evacuation of the building, you should follow the instructions of your supervisor or any other member of management. You should leave the building in a quick and orderly manner. You should assemble at the pre-determined location as communicated to you by your supervisor to await further instructions or information.

Please direct any questions you may have about the company's emergency procedures to your supervisor.



## **Substance Abuse**

The company has vital interests in ensuring a safe, healthy and efficient working environment for our employees, their co-workers and the clients we serve. The unlawful or improper presence or use of controlled substances or alcohol in the workplace presents a danger to everyone. For these reasons, we have established as a condition of employment and continued employment with the company the following substance abuse policy.

The company has implemented a drug testing program in compliance with local, state and federal laws. Employees are prohibited from reporting to work or working while using illegal or unauthorized substances. Employees are prohibited from reporting to work or working when the employee uses any controlled substance, except when the use is pursuant to a doctor's orders and the doctor advised the employee that the substance does not adversely affect the employee's ability to safely perform his or her job duties.

In addition, employees are prohibited from engaging in the unlawful or unauthorized manufacture, distribution, sale or possession of illegal or unauthorized substances and alcohol in the workplace including: on company paid time, on company premises, in company vehicles, or while engaged in company activities. Our employees are also prohibited from reporting for duty or remaining on duty with any alcohol in their systems. Employees are further prohibited from consuming alcohol during working hours, including meal and break periods.

Your employment or continued employment with the company is conditioned upon your full compliance with the foregoing substance abuse policy. Any violation of this policy may result in disciplinary action, up to and

including discharge. Furthermore, any employee who violates this policy who is subject to discharge, may be permitted in lieu of discharge, at the company's sole discretion, to participate in and successfully complete an appropriate treatment, counseling or rehabilitation program as recommended by a substance abuse professional as a condition of continued employment and in accordance with applicable federal, state, and local laws.

Consistent with its fair employment policy, the company maintains a policy of non-discrimination and reasonable accommodation with respect to recovering addicts and alcoholics, and those having a medical history reflecting treatment for substance abuse conditions. We encourage employees to seek assistance before their substance or alcohol use renders them unable to perform their essential job functions or jeopardizes the health and safety of themselves or others. The company will attempt to assist its employees through referrals to rehabilitation, appropriate leaves of absence and other measures consistent with the company's policies and applicable federal, state or local laws.

The company further reserves the right to take any and all appropriate and lawful actions necessary to enforce this substance abuse policy including, but not limited to, the inspection of company issued lockers, desks or other suspected areas of concealment, as well as an employee's personal property when the company has reasonable suspicion to believe that the employee has violated this substance abuse policy.

This policy represents management guidelines. For more information, please speak to the executive director.



## **Receipt of Employee Handbook and Employment-At-Will Statement**

This is to acknowledge that I have received a copy of the Charlevoix Housing Commission Employee Handbook and I understand that it contains information about the employment policies and practices of the company. I agree to read and comply with this Employee Handbook. I understand that the policies outlined in this Employee Handbook are management guidelines only, which in a developing business will require changes from time to time. I understand that the company retains the right to make decisions involving employment as needed in order to conduct its work in a manner that is beneficial to the employees and the company. I understand that this Employee Handbook supersedes and replaces any and all prior Employee Handbooks and any inconsistent verbal or written policy statements.

I understand that except for the policy of at-will employment, the company reserves the right to revise, delete and add to the provisions of this Employee Handbook at any time without further notice. All such revisions, deletions or additions to the Employee Handbook will be in writing and will be signed by the executive director of the company. I understand that no oral statements or representations can change the provisions of this Employee Handbook.

I understand that this Employee Handbook is not intended to create contractual obligations with respect to any matters it covers and that the Employee Handbook does not create a contract guaranteeing that I will be employed for any specific time period.

**THIS COMPANY IS AN AT-WILL EMPLOYER. THIS MEANS THAT REGARDLESS OF ANY PROVISION IN THIS EMPLOYEE HANDBOOK, THE COMPANY OR I**

MAY TERMINATE THE EMPLOYMENT RELATIONSHIP AT ANY TIME, FOR ANY REASON, WITH OR WITHOUT CAUSE OR NOTICE. NOTHING IN THIS EMPLOYEE HANDBOOK OR IN ANY DOCUMENT OR STATEMENT, WRITTEN OR ORAL, SHALL LIMIT THE RIGHT TO TERMINATE EMPLOYMENT AT-WILL. NO OFFICER, EMPLOYEE OR REPRESENTATIVE OF THE COMPANY IS AUTHORIZED TO ENTER INTO AN AGREEMENT— EXPRESS OR IMPLIED—WITH ME OR ANY EMPLOYEE FOR EMPLOYMENT FOR A SPECIFIED PERIOD OF TIME. ANY AGREEMENT TO EMPLOYMENT FOR A SPECIFIED PERIOD OF TIME WILL BE PUT INTO WRITING AND SIGNED BY THE EXECUTIVE DIRECTOR OF THE COMPANY.

