



A G E N D A

SEQUOIA HEALTHCARE DISTRICT REGULAR BOARD OF DIRECTORS MEETING 4:30 PM, Wednesday, December 7, 2022 Conference Room, 525 Veterans Boulevard Redwood City, CA 94063

This meeting will be held in person at 525 Veteran’s Boulevard in Redwood City with access available via Zoom teleconference. To join the meeting from your cellphone dial [\(669\) 900-9128](tel:6699009128) and enter meeting ID: [814 2040 5350](tel:81420405350) or join from a computer to <https://us02web.zoom.us/j/81420405350>. Additional information regarding the meeting can be located at our website: www.seqhd.org

1. Call To Order And Roll Call
2. Public Comment On Non-Agenda Items*
- ACTION 3. Consent Calendar - President Shefren
 - a. Approve September 28, 2022 Regular Meeting Minutes
 - b. Accept September And October 2022 Financial Statements
- ACTION 4. New Business
 - a. Accept November 8, 2022 Election Results From San Mateo County Registrar’s Office And Recognize Dr. William Fong, Dr. Aaron Nayfack, And Dr. Gerald Shefren As Elected Directors For The Term 12/2/2022 To 12/4/2022 - President Shefren 4:40-4:45
 - b. Introduction To Samaritan House Clinic New Leadership - Dr. Singh And Dr. Montacute 4:45-4:55
 - ACTION c. Consider Funding Request From County Health and County Office Of Education For \$25,000 For Mental Health Mapping - Louise Rogers And Nancy Magee 4:55-5:10
 - d. Update By First 5 SMC On Year 3 Grant Outcomes - Emily Roberts 5:10-5:25
 - e. Update By Planned Parenthood - Margaux Lazarin, MD, and Jenni Veitch-Olson 5:25-5:40
 - ACTION f. Director Requests For Future Agenda Items Per Board Policy 8.3 - President Shefren 5:40-5:45
- ACTION 5. Old Business
 - a. Accept Revisions To The Employee Handbook - Ms. Stamper And Mr. Hudak 5:45-6:00
6. CEO/Staff Reports:
 - a. CEO Report And Staff Reports- Ms. Kurtzman, Ms. Bratton, Ms. Garcia 6:00-6:20
- ACTION 7. Adjourn to Closed Session For The Purpose Of:
Under Government Code Sections 54957 and 54957.6 for the following purposes:
PUBLIC EMPLOYEE PERFORMANCE EVALUATION (54957) Title: Chief Executive Officer of Sequoia Healthcare District. CONFERENCE WITH LABOR NEGOTIATOR (54957.6) Agency Designated Representative: Jerry Shefren, Board President, Unrepresented Employee: Chief Executive Officer, Sequoia Healthcare District
- ACTION 8. Reconvene To Open Session: Announce Any Reportable Action Taken In Closed Session.
- ACTION 9. Adjourn
The Next Regular Meeting Of The Board Of Directors Of Sequoia Healthcare District is Scheduled For 4:30 PM, Wednesday, February 1, 2023, District Conference Room, 525 Veterans Blvd., Redwood City, CA 94063

Jerry Shefren, MD, Board President

*Public comment will be taken for each agenda item prior to the board’s consideration on that item.

Any writings or documents provided to a majority of the Board of Directors regarding any item on this agenda will be made available for public inspection at the District office, 525 Veterans Blvd., Redwood City, CA, during normal business hours. Please telephone 650-421-2155 ext 201 to arrange an appointment.

If you are an individual with a disability and need an accommodation to participate in this meeting, please contact Sequoia Healthcare District at least 48-hours in advance at 650-421-2155 ext 201.

**MINUTES OF SPECIAL MEETING
BOARD OF DIRECTORS
SEQUOIA HEALTHCARE DISTRICT
September 28, 2022
Conference Room, 525 Veterans Boulevard
Redwood City, CA 94063**

<u>Directors Present</u> Director Garb Director Griffin Director Martinez Director Nayfack Director Shefren	<u>Directors Excused</u>	<u>Also Present</u> Pamela Kurtzman, CEO Mr. Hudak, Legal Counsel Ms. Stamper, Recorder
<u>1. Call to Order</u> President Shefren called the meeting to order at 4:30PM. Roll call attendance was taken. A quorum was present.		
<u>2. Public Comment/Non-Agenda Items</u> President Shefren asked if there was any public comment on non-agenda items. There was none.		
<u>3. Consent Calendar</u> Motion: To approve consent calendar. By: Director Garb Seconded by: Director Nayfack Vote: Ayes - Garb, Griffin, Martinez, Nayfack, Shefren Nos -- Abstain -- Absent -- Motion Passed: 5-0		
<u>4.a. Consider Richardson & Company LLC Contract For Audit Services For 5 Years Beginning With FY 21-22</u> President Shefren asked if there was public comment on this agenda item. There was none. Brian Nash, Partner, and Ingrid Shepline, Managing Partner, of Richardson & Company LLP discussed their background, vast experience with Special District clients, scope of services to be provided, pricing, and timeline for completing the FY 21-22 Audit. Motion: To approve Richardson & Company LLC as Sequoia Healthcare District Auditors for 5 years beginning with FY 2021-2022. By: Director Nayfack Seconded by: Director Garb Vote: Ayes - Garb, Griffin, Martinez, Nayfack, Shefren Nos -- Abstain -- Absent -- Motion Passed: 5-0		

4.b. Update By San Mateo Medical Center Dental Clinic On Year-End Outcomes

President Shefren asked if there was public comment on this agenda item. There was none.

Dr. Miriam Hashoush gave a brief report on the dental clinic's office space and services provided, who they serve, current staffing levels, the increase in dental visit data from June 2021 through August 2022, the barriers to client access for services, and their future steps to see more clients and increase staffing. Their staffing challenges have impacted the number of patients they can accommodate, and the waitlist is increasing.

4.c. Update On Dental Access Planning and Discussion Of Pilot Program To Partner With Private Dentists To Increase Access For District Residents

President Shefren asked if there was public comment on this agenda item. There was none.

CEO Kurtzman presented 4 concepts for a private dentist fee-for-service program to increase access to dental services for low-income waitlisted residents at Samaritan House, Ravenswood, San Mateo Medical Center Dental Clinic, and Sonrisas. Due to a shortage of Dental providers accepting DentiCal insurance, the waitlists at these 4 providers has become very large and is expected to grow due to the Medi-Cal expansion for all undocumented residents effective January 2024.

Option 1 - Reimburse dental providers the standard "out of pocket" or uninsured fee for current waitlisted residents. Option 2 - Reimburse dental providers the standard "out of pocket" or uninsured fee for residents with no coverage. Option 3 - Contract with Health Plan of San Mateo to enroll dentists in Denti-Cal and the District pays the difference. Option 4 - Combination of enrolling dentists in Denti-Cal and an initial fee for service until dentist enrollment process is complete.

Directors shared their concerns about SHD handling the billing. The District is not specialized in medical billing, and would take on the burden of being the go between for the private dentists and our 4 partner agencies. Directors would like CEO Kurtzman to do further research and create a concrete business plan. CEO Kurtzman will be meeting with stakeholders the week of October 17th and will refine and submit a formal proposal at a special meeting in late October/early November.

4.d. Consider Grant Request For \$85,000 From Redwood City Together For RCT Youth Initiative

President Shefren asked if there was public comment on this agenda item. There was none.

Director Martinez recused himself from the meeting and left the Zoom.

Rafael Avendano, President of Redwood City Together, gave a presentation regarding the teen bike movement in downtown Redwood City. He stressed the need for ways to channel youth energy into positive outcomes. Redwood City Together along with Redwood City PAL and youth representatives have created a pilot program to support more transition-age youth and their families by linking them to job opportunities, recreation, social services and mentorships. Mr. Avendano requests \$85,000 for the RCT Youth Initiative to support the health and wellbeing of youth in the Redwood City area.

Motion: To approve a grant for up to \$85,000 for the Redwood City Together Youth Initiative.

By: Director Nayfack

Seconded by: Director Garb

Vote: Ayes - Garb, Griffin, Nayfack, Shefren

DRAFT

Nos --
Abstain --
Absent -- Martinez

Motion Passed: 4-0-0-1

Director Martinez was contacted and rejoined the meeting via Zoom.

**4.e. Consider \$50,000 Grant For Joint Proposal
With Dignity Health/Sequoia Hospital To Provide Funds
To Non-Profits That Feed Food Insecure Clients During The Holiday Season**

President Shefren asked if there was public comment on this agenda item. There was none.

Jenny Bratton, Grants and Programs Manager at the District, has been working with Marie Violet of Dignity Health Sequoia Hospital discussing the need for additional food and meal distribution during the holiday season, which typically sees a surge in need. Last year Dignity Health Sequoia Hospital and the District each provided \$50,000 in funding to community nonprofits that feed food insecure clients. Dignity Health Sequoia Hospital would match the District's \$50,000 grant.

Motion: To approve the \$50,000 grant request for the joint proposal with Sequoia Hospital to feed food insecure clients during the holiday season.

By: Director Shefren

Seconded by: Director Nayfack

Vote: Ayes - Garb, Griffin, Martinez, Nayfack, Shefren

Nos --

Abstain --

Absent --

Motion Passed: 5-0

4.f. Director Requests for Future Agenda Items per Board Policy 8.3

Director Nayfack would like to know if district residents are having trouble accessing Planned Parenthood services due to the increased demand caused by anti-abortion legislation in other states.

Directors would like more detailed routine information in the CEO reports.

5. CEO/Staff Reports

57 applicants have applied for the open Director of School Health position. CEO Kurtzman has narrowed it down to 8 applicants that she will interview. A committee consisting of CEO Kurtzman, Ms. Bratton, Mr. Avenano of Redwood City Together, and consultant Joann Sokolov, will conduct second round interviews.

Ms. Bratton is exploring partnerships to provide Sequoia Smart classes. A new District partner, the American Red Cross, will be teaching Disaster Prep and Hands-Only CPR classes at the District offices starting in October.

Ms. Bratton presented a draft annual report and received feedback.

6. Adjourn

DRAFT

Motion: To adjourn the meeting at 7:40PM.

By: Director Nayfack

Seconded by: Director Garb

All in favor

Motion Passed

The next regular meeting of the Board of Directors of Sequoia Healthcare District is scheduled for 4:30 PM, Wednesday, December 7, 2022, District Conference Room, 525 Veterans Blvd., Redwood City, CA.

Respectfully Submitted,

Aaron Nayfack, M.D.,
Secretary

2:22 PM

11/30/22

Accrual Basis

Sequoia Healthcare District
Balance Sheet - by Month
As of October 31, 2022

	Sep 30, 22	Oct 31, 22
ASSETS		
Current Assets		
Checking/Savings		
10150-0 · Cash (WF-MMA)	2,960,312.50	2,960,337.64
10200-0 · Cash (WF)	837,230.53	709,206.50
10250-0 · Cash from Investments	314,916.70	314,916.70
10300-5 · Cash Equivalents	10,528,442.78	10,519,989.78
10350-0 · Schwab Operating Funds Acct#739	19,882,772.01	19,891,471.01
Total Checking/Savings	34,523,674.52	34,395,921.63
Other Current Assets		
10400-0 · Pension Assets-Vanguard	62,291,104.00	62,291,104.00
10500-9 · Pension Contribution Rcvble	24,378,931.00	24,378,931.00
10502-0 · Prepaid Grants	500,000.00	500,000.00
Total Other Current Assets	87,170,035.00	87,170,035.00
Total Current Assets	121,693,709.52	121,565,956.63
Fixed Assets		
12100-6 · Land	138,927.00	138,927.00
12200-6 · Land Improvements	144,158.05	144,158.05
12300-1 · Improvements-Classroom	83,410.44	83,410.44
12300-6 · Buildings	1,249,382.30	1,249,382.30
12300-8 · Building Improvements	547,329.57	547,329.57
12300-9 · Tenant Improvements	215,113.29	215,113.29
12400-6 · Equipment	76,222.26	76,222.26
12400-7 · Furniture	28,259.91	28,259.91
12500-6 · Accumulated Depreciation	-2,177,413.13	-2,181,287.96
Total Fixed Assets	305,389.69	301,514.86
TOTAL ASSETS	121,999,099.21	121,867,471.49
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
20001-0 · Deposit Payable	3,565.00	3,565.00
20100-0 · Grants Payable	2,034,000.00	2,034,000.00
20200-0 · HSI Grants Payable	206,566.71	206,566.71
Total Other Current Liabilities	2,244,131.71	2,244,131.71
Total Current Liabilities	2,244,131.71	2,244,131.71
Long Term Liabilities		
22000-1 · Pension Contribution Payable	22,485,573.00	22,485,573.00
25000-0 · Deferred inflows from pension	1,893,358.00	1,893,358.00
Total Long Term Liabilities	24,378,931.00	24,378,931.00
Total Liabilities	26,623,062.71	26,623,062.71
Equity		

2:22 PM
11/30/22
Accrual Basis

Sequoia Healthcare District
Balance Sheet - by Month
As of October 31, 2022

	<u>Sep 30, 22</u>	<u>Oct 31, 22</u>
32000 · Retained Earnings	35,519,985.86	35,519,985.86
39004-1 · Invested in Capital Assets	516,195.00	516,195.00
39004-3 · Fiduciary Fund Balance	61,011,405.00	61,011,405.00
Net Income	-1,671,549.36	-1,803,177.08
Total Equity	<u>95,376,036.50</u>	<u>95,244,408.78</u>
TOTAL LIABILITIES & EQUITY	<u>121,999,099.21</u>	<u>121,867,471.49</u>

2:23 PM
11/30/22
Accrual Basis

Sequoia Healthcare District
Profit & Loss - by Month
September through October 2022

	Sep 22	Oct 22	TOTAL
Income			
40300 · Rental Income	800.00	800.00	1,600.00
40400 · Tax Revenue	55,638.49	525,131.10	580,769.59
40500 · Investment Income	-374,885.00	246.00	-374,639.00
40600 · Interest Income	37.89	33.99	71.88
Total Income	-318,408.62	526,211.09	207,802.47
Gross Profit	-318,408.62	526,211.09	207,802.47
Expense			
60100-1 · Admin. Expense	6,592.54	3,032.28	9,624.82
60101-1 · Administration Payroll	35,788.98	24,643.24	60,432.22
60300-2 · Employee Health Insurance	8,069.00	6,988.59	15,057.59
60350 · Employee Retirement Benefit	3,409.65	1,804.70	5,214.35
60400-1 · Investment Fees	0.00	9,607.16	9,607.16
60500-1 · Office Supplies/Equip Maint	1,025.82	425.25	1,451.07
60600-1 · Purchase Services	0.00	2,500.00	2,500.00
60700-1 · Board Expense	1,729.33	0.00	1,729.33
60700-2 · Association/Membership Dues	225.00	0.00	225.00
60750-2 · Web Site/IT	3,745.16	2,905.53	6,650.69
60800-1 · Insurance	1,543.00	-600.50	942.50
60810-1 · Legal Fees	630.00	-4,841.75	-4,211.75
65200-1 · Maintenance	1,190.00	3,239.53	4,429.53
65400-1 · Utilities	2,506.70	1,881.21	4,387.91
65500-1 · Depreciation Expense	3,874.83	3,874.83	7,749.66
70201-1 · Grant Admin Payroll	22,567.70	15,045.15	37,612.85
70350-1 · Samaritan House	0.00	325,900.00	325,900.00
70400-1 · Other Grants	5,000.00	0.00	5,000.00
70550-1 · San Mateo Medical Center	0.00	160,000.00	160,000.00
70566-1 · Pen Volunteers LYFT program	1,809.63	1,834.27	3,643.90
70568-1 · Sonrisas	0.00	82,756.00	82,756.00
70706-1 · Sequoia Safe (+HeartSafe)	810.49	-48.84	761.65
70707-1 · Sequoia Strong	2,404.63	1.03	2,405.66
70707-2 · Sequoia Strong Payroll	9,912.07	6,608.05	16,520.12
70800-1 · School Health Expense	1,436.46	0.00	1,436.46
70801-1 · School Health Payroll	23,665.80	10,283.08	33,948.88
70802-1 · School Health Grants	90,965.01	0.00	90,965.01
Total Expense	228,901.80	657,838.81	886,740.61
Net Income	<u>-547,310.42</u>	<u>-131,627.72</u>	<u>-678,938.14</u>

**Month to Month Budget
September - October 2022**

	September Budget	September Actual	October Budget	October Actual	4 Month Total Budget	4 Month Total Actual	12 Month (July - June) Total Budget
Income							
Rental Income	800.00	800.00	800.00	800.00	3,200.00	3,200.00	9,600.00
Tax Revenue	0.00	55,638.49	500,000.00	525,131.10	640,000.00	677,050.83	14,000,000.00
Investment Income	7,000.00	(374,885.00)	7,000.00	246.00	28,000.00	(423,701.00)	80,000.00
Interest Income	75.00	37.89	75.00	33.99	300.00	282.21	800.00
2021 Dignity Settlement Agrmt	0.00	0.00	0.00	0.00	0.00	0.00	510,000.00
Pension Income	0.00	0.00	0.00	0.00	0.00	0.00	2,200,000.00
Total Income	7,875.00	(318,408.62)	507,875.00	526,211.09	671,500.00	256,832.04	16,800,400.00
Expenses							
Admin. Expense	2,500.00	6,592.54	2,400.00	3,032.28	11,500.00	15,756.22	28,000.00
Admin. Payroll	25,500.00	35,788.98	40,000.00	24,643.24	120,500.00	108,609.68	390,500.00
Board Health Insurance	1,600.00	0.00	1,600.00	0.00	6,400.00	0.00	20,000.00
Employee Health Insurance	10,000.00	8,069.00	10,000.00	6,988.59	38,000.00	31,499.33	120,000.00
Employee Retirement Benefit	2,250.00	3,409.65	2,250.00	1,804.70	9,146.00	9,932.93	28,000.00
Investment Fees	0.00	0.00	7,500.00	9,607.16	7,500.00	9,607.16	30,400.00
Office Supplies/Equip Maint	750.00	1,025.82	750.00	425.25	3,000.00	2,991.87	9,000.00
Purchased Services	15,000.00	0.00	15,000.00	2,500.00	32,800.00	3,850.00	100,000.00
Accounting fees	0.00	0.00	8,000.00	0.00	8,000.00	0.00	48,000.00
Board Expense	2,000.00	1,729.33	2,000.00	0.00	6,500.00	4,079.33	15,000.00
Associations/Membership	25,000.00	225.00	2,700.00	0.00	37,700.00	8,336.00	38,000.00
Communications	0.00	0.00	500.00	0.00	500.00	(5,000.00)	45,700.00
Public Relations	0.00	0.00	200.00	0.00	4,100.00	3,853.00	4,300.00
Web Site/IT	7,000.00	3,745.16	5,000.00	2,905.53	24,000.00	15,792.75	52,000.00
Pension Plan Expense	0.00	0.00	0.00	0.00	0.00	0.00	2,200,000.00
Insurance/D&O/Liability/WC	0.00	1,543.00	0.00	(600.50)	40,000.00	40,355.91	40,000.00
Election fees	0.00	0.00	0.00	0.00	0.00	0.00	250,000.00
LAFCO fees	0.00	0.00	0.00	0.00	15,450.00	12,215.00	15,450.00
Legal Fees	4,500.00	630.00	4,500.00	(4,841.75)	18,000.00	(3,401.75)	50,000.00
Bank Fees	0.00	0.00	0.00	0.00	0.00	0.00	100.00
Maintenance	2,000.00	1,190.00	2,000.00	3,239.53	9,000.00	8,137.81	25,000.00
Utilities	2,500.00	2,506.70	2,000.00	1,881.21	9,000.00	8,779.42	25,000.00
Property Insurance	0.00	0.00	0.00	0.00	3,900.00	5,656.58	3,900.00
Depreciation	3,916.00	3,874.83	3,916.00	3,874.83	15,672.00	15,499.32	47,000.00
Grant Admin Expenses	100.00	0.00	1,000.00	0.00	1,300.00	11.50	30,000.00
Grant Admin Payroll	10,000.00	22,567.70	10,000.00	15,045.15	60,000.00	67,607.72	190,000.00
Samaritan House Grant	0.00	0.00	316,887.50	325,900.00	316,887.50	325,900.00	1,267,550.00
Other Grants	1,000.00	5,000.00	1,000.00	0.00	3,000.00	5,300.00	10,000.00
San Mateo Medical Ctr. Dental Cli	0.00	0.00	0.00	160,000.00	160,000.00	160,000.00	160,000.00
Ravenswood Family Health Ctr	0.00	0.00	0.00	0.00	500,000.00	500,000.00	1,000,000.00
LifeMoves LVN	0.00	0.00	0.00	0.00	0.00	0.00	127,500.00
Pen Volunteers LYFT program	5,000.00	1,809.63	5,000.00	1,834.27	20,000.00	5,591.18	60,000.00
BGCP Psychotherapist	0.00	0.00	0.00	0.00	46,585.00	46,585.00	93,170.00
Sonrisas	0.00	0.00	89,275.00	82,756.00	89,275.00	82,756.00	357,100.00
First 5 SMC	0.00	0.00	0.00	0.00	0.00	0.00	396,830.00
Future Impact Funds	93,000.00	0.00	0.00	0.00	93,000.00	0.00	277,900.00
Covid-19 Emergency Funds	0.00	0.00	0.00	0.00	0.00	(5,000.00)	0.00
Community Grants Program	0.00	0.00	0.00	0.00	0.00	0.00	4,050,000.00
Sequoia Smart	4,200.00	0.00	4,200.00	0.00	16,800.00	0.00	50,000.00
Sequoia Safe (+HeartSafe)	2,500.00	810.49	5,000.00	(48.84)	50,000.00	41,641.68	150,000.00
Sequoia Strong Program	11,200.00	12,316.70	14,800.00	6,609.08	48,400.00	33,530.33	145,000.00
School Health Program	21,625.00	116,067.27	168,325.00	10,283.08	624,300.00	499,535.15	4,850,000.00
Total Expenses	253,141.00	228,901.80	725,803.50	657,838.81	2,450,215.50	2,060,009.12	16,800,400.00
Net	(245,266.00)	(547,310.42)	(217,928.50)	(131,627.72)	(1,778,715.50)	(1,803,177.08)	0.00



**SAN MATEO
COUNTY HEALTH**

2000 Alameda de las Pulgas
San Mateo, CA 94403
smchealth.org



Pamela Kurtzman, MPH
Chief Executive Officer
Sequoia Health Care District
525 Veterans Blvd.
Redwood City, CA 94063

November 14, 2022

Dear Pamela,

Thanks in advance for asking your board to consider contributing \$25,000 to our project to conduct a planning process in CY 2023 that will generate a unified plan for improving social-emotional wellness for children and youth in San Mateo County. As we have discussed, we would also be eager to engage your staff in the planning. We have attached the scope of work we are sharing with potential consultants. The total cost will not exceed \$200,000, most of which we will be able to fund from County sources along with the County Office of Education. We are asking each of the health care districts for \$25,000.

As you know, San Mateo County’s school-age children, youth and the caregivers who support them face mental health and behavioral health challenges that are compounded by long-standing inequities experienced acutely in specific places and by specific populations. Addressing the complex multi-faceted and multi-system challenges require a holistic approach including shared understanding that aligns strategies, prioritizes collaboration, and embraces accountability to achieve equity. While there are existing initiatives and individual projects in place to achieve better systems and services for our young people, San Mateo County lacks a unified and aligned collaborative structure that can develop, communicate, and hold a shared vision and accountability on behalf of children and youth throughout and across the county.

The project will map intersecting initiatives and create a more defined collaborative infrastructure to help assess gaps and develop a plan of action to achieve access to equitable social-emotional wellness for children and youth. This unified plan is also expected to position the partners favorably to act on state and local funding opportunities.

Let us know if you need additional information.

Sincerely,

DocuSigned by:

5EA0DB8B58304D3...
Louise F. Rogers
Chief, Health

DocuSigned by:

40E1FA24861F4DD...
Nancy Magee
San Mateo County Superintendent of Schools

cc Lisa Mancini, BHRS Director



Quotes for Consultant Services Requested

San Mateo County Collaborative for Children and Youth: Improving Mental Wellness and Achieving Equity

We are requesting a cover letter, resumes and a rate schedule for consultant groups interested in providing the following services. There will be a phone interview for those whose cover letter and resumes demonstrate relevant experience. The ideal consultant is familiar with State of California initiatives related to child/youth mental health and wellness, and the underlying drivers for challenges including racial and socio-economic disparities and has previous experience working with San Mateo and/or California child/youth focused stakeholders in the mental health, substance use, education or health and wellness arenas on system strategic planning problems and activities similar to those we have planned. Please provide the cover letter, resumes and rate schedules to _____ by ____ date.

Overview

San Mateo County's school-age children, youth and the caregivers who support them face mental health and behavioral health challenges that are compounded by long-standing inequities experienced acutely in specific places and by specific populations. Addressing the complex multi-faceted and multi-system challenges require a holistic approach including shared understanding that aligns strategies, prioritizes collaboration, and embraces accountability to achieve equity. While there are existing initiatives and individual projects in place to achieve better systems and services for our young people, San Mateo County lacks a unified and aligned collaborative structure that can develop, communicate, and hold a shared vision and accountability on behalf of children and youth throughout and across the county.

The purpose of this project is to map intersecting initiatives and create a more defined collaborative infrastructure to help assess gaps and develop a plan of action to achieve access to equitable social-emotional wellness for children and youth. This unified plan is expected to position the partners favorably to act on state and local funding opportunities.

This memo outlines the key steps and milestones for a Lead Team to guide the overall project and four Workgroups that will contribute to a plan of action. We understand the project requires an iterative approach and appreciate the need to incorporate new ideas as the project progresses and unfolds.

❖ Launch Announcement: October 2022--Completed

An announcement of work to develop an equity-focused mental wellness plan for our county's school and transition age youth (up to age 21). The project was announced on October 27, 2022, at the Coalition for Safe Schools & Communities Leadership Breakfast to build support and excitement for the work ahead among diverse leaders in the community.

❖ **Lead Team: January 2023 and ongoing**

A small group of key leaders (Lead Team) with representation on the Coalition for Safe Schools and Communities Steering Committee will provide ongoing guidance and oversight to the project. The County Superintendent of Schools, the Director of the Health Care Services Agency, the Director of San Mateo County Behavioral Health and Recovery Services, and the CEO of the Health Plan of San Mateo are proposed as members, at a minimum. In addition, Lead Team members will identify other staff from their agency to lead or participate in the Workgroups. The Lead Team will kick off its work by drafting an overarching vision, refining the proposed timeline, and outlining a plan to recruit Workgroup members. The Lead Team will meet monthly to guide the work with the support of the consultant team.

Workgroup Structure: March – November 2023

Consultant will support the development and ongoing work of four Workgroups to be recruited from child-serving organizations and agencies as well as existing collaboratives and initiatives relevant to the project including those with an equity focus on underserved populations. Workgroups will be led by Lead Team members or their designated senior staff. Workgroups will be organized by age cohorts and will meet 6-8 times with support from consultant team: Group #1 – elementary age; Group #2 – middle school age; Group #3 – high school age; Group #4 – transition age).

Consultant Major Activities:

- Support the Lead Team in guiding and overseeing the project.
- Develop the Workgroups, identify and secure members, convene regular meetings, develop and implement a work plan over 6-8 meetings for each Workgroup.
- Identify and inventory the available data and reports and identify gaps to inform the Workgroups, in particular to surface information needed to develop a plan that addresses equity.
- Inventory and map existing collaboratives and initiatives across sectors and ages.
- Offer ongoing outreach and communication to other initiatives and stakeholders to gain buy-in and gather ideas.
- Conduct listening sessions with youth and parents as well as other stakeholders.
- Summarize the Workgroups to develop a shared understanding of the root causes of poor outcomes, leading gaps, missing linkages to align priorities and address equity.
- Develop the final design and plan for launch of the collaborative structure for Lead Team discussion and possible refinement.
- Participate in three meetings to update the Safe Schools and Communities Coalition (Coalition) on progress, reflect on the Workgroup findings, develop shared outcomes, and adopt a new collaborative structure.

TIMELINE

Coalition for Safe Schools & Communities

- ✓ Coalition for Safe Schools & Communities Leadership Breakfast Event Launch October 27, 2022
- ✓ Meet three times in 2023 to:
 - Develop shared outcomes and strategies
 - Discuss new collaborative structure to oversee progress
 - Adopt final design and launch plan for collaborative

Lead Team January – November 2023

- ✓ Develop DRAFT Vision Statement
- ✓ Refine Project Timeline
- ✓ Recruit Workgroups
- ✓ Meet monthly to offer guidance, reflect on Workgroup findings, vet collaborative design and plan for adoption

Workgroups February – November 2023

- ✓ February - March: Invitation, Meeting timeline and Workgroups structure
- ✓ April: Workgroups launch and meet 6-8 times each
- ✓ Feb - May: Inventory data and assessments to identify gaps
- ✓ Feb - May: Map initiatives and collaboratives across sectors and ages
- ✓ May - July: Conduct listening sessions
- ✓ August: Gain shared understanding of root causes, gaps, and missing linkages
- ✓ September: Vet initial concepts for shared outcomes and strategies to address findings
- ✓ October - November: Inform collaborative structure to oversee progress
- ✓ Ongoing: Outreach and communication to stakeholders and initiatives

Specific Activities

Project Activity

1. LEAD TEAM

- a. Schedule, prepare agendas and facilitate 10 monthly meetings of the Lead Team to guide overall direction of the project (virtual meetings) by two consultants

2. WORKGROUPS

- a. Support the recruitment, meeting timeline, work plan and meeting agendas for four Workgroups to meet for 90 minutes over 6-8 meetings for each workgroup (Group #1 – elementary age; Group #2 – middle school age; Group #3 – high school age; Group #4 – transition age).
- b. Consultants will support the Workgroups through a process to identify gaps, map intersecting initiatives and develop a plan of action for school-aged and transition-aged youth.

3. RESEARCH AND DATA COLLECTION INCLUDING LISTENING SESSIONS

- a. Identify and inventory the available data and reports and identify gaps, in particular information needed to develop a plan that addresses equity and underserved populations.
- a. Inventory and map existing collaboratives and initiatives across sectors and ages.
- b. Offer ongoing outreach and communication to other initiatives and stakeholders to gain buy-in and gather ideas.
- c. Conduct listening sessions with youth and parents and grass-roots stakeholders.
- d. Organize this research and data into advance materials for Workgroup meetings and Coalition meetings

4. DEVELOP FUTURE COLLABORATIVE STRUCTURE (work to be accomplished with the Lead Team and Coalition following Workgroup conclusion)

- a. Develop shared outcomes, strategies, and indicators to address the findings and measure progress.
- b. Gain a shared understanding of the root causes of poor

- outcomes, leading gaps, missing linkages to align priorities and measure progress across initiatives.
- c. Develop the final design and plan for launch of the collaborative structure.
 - d. Lead Team will vet proposals and present at Coalition in person meetings

UPDATES TO COALITION FOR SAFE SCHOOLS AND COMMUNITIES

- a. Support three, two-hour meetings in-person over the course of the project with the Coalition for Safe Schools and Communities to discuss periodic updates, adopting the structure and action plan proposed.

Please Note:

1. All activities include preparation, meeting planning, research, and data collection (when required), meeting facilitation, coordination of meetings, meeting materials development, meeting follow-up, summaries of all meetings by consultant team members.
2. Client will only be billed for actual hours of consultation services provided up to the amount of the approved budget.
3. Invoices will be submitted monthly by major task.



Healthy Beginnings Initiative

Sequoia Healthcare District Report July 1, 2021 – June 30, 2022

First 5 San Mateo County is pleased to submit this report to Sequoia Healthcare District (SHD) covering the second full-year of our three-year partnership, which intends to meet two areas of critical need for young children, their families, and those that serve them: children at risk of or with identified special needs, and those impacted by adverse childhood experiences (ACEs).

Over the course of this year, though the global pandemic continued, the ability to return to some pre-pandemic activities has increased for most. However, the scars of the hardship endured by many have persisted and are still being felt deeply by many. These prolonged impacts are significant and real, and we at First 5 SMC feel fortunate to have been well-positioned with collaborative funding from SHD and excellent partner agencies providing services to help mitigate these challenges.

Integrated Systems for Children with Special Needs

First 5 SMCs history supporting children with or at risk of special needs and their families dates back more than 15 years. With enhanced funding from SHD and other funders including The David and Lucile Packard Foundation and Peninsula Health Care District, the impact, visibility and reach of the work has grown.

Two years ago, two sister projects of First 5 merged to become our Integrated System for Children with Special Needs. The result was funding for AbilityPath as the lead grantee along with six subcontractors in order to promote a streamlined continuum of care. This initiative supports greater coordination between the components, which includes a fully implemented Help Me Grow model and wrap-around supports to fill gaps in services.

Annual Service Deliverables

1. Outreach to 250 community service providers and 500 parents of young children about the Help Me Grow San Mateo County (HMG) system.
In SHD during this funding term, our HMG SMC outreach efforts reached 267 community service providers and 565 parents/families. Although outreach efforts were minimal during the first half of the fiscal year due to temporarily reduced staffing, the increased ability to support in-person outreach in the Spring paired with more stable staffing helped to ensure that targets were met. Additionally, our website analytics show that a total of 7,195 users accessed the HMG SMC website within the cities represented within SHD during this funding period.
2. Conduct office-based training for five pediatric and family practices serving SHD children to promote best practices for developmental promotion, surveillance, and screenings.
During fiscal year 2021-22, our HMG SMC Healthcare Provider Liaison Team housed within Stanford Children's Health's Department of Community and Government Relations supported three SHD-serving practices with ongoing technical assistance and tailored supports including Regional Center referral strategies and the development of a provider referral grid. Seven other SHD-serving practices

received the HMG Quarterly Newsletter. The practices receiving technical assistance and tailored supports during this funding term serve approximately 17,000 pediatric patients, 6,500 of which are 0 to 5 years old.

3. **Screen 200 unduplicated children using the ASQ-3 and ASQ-SE.**

As noted in previous reports, while HMG SMC offers an online screening portal and facilitates scoring and communication following these screenings, our focus has not been to promote screening in this venue as a first choice. As our work and best practices in the field have evolved, so has a strong push to promote developmental screening within a child's medical home, with their primary healthcare provider. This aligns with the goals of our HMG SMC Healthcare Provider Outreach, noted above.

Even with the incentives and encouragement for medical homes to screen, HMG SMC completed 307 screenings this past year for 157 children. Many of the children received both a developmental screening via the Ages and Stages Questionnaire-3 (ASQ-3) and also a social-emotional screening with the Ages and Stages Questionnaire: Social Emotional-2(ASQ:SE-2).

4. **Serve 90 families through the HMG call center and online supports.**

As you may recall, the HMG Call Center, or centralized access point, is a resource dedicated to supporting parents of young children and the providers who serve them with high quality, up-to-date information about child development, including addressing any concerns or questions, and providing linkages to necessary services to address these needs. The HMG SMC bilingual website provides information about our local model and can be viewed here: <https://helpmegrowsmc.org/>.