I understand that this Employee Handbook refers to current benefit plans maintained by the company and that I must refer to the actual plan documents and summary plan descriptions as these documents are controlling.

I have read and understand the Paid Time Off (PTO) Policy in this Employee Handbook.

Initials \_\_\_\_\_ Date \_\_\_\_\_

I also understand that if a written contract is inconsistent with the Employee Handbook, the written contract is controlling.

If I have questions regarding the content or interpretation of this Employee Handbook, I will ask the executive director or a member of management.

NAME \_\_\_\_\_

DATE \_\_\_\_\_

EMPLOYEE  
SIGNATURE \_\_\_\_\_

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## **Receipt of Employee Handbook and Employment-At-Will Statement**

This is to acknowledge that I have received a copy of the Charlevoix Housing Commission Employee Handbook and I understand that it contains information about the employment policies and practices of the company. I agree to read and comply with this Employee Handbook. I understand that the policies outlined in this Employee Handbook are management guidelines only, which in a developing business will require changes from time to time. I understand that the company retains the right to make decisions involving employment as needed in order to conduct its work in a manner that is beneficial to the employees and the company. I understand that this Employee Handbook supersedes and replaces any and all prior Employee Handbooks and any inconsistent verbal or written policy statements.

I understand that except for the policy of at-will employment, the company reserves the right to revise, delete and add to the provisions of this Employee Handbook at any time without further notice. All such revisions, deletions or additions to the Employee Handbook will be in writing and will be signed by the executive director of the company. I understand that no oral statements or representations can change the provisions of this Employee Handbook.

I understand that this Employee Handbook is not intended to create contractual obligations with respect to any matters it covers and that the Employee Handbook does not create a contract guaranteeing that I will be employed for any specific time period.

**THIS COMPANY IS AN AT-WILL EMPLOYER. THIS MEANS THAT REGARDLESS OF ANY PROVISION IN THIS EMPLOYEE HANDBOOK, THE COMPANY OR I**

MAY TERMINATE THE EMPLOYMENT RELATIONSHIP AT ANY TIME, FOR ANY REASON, WITH OR WITHOUT CAUSE OR NOTICE. NOTHING IN THIS EMPLOYEE HANDBOOK OR IN ANY DOCUMENT OR STATEMENT, WRITTEN OR ORAL, SHALL LIMIT THE RIGHT TO TERMINATE EMPLOYMENT AT-WILL. NO OFFICER, EMPLOYEE OR REPRESENTATIVE OF THE COMPANY IS AUTHORIZED TO ENTER INTO AN AGREEMENT— EXPRESS OR IMPLIED—WITH ME OR ANY EMPLOYEE FOR EMPLOYMENT FOR A SPECIFIED PERIOD OF TIME. ANY AGREEMENT TO EMPLOYMENT FOR A SPECIFIED PERIOD OF TIME WILL BE PUT INTO WRITING AND SIGNED BY THE EXECUTIVE DIRECTOR OF THE COMPANY.

I understand that this Employee Handbook refers to current benefit plans maintained by the company and that I must refer to the actual plan documents and summary plan descriptions as these documents are controlling.

I have read and understand the Paid Time Off (PTO) Policy in this Employee Handbook.

Initials \_\_\_\_\_ Date \_\_\_\_\_

I also understand that if a written contract is inconsistent with the Employee Handbook, the written contract is controlling.

If I have questions regarding the content or interpretation of this Employee Handbook, I will ask the executive director or a member of management.

NAME \_\_\_\_\_

DATE \_\_\_\_\_

EMPLOYEE  
SIGNATURE \_\_\_\_\_

Approval Copy 10-9-15

**Charlevoix Housing Commission  
Agenda Item**

**Agenda Item Title:** Capital Fund Budget Revision

**Date:** November 12, 2015

**Presented By:** Julie Waterman, Interim Executive Director

**Attachments:** Capital Fund Budget for 2015 and Revision 1

**Background Information:**

The 2015 Capital Fund Budget requires a revision. When the original was submitted the numbers used were estimates. As the year progresses and we have building needs that fall under capital needs we have exact numbers needed to submit a revision.