The Call Center offers contact via phone, text, email, or faxed referrals from providers and parents and all staff are bilingual in English and Spanish. Connection to Help Me Grow offers a continuum of care for families, since the Family Resource Center (FRC) for families of children with special needs is also run through AbilityPath. Services range from basic resource calls to families with concerns or questions about their child's development, as well as contacts with families who may have a young child with a known diagnosis who have questions about access or services.

During this past year, 256 unduplicated families in SHD received 1-on-1 support from a care coordinator through the Help Me Grow Call Center or Family Resource Center. These families received a total of 1,993 service contacts during the same timeframe.

5. **Provide care coordination for 250 unduplicated families of young children in SHD.**

With the new streamlined HMG model, the number of contacts to the HMG Call Center, which are noted under the previous deliverable, and care coordination are synonymous. HMG SMC provided care coordination to 256 families during this funding term.

Partnerships

In addition to the deliverables noted above, the subcontracted partners on this Initiative contributed valuable services during this time period to SHC families, which warranted inclusion in this report:

Life Steps Foundation

- 102 families attended the Grow With Me program, parent-child groups that promotes and offers developmental screening

Legal Aid Society of SMC

- 27 families within the District boundaries were provided free legal services for issues regarding their children with diagnosed or suspected special needs

StarVista

- StarVista has supported at least 16 clients with targeted parent-child groups focused on mental health or parental stress

Annual Systems Deliverables

1. Ensure that child- and family-serving systems leaders are informed and have input into the implementation and continuous improvement of the HMG system via bi-annual Leadership Advisory Team meetings.

As noted in previous reports, while we continue to ensure that leaders of our local child- and family-serving systems are informed about HMG SMC, we shifted the mechanism for achieving this outcome. The F5SMC Commission, which includes the top leadership of SMCOE, SMC Health, SMC Human Services Agency, and a representative from the Board of Supervisors as well as other notable and well-respected professionals including two local pediatricians, receives routine updates on the progress of our Integrated System for Children with Special Needs.

Additionally, Help Me Grow SMC leadership has continued to meet every other month with the leadership of Family Health Services and the SMC Clinics to coordinate service delivery and troubleshoot systems-level challenges on behalf of the children and families that we collectively serve.

2. Convene local pediatricians six times a year to identify opportunities to further efforts to promote universal screening and to advise on all health provider outreach efforts.

The HMG Physician Advisory Group has continued to meet regularly, although meetings have been moved from every other month to quarterly. Under the strong leadership of Dr. Neel Patel, PAMF San Carlos pediatrician, former F5SMC Commissioner, and HMG SMC Physician Champion. This group includes physicians from various practices countywide, including the SMC Clinics, Stanford Children's Health, Gardner Packard, PAMF, Ravenswood FHN, Golden Gate Regional Center, and others. The group continues to advise on the HMG health provider outreach strategy, facilitate the dissemination of resources within their own systems, and encourage trainings on developmental screening. Over the past year, the group has been focusing energy on better understanding the process and barriers to effective referrals for speech services due to particular challenges with this specialty service.

3. Use regular Community Provider Networking meetings to promote use of the HMG Call Center, update the resource database, and align efforts to support early identification and linkage for families.

The HMG SMC team conducted two Community Networking Meeting over the course of the most recent funding year. The first of the meetings focused on the topic of Early Identification and Intervention During COVID, while the second meeting was centered on the topic of Hope, Healing, and Resilience in Pandemic Times, as presented by Julie Kurtz, CEO of the Center for Optimal Brain Integration. Nearly 60 community-based service providers attended the combined meetings.

4. Facilitate monthly multidisciplinary case conferences for children with complex circumstances or conditions.

The HMG Multidisciplinary Roundtable, a monthly multidisciplinary case conference model for children with complex circumstances or conditions, has continued to convene monthly during the reporting term, facilitated by Stanford Children's Health Developmental Behavioral Pediatrics Department in partnership with many other

community stakeholders. The intention of this group is not only to focus on coordination of the individual cases, but to elevate persistent and 'sticky' barriers that continue to inhibit children receiving services that support their optimal development. During this funding term, 21 children residing in SHD were served through this model.

Early Childhood Mental Health Systems

As you may recall, the contribution from SHD in the area of early childhood mental health is targeted to address the impacts of adverse childhood experiences (ACEs), or trauma, on children and families and the providers who serve them. Specifically, the Trauma- and Resiliency-Informed Systems Initiative (TRISI) led by F5SMC and co-funded through local Mental Health Services Act dollars alongside SHD, focuses on supporting child- and family-serving agencies to adopt trauma-informed practices and policies. The goals of this effort are to (1) ensure that the agencies designed to support families do so in a way that promotes healing for children and families and reduces re-traumatization and (2) support the experience of staff within these agencies with internal policies and practices that bolster their ability to reduce and mitigate trauma in a healthy way.

In partnership with our team of consultants who serve the critical functions of initiative design, cohort facilitation, organizational coaching, and assessment administration, First 5 SMC continues to support local child- and family-serving agencies to deepen their internal practices to promote healing and integrate trauma-informed organizational practices through a Trauma-Informed Organizational Practices Assessment and a paired cross-agency cohort and individualized coaching offering.

Through FY 2021-22, our team continued to support the initial round of participating agencies (TRISI 1.0) with monthly multi-agency cohort meetings and individualized agency coaching sessions throughout this funding term, though cohorts shifted from monthly to quarterly after January 2022.

The second half of this year was largely dedicated to designing the launch of TRISI 2.0, a similar model focused on three of the largest public child- and family-serving agencies within the County. This coming fiscal year, SMC Health: Behavioral Health and Recovery Services, Child and Family Services within County Health and Human Services, and SMC Office of Education will be embarking on this journey with our collective guidance.

Annual Service Deliverables

1. Train 10 agencies serving SHD families on trauma, its impacts, and practices of trauma-informed organizations.

As noted above, the primary focus of our trauma-related work has been inward-facing; looking at our network of child- and family-serving agencies countywide to promote trauma-informed organizational practices before focusing on supporting clients themselves. In this vein, we offered two trainings in early 2021 dedicated to this topic and used the opportunity of learning about our Trauma-Informed Organizations Assessment Tool as the hook, or opportunity to engage agencies on this issue. Thirteen local agencies that serve children and families within SHD attended one or both of these sessions, exceeding the original goal of 10.

While we anticipate offering similar trainings (as those noted above) to the organizations that partner with us to roll this effort out internally, we do not see our work at this time as primarily focused on broad training for multiple agencies on trauma and its impacts.

2. Support five agencies serving SHD families to conduct trauma-informed organization self-assessments.

Similar to the previous deliverable, the assessment phase of this process for our first cohort took place in early 2021 and helped to launch the deeper opportunity to join the learning cohort and receive individualized coaching. At that time, the TIO Assessment Tool was completed by eight agencies countywide and 351 staff members within these agencies collectively. Seven of these eight agencies serve residents of SHD. As with the previous deliverable, we anticipate supporting another round of TIO assessments with our three large target agencies in the coming year.

3. **Provide intensive coaching and/or technical assistance to two organizations serving SHD families.**

As noted in the previous report, First 5 SMC offered the opportunity to deepen trauma-informed organizational practices through multi-agency cohorts, or learning communities, paired with individualized agency-specific coaching. Six agencies, all with a presence in SHD, have continued to be active participants in the TRISI 1.0 cohort and coaching components through this funding term. The summary of the evaluation of the first round of this work is included in this report as an attachment.

Annual Systems Deliverables

1. **Moderate, curate and promote the use of a local online platform for information and resources to further trauma-informed systems and service delivery.**

First 5 SMC continues to serve as the moderator of the San Mateo County PACEs Connection Network. PACEs Connection is an international hub for sharing information about ACEs and trauma. The San Mateo County subgroup is curated by the F5SMC Communications Team and other members who contribute content. The platform also includes functionality to promote local events focused on trauma and its impacts.

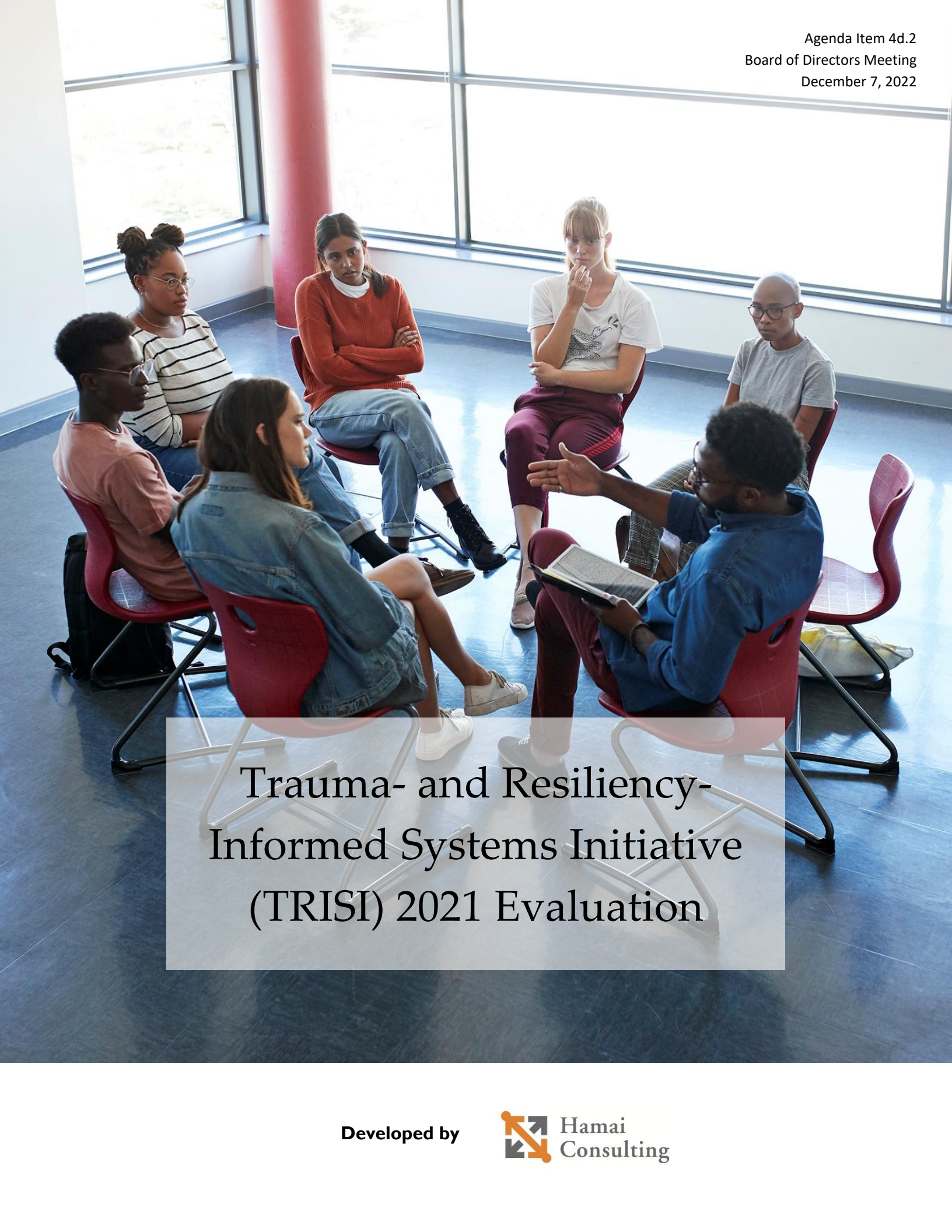
2. **Link to other local, regional, and statewide efforts focused on elevating trauma- and resiliency-informed issues.**

Our efforts to align with local, regional and statewide trauma- and resiliency-informed issues continued throughout this funding term. We see this work as essential to ensuring nonduplication, magnifying opportunities, and communicating to our target populations. Linkages are made through a variety of means. F5SMC staff and TRISI consultants are deeply engaged with other trauma-focused efforts locally and across the country. A core deliverable for Hamai Consulting in their role as Initiative Design Consultant has been to provide a monthly report of these efforts so that we can learn or connect to them over time. Though the monthly report of these activities ended in December of 2021, our team continues to track and connect to efforts as necessary.

3. **Support the use of common definitions around trauma and resiliency to better align efforts and promote awareness of trauma and its impacts.**

As touched on in the response above, alignment of efforts is critical and essential in building a cohesive message about ACEs, trauma, and resiliency. We have noted this in previous reports and it remains true; experts in the field have dedicated time and energy to the goal of creating common definitions and terms, an area which F5SMC doesn't consider ourselves a leader. For example, we do follow the latest trends regarding the use of the term "resilience", its evolution, and interpretation, to help guide our understanding and use of such terminology.

As always, we feel so fortunate to have such a meaningful partnership with Sequoia Healthcare District to support these two expansive and significant investments for young children in the District and across San Mateo County. We speak on behalf of the providers in our network who also benefit from your contributions. We look forward to the continued partnership and to celebrating our progress .



Trauma- and Resiliency-
Informed Systems Initiative
(TRISI) 2021 Evaluation

Developed by



Background and Methods

In December 2021, Hamai Consulting created an online survey for the purposes of understanding how Trauma- and Resiliency-Informed Systems Initiative (TRISI) cohort members have implemented trauma-informed and resiliency-building practices in their organizations, and to elicit suggestions for improving TRISI before future sessions begin.

The survey was emailed to 23 cohort members with 2 subsequent reminders. Only 10 members completed the survey: 5 from the Wednesday cohort (small organizations) and 5 from the Friday cohort (larger organizations).

In addition to survey responses, we drew from notes taken at the December cohort meeting when we asked members to provide verbal feedback.

Embodying Voice, Choice, & Empowerment

Many participants described using their own voice more to speak out and share, and be quiet to give space to others to use their voices. Participants helped to establish more inclusive decision-making processes and feedback systems in their organizations. Below are some quotes that illustrate these themes.

Self

“I have been more open with my voice and choice and inviting my staff to voice their differences.”

“Since joining TRISI, it gave me a little boost of confidence to speak up more -- to share my opinion, experiences, and sometimes vulnerability.”

“I tend to step forward and contribute in discussions and conversations, and as an employee with identities that reflect the dominant culture, I have tried to step back more in an effort to encourage others to step up and participate more. I notice that as a team, we are all generally a bit more cognizant of the power dynamics and do this more.”

Organization

“Choice to participate, feedback/feedforward forms for all staff, feedback loops for new projects and initiatives, speaking truth to power.”

“I have worked with group to have a process for staff to give feedback. It has not really taken off yet, but our core group is working with executive level staff to begin the work there with specific decisions.”

“I have been creating more space for people to exercise choice in how they participate and engage in activities... This program helped to influence our design and implementation of this new feedback/feedforward process to be more people centered and inclusive.”

Embodying Safety

Cohort members took more and better care of themselves at work, noting that they now feel like they “have permission” to do so. Their care for self appears to ripple out into interactions with co-workers and clients, reinforcing that the work begins with the self, wherever one is positioned within the organization. Below are some quotes that illustrate these themes.

Self

“Self-awareness has been my biggest gain. It is in my thoughts in all aspects of my work: planning, finances, discipline, in every place.”

“I have gotten clearer on why I have often felt unsafe at my organization.”

“I pay more attention to my own health and safety as well as with family members and colleagues through the TI perspective lens.”

Organization

“I have incorporated this work with clients. Providing a safe space to be heard and share conversations in a respectful and thoughtful way without judgment. I have also created a training for my volunteers to be trauma-sensitive when engaging out with our community members.”

Embodying “Collaboration & Mutuality”

Growth under this principle was mixed, with participants describing both successes and challenges. Below are some quotes that illustrate the successes and challenges.

Successes

“Our internal cohort for this project has been really collaborative and demonstrated mutual respect. I think this radiates outward to everyone we interact with at work, and in our lives.”

“We are expanding how we engage in feedback and ask for input before making changes, planning for employee engagement, or introducing new policies or processes.”

Challenges

“Me with my direct and indirect reports - have always been successful. Me with colleagues at my level and up - has been a challenge.”

“It’s been a challenge since other leadership is supervised by a different person with different styles of leadership that doesn’t necessarily follow TIC.”

Embodying Trust & Transparency

Themes that emerged in participants’ responses for this principle include: More open communication, creating space and time to listen, and explaining the rationale for decisions, and setting boundaries. Below are some quotes that illustrate these themes.

Self

“I take time to explain decisions and not just work as an authoritarian. Communicate changes.”

“Setting, honoring and reinforcing boundaries. Set context for decision making. Hold 1:1 confidential space, give time for change to marinate with others.”

Organization

“During staff meetings I have promoted among leadership to share reasoning behind changes. Also, as our team is returning to offices and gathering there together, the importance of being transparent and listening to their concerns has been my top priority. Not something that has been followed 100% but I have given feedback on this.”

Embodying Peer Support

Participants described how they became more intentional about building relationships with their peers and advocated for more time for people to engage and connect with each other within the organization. Below are some quotes that illustrate these themes.

Self

“I’ve made more of a conscious effort myself to have healthy relationships with coworkers.”

“Acknowledging that many of our staff have had a particularly tough year, I have tried to extend grace and compassion to allow them space and healing.”

Organization

“Schedule more 1:1s with others, try to build in time for team builders to disrupt business as usual, meditate conflict between parties with room for the ‘pause.’”

“...allow the team to voice their concerns and encourage them to use empathy to reflect on the new team member’s process as she is coming into a well-built team.”

“...we are investing in and facilitating team building activities to support employee engagement and peer connections.”

Embodying Cultural, Historic, and Gender issues

Participants acknowledged and highlighted the synergy between the work of becoming trauma- and resiliency-informed and becoming more equitable and just. Cultural, historic, and gender issues underlie both set of values and efforts. Below are some quotes that illustrate this theme.

“We have elevated this as a concern and been in communication with our new Director of Diversity, (IDEAL as we call it at our organization) and asked her to join our cohort. She has brought TI work to the attention of the leadership and board.”

“DEI Core Curriculum trainings, rethinking the intake process to be more identity-confirming and -specific.”

“We have been engaged in equity training this year and it has been powerful and transformative for all of us. We have also included our pronouns in our email signatures and been more mindful of accessibility of our materials to diverse stakeholder groups.”

“Our employee newsletter content is more diverse now and highlights the different identities and voices of our community.”

Adapted communication materials, handouts, classes to reach wider public and improve inclusion.

Embodying Policy & Implementation

Making policy change requires substantial organizational shifts and one that typically does not occur in the early stages of becoming trauma informed. Yet, several participants reported changes in organization policies or documentation that started or finished during the TRISI.

Below are some quotes that illustrate these changes.

“We are working on handbooks for employees, and I am working on collaboration instead of a formal documentation process.”

“Wellness PTO days over December holiday time, staff wellness sub-group.”

“I have communicated with HR and other teams about the experience of secondary trauma for our client-facing staff and taught about self-care.

“I am currently working on all my policy documents to change language for inclusivity and equity. It’s been a great eye opening. Although I had already identified the need for this in the prior months due to other trainings, being part of this cohort pushed me to get started. It’s been great to know that our documents will be read differently and will have a tone that will support TI principles.”

“We added DEI job responsibilities to all job descriptions which included self-care and wellness practices.”

Feedback on TRISI Design and Implementation



Helpful

Assessment

- “The assessment was helpful as it gave me a deeper understanding of all the levels of TI. Assessing our organization and seeing where we fall short or where we carry our strengths were good to evaluate.”

Cohorts

- Wellness package given to everyone.
- Being with other organizations in the cohorts. “The connects and understanding with my peers of our struggles and the honesty. The authentic, reflective time was super valuable – it’s the most profound way to learn.”
- Topics/content for each session.
- Presentations, videos, and other materials.
- Meeting structure and circle process. “I loved the shift from our normal way of operating in meetings to the cohort format. I think the circle format was particularly effective, the grounding exercises, and the prompts for discussion.”
- Modeling TI practices in cohort sessions.
- Opportunities for reflection and mindfulness.
- Breakout rooms by organization (time to digest concepts together and brainstorm relevant applications).



Least Helpful

Assessment

- Challenges with getting full participation
- Delay in getting back the results
- Difficult to understand
“The assessment was least helpful - design was not tailored to our organization and didn’t produce meaningful data. It would have helped if assessors understood our organizational structure and what we should get out of it – it didn’t address subcultures, only have the big picture and it lacked details. It was not well-received because of the design and needed more applicable insight.”

Cohorts

- Too busy to take advantage of the materials.
- Variation in helpfulness of materials.
- Goal setting happened too soon (without enough understanding of the principles).
- Did not leave with concrete actions to move ideas forward.
- Needed more time to further agency workplans and to discuss internal progress in the last few sessions.
- Web activity (some were uncomfortable with it because what they had to authentically share and didn’t feel safe).



Helpful

Coaching

- Homework between sessions
- Resources shared based on what was being discussed

“Speaking to our coach was very important to me. It allowed us to discuss specific needs that we identified. Most important to me in order: monthly cohort meetings, resources shared, coaching”



Least Helpful

Coaching

- Style was different than desired style.
- Not structured enough and with no concrete outcomes.

“From day one I had an itch to want to 'do' and move this to actionable steps, not sure if I got that these past few months, but I want to continue the work because I'm very passionate about it.”

Suggestions for Improvement

- “I think the work is so non-linear and sometimes hard to identify progress. I think calling this out early and often in the process and helping to identify small wins and ways we can communicate progress would be helpful.”
- Combine organizations that have similar goals or focuses together
- Shorter sessions but maybe more frequently.
- “I would like social identity/-ies to be a bigger, more intentional part of TRISI framing and conversations. Especially since trauma is everywhere, yet also compounded for folk with marginalized identities who live and breathe it every day.”
- Provide a single syllabus with embedded links to content and summaries of each topic, including what to expect and what's covered for each topic
- Adding individual coaching and/or support with how manage when others are not understanding or connecting with being trauma informed
- Have coaches observe organizations and give feedback
- Emphasize that this is a way of operating, not a project
- More support with the assessment to help the results be more meaningful
- End the cohorts with goal setting, rather than starting with it
- More group work and reflection exercises
- Coaching sessions from the start
- More practical applications or examples
- “Implementation guidance - step by step with examples on size and type of organization. and help with how to involve upper management and have continued buy in.”



Planned Parenthood Mar Monte (PPMM) delivers vital health care, sex education, and information to adults and children across California and Nevada, regardless of their income, identities, immigration status, beliefs, or zip code. At PPMM, care is much more than the services we provide; It's the way we approach the world. We care. Deeply. With respect. Without judgment.

We are unwavering in our belief that all people deserve high-quality, affordable health care. We are tireless in our efforts to provide education and information so people can make their own health decisions. We do all of this because we care passionately about helping people lead healthy lives. No matter who they are. No matter where they live. We will do everything we can to get them the care they need. We believe that when people are truly cared for, they will make their lives, their families – and even the world – better and healthier.

While 2022 has been the worst year on record for the right to abortion and bodily autonomy, know this – PPMM will not back down and we are prepared. In July and August 2022, PPMM saw more out-of-state abortion patients than we did for all of 2021 in total. The steepest increase in out-of-state abortion patients has been those traveling to PPMM health centers from Texas. We trained more of our clinicians to provide abortions and take on a greater volume of patients. Additionally, we are expanding our health centers near transportation hubs in order to accommodate more patients.

At PPMM, it is not only about abortion though. Our reproductive health care encompasses all of the decisions about one's bodily autonomy, and thus we continue to work to reduce the stigma of abortion. We know that both behavioral health and primary care decisions should be made alongside sexual and reproductive health ones, and we provide this comprehensive care at our centers. We are piloting innovative technology to care for more patients more efficiently. We are more than a health center, we are a health home.

Thank you for your generous, sustaining support for our work. We are so grateful that you reached out to us in this critical moment. We look forward to sharing more with you in your meeting.

Dr. Margaux Lazarin
Associate Medical Director

Jenni Veitch-Olson
Senior Director of Institutional Giving

Revisions to the Employee Manual

Heidi Stamper, Office Manager and Board Clerk

It came to our attention in 2020 that the District's employee handbook was outdated and needed to incorporate new state legislative requirements.

A document summarizing the changes made to the Employee Handbook and a redlined copy of the Employee Handbook showing the exact changes to the original were presented to the Board at the June 24, 2022 Board of Directors meeting. At that time there were questions regarding the wording for sections 1.03 and 8.03, regarding disciplinary action and the complaint process. The Board postponed voting on the Employee Manual until Mr. Hudak had a chance to review those sections and provided new wording.

Attached for your consideration and approval is the latest version, entitled "REDLINE DRAFT revised Employee Handbook 10-26-2022," which incorporates Mr. Hudak's edits.

Summary of changes to the SHD Employee Handbook 10-28-2022

Changes

WELCOME TO SEQUIOIA HEALTHCARE DISTRICT!

INTRODUCTION

GENERAL POLICIES

1.01 Equal Employment Opportunity no changes

1.02 Immigration Law Compliance no changes

1.03 Prohibition of Harassment, Discrimination and Retaliation Prevention Policy Complete rewrite to include retaliation prevention policy, more precise language specific to forms of harassment, harassment prevention, non-discrimination, reasonable accomodation, and complaint process. 10/2022-updated with wording from M.Hudak

1.04 Violence in the Workplace new language added defining threats and employee responsibility to report incidences

1.05 Diversity, Equity and Inclusion NEW section regarding diversity, equity and inclusion

EMPLOYMENT

2.01 Employee Relations no changes

2.02 Hiring Procedures no changes

2.03 Employment of Relatives no changes

2.04 Introductory Period reworded for clarity only

2.05 At-Will Employment Status title changed for clarity; body text no changes

2.06 Service Date and Continuous Services no changes

2.07 Layoff and Demotion no changes

2.08 Remote Workers NEW section regarding telecommuting and working from home epectations including permission, safety, hours of work, attendance at meetings.

EMPLOYMENT STATUS AND RECORDS

3.01 Employee Categories removed "Short Hour" definition which is obsolete

3.02 Personnel Records Changed a few words for clarity only

3.03 Employment References no changes

3.04 Accuracy of Information no changes

YOUR PAYCHECK

4.01 Pay Periods and Payment of Wages Complete rewrite. Added to title "and Payment of Wages"; corrected wording for when timesheets are due and what date range is covered, added automatic payroll deposit instructions.

4.02 Regular Work Hours reworded for clarity only

4.03 Overtime no changes

4.04 Meal Periods/Rest Periods no changes

4.05 Deductions added language regarding deducation errors.

4.06 Advance Pay reworded for clarity only

4.07 Compensation	no changes
4.08 Change of Employment Status and Job Duties	no changes
4.09 Special Guarantees – Non-Exempt Employees	no changes
BENEFITS	reworded for clarity only
5.01 Paid Time Off	added wording regarding the use of PTO for vacations and up to 3 days of sick time
5.02 PTO Guidelines	Changed PTO cashout from 50 hours per year to 100 hour per year
5.03 Extended Sick Leave	no changes
5.04 Holidays	Added federal holiday "Juneteenth"
5.05 Medical Insurance	Updated to include new District limit; added information on vision and dental coverage and health FSA account
5.06 Educational Reimbursement	reworded for clarity and added wording for existing requirement to complete a report detailing summary of participation and summary of expenses to be signed by CEO.
5.07 State Disability	no changes
5.08 Retirement 401(k)	no changes
5.09 Social Security Retirement Benefit	no changes
5.10 Workers' Compensation	Complete rewrite to include process for reporting and filing, medical certification, return to work requirements, Family Medical Leave Act (FMLA) and the California Family Rights Act (CFRA) rights, Paid sick leave vs. Workers Compensations Benefits.
5.11 Life Insurance	no changes
5.12 Lactation Accommodation	NEW section required by state law
LEAVE OF ABSENCE	
6.01 General Leave of Absence	renumbered from 6.02 to 6.01 - body text no changes
6.02 Bereavement Leave	renumbered from 6.03 to 6.02 - body text no changes
6.03 Time Off for Voting	NEW section pulled from details in deleted section "Other Legally Required Leaves of Absense" that was obsolete and repetative of other sections
6.04 Jury Duty and Subpoenaed Witness Appearance	Added language regarding notifying supervisor in advance, county clerk written verification of service, included language to return to work for partial jury days, deleted requirement to reimburse District for any court fees received.
6.05 KinCare Leave	no changes
6.06 Pregnancy Disability Leave	Used to be section 6.01 - renumbered to 6.06 and All new wording clarifying reporting requirements, using PTO, unpaid leave, disability, health insurance, and return to work requirements.
6.07 New Parent Leave Act	NEW section replacing deleted section 6.07 "Other Legally Required Leaves of Absense" that was obsolete and repetative of other sections
6.08 Family and Medical Leave	NEW section
6.09 School Appearances Involving Suspension	New section

Domestic Violence , Sexual Assault or Stalking 6.10 Leave and Accommodation	Renumbered from 6.06 to 6.10. Complete rewrite. Added to title "Sexual Assault or Stalking Leave and Accommodation"; Added language regarding unpaid leave, work accommodations and confidentiality.
Domestic Violence, Sexual Assault or Stalking Leave 6.11 for Treatment	NEW section regarding unpaid leave for treatment
GENERAL INFORMATION	
7.01 Job Description	no changes
7.02 Smoking	reworded for clarity only
7.03 Punctuality and Attendance	Added "Punctuality" to title. Changed a few words for clarity but meaning is the same.
7.04 Tardiness	no changes
7.05 Expense Reimbursement and District Credit Cards	Added District Credit Cards to title and added section D regarding credit card usage, statements, and approval; changed Business travel, breakfast reimbursement from \$20 to \$30
7.06 District Property	Reworded for clarity and to remove obsolete items; included language regarding voicemail, email, software, district property.
7.07 Use of Telephones	no changes
7.08 Solicitation and Distribution of Literature	Added "of Literature" to the title. No change to body text.
7.09 Proprietary Information/Confidentiality	no changes
7.10 Conflicts of Interest	no changes
7.11 Acceptance of Gifts and Gratuities	no changes
7.12 Outside Employment	no changes
7.13 Appearance	no changes
7.14 Security	reworded for clarity
7.15 Personal Property	no changes
7.16 Electronic and Social Media	NEW section regarding general policies, monitoring, prohibited uses, computer and internet use, social media, and employee owned devices.
7.17 News Media Contacts	NEW section prohibiting employees from commenting to news regarding Sequoia Healthcare District policy or events without express permission of CEO.
PERFORMANCE, CORRECTIVE DISCIPLINE AND TERMINATION	
8.01 Performance Appraisals	no changes
8.02 Standards of Conduct	no changes
8.03 Counseling and Discipline	reworded Districts rights regarding discipline and termination for clarity. 10/2022 - added updated wording from H.Hudak
8.04 Resignation	added sentence regarding returning District property.
Confirmation of Harassment Discrimination and Retaliation Prevention Policy	NEW signature page
Confirmation of Handbook Receipt	reworded for clarity



Approved by the Board of Directors 12/2/2009
Revised 4/3/2013
Revised 12/7/16
Revised 8/2/17
Revised 10/17/17
Revised Welcome Letter 12/12/2018

Revised 6/3/2022
Revised and Approved by the Board of Directors 11/XX/2022

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EMPLOYEE HANDBOOK

SEQUOIA HEALTHCARE DISTRICT

TABLE OF CONTENTS

WELCOME

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INTRODUCTION

Table of Contents

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WELCOME TO SEQUIOA HEALTHCARE DISTRICT!

INTRODUCTION

GENERAL POLICIES

- 1.01 Equal Employment Opportunity
- 1.02 Immigration Law Compliance
- 1.03 Prohibition of Harassment, Discrimination and Retaliation Prevention Policy
- 1.04 Violence in the Workplace
- 1.05 Diversity, Equity and Inclusion

EMPLOYMENT

- 2.01 Employee Relations
- 2.02 Hiring Procedures
- 2.03 Employment of Relatives
- 2.04 Introductory Period
- 2.05 At-Will Employment Status
- 2.06 Service Date and Continuous Services
- 2.07 Layoff and Demotion
- 2.08 Remote Workers

EMPLOYMENT STATUS AND RECORDS

- 3.01 Employee Categories
- 3.02 Personnel Records
- 3.03 Employment References
- 3.04 Accuracy of Information

YOUR PAYCHECK

- 4.01 Pay Periods and Payment of Wages
- 4.02 Regular Work Hours
- 4.03 Overtime
- 4.04 Meal Periods/Rest Periods
- 4.05 Deductions

[4.06 Advance Pay](#)

[4.07 Compensation](#)

[4.08 Change of Employment Status and Job Duties](#)

[4.09 Special Guarantees – Non-Exempt Employees](#)

BENEFITS

[5.01 Paid Time Off](#)

[5.02 PTO Guidelines](#)

[5.03 Extended Sick Leave](#)

[5.04 Holidays](#)

[5.05 Medical Insurance](#)

[5.06 Educational Reimbursement](#)

[5.07 State Disability](#)

[5.08 Retirement 401\(k\)](#)

[5.09 Social Security Retirement Benefit](#)

[5.10 Workers' Compensation](#)

[5.11 Life Insurance](#)

[5.12 Lactation Accommodation](#)

LEAVE OF ABSENCE

[6.01 General Leave of Absence](#)

[6.02 Bereavement Leave](#)

[6.03 Time Off for Voting](#)

[6.04 Jury Duty and Subpoenaed Witness Appearance](#)

[6.05 KinCare Leave](#)

[6.06 Pregnancy Disability Leave](#)

[6.07 New Parent Leave Act](#)

[6.08 Family and Medical Leave](#)

[6.09 School Appearances Involving Suspension](#)

[6.10 Domestic Violence, Sexual Assault or Stalking Leave and Accommodation](#)

[6.11 Domestic Violence, Sexual Assault or Stalking Leave for Treatment](#)

GENERAL INFORMATION

[7.01 Job Description](#)

[7.02 Smoking](#)

[7.03 Punctuality and Attendance](#)

[7.04 Tardiness](#)

7.05 Expense Reimbursement and District Credit Cards

7.06 District Property

7.07 Use of Telephones

7.08 Solicitation and Distribution of Literature

7.09 Proprietary Information/Confidentiality

7.10 Conflicts of Interest

7.11 Acceptance of Gifts and Gratuities

7.12 Outside Employment

7.13 Appearance

7.14 Security

7.15 Personal Property

7.16 Electronic and Social Media

7.17 News Media Contacts

PERFORMANCE, CORRECTIVE DISCIPLINE AND TERMINATION

8.01 Performance Appraisals

8.02 Standards of Conduct

8.03 Counseling and Discipline

8.04 Resignation

Confirmation of Harassment Discrimination and Retaliation Prevention Policy

Confirmation of Handbook Receipt

GENERAL POLICIES

1.01 Equal Employment Opportunity

1.02 Immigration Law Compliance

1.03 Prohibition of Harassment and Other Inappropriate Conduct

1.04 Violence in the Workplace

EMPLOYMENT

2.01 Employee Relations

2.02 Hiring Procedures

2.03 Employment of Relatives

2.04 Introductory Period

2.05 Employment is Terminable At Will

2.06 Service Date and Continuous Service

2.07 Layoff and Demotion

EMPLOYMENT STATUS AND RECORDS

3.01 Employment Categories

3.02 Personnel Records

3.03 Employment References

3.04 Accuracy of Information

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YOUR PAY CHECK

- 4.01 Pay Periods
- 4.02 Regular Work Hours
- 4.03 Overtime
- 4.04 Meal Periods/Rest Periods
- 4.05 Deductions
- 4.06 Advance Pay
- 4.07 Compensation
- 4.08 Change of Employment Status and Job Duties
- 4.09 Special Guarantees—Non-exempt Employees

EMPLOYEE BENEFITS

- 5.01 Paid Time Off (Amended 10/4/17)
- 5.02 PTO Guideline
- 5.03 Extended Sick Leave (Amended 12/7/16)
- 5.04 Holidays
- 5.05 Medical, Dental and Vision Plans (Amended 8/2/17 effective 9/1/17) (Amended 10/4/17)
- 5.06 Educational Reimbursement
- 5.07 State Disability
- 5.08 Retirement 401(k) (Amended 12/7/16) (Amended 10/4/17)
- 5.09 Social Security Retirement Benefit
- 5.10 Health Club Membership (On 4/3/13 benefit was eliminated effective 7/1/13)
- 5.10 Workers' Compensation
- 5.11 Life Insurance Benefit (On 4/3/13 benefit was added effective 7/1/13)

LEAVE OF ABSENCE

- 6.01 Pregnancy Disability Leave
- 6.02 General Leave of Absence
- 6.03 Bereavement Leave (Amended 12/7/16)
- 6.04 Jury Duty (Amended 12/7/16)
- 6.05 Kin Care Leave (Amended 12/7/16)
- 6.06 Domestic Violence Leave
- 6.07 Other Legally Required Leaves of Absence

GENERAL INFORMATION

- 7.01 Job Description
- 7.02 Smoking
- 7.03 Attendance
- 7.04 Tardiness
- 7.05 Expense Reimbursement (Amended 12/7/16)
- 7.06 Use of District Property
- 7.07 Use of Telephones
- 7.08 Solicitation and Distribution
- 7.09 Proprietary Information/Confidentiality
- 7.10 Conflicts of Interest
- 7.11 Acceptance of Gifts and Gratuities
- 7.12 Outside Employment
- 7.13 Appearance
- 7.14 Security
- 7.15 Personal Property

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PERFORMANCE, CORRECTIVE DISCIPLINE, AND TERMINATION

8.01 Performance Appraisals

8.02 Standard of Conduct

8.03 Counseling and Discipline

8.04 Resignation

ACKNOWLEDGEMENT OF RECEIPT OF EMPLOYEE HANDBOOK

WELCOME TO SEQUIOA HEALTHCARE DISTRICT!