**Recommendation:**

Motion to approve Resolution 2015-09 to approve 2015 Capital Fund Budget Revision 1.

RECEIVED

06/30/2015

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

Part I: Summary		FFY of Grant: 2015
PHA Name: Charlevoix Housing Commission		FFY of Grant Approval:
Grant Type and Number Capital Fund Program Grant No: ME3P18250115 Replacement Housing Factor Grant No: Date of CFFP:		
Type of Grant		
<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	
<input type="checkbox"/> Performance and Evaluation Report for Period Ending:	<input type="checkbox"/> Revised Annual Statement (revision no: REV (1) )	
Summary by Development Account		Total Actual Cost <sup>1</sup>
Line		Revised <sup>2</sup>
1	Total non-CFF Funds	Obligated
2	1406 Operations (may not exceed 20% of line 21) <sup>3</sup>	Expended
3	1408 Management Improvements	41,932.90
4	1410 Administration (may not exceed 10% of line 21)	2,826.10
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	10,000
10	1460 Dwelling Structures	3,000
11	1465.1 Dwelling Equipment—Nonexpendable	5,000
12	1470 Non-dwelling Structures	2,000
13	1475 Non-dwelling Equipment	28,999
14	1485 Demolition	
15	1492 Moving to Work Demonstration	
16	1495.1 Relocation Costs	
17	1499 Development Activities <sup>4</sup>	

<sup>1</sup> To be completed for the Performance and Evaluation Report.

<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>3</sup> PHAs with under 250 units in management may use 100% of CFF Grants for operations.

<sup>4</sup> RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 06/30/2017

<b>Part I: Summary</b>		FFY of Grant: 2015	
PHA Name: Charlevoix Housing Commission	Grant Type and Number Capital Fund Program Grant No: M33P18250115 Replacement Housing Factor Grant No: Date of CFFP:	FFY of Grant Approval:	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Performance and Evaluation Report for Period Ending:		<input checked="" type="checkbox"/> Revised Annual Statement (revision no: REV (1) ) <input type="checkbox"/> Final Performance and Evaluation Report	
Line	Summary by Development Account	Total Estimated Cost	Total Actual Cost <sup>1</sup>
		Original	Obligated
18a	1501 Collateralization or Debt Service paid by the PHA		
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment		
19	1502 Contingency (may not exceed 8% of line 20)		
20	Amount of Annual Grant: (sum of lines 2 - 19)	58,999	58,999
21	Amount of line 20 Related to LBP Activities		
22	Amount of line 20 Related to Section 504 Activities		
23	Amount of line 20 Related to Security - Soft Costs		
24	Amount of line 20 Related to Security - Hard Costs		
25	Amount of line 20 Related to Energy Conservation Measures		
Signature of Executive Director		Signature of Public Housing Director	
Date		Date	
10-21-15		11/6/15	

<sup>1</sup> To be completed for the Performance and Evaluation Report.  
<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.  
<sup>4</sup> RHF funds shall be included here.







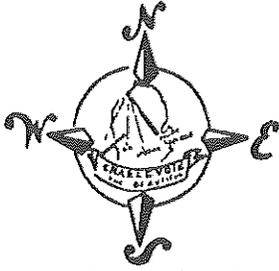


# CHARLEVOIX HOUSING COMMISSION

210 WEST GARFIELD ST.

CHARLEVOIX, MICHIGAN 49720

(231) 547-5451



PROJECT  
PINE RIVER PLACE

## Resolution Approving FY 2015 Capital Fund Budget Revision

November 17, 2015

2015-09

Whereas, it is the Charlevoix Housing Commission's responsibility to follow federal regulations concerning Public Housing; and

Whereas, the Charlevoix Housing Commission board resolves to approve the Capital Fund Annual Statement for FY2015 Parts I and II and revision (1) to The Five Year Action Plan

Now, therefore, be it resolved that the Charlevoix Housing Commission board is in support of approving the Capital Fund Annual Statement for FY2015 Parts I and II and revision (1) to The Five Year Action Plan.