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It is our pleasure to welcome you to the Sequoia Healthcare District (“District”). Whether you have just joined us or have been with us for some time, we want you to know that we are proud to have you as part of the District.

We recognize that people are a great asset to every organization. Every individual’s personal effort contributes toward building a team of whom we can all be proud. Our attitudes and conduct toward our customers and vendors, as well as our internal staff, are essential to the success of the District.

We strongly encourage employee communication in the form of suggestions that will improve our organization. Because those who perform the jobs know the processes best, your ideas can bring to light opportunities for improvement which might otherwise be missed.

We hope you will be proud of your work at the District, and enthusiastically contribute to our goal to serve our constituents, our industry and our own staff with excellence and integrity. Our success depends upon hard work and a strong commitment to product quality and customer service. We look forward to working with you to maximize your contribution to our success.

Again, welcome. We are pleased to have you at the District.

Signed,



Pamela Kurtzman
Chief Executive Officer

INTRODUCTION

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About This Handbook

This handbook has been designed to provide you with information about Sequoia Healthcare District, what you can expect from us, and what we expect of you. You will find a summary of current policies and procedures that are important to your performance, success and growth, as you carry out your job responsibilities. If you have questions about any policy or procedure, please discuss them with our CEO.

Please take a moment to sign the Acknowledgment or Receipt located on the last page of this Handbook, and return it to the CEO immediately.

This edition of the handbook replaces all earlier documents outlining employment policies and benefits and takes precedence over all memoranda or oral description of the terms and conditions of your employment. Written employment contracts between the District and some individuals may supersede some provisions of this Handbook. Circumstances may require that information provided in this handbook change from time to time. Consequently the District reserves the right to amend, supplement or rescind any provision(s) of this handbook as it deems appropriate, at its sole and absolute discretion, in writing, with or without notice.

The District retains the exclusive right of interpretation and application of all handbook provisions. If the handbook refers to other documents concerning items such as insurance, benefits or other matters, the provisions of those documents control.

This handbook is the property of the District and is provided to each employee for personal information only. It may not be published or otherwise copied without written authorization of the District.

Please understand that the policies and procedures outlined in this handbook are informational. They are not intended to create or imply a contractual relationship.

The District is an at-will employer, which means you or the District, may choose to terminate employment for any or no reason. The specifics of at-will employment are discussed in greater detail in Section 2.05.

GENERAL POLICIES

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1.01 Equal Employment Opportunity

It is the policy of the District that employment shall be based on merit, qualifications and abilities and that employment decisions shall be made without regard to race, color, age, gender (including pregnancy, child birth, or related medical conditions), sexual orientation, religion, creed, national origin, ancestry, legally protected medical condition including genetic characteristics, marital status, registered domestic partner status, family care status, veteran status, physical or mental disability or other factors protected by law. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics. All such discrimination is unlawful. This policy governs all aspects of employment, including selection, job assignment, promotion, compensation, discipline, termination and access to benefits and training.

When necessary, the District also makes reasonable accommodations for pregnant employees, with the advice of their health care providers.

Any employee with questions or concerns about any type of discrimination or harassment in the workplace is encouraged to bring these issues to the attention of the District's CEO or the District's Board President. Please see section 1.04 of this handbook for the District's Prohibition of Harassment policy. Employees who in good faith raise concerns and make reports may do so without fear of retaliation. Anyone found to have engaged in any type of unlawful discrimination or other inappropriate conduct will be subject to disciplinary action, up to and including termination of employment.

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1.02 Immigration Law Compliance

The District is committed to employing only United States citizens and non-citizens who are authorized to work in the United States, and does not unlawfully discriminate on the basis of citizenship or national origin.

In compliance with the Immigration Reform and Control Act of 1986, 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. Former employees who are re-hired must also complete the form if they have not completed an I-9 with the District within the past three years, or if their previous I-9 is no longer retained or valid. Employees who are found to have falsified these documents may be terminated.

1.03 Prohibition of Harassment, Discrimination and Retaliation Prevention

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Policy~~Other Inappropriate Conduct~~

Sequoia Healthcare District is an equal opportunity employer. The District is committed to providing a work environment free of harassment, discrimination, retaliation, and disrespectful or other unprofessional conduct based on:

- Race
- Religion (including religious dress and grooming practices)
- Color
- Sex/gender (including pregnancy, childbirth, breastfeeding or related medical conditions), sex stereotype, gender identity/gender expression/transgender (including whether or not you are transitioning or have transitioned) and sexual orientation
- National origin
- Ancestry
- Physical or mental disability
- Medical condition
- Genetic information/characteristics
- Marital status/registered domestic partner status
- Age (40 and over)
- Sexual orientation
- Military or veteran status
- Any other basis protected by federal, state or local law or ordinance or regulation

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Sequoia Healthcare District also prohibits discrimination, harassment, disrespectful or unprofessional conduct based on the perception that anyone has any of those characteristics or is associated with a person who has or is perceived as having any of those characteristics.

In addition, the District prohibits retaliation against individuals who raise complaints of discrimination or harassment or who participate in workplace investigations.

All such conduct violates District policy.

Harassment Prevention

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The District's policy prohibiting harassment applies to all persons involved in the operation of the District, including the Board of Directors, officers, employees, independent contractors, and consultants. The District prohibits harassment, disrespectful or unprofessional conduct by any employee of the District, including Directors, supervisors, managers, and co-workers. The District's anti-harassment policy also applies to vendors, customers, independent contractors, unpaid interns, volunteers, persons providing services pursuant to a contract and other persons with whom you come into contact while working.

Prohibited harassment, disrespectful or unprofessional conduct includes, but is not limited to, the following behavior:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations, comments, posts, or messages.
- Visual displays such as derogatory and/or sexually oriented posters, photography, cartoons, drawings, or gestures.
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work because of sex, race, or any other protected basis.
- Threats and demands to submit to sexual requests or sexual advances as a condition of continued employment, or to avoid some other loss and offers of employment benefits in return for sexual favors.
- Retaliation for reporting or threatening to report harassment.
- Communication via electronic media of any type that includes any conduct that is prohibited by state and/or federal law or by District policy.

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Sexual harassment does not need to be motivated by sexual desire to be unlawful or to violate this policy. For example, hostile acts toward an employee because of their gender can amount to sexual harassment, regardless of whether the treatment is motivated by sexual desire.

Prohibited harassment is not just sexual harassment but harassment based on any protected category.

Non-Discrimination

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The District is committed to compliance with all applicable laws providing equal employment opportunities. This commitment applies to all persons involved in District operations. The District prohibits unlawful discrimination against any job applicant, employee or unpaid intern by any employee of the District, including supervisors and coworkers.

Pay discrimination between employees of the opposite sex or between employees of another race or ethnicity performing substantially similar work, as defined by the California Fair Pay Act and federal law, is prohibited. Pay differentials may be valid in certain situations defined by law. Employees will not be retaliated against for inquiring about or discussing wages. However, Sequoia Healthcare District is not obligated to disclose the wages of other employees.

Anti-Retaliation

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The District will not retaliate against you for filing a complaint or participating in any workplace investigation or complaint process, and will not tolerate or permit retaliation by management, employees or co-workers.

Reasonable Accommodation

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Discrimination can also include failing to reasonably accommodate religious practices or qualified individuals with disabilities where the accommodation does not pose an undue hardship.

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To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the District will make reasonable accommodations for the known physical or

mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any job applicant or employee who requires an accommodation to perform the essential functions of the job should contact the office manager and discuss the need for an accommodation. The District will engage in an interactive process with the employee to identify possible accommodations, if any, that will help the applicant or employee perform the job. An applicant, employee or unpaid intern who requires an accommodation of a religious belief or practice (including religious dress and grooming practices, such as religious clothing or hairstyles) should also contact the office manager and discuss the need for an accommodation. If the accommodation is reasonable and will not impose an undue hardship, the District will make the accommodation. The District will not retaliate against you for requesting a reasonable accommodation and will not knowingly tolerate or permit retaliation by management, employees or co-workers.

Complaint Process

The District fully supports the laws prohibiting workplace harassment, including harassment because of gender, pregnancy, childbirth, or related medical conditions, as well as harassment based on factors such as race, color, creed, national origin, ancestry, age, physical disability, mental disability, medical condition, marital status, registered domestic partner status, sexual orientation, family care or medical leave status, veteran status, or any other basis protected by federal, state or local laws. We are committed to maintaining a workplace free of unlawful harassment and other inappropriate conduct.

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Prohibited unlawful harassment includes, but is not limited to, the following behavior:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations or comments;
- Visual displays such as derogatory and/or sexually oriented posters, photography, cartoons, drawings or gestures;
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement or work because of sex, race or any other protected basis;
- Threats and demands to sexual requests as a condition of continued employment, or to avoid some other loss and offers of employment benefits in return for sexual favors; and
- Retaliation for reporting or threatening to report harassment.

If you believe that you have been the subject of harassment, discrimination, retaliation, or other prohibited conduct, unlawfully harassed, bring your complaint first (step 1) to your supervisor or to the CEO or -If unresolved by step 1, then lastly (step 2) bring your complaint to the or Board President- as soon as possible after the incident. You will be asked to provide details of the incident or incidents, names of individuals involved and names of any witnesses. It would be best to communicate your complaint in writing, but this is not mandatory.

The District encourages all individuals to report any incidents of harassment, discrimination, retaliation, or other prohibited conduct forbidden by this policy immediately so that complaints can be quickly and fairly resolved.

You also should be aware that the Federal Equal Employment Opportunity Commission and the California Department of Fair Employment and Housing investigate and prosecute complaints of prohibited harassment, discrimination, and retaliation in employment. If you think you have been harassed or discriminated against or that you have been retaliated against for resisting, complaining, or participating in an investigation, you may file a complaint with the appropriate agency. The nearest office can be found by visiting the agency websites at www.dfeh.ca.gov and www.eeoc.gov.

The CEO shall inform the Board President of all complaints involving harassment, discrimination, retaliation, or other prohibited conduct so the District can try to resolve the complaint. If the Board President is the subject of the complaint, the CEO shall inform the Board Vice-President. If a Board member learns of a complaint, he/she shall inform the Board President and CEO.

In order to carry out their duties as elected officials, all members of the Board shall be informed of all complaints involving harassment, discrimination, retaliation, or other prohibited conduct. Notice may be provided by a confidential memorandum or in a closed session of the Board and should be provided by the Board President. In the event that the Board President is the subject of the complaint, the CEO should inform the Board Vice-President who shall provide notice to the other Board members.

When the District receives allegations of misconduct, it will immediately undertake a fair, timely, thorough, and objective investigation of the allegations in accordance with all legal requirements. The District will reach reasonable conclusions based on the evidence collected.

The District will maintain confidentiality to the extent possible. However, the District cannot promise complete confidentiality. The employer's duty to investigate and take corrective action may require the disclosure of information to individuals with a need to know. The District will immediately undertake an effective, thorough and objective investigation of the harassment allegations.

If the District determines that unlawful harassment has occurred, effective remedial action will be taken in accordance with the circumstances involved. Any employee determined by the District to be responsible for unlawful harassment will be subject to appropriate disciplinary action, up to, and including termination. A District representative will advise all parties concerned of the results of the investigation. The District will not retaliate against you for filing a complaint and will not tolerate or permit retaliation by management, employees or co-workers.

If the District determines that harassment, discrimination, retaliation, or other prohibited conduct has occurred; appropriate and effective corrective and remedial action will be taken in accordance with the circumstances involved. The District will also take appropriate action to deter future misconduct.

Any employee determined by the District to have engaged in harassment, discrimination, retaliation, or other prohibited conduct will be subject to appropriate disciplinary action, up to, and including termination. Employees should also know that if they engage in unlawful harassment, they can be held personally liable for the misconduct. The District encourages all employees to report any incidents of harassment forbidden by this policy **immediately** so that complaints can be quickly and fairly resolved. You also should be aware that the Federal Equal Employment Opportunity Commission and the California Department of Fair Employment and Housing investigate and prosecute complaints of prohibited harassment in employment. If you think you have been harassed or that you have been retaliated against for resisting or complaining, you may file a complaint with the appropriate agency. The nearest office is listed in the telephone directory or available on the Internet.

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1.04 Violence in the Workplace

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~~The District recognizes that workplace violence may be a concern among employees.~~ The District is ~~therefore~~ committed to providing a safe, violence-free workplace. In this regard, the District strictly prohibits employees, consultants, customers, visitors, or anyone else on the District's premises or engaging in a District-related activity from behaving in a violent or threatening manner. Moreover, the District seeks to prevent workplace violence before it begins and reserves the right to deal with behavior that suggests a propensity towards violence prior to any violent behavior occurring.

A threat includes, but is not limited to, any indication of intent to harm a person or damage District property. Threats may be direct or indirect, and they may be communicated verbally or nonverbally.

It is every employee's responsibility to assist in establishing and maintaining a violence-free work environment. Therefore, you are expected and encouraged to report any incident which may be threatening to you or your co-workers or any event which you reasonably believe is threatening or violent to any supervisor and/or the CEO.

~~Any employee must report any concerns to their immediate supervisor and/or the CEO.~~ An immediate and thorough investigation will be conducted. The District will not retaliate against employees who report workplace violence or potential workplace violence. The District will take corrective action if it determines that workplace violence occurred.

1.05 Diversity, Equity and Inclusion

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Sequoia Healthcare District is committed to fostering a diverse workforce, and maintaining a workplace that is equitable, inclusive and safe for all employees. From recruiting practices, to pay and benefits, promotions, and all other aspects of employment with us, an environment of equity is of the utmost importance.

We not only recognize that you, our employees, comprise a wide range of backgrounds and characteristics, but we believe those differences should be celebrated and valued. Whether it's race, religion, gender, national origin, ancestry, color, language, age, marital status, sexual orientation, gender identity, gender expression, physical or mental disability, medical condition, genetic information/characteristics, veteran status, political affiliation or any other characteristic, these are parts of each of you that contribute to your experiences as humans, and ultimately to the knowledge and expertise that make you a valuable asset to the District.

Sequoia Healthcare District is committed and determined that there is access, opportunity, and advancement for all individuals. We are always looking for ways in which we can cultivate an inclusive work environment, strengthen our cultural competency, and train our managers and employees to provide opportunities for growth and development.

It is our intention that all our employees, regardless of any background or characteristic, are always treated with respect and dignity. Likewise, we expect that as our employees, you treat your coworkers, supervisors and other team members with the same dignity and respect at all times. Disrespect, inappropriate behavior or conduct toward others will not be tolerated and may subject an employee to disciplinary action, up to and including termination. If you feel you have been mistreated, harassed, or discriminated or retaliated against in violation of the District's Harassment, Discrimination and Retaliation Prevention policy, please contact your supervisor or office manager.

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| Last Updated ~~4/10/2021~~ 10/28/2022

EMPLOYMENT

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2.01 – Employee Relations

The District believes that employees want to work for an organization that is committed to providing an environment where they can enjoy and be proud of the work they do, where they can contribute to a common good, and where they are encouraged to apply their talents and energy. To this end, we strive to provide an environment that is characterized by mutual respect and open communication. Employees are encouraged to bring suggestions and concerns for improvement to the CEO's attention. The CEO will address your concerns and suggestions in a timely manner. Should you feel that this is not occurring, you can contact the District's Board President for assistance.

The District believes that the working conditions, wages and benefits offered to its employees are competitive with those offered by other similar employers in this area. If employees have concerns about work conditions or compensation, they are encouraged to voice these concerns openly and directly to the CEO. You may be asked to put your concerns in writing.