Motion by Commissioner \_\_\_\_\_

Support by Commissioner \_\_\_\_\_

A roll call was taken:

Commissioner Lillian Left	Yes	No	Abstention	Absent
Commissioner Joan Buday	Yes	No	Abstention	Absent
Commissioner Gloria (Joni) Olach	Yes	No	Abstention	Absent
Commissioner Paul Stephan	Yes	No	Abstention	Absent
Commissioner Gregory Stevens	Yes	No	Abstention	Absent

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Abstention \_\_\_\_\_ Absent

\_\_\_\_\_  
Board President

\_\_\_\_\_  
Date

**Charlevoix Housing Commission**  
**Agenda Item**

**Agenda Item Title:** Public Participation at Board Meetings Policy

**Date:** November 12, 2015

**Presented By:** Julie Waterman, Interim Executive Director

**Attachments:** Proposed Policy for Public Participation at Board Meetings

**Background Information:**

In order to encourage appropriate public participation at board meetings of the Charlevoix Housing Commission a policy is needed. This will help to clear up confusion and assure that public comments are handled in a fair and orderly manner. The attached policy is presented for board review, corrections and/or changes. After the board approves of the policy (with any changes made) it will need a period of public posting (30 days) to allow questions and comments from the public. After the period of public posting, the board may choose to adopt the policy by board resolution.

**Recommendation:**

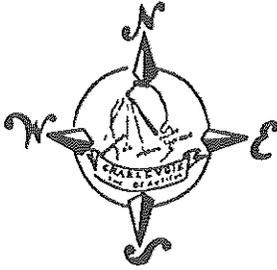
Motion to approve adoption of Public Participation at Board Meetings Policy to be posted for 30 days for public comment.

# CHARLEVOIX HOUSING COMMISSION

210 WEST GARFIELD ST.

CHARLEVOIX, MICHIGAN 49720

(231) 547-5451



PROJECT  
PINE RIVER PLACE

## Public Participation in Board Meetings Policy

The Open Meetings Act states, "A person shall be permitted to address a meeting of a public body under rules established and recorded by the public body." Public participation at the meetings of the Board of Commissioners ("Board") of the Charlevoix Housing Commission ("Commission") and the Committees established by the Board is intended to provide residents and interested persons with the opportunity to comment on issues or topics that are within the purview of the Board or Committee, as the case may be.

To permit fair and orderly public expression, the Board shall provide a period for public participation at every meeting of the Board and publish rules to govern such participation in Board Meetings.

Public participation shall occur in accordance with the procedures set forth below:

Any person or group wishing to place an item on the agenda shall register their intent with the Executive Director no later than seven (7) days prior to the meeting and include:

- A. Name and address of the participant
- B. Group affiliation, if and when appropriate
- C. Topic to be addressed

Such requests shall be subject to the approval of the Executive Director and the Board President.

The presiding officer of each Board meeting at which public participation is permitted shall administer the rules of the Board for its conduct.

Charlevoix Housing Commission Board and Committee meeting shall be guided by the following rules:

- A. Although the public has the right and is invited to attend meetings of the Board and its Committees, no individual or group has the right to enter into the deliberations of the Board or Committees.
- B. With respect to Board meetings, unless input is solicited by the Board, communications by members of the public will be limited to the portion of the meeting designated on the agenda as the time for "Public Comment."
- C. With respect to Committee meetings, unless input is solicited by the Committee, communications by members of the public shall be entertained only if they are related to a specific agenda item. Participation by the public on an agenda item may begin after the Committee has heard staff's presentation (if any) on such item and discussed same.