Our experience has shown that when employees deal openly and directly with management the work environment is excellent, communications are clear, and attitudes are positive. We believe that the District demonstrates its commitment to employees by responding effectively to employee concerns.

We will make every effort to recognize and resolve any causes of employees' concerns to the mutual satisfaction of the parties involved. You should recognize that not every problem can be resolved to your satisfaction. However, the District values your input and you should feel free to raise issues of concern, in good faith, without fear of retaliation.

The District hires individuals who demonstrate job-related education, experience, aptitude and character. All decisions regarding recruitment, selection and placement of employees are made solely on the basis of job-related criteria. Each applicant is evaluated objectively, and hiring decisions are made on the basis of requirements for the job and the qualifications of the applicant.

In no event shall the hiring of an individual be construed as creating a contractual relationship with the District nor shall the hiring of an individual be construed to change or contradict the at-will nature of the employment relationship. This at-will employment relationship is further explained in section 2.05 of this handbook.

The CEO will schedule an orientation for you shortly after your first day of work.

2.02 – Hiring Procedures

The District may post available positions in-house at the sole discretion of the CEO. It may, in its sole discretion, recruit using other sources. Our goal is to hire individuals who most closely meet the needs of the District.

2.03 –Employment of Relatives

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Due to the size, closeness of the working conditions and job interdependence the District discourages the employment of relatives as they could easily affect interpersonal and/or morale within the office. The approval of the CEO is required prior to consideration of the employment of a relative. For purposes of this regulation relative shall mean parents, children, spouse, brothers, sisters, in-laws and step-relationships of the same level.

Present employees who marry or who become related by marriage will be permitted to continue employment with the District only if such continued employment will not adversely affect supervision, safety, security, or morale within the District, and provided that there is no conflict of interest in such continued employment.

2.04 –Introductory Period

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The first ninety (90) days of ~~continuous~~ your employment is considered a ~~"get acquainted" or an~~ introductory period. ~~During this time, you will learn your responsibilities, get acquainted with co-workers and determine whether you are happy with your job. Your supervisor will closely monitor your performance. Completion of the introductory period does not entitle you to remain employed by Sequoia Healthcare District for any definite period of time. Your status as an at-will employee does not change. The employment relationship may be terminated with or without cause an with or without advance notice, at any time by you or the District. This period allows new employees ample time to learn the duties of the job, and decide if they wish to join the staff. It also gives the supervisor an opportunity to determine whether a new employee has the ability to perform the job assigned. Employees' work habits, attitude and attendance record will be reviewed, discussed and documented. Employment past the first ninety (90) days is still considered terminable at will by either the employee or by the District. The District reserves the right to extend the introductory period.~~

2.05 –Employment is Terminable At-Will Employment Status

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You are free to terminate your employment with the District at any time, with or without notice and with or without a reason, and the District may choose to terminate your employment at any time, with or without notice and with or without reason. Although the District may choose to terminate employment for cause, cause is not required. This employment relationship is called "at-will" employment. No one other than the CEO has authority to enter into any agreement for employment for any specified period of time and any such agreement must be in writing and signed by the CEO.

The District’s policy of at-will employment can be changed only in writing signed by the CEO of the District.

No implied contract concerning any employment-related decision or term or condition of employment can be established by any other statement, conduct, policy or practice.

2.06 –Service Date and Continuous Services

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For purposes of continuous employment service eligibility, an employee’s Service Date is defined as the first day on the job in the employee’s current period of continuous employment.

Continuous employment service date is forfeited whenever:

- There is voluntary or involuntary employment separation, or
- An employee fails to return from or comply with the conditions of a leave of absence.

2.07 –Layoff and Demotion

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Where reductions or changes in production and/or operations result in the layoff or demotion of employees, the District will provide advance notice as soon as practical and in compliance with all applicable laws. Decisions on assignments and/or layoffs will be determined by the District, giving consideration to operating requirements, productivity, present skills and abilities, past performance and, where practical, the employee’s length of service with the District.

2.08 Remote Workers

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Working remotely, also referred to as “telecommuting,” provides employees with an opportunity to work from an alternative work environment instead of in the primary location of the District.

The District retains the right in its sole discretion to designate positions that are appropriate for working remote and approve employees for working remotely. Working remotely must be approved by the CEO. Working remotely does not change the conditions of employment or required compliance with all District policies and procedures. The District reserves the right to change or terminate, without cause or advance notice the ability to work under a remotely. Working remotely is a privilege and may not be appropriate for all employees. If you wish work remotely, you should contact your supervisor and ask for a permission.

Remote Work Safety

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Remote workers are solely responsible for ensuring the safety of their alternative work environment. Remote Workers are protected by the District's workers' compensation insurance. As such, Remote Workers are required to immediately report any injuries that occur while working.

The Remote Workers is liable for any injuries that occur to third parties at or around the Remote Worker's alternative work environment.

Hours of Work

Unless otherwise agreed in in advance, hours and days of work will not change. Employees agree to apply themselves during work hours.

Nonexempt employees agree not to work outside of scheduled hours without advance approval; this includes such activities as checking and responding to emails. Any work outside of a scheduled shift must be reported to a supervisor.

Working remotely is not intended as a substitute for childcare or care for another adult. If a child or adult needs care during work time, another responsible individual is expected to be present.

Attendance at Meetings

Remote workers are expected to attend all required meetings.

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EMPLOYMENT STATUS AND RECORDS

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3.01 __-Employee Categories

It is the intent of the District to define employee categories so that employees understand their employment status and benefit eligibility. Employee categories do not guarantee employment for any specified period of time.

Each employee is designated as either exempt or non-exempt under federal and state wage and hour laws. An employee's designation as exempt or non-exempt may be changed only upon written notification by the District.

Exempt employees (including employees in administrative, executive and professional capacities) are paid on a salary basis and do not receive overtime pay. Exempt employees generally work at least forty (40) hours per workweek and are therefore usually eligible for the District benefit package, subject to the terms, conditions and limitations of each benefit program.

Non-exempt employees are entitled to overtime pay under the specific provisions of federal and state laws.

Each employee is assigned to one of the following categories:

- **Regular Full-Time:** Employees who work forty (40) hours per workweek on a regularly scheduled basis are considered regular full-time employees. Full-time employees are eligible for the District's benefit package, subject to the terms, conditions and limitations of each benefit program. They are covered by statutory benefits required by state or federal law and leaves of absence in accordance with current District policies.
- **Regular Part-Time:** Employees who work a regular schedule of less than forty (40) hours but a minimum of twenty (20) hours per week on a continuing basis are considered regular part-time employees. Part-time employees are eligible for the District's benefit package, subject to the terms, conditions and limitations of each benefit program. They are covered by statutory benefits and leaves of absence required by state or federal law.
- ~~Short Hour: Employees who work a regular schedule of less than twenty (20) hours per week on a continuing basis are considered short hour employees.~~

3.02 __-Personnel Records

Sequoia Healthcare District is required by law to keep current all employees' names and addresses. You are responsible for notifying ~~It is an employee's responsibility to notify the office of~~ the District when any of the following changes are made:

- Home address or telephone number.
- Legal name.

- The name and address of the person to notify in case of emergency.
- Marital status and number of dependents.

This information is handled in a confidential manner. To change this information you must complete a Change Form available from the [office manager and/or the CEO](#).

Your right to privacy is respected and taken into consideration with regard to all facets of employment information. The District adopts the following principles in order to protect employee confidentiality:

All necessary personal information will be obtained from the employee, except information obtained from references.

The District will maintain a personnel file for each employee containing only job-related information appropriate to employment.

The file includes:

- Employment applications, resumes, reference checklists, tests specific to position, and similar documents;
- Performance appraisals;
- Letters of recognition, certificates, license verifications, and statements of course study completion;
- Other employment related documents.

Access to employee files is strictly limited to:

- [the CEO](#), a Board member with the need to know, and the employee;
- Subpoena, court order, or order from a governmental agency;
- Additional information (such as salary in the case of a request from a lender) if you give us a written release allowing us to provide the information.

As required by California law, we will notify you if we receive a subpoena for your employment records.

The contents of your personnel file, with the exception of letters of reference and certain other limited information, are available for your inspection at reasonable intervals upon your request. You do not have the right to copy your entire personnel record. However, you do have the right to copy any document you have signed relating to obtaining or holding employment, [and any documents related to your performance or to any grievance concerning you](#). You may also take notes about the entire contents of the file.

In addition, upon reasonable request, you also have the right to inspect and copy certain District payroll records regarding your compensation and deductions. Please note that if the District receives any medical information concerning you this will be kept in a file separate from your

personnel file, and access to its contents will be strictly limited to those with a valid need to know. Any files related to employee financial matters such as wage assignments, garnishments, credit inquiries will be kept separately and only be accessible to payroll administrators and strictly limited to those with a valid need to know.

If you wish to review your Personnel File, please contact the CEO.

3.03 __-Employment References

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All telephone calls requesting personal reference information regarding prior employees must be directed to the CEO. Unless specifically authorized, the information disclosed in response to outside inquiries concerning employment status is limited to dates of employment, current/final job title and verification of salary (when quoted from an employee's statement). Current or former employees who request the disclosure of additional information must sign a written waiver of liability.

3.04 __-Accuracy of Information

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The District relies upon the accuracy of information contained in the employment application, as well as the accuracy of other data presented throughout the hiring process and employment. Any misrepresentations, falsifications, or material omissions in any of this information or data may result in exclusion of the individual from further consideration for employment, or if the person has been hired, termination of employment.

YOUR PAYCHECK

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4.01 __-Pay Periods and Payment of Wages

~~Employees are paid on a bi-weekly basis and there are 26 pay periods per year. When the pay date falls on a holiday, the paychecks will be distributed the last scheduled business day preceding the holiday. Employees are encouraged to use automatic deposits to a designated checking account for the receipt of their payroll.~~

~~All employees of Sequoia Healthcare District are paid every other Friday for work performed during the previous two-week pay period. Timesheets covering that pay period should be turned in to the Office Manager by the end of business on the Monday of the pay week. If a regular payday falls on a holiday, you will be paid on the workday before the holiday.~~

~~Sequoia Healthcare District offers automatic payroll deposit. You may begin and stop automatic payroll deposit at any time. To begin automatic payroll deposit, you must complete a form (available from the payroll department) and return it to payroll at least 10 days before the pay period for which you would like the service to begin. You should carefully monitor your payroll deposit statements for the first two pay periods after the service begins. If you observe an error on your check, please report it immediately to your supervisor.~~

~~To stop automatic payroll deposit, complete the form available from the payroll department and return it to payroll at least 10 days before the pay period for which you would like the service to end. You will receive a regular payroll check on the first pay period after the receipt of the form, provided it is received no later than 10 days before the end of the pay period.~~

~~In order to allow for the processing of the payroll, hours are reported prior to the end of the pay period. Any adjustments to an employee's regular hours of overtime will be processed on the following pay period.~~

~~An employee may make arrangements for distribution of a paycheck that occurs during an employee's vacation, provided the written request by the employee is submitted to the CEO at least three (3) working days in advance of the commencement of the Employee's vacation.~~

~~Errors in pay must be reported promptly to the CEO.~~

~~Please notify the District immediately if your paycheck is lost or stolen.~~

4.02 __-Regular Work Hours

~~Sequoia Healthcare District is normally open for business between the hours of 9:00 a.m. to 5:00 p.m., Monday-Friday.~~

~~The workweek begins at 12:01 a.m. Sunday and ends at midnight on Saturday.~~

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Our workweek runs seven (7) consecutive days, starting Monday at 12:01 a.m. Our workday-
~~starts at 12:01 a.m. each day-~~

~~Employees may also be scheduled for less than a full schedule of days per week, hours per day, or for non-consecutive days. The District does not guarantee full employment or retention of assigned schedules.~~

4.03 __-Overtime

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The nature of our business requires occasional overtime work. Every effort will be made to provide you with advance notice of any overtime that will be required of you. All overtime work for non-exempt employees must be approved in writing by the CEO before the workday is extended. In the event that overtime is necessary, non-exempt employees will be compensated as required by applicable law. An employee who works unauthorized overtime may be subject to disciplinary action.

Non-exempt employees are eligible for one and one-half (1-1/2) times the employee's regular rate of pay for all hours worked in excess of eight (8) hours up to and including twelve (12) hours in any workday, all hours worked in excess of forty (40) hours in any one workweek, and for the first eight (8) hours worked on the seventh (7th) day of work. Non-exempt employees are eligible for double their regular rate of pay for all hours worked in excess of twelve (12) hours in any workday and for all hours worked in excess of eight (8) hours on the seventh (7th) day of work in any workweek.

Paid time off for any reason, such as holidays or vacation, will not be considered as hours worked for the purpose of computing overtime pay.

4.04 __-Meal Periods/Rest Periods

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Non-exempt employees are required by law to take an unpaid one-half (1/2) hour meal period no later than five (5) hours after the start of the workday. The meal period may not be taken at the beginning or end of the workday. All employees must take unpaid lunch period of no less than thirty minutes and no more than one hour between 12:00 and 1:30 p.m.

Non-exempt employees are also required to take a paid ten (10) minute break in the middle of each four (4) hour work period. Breaks must be scheduled with the Supervisor and may not be taken at the beginning or end of the workday.

4.05 __-Deductions

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By law, required deductions must be made in each pay period for federal and state income taxes, FICA (Social Security and Medicare), state disability and legal garnishments. The amount withheld varies according to your wage, marital status and the number of exemptions you claim. If you believe that an improper deduction from your salary has been made, you should immediately report this information to the CEO or office manager.

4.06 __-Advance Pay

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Sequoia Healthcare District does not permit advances against paychecks or against unaccrued vacation. The District's fiscal policy makes no provision for advances of pay to any employee.

4.07 __-Compensation

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The compensation policy at the District is designed to accomplish the following goals:

- To fairly and accurately compensate employees for hours worked.
- To attract and retain qualified and competent employees and compensate them without regard to race, color, religion, national origin, sex, sexual orientation, age, physical or mental disability, veteran status, or any other legally protected characteristic.

4.08 __-Change of Employment Status and Job Duties

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The District reserves the right to change or discontinue an employee's employment status and/or job classification, title, job description, responsibilities, and applicable benefits, privileges and conditions of employment.

4.09 __-Special Guarantees – Non-Exempt Employees

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If a non-exempt employee is called back to work after having left the District premises and after working a regular workday schedule, then that employee is guaranteed a minimum of -two (2) hours pay at the applicable rate of pay for working as assigned.

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BENEFITS

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~~While it is objective of the District to provide a benefit package that is competitive and protects employees and their families, the following benefits are subject to change at the sole discretion of the District.~~ Sequoia Healthcare District is committed to providing the following benefits for eligible employees. Benefit eligibility may be dependent upon your employee classification (full-time versus part-time, for example) and on length of continuous employment at the District. Benefit eligibility requirements may also be imposed by the plans themselves.

The District reserves the right to modify, amend or terminate benefits and to modify or amend benefit eligibility requirements at any time and for any reason, subject to any legal restrictions.

The District offers the following employee benefits:

- Health Insurance
- Term Life Insurance policy
- 401K Retirement Savings Plan

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5.01 –Paid Time Off

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The District’s policy is to provide Paid Time Off (PTO). Paid Time Off (PTO) is to be used for vacations and up to three consecutive days off as a result of illness, injury or for the employee to receive medical care, treatment or diagnosis. For lengthy illnesses, please see section 5.03 Extended Sick Leave.

Effective 10/4/17, PTO accrual begins the 1st of the month following the beginning of employment with the District. The program was established to provide employees a greater degree of flexibility in the use of time. Full-Time and Part-Time employees are eligible to participate in the PTO program. Part-Time employees will accrue PTO on a pro-rated basis, based on their regularly scheduled hours. The PTO schedule is set forth below is subject to change at the District’s discretion, with or without notice.

PTO hours will accrue bi-weekly pay period schedule is as follows:

	Full-Time		Part-Time
0-4 years	6.45 hours per pay period	0-4 years	3.22 hours per pay period
5-9 years	7.99 hours per pay period	5-9 years	3.99 hours per pay period
10+ years	9.53 hours per pay period	10+years	4.77 hours per pay period

Employees are encouraged to take their earned PTO in a timely fashion, as the District feels employees need time away from the job for rest and relaxation. No PTO is accrued after the maximum annual allowable hours of three hundred twenty (320). Therefore, the employee who reaches the maximum annual accrual does not earn any future PTO accrual until a portion of the balance is used. The maximum consecutive hours of PTO an employee may request at one time is one hundred sixty (160).

5.02 -PTO Guidelines

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An employee must submit their request for PTO to the CEO for approval. Every effort will be made to grant employees their request. The rate of PTO pay is the regular straight-time pay rate. PTO must be taken in a minimum of one-half (1/2) hour increments.

PTO is paid at your base rate of pay, exclusive of overtime or bonus. In the event that a payday falls during your PTO period, you may request an advance paycheck at least three (3) working days in advance of the commencement of your PTO in writing to the CEO.

A paid holiday, which falls during your vacation, will be paid as a holiday.

PTO is not earned or accrued during an unpaid leave of absence, unless otherwise required by law. An employee may request a PTO cash-out of no more than ~~50-100~~ hours per calendar year to be approved by the CEO. Upon termination of employment, the PTO balance will be paid to employee.

5.03 **5.03 Extended Sick Leave**

Paid Time Off (PTO) is to be used for up to three consecutive days off as a result of illness, injury or for the employee to receive medical care, treatment or diagnosis. Upon their start date employees will be eligible to accrue for Extended Sick Leave (ESL) to cover personal illnesses exceeding three (3) consecutive workdays. An employee is entitled to use accrued ESL beginning on the 90th day of employment. Full-time employees will accrue 2.40 ESL hours per pay period and part-time employees will accrue ESL on a prorated basis based on their regularly scheduled hours. No ESL is accrued after the maximum annual allowable hours of one hundred twenty (120) hours. Therefore, the employee who reaches the maximum annual accrual does not earn any future ESL accrual until a portion of the balance is used.

Because paid ESL benefits are intended to provide income protection in the event of an actual illness or injury, unused paid ESL benefits cannot be used for any other paid or unpaid absence and no compensation for accumulated ESL will be paid at the time of termination of employment or retirement.

The District may require the certification of a physician from employees on an extended leave of three (3) consecutive days or more. However, if there is reason to suspect abuse of the ESL leave benefit, the District reserves the right to request proof of illness at any time.

5.04 **__Holidays**

The District provides paid holidays for regular Full-Time and Part-Time employees who have completed their Introductory Period. Part-Time employee's holiday pay will be pro-rated based on their regularly scheduled hours.

The holiday schedule is determined and posted each year, but generally includes:

- New Year's Day
- Martin Luther King Day
- Presidents' Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Day after Thanksgiving Day
- Christmas Eve Day
- Christmas Day
- One Floating Holiday

Holidays occurring on Saturday are observed on the preceding Friday, and those occurring on Sunday are observed on the following Monday.

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5.05 – Medical Insurance

The District offers CalPers health insurance for regular Full-Time and Part-Time employees and their dependents. Effective ~~November 2019~~ July 2022, participating staff will receive up to a maximum of \$2,300.00 per month health insurance benefit and will be required to reimburse the District for the cost of coverage over the \$2,300 per month limit plus 5% of the premium. CalPers premiums are paid monthly by the District and participating staff will be billed quarterly for their share of their individual premium. Such coverage shall cease to be effective at the end of the month the employee leaves the District. (updated ~~Nov. 2019~~ July 2022)

More detailed information is set forth in the official plan documents and insurance policies that govern the plans. The various benefits set forth in this handbook are explained in more detail in separate documentation pertaining to each category or type of benefit.

Effective 10/4/17, participation in the medical insurance program begins the 1st of the month following the beginning of employment with the District. An employee must be actively at work in order to begin participation. Otherwise, an employee's insurance will begin on the date he or she returns to work.

It is required that an employee notify the CEO immediately of any changes in family status due to marriage, divorce, acquiring a new dependent or when a child is no longer an eligible dependent due to attainment of the maximum age, loss of college student qualification or marriage.

Should an employee lose his or her eligibility for the medical insurance plan (due to reduction of hours, termination, etc.) an employee may have the right to continue coverage for a temporary period of time on a self-pay basis. The Consolidated Omnibus Budget Reconciliation Act (“Cal-COBRA”) requires this continuation option for employer-sponsored group insurance plans.

Additionally, this continuation may be available to covered dependents that lose eligibility due to divorce or attaining maximum age (children). It is the District's responsibility to notify your dependents of the availability of continued coverage; however, in order for us to do this, it is your responsibility to notify us of any change of status.

Continuance of medical insurance coverage is also available through a conversion policy. This conversion can be elected either at the time you terminate and do not elect Cal-COBRA continuation or at the end of your Cal-COBRA continuation of benefits.

Effective July 2022, the District is offering employees a Delta Dental and Vision Policy. Participating staff will be required to reimburse the District 5% of the premium. In addition, the District is offering participating employees a HealthEquity FSA (flexible savings account) to assist with medical expenses. Details and enrollment forms are available from the office manager. (updated July 2022)

5.06 __-Educational Reimbursement

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The District will reimburse employees for tuition and registration fees for preapproved seminars and programs related to the employee's responsibility. Approval for attendance must be approved by the CEO. Full time employees will be allowed up to three (3) days off with pay for professional education. Part time employees shall receive pro-rated leave based on the number of hours worked in relation to full time hours. Some employees may need to attend training programs, seminars, conferences, lectures, meetings, or other outside activities for the benefit of Sequoia Healthcare District or the individual employees. Attendance at such activities, whether required by the District or requested by individual employees, requires the written approval of the CEO. To obtain approval, any employee wishing to attend an activity must submit a written request detailing all relevant information, including date, hours, location, cost, expenses, and the nature, purpose, and justification for attendance.

Attendance at any such event is subject to the following policies on reimbursement and compensation. For attendance at events required or authorized by the District, customary and reasonable expenses will be reimbursed upon submission of proper receipts. Acceptable expenses generally include registration fees, materials, meals, transportation, lodging and parking.

Reimbursement policies regarding these expenses should be discussed with the office manager in advance. The employee is required to submit a *Conference/Training Attendance Form* that presents a summary of your participation and a list of total related expenses for signature by the CEO.

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Employee attendance at authorized outside activities will be considered hours worked for non-exempt employees and will be compensated in accordance with normal payroll practices.

5.07 __-State Disability

The District is a participant in the disability plan offered by the State of California. The purpose of the SDI program is to partially compensate you for wages lost if you are unable to work due to illness or injury not caused while working. The amount of your weekly benefit is determined by your wages. All employees, except contract employees, participate in this program through a payroll deduction.

In order to receive SDI benefits, your disability must last at least eight days and you must file a timely claim. Forms and information are available from your local State Disability office or your doctor. In the event a benefit eligible employee qualifies for SDI, the District will coordinate their SDI benefit with any accrued sick leave.

5.08 __-Retirement 401(k)

The District offers employees the opportunity to participate in a Safe Harbor 401(k) retirement program beginning the 1st of the month following the start of employment with the District, effective 10/4/17. This gives an employee the opportunity to build up additional and substantial savings intended for use after retirement. It is a voluntary program. You defer state and federal income taxes on the money you put away for your future. (updated Jan. 2021)

The District will match all of your contribution up to three percent (3%) and one half (½) of your contribution up to five percent (5%). District matching is vested immediately. (updated Jan. 2021)

5.09 __-Social Security Retirement Benefit

Social Security also provides a monthly lifetime benefit when you retire. The amount of this benefit is based on an employee's earnings over their working career and the number of years an employee is covered by Social Security. The employee and the District pay equal amounts of taxes while you are working here.

5.10 __-Workers' Compensation

The District provides Workers' Compensation Insurance for all employees. This insurance provides an employee with medical care and cash compensation in the event of injury or disease resulting from employment.

If an Employee is injured while working, the Employee is responsible for reporting the injury to his or her supervisor immediately, regardless of how minor the injury might be.

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To ensure that you receive any workers' compensation benefits to which you may be entitled, you need to:

- Immediately report any work-related injury to your supervisor;
- Seek medical treatment and follow-up care if required;
- Complete a written *Employee's Claim for Workers' Compensation Benefits* (DWC Form 1) and return it to office manager; and
- Provide the District with a certification from your health care provider regarding the need for workers' compensation disability leave, as well as your eventual ability to return to work from the leave.

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Upon submission of a medical certification that an employee is able to return to work after a workers' compensation leave, the employee under most circumstances will be reinstated to their same position held at the time the leave began, or to an equivalent position, if available. An employee returning from a workers' compensation leave has no greater right to reinstatement than if the employee had been continuously employed rather than on leave.

An employee's return depends on their qualifications for any existing openings. If, after returning from a workers' compensation disability leave, an employee is unable to perform the essential functions of their job because of a physical or mental disability, the District's obligations to the employee may include reasonable accommodation, as governed by the Americans with Disabilities Act or the California Fair Employment and Housing Act.

The law requires Sequoia Healthcare District to notify the workers' compensation insurance company of any concerns of false or fraudulent claims.

Workers' Compensation and FMLA/CFRA

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Employees who are ill or injured as a result of a work-related incident, and who are eligible for family and medical leave under state and federal law (Family Medical Leave Act (FMLA) and the California Family Rights Act (CFRA)), will be placed on FMLA/CFRA during the time they are disabled and not released to return to work. The leave under these laws runs concurrently, and eligible employees will be on FMLA/CFRA for a maximum of 12 weeks in a 12-month period calendar year.

Paid Sick Leave and Workers' Compensation Benefits

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Paid sick leave is a benefit that also covers absences for work-related illness or injury. Employees who have a work-related illness or injury are covered by workers' compensation insurance. However, workers' compensation benefits usually do not cover absences for medical treatment. When you report a work-related illness or injury, you will be sent for medical treatment, if treatment is necessary. You will be paid your regular wages for the time you spend seeking initial medical treatment.

Any further medical treatment will be under the direction of the health care provider. Any absences from work for follow-up treatment, physical therapy or other prescribed appointments.

will not be paid as time worked. If you have accrued and unused sick leave, you may choose to substitute paid sick leave for any time that would otherwise be unpaid.

If you do not have accrued, paid sick leave, or if you have used all of your sick leave, you may choose to substitute vacation/paid time off for further absences from worked, related to your illness or injury.

If an employee is unable to work due to a work related illness or injury the employee may be entitled to temporary Workers' Compensation disability benefits after a three (3) day waiting period. An employee may use any accrued sick time or PTO during the waiting period. Subsequent to the waiting period, you may be able to coordinate your workers compensation benefits with your sick and vacation accrued time.

In the event you exhaust your sick leave accruals, you will be placed on a Workers' Compensation leave of absence. If your Workers' Compensation leave of absence exceeds 30 days, you may continue your health insurance through Cal-COBRA.

5.11 _____ Life Insurance

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This District shall offer employees a paid term life insurance policy valued at up to \$50,000 at no cost to the employee. Employees cannot increase the value of this policy by paying an additional premium. This benefit will cease upon termination of employment from the District.

5.12 Lactation Accommodation

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Sequoia Healthcare District recognizes lactating employees' rights to request lactation accommodation and accommodates lactating employees by providing a reasonable amount of break time and a suitable lactation location to any employee who desires to express breast milk for their infant child, subject to any exemption allowed under applicable law.

If possible, the break time should run concurrently with your normally scheduled break time. Any break time to express breast milk that does not run concurrently with your normally scheduled break time is unpaid.

The lactation location will be private (shielded from view and free from intrusion from co-workers and the public) and located close to your work area. The location will be safe, clean and free of toxic or hazardous materials; have a surface to place a breast pump and other personal items; have a place to sit; and have access to electricity or alternative devices (including, but not limited to extension cords or charging stations) needed to operate an electric or battery-powered breast pump. Sequoia Healthcare District will also provide access to a sink with running water and a refrigerator suitable for storing milk in close proximity to your workspace. If a refrigerator cannot be provided, Sequoia Healthcare District will provide another cooling device suitable for storing milk, such as an employer-provided cooler. The lactation location will not be a bathroom or restroom. The room or location may include an employee's private office if it otherwise meets the requirements of the lactation space. Multi-purpose rooms may be used as lactation space if they

satisfy the requirements for space; however, use of the room for lactation takes priority over other uses for the time it is in use for lactation purposes.

Employees who desire lactation accommodations should contact the office manager to request accommodations. An employee's request may be provided orally, by email, or in writing, and need not be submitted on a specific form. We will engage in an interactive process with you to determine when and where lactation breaks will occur. If we cannot provide break time or a location that complies with this policy, we will provide a written response to your request.

Sequoia Healthcare District will not tolerate discrimination or retaliation against employees who exercise their rights to lactation accommodation, including those who request time to express milk at work and/or who lodge a complaint related to the right to lactation accommodation. If you believe you have been denied reasonable break time or adequate space to express milk, or have been otherwise been denied your rights related to lactation accommodation, you have the right to file a complaint with the Labor Commissioner.

LEAVE OF ABSENCE

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6.01 Pregnancy Disability Leave

~~Pregnancy Disability Leave (PDL) is available for employees who are disabled due to pregnancy or related medical conditions. PDL can also be used for prenatal care and prenatal complications.~~

~~Employees may take up to four (4) months of PDL per pregnancy. Medical certification is required, and the actual length of time for PDL will depend on the medical necessity for the leave.~~

~~Pregnancy disability is also considered a “serious health condition” so that, for employees who are eligible for Medical Leave, health insurance will continue under pre-leave conditions for up to a combined total of twelve (12) workweeks per calendar year. For lengthier leaves and for employees who are ineligible for Medical Leave, health insurance can be continued at the employee’s expense under COBRA for the employee and covered dependents.~~

~~PDL is unpaid, except that employees must use any accrued Sick Leave and may use any accrued vacation while on leave.~~

6.01 2 General Leave of Absence

The District recognizes that circumstances may occur which may require an employee to request a leave of absence.

Unpaid time off may be granted to full-time employees who have been employed for at least one continuous year. Approval of a request for a leave of absence will be at the discretion of the District.

If your leave is not for emergency reasons, you must make a request in writing and receive approval from the CEO at least 20 days prior to the onset of the leave.

Leaves may be granted up to six (6) weeks, at the sole discretion of the District, based upon information provided by the employee. Leaves of more than six (6) consecutive weeks must be approved by the CEO of the District.

Conditions of a leave are included on the District “Extended Absence Form” that must be signed by the employee. Failure to meet the conditions of the leave may result in immediate termination.

To the extent feasible, we will attempt to place you in your former position, or in an available position for which you are qualified; however, no promise of continued employment can be made.

The District may require that an employee utilize accrued vacation and, if appropriate, sick pay during the leave, but not for the purpose of extending the approved leave of absence beyond the term approved.

In the event your leave of absence is in excess of thirty (30) days you will be required to continue your health insurance through Cal-COBRA. If Cal-COBRA coverage is elected, you will be responsible for paying the premiums. Prior to beginning an approved leave of absence, you should contact the District to determine your options for continued medical coverage, if you were enrolled in the plan. In the event you do not elect to continue coverage through Cal-COBRA you will be entitled to re-enroll in your health and dental plan the first of the month following your return from your leave of absence.

Time off on an approved leave of absence will not count as time worked for the purpose of vacation or sick leave accrual. Holidays that fall during a leave of absence will be unpaid.

6.02 ~~03~~ Bereavement Leave

Regular full-time employees are eligible for five (5) paid days bereavement leave for the death of a spouse, domestic partner, parent, child, brother, sister or relation of spouse or domestic partner of the same status. Part-time employees may take up to three (3) paid days off to attend the funeral of a spouse, domestic partner, parent, child, brother, or sister or relation of spouse or domestic partner of the same status.

6.03 Time Off for Voting

If you do not have sufficient time outside of working hours to vote in an official statewide election, you may take off enough working time to vote, including up to two hours off without loss of pay. Please inform your supervisor in advance of your need for time off to vote.

6.04 ~~05~~ Jury Duty and Subpoenaed Witness Appearance

Regular full-time employees are eligible for five (5) days paid jury duty/subpoenaed witness appearance pay and part-time employees are eligible for three (3) days. Exempt employees will receive full salary unless they are absent for a full week and perform no work. You should notify your supervisor of the need for time off for jury duty as soon as a notice or summons from the court is received. You may be requested to provide written verification from the court clerk of performance of jury service. If work time remains after any day of jury selection or jury duty, you will be expected to return to work for the remainder of your work schedule. You may retain any mileage allowance or other fee paid by the court for jury services. Any pay received from the jury duty pay must be coordinated with accrued PTO.

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6.05 –KinCare Leave

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Employees are allowed to take up to half (½) of their accrued PTO/ESL in any year, for the care of a sick family member. Eligible family members include child, parent, spouse domestic partner or the domestic partner’s child, grandparent, grandchild and sibling.

For purposes of kin care use, a “child” is defined as a biological, foster, or adopted child; stepchild; or a legal ward. A “child” also may be someone for whom an employee has accepted the duties and responsibilities of raising, even if he or she is not the employee’s legal child.

A “parent” is an employee’s biological, foster, or adoptive parent; stepparent; or legal guardian.

A “spouse” is your legal spouse according to the laws of California.

A “domestic partner” is another adult of the same sex with whom an employee has chosen to share his or her life in an intimate and committed relationship of mutual caring, and with whom the employee has filed a Declaration of Domestic Partnership with the Secretary of State.

A “domestic partner’s child” is the biological, foster or adopted child, stepchild, or legal ward of an employee’s domestic partner. A “domestic partner’s child” also may be someone for whom an employee’s domestic partner has accepted the duties and responsibilities of raising, even if he or she is not an employee’s domestic partner’s legal child.

6.06 Pregnancy Disability Leave

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If you are pregnant, have a related medical condition, or are recovering from childbirth, please review this policy. Any employee planning to take pregnancy disability leave (PDL) should advise the office manager and CEO as early as possible. Please make an appointment with the office manager to discuss the following conditions:

- The length of pregnancy disability leave will be determined by the advice of the your physician, but employees disabled by pregnancy may take up to four months of leave per pregnancy (the working days you normally would work in one-third of a year or 17 1/3 weeks). Part-time employees are entitled to leave on a pro rata basis. The four months of leave includes any period of time for actual disability caused by the your pregnancy, childbirth, or related medical condition. This includes leave for severe morning sickness and for prenatal care, doctor-ordered bed rest, as well as other reasons. Your healthcare provider determines how much time you need for your disability;
- Sequoia Healthcare District will also reasonably accommodate medical needs related to pregnancy, childbirth, or related conditions or temporarily transfer you to a less strenuous or hazardous position (where one is available) or duties if medically needed because of your pregnancy;
- If you need to take PDL, you must inform Sequoia Healthcare District when a leave is expected to begin and how long it will likely last. If the need for a leave, reasonable

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accommodation, or transfer is foreseeable (such as the expected birth of a child or a planned medical treatment for yourself), you must provide at least 30 days advance notice before the PDL or transfer is to begin. Consult with the personnel manager regarding the scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of the District. Any such scheduling is subject to the approval of the your health care provider:

- For emergencies or events that are unforeseeable, we need you to notify the District, at least verbally, as soon as practical after you learn of the need for the leave;
- Failure to comply with these notice requirements may result in delay of PDL, reasonable accommodation, or transfer;
- Pregnancy leave usually begins when ordered by your health care provider. You must provide Sequoia Healthcare District with a written certification from a health care provider for need of PDL, reasonable accommodation or transfer. The certification must be returned no later than 15 calendar days after it is requested by the District. Failure to do so may, in some circumstances, delay PDL, reasonable accommodation or transfer. Please see the personnel department for a medical certification form to give to your health care provider;
- Leave returns will be allowed only when your health care provider sends a release;
- *You are required to use accrued sick time (if otherwise eligible to take the time) during PDL. You are allowed to use accrued PTO time (if otherwise eligible to take the time) during PDL;* and
- Leave does not need to be taken in one continuous period of time and may be taken intermittently, as needed. Leave may be taken in increments of 4 hours.