- D. Public wishing to address the Board during public participation must register with Management 24 hours in advance of the Monthly Board meeting that they want to speak during the public comment period and state their topic.
- E. Public participation shall be permitted as indicated on the order of business at the discretion of the presiding officer.
- F. Speakers will appear individually and will be afforded attention and respect. When called upon, the person shall come to the podium or designated speaking area; state his/her name and address; and, if speaking for an organization or other group, identify the group represented. Groups must select a maximum of two representatives to speak on their behalf. No person may speak without first being recognized by the presiding officer.
- G. Each statement made by a speaker shall be limited to three (3) minutes duration. Speakers are not allowed to cede their time to any other person.
- H. No participant may speak more than once on the same topic unless all others who wish to speak on that topic have been heard.
- I. With respect to Board meetings, there shall be a cumulative limit of thirty (30) minutes available for public comment. If requested by the presiding officers and approved by majority vote of the Board, the time allocation for individuals and/or the cumulative limit may be altered based upon the number of persons registered to speak.
- J. Speaker shall direct comments to the Board and not to staff or other participants.
- K. All statements shall be directed to the presiding officer; no person may address or question Board members individually.
- L. With respect to Committee meetings, the period available for public comment may be limited if requested by the Chairperson and approved by majority vote of the Committee.
- M. Courteous, respectful and civil behavior is expected from all speakers and all persons attending a Board or Committee meeting. Personal attacks, abusive or intemperate language and unsubstantiated allegations leveled at Commissioners, staff, property managers or other residents are prohibited. Individuals who are disruptive may be given a warning and will, if necessary, be removed from the meeting. If any individual is removed from a meeting as a result of disruptive behavior, then the individual may forfeit his or her right of re-entry to future Board and Committee meetings.
- N. The Board or Committee, as the case may be, has discretion to restrict comments that are repetitive or redundant.
- O. The Board or Committee will restrict comments that are inappropriate.
- P. Written comments and/or literature will be accepted at Board and Committee meetings from a) registered speakers, including speakers who are unable to complete their comments in the allotted time, and b) individuals who wish to speak but are unable to address the Board or Committee. As is the case with respect to oral communications, written materials will not be accepted if they are outside the purview of the Board or Committee; contain personal attacks, abusive or intemperate language or unsubstantiated allegations; or relate to current or prospective bids.

- Q. All persons attending a Board or Committee meeting shall turn off or silence their cell phones while the meeting is in session.
- R. Current or prospective vendors wishing to present product or services for purchase should not use the public participation portion of a Board or Committee meeting for this purpose. Vendors will, as appropriate, be referred to the staff responsible for procurement. The Board or Committee Chairperson will have the discretion to withdraw a speaker's right to address the Board or Committee if any of the above rules are violated.
- S. Residents with specific property complaints or concerns will be referred to the Executive Director.
- T. The presiding officer of the Charlevoix Housing Board of Commissioners does reserve the right to recognize or call upon members of the public present at a meeting during the course of discussion of various issues.

Persons who wish to obtain copies of the meeting schedule, minutes or board packets are encouraged to visit the Commission's tab on the City of Charlevoix website at <http://cityofcharlevoix.org/area-links/charlevoix-housing-commission.html>, or call the Commission office at (231) 547-5451 for written materials.

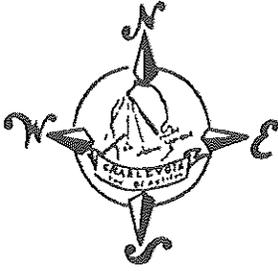
Adopted by Charlevoix Housing Commission XX/XX/201X

# CHARLEVOIX HOUSING COMMISSION

210 WEST GARFIELD ST.

CHARLEVOIX, MICHIGAN 49720

(231) 547-5451



PROJECT  
PINE RIVER PLACE

## Charlevoix Housing Commission 2016 Meeting Schedule

The Charlevoix Housing Commission will hold regular meetings on the following dates in 2016. The Board of Commissioners meets on the third Tuesday of the month. Meetings will be held in the Community Room at Pine River Place Apartments, 210 W. Garfield in Charlevoix, Michigan and will begin at 2:00pm unless posted otherwise.

January 19, 2016

February 16, 2016

March 15, 2016

April 19, 2016      ANNUAL MEETING

May 17, 2016

June 21, 2016

July 19, 2016

August 16, 2016

September 20, 2016

October 18, 2016

November 15, 2016

December 20, 2016

Julie Waterman

Interim Executive Director

December 15, 2015

# Calendar for year 2016 (United States)

January						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February						
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14	15	16	17	18	19	20
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28	29					

March						
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20	21	22	23	24	25	26
27	28	29	30	31		

April						
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					1	2
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24	25	26	27	28	29	30

May						
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

June						
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

July						
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					1	2
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17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

August						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

September						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
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17	18	19	20	21	22	23
24	25	26	27	28	29	30

October						
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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

November						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

December						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Holidays:		
Jan 1 New Year's Day	Jul 4 Independence Day	Nov 24 Thanksgiving Day
Jan 18 Martin Luther King Day	Sep 5 Labor Day	Dec 25 Christmas Day
Feb 15 Washington's Birthday	Oct 10 Columbus Day (Most regions)	Dec 26 'Christmas Day' observed
May 30 Memorial Day	Nov 11 Veterans Day	

Calendar generated on [www.timeanddate.com/calendar](http://www.timeanddate.com/calendar)