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If intermittent leave or leave on a reduced work schedule is medically advisable you may, in some instances, be required to transfer temporarily to an available alternative position that meets your needs. The alternative position does not need to have equivalent job duties, but must have the equivalent rate of pay and benefits, and you must be qualified for the position. The position must better accommodate your leave requirements than your regular job. Transfer to an alternative position can include altering an existing job to better accommodate your need for intermittent leave or a reduced work schedule.

When your health care provider releases you to return to work, from PDL, you will be reinstated to your same position held at the time the leave began or, in certain instances, to a comparable position, if available. There are limited exceptions to this policy. An employee returning from a pregnancy disability leave has no greater right to reinstatement than if the employee had been continuously employed.

If you are on PDL, you will be allowed to continue to participate in group health insurance coverage for up to a maximum of four months of disability leave (if such insurance was provided before the leave was taken) at the level and under the conditions that coverage would have been provided if you had continued in employment continuously for the duration of the leave. PDL may impact other benefits or a seniority date. Please contact the office manager for more information.

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6.07 New Parent Leave Act

California's New Parent Leave Act (NPLA) provides an employee with up to a maximum of 12 weeks of unpaid NPLA leave within one year of a child's birth, adoption, or foster care placement if you meet all of the following eligibility requirements:

- You have been employed with the District for a total of at least 12 months prior to the commencement of leave;
- You have worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- You are employed at a worksite where there are 20 or more employees within a 75-mile radius.

If you are eligible for NPLA leave, you need to be aware of the following important information:

- You have the right to take up to a maximum of 12 weeks of unpaid, job-protected NPLA leave within one year of the child's birth, adoption or foster care placement.
- You are guaranteed employment in the same or comparable position at the end of your NPLA leave.
- Your group health benefits will be maintained during your NPLA leave at the same level and under the same conditions as if you continued to work (not to exceed 12 weeks over the course of a 12-month period for NPLA leave). If you currently contribute to the payment of benefits, you must continue to do so while on leave.
- If you do not return to work after your NPLA leave, you may be required to reimburse the District for its share of any group health insurance premium paid on your behalf during your NPLA leave — unless your failure to return is due to the continuation, recurrence, or onset of a serious health condition or other circumstances beyond your control.

You can choose to use sick leave or other accrued paid time off during your NPLA leave. Please advise office manager if you wish to use any of your accrued leave benefits during your NPLA leave.

In addition, you may be eligible for Paid Family Leave (PFL) wage replacement benefits or other forms of wage replacement during your NPLA leave. Contact office manager for more information regarding wage replacement.

If you have any questions about NPLA leave or other benefits, please contact the office manager.

6.08 Family and Medical Leave

California's California Family Rights Act (CFRA) and the federal Family and Medical Leave Act (FMLA) provide up to 12 work weeks of unpaid family/medical leave within a 12-month period, under the following conditions:

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- You have been employed with the District for a total of at least 12 months prior to the commencement of leave. The 12 months of employment must have accumulated within the previous seven years (certain exceptions apply);
- You have worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- You are employed at a work site where there are 50 or more employees within a 75-mile radius.

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Leave may be taken for one or more of the following reasons:

- The birth of your child, or placement of a child with you for adoption or foster care (FMLA/CFRA);
- Incapacity due to pregnancy, prenatal medical care or child birth (FMLA only);
- Your serious health condition that makes you unable to perform your job (FMLA/CFRA);
- To care for your spouse, child or parent who has a serious health condition (FMLA/CFRA);
- To care for your registered domestic partner (CFRA only).
- For additional information about eligibility for family/medical leave, contact office manager.

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Military Family Leave Entitlements

- Eligible employees whose spouse, son, daughter or parent is on covered active duty or call to covered active duty status may use their 12-week leave entitlement for certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings.
- Eligible employees may also take a special leave entitlement of up to 26 weeks of leave during a single 12-month period to care for a covered servicemember. (FMLA/CFRA for 12 weeks if the care provider is eligible for both, followed by 14 weeks of (FMLA only), or 26 weeks of FMLA only if leave is not CFRA covered leave). A covered servicemember is either:
- A current member of the Armed forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness*; or
- A veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employee takes FMLA leave to care for the covered veteran, and who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness.*

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*The FMLA definitions of "serious injury or illness" for current servicemembers and veterans are different from the FMLA definition of "serious health condition."

Calculating the 12-month Period

For purposes of calculating the 12-month period during which 12 weeks of family and medical leave or qualifying exigency leaves may be taken, Sequoia Healthcare District uses the calendar year.

Under most circumstances, leave under federal and state law will run at the same time and an eligible employee will be entitled to a total of 12 weeks of family and medical leave in the designated 12-month period.

For leave to care for a covered servicemember, the 12-month period begins on the first day of the leave, regardless of how the 12-month period is calculated for other leaves. Leave to care for a covered servicemember is for a maximum of 26 workweeks during a 12-month period.

Pregnancy, Childbirth or Related Conditions and Baby Bonding

Leave because of a disability for pregnancy, childbirth or related medical condition is not counted as time used under California law (CFRA). However, time off because of pregnancy disability, childbirth or related medical condition does count as family and medical leave under federal law (FMLA). Employees who take time off for pregnancy disability and who are eligible for FMLA will be placed on FMLA that runs at the same time as their pregnancy disability leave (PDL). Once the pregnant employee is no longer disabled, or once the employee has given birth and exhausted PDL, the employee may apply for leave under the CFRA, for purposes of baby bonding.*

Any leave taken for the birth, adoption, or foster care placement of a child does not have to be taken in one continuous period of time. CFRA leave taken for the birth or placement of a child will be granted in minimum amounts of two weeks. However, the District will grant a request for a CFRA leave (for birth/placement of a child) of less than two weeks' duration on any two occasions. The District may also grant additional requests for leave lasting less than two weeks at its discretion. Any leave taken must be concluded within one year of the birth or placement of the child with the employee.

*If you are not eligible for baby bonding leave because you work at a worksite with less than 50 employees in a 75-mile radius, you may be eligible for time off to bond with a new child under the New Parent Leave Act (if you meet the eligibility requirements under this law). For more information, contact the CEO.

Leave Procedures

The following procedures shall apply when requesting family/medical leave:

- Please contact the CEO as soon as you realize the need for family/medical leave. If the leave is based on the expected birth, placement for adoption or foster care, or planned medical treatment for your serious health condition or that of a family member, you must notify the District at least 30 days before leave is to begin. You must consult with your supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of the District. Any such scheduling is

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subject to the approval of your health care provider or the health care provider of your child, parent, or spouse.

- If you cannot provide 30 days' notice, the District must be informed as soon as is practical.
- If the FMLA/CFRA request is made because of your own serious health condition, the District may require, at its expense, a second opinion from a health care provider that the District chooses. The health care provider designated to give a second opinion will not be one who is employed on a regular basis by the District.
- If the second opinion differs from the first opinion, the District may require you, at the District's expense, to obtain the opinion of a third health care provider designated or approved jointly by you and the employer. The opinion of the third health care provider shall be considered final and binding on you and the District.

Certification

Sequoia Healthcare District requires you to provide certification. You will have 15 calendar days from the District's request for certification to provide it to the District, unless it is not practical to do so. The District may require recertification from the health care provider if you request additional leave upon expiration of the time period in the original certification. (For example, if you need two weeks of family and medical leave, but following the two weeks you need intermittent leave, a new medical certification will be requested and required.) If you do not provide medical certification in a timely manner to substantiate the need for family and medical leave, the District may delay approval of the leave, or continuation thereof, until certification is received. If certification is never received, the leave may not be considered family and medical leave.

If the leave is needed to care for a sick child, spouse, or parent, you must provide a certification from the health care provider stating:

- Date of commencement of the serious health condition;
- Probable duration of the condition;
- Estimated amount of time for care by the health care provider; and
- Confirmation that the serious health condition warrants your participation.

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When both parents are employed by the District, and request simultaneous leave for the birth or placement for adoption or foster care of a child, the District will not grant more than a total of 12 workweeks of family/medical leave for this reason.

If your serious health condition is the reason for leave, you must provide a certification from the health care provider stating:

- Date of commencement of the serious health condition;
- Probable duration of the condition; and
- Your inability to work at all or to perform any one or more of the essential functions of your position because of the serious health condition.

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If you are absent because of your own serious health condition, the District will also require a medical release to return to work form or certification from your health care provider that you are able to resume work.

Failure to provide a release to return to work certificate from your health care provider may result in denial of reinstatement until the certificate is obtained.

Leave Related to Military Service

A leave taken due to a "qualifying exigency" related to military service must be supported by a certification of its necessity. A leave taken due to the need to care for a servicemember must be supported by a certification by the servicemember's health care provider or other certification allowed by law. Special certification requirements apply to leaves related to military service.

Health and Benefit Plans

If you are taking family/medical leave, you will be allowed to continue participating in any health and welfare benefit plans in which you were enrolled in before the first day of the leave (for a maximum of 12 workweeks, or 26 workweeks if the leave is to care for a covered servicemember) at the level and under the conditions of coverage as if you had continued in employment for the duration of such leave. The District will continue to make the same premium contribution as if you had continued working. The continued participation in health benefits begins on the date leave first begins. In some instances, the District may recover premiums paid to maintain health coverage if you fail to return to work following family/medical leave.

Employees on pregnancy disability leave will be allowed to continue to participate in group health coverage for up to a maximum of four months of pregnancy disability leave (if such insurance was provided before the leave was taken) on the same terms as if you had continued to work. The right to continued group health coverage during pregnancy disability leave is a separate and distinct entitlement from the CFRA entitlement.

Payment is to be made Unpaid time off may be granted to full-time employees who have been employed for at least one continuous year. Approval of a request for a leave of absence will be at the discretion of the District. If the leave of absence is in excess of thirty (30) days, the employee will be required to pay the prorated health premium for the time period or continue their health insurance through Cal-COBRA at their discretion.

Substitution of Paid Leave

Generally, FMLA/CFRA leave is unpaid. The District may require, or you may choose, to use accrued paid leave while taking FMLA leave. In order to use paid leave for FMLA leave, you must comply with the District's normal paid leave policies. For more information on those specific circumstances requiring or allowing the substitution of paid leave contact office manager.

Reinstatement

Under most circumstances, upon return from family/medical leave, you will be reinstated to your original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to reinstatement than if the employee had been continuously employed rather than on leave. For example, if an employee on family/medical leave would have been laid off had the employee not gone on leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement. In addition, an employee's use of family/medical leave will not result in the loss of any employment benefit that the employee earned before using family/medical leave.

Reinstatement after family/medical leave may be denied to certain salaried "key" employees under the following conditions:

- An employee requesting reinstatement was among the highest-paid 10 percent of salaried employees employed within 75 miles of the worksite at which the employee worked at the time of the leave request;
- The refusal to reinstate is necessary because reinstatement would cause substantial and grievous economic injury to the District's operations;
- The employee is notified of the District's intent to refuse reinstatement at the time the District determines the refusal is necessary; and
- If leave has already begun, the District gives the employee a reasonable opportunity to return to work following the notice described previously.

Time Accrual

Please contact office manager with any questions regarding accrual of other District provided paid leave benefits (such as PTO or sick leave) during unpaid FMLA/CFRA leave.

Carryover

Leave granted under any of the reasons provided by state and federal law will be counted as family/medical leave and will be considered as part of the 12-workweek entitlement (26-workweek entitlement if leave is to care for a servicemember) in any 12-month period. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

Intermittent Leave

You may take Family and Medical Leave Act/California Family Rights Act leave intermittently (in blocks of time, or by reducing your normal weekly or daily work schedule) if the leave is for your serious health condition or that of a qualifying family member and the reduced leave schedule is medically necessary as determined by the health care provider of the person with the serious health condition. The smallest increment of time that can be used for such leave is half hour.

See also the discussion of Pregnancy, Childbirth or Related Conditions and Baby Bonding above.

6.09 School Appearances Involving Suspension

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If you are the parent or guardian of a child facing suspension from school is summoned to the school to discuss the matter, you should alert your supervisor as soon as possible before leaving work. In agreement with California Labor Code Section 230.7, no discriminatory action will be taken against an employee who takes time off for this purpose.

6.05—6.10 Domestic Violence Leave, Sexual Assault or Stalking Leave and Accommodation

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If an employee is a victim of domestic violence they are entitled to take time off to seek medical attention, obtain services from an agency, obtain psychological counseling and participate in a program to increase safety from future domestic violence, including temporary or permanent relocation. Employees will be required to utilize available vacation to attend the activity. In the event and employee does not have accrued vacation available the time off will be without pay. If you are the victim of domestic violence, sexual assault or stalking, you are eligible for unpaid leave. While the leave is generally unpaid, employees can use their paid sick time under California's Healthy Workplaces, Healthy Families Act for the purposes described below.

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You may request leave if you are involved in a legal action, such as obtaining restraining orders, or appearing in court to obtain relief to ensure your or your child's health, safety, or welfare. Please provide reasonable advance notice of the need for leave, unless advance notice is not feasible. Contact the CEO or the President of the Board.

If you need a reasonable accommodation for your safety at work, contact the CEO or the President of the Board. If you are requesting a reasonable accommodation, you will need to submit a written statement signed by you, or by an individual acting on your behalf, certifying that the accommodation is for the purpose of your safety at work.

For reasonable accommodation requests, the District will also require certification demonstrating that you are the victim of domestic violence, sexual assault or stalking. The District may request recertification every six months. Please notify the District if an approved accommodation is no longer needed.

The District will engage in an interactive process with you to identify possible accommodations, if any, that are effective and will make reasonable accommodations unless an undue hardship will result.

Sequoia Healthcare District will, to the extent allowed by law, maintain the confidentiality of an employee requesting leave or accommodation under these provisions.

6.11 Domestic Violence, Sexual Assault or Stalking Leave for Treatment

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Employees who are victims of domestic violence, sexual assault or stalking are eligible for unpaid leave. Although the leave is generally unpaid, employees can use their paid sick time under California's Healthy Workplaces, Healthy Families Act for the purposes described below.

You may request leave for any of the following purposes:

- To seek medical attention for injuries caused by domestic violence, sexual assault or stalking;
- To obtain services from a domestic violence shelter, program or rape crisis center as a result of domestic violence, sexual assault or stalking;
- To obtain psychological counseling related to experiencing domestic violence, sexual assault or stalking;
- To participate in safety planning and take other actions to increase safety from future domestic violence, sexual assault or stalking including temporary or permanent relocation.

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Please provide reasonable advance notice of the need for leave unless advance notice is not feasible. Contact the CEO.

Sequoia Healthcare District will, to the extent allowed by law, maintain the confidentiality of an employee requesting leave under this provision.

The length of unpaid leave an employee may take is limited to 12 weeks provided for in the federal Family and Medical Leave Act (FMLA) for eligible employees.

6.07 Other Legally Required Leaves of Absence

~~Employees will be granted a leave of absence as required by law for the purpose of fulfilling any required legal or military obligation (e.g. jury duty, appearance as a witness in a legal proceeding, military reserve duty, volunteers in the National Disaster Medical System or performance of emergency duty by a volunteer fire fighter). Employees are required to provide reasonable advance notice of any need for such leave and are expected to return to work each day or portion of the day that they are not selected for jury duty or called as a witness. For non-exempt employees, this leave will be unpaid. For exempt employees, salary will continue provided the employee has performed District work during the workweek. For exempt employees, any salary paid during leave will be offset by amounts received as jury or witness fees or as military pay, and no salary will be paid for workweeks in which no District work is performed, in accordance with law.~~

~~Employees who do not have sufficient time outside their regular business hours to vote in a statewide election may request time off to vote. Employees must make their request at least (2) days in advance of the election. Up to two (2) hours of paid time off will be provided, at the beginning or end of the employee's regular shift, whichever will allow the freest time for voting.~~

GENERAL INFORMATION

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7.01 __-Job Description

The responsibilities of staff positions are described in the job description. Although each job is basically separate from others, all employees are expected to be mutually cooperative and to share responsibilities as needed to improve the work performance of the District. The District may require an employee to perform work normally allocated to another employee where, in the District's best business judgement, this arrangement is necessary for efficient operations at the office. Each employee shall resume his/her regular responsibilities as soon as it is feasible.

7.02 __-Smoking

Various laws restrict smoking in the workplace. It is the District's policy that smoking is prohibited ~~inside the perimeter of any District structure and further restricted as follows:~~

~~Smoking on District property is permitted only outside of all structures in designated areas away from entrances during off duty time before or after work, or during breaks and meal periods. Smoking in District vehicles off our property is permitted only when non smoking employees are not present.~~
~~at this workplace. The smoking prohibition applies to all smoking devices, including, but not limited to, the use of electronic smoking devices, such as electronic cigarettes, pipes, hookahs, and vaping devices.~~

7.03 __-Punctuality and Attendance

~~As an employee of the Sequoia Healthcare district, you are expected to be punctual and regular in attendance. Your regular attendance and punctuality are extremely important to the success of the District. Absenteeism and tardiness put a strain on the District's operation and create an unfair burden on other employees.~~ It is also a factor that will be considered during performance evaluations and may affect continued employment. Violation of the attendance and punctuality policy will result in disciplinary action, up to and including immediate termination.

~~Absenteeism and tardiness put a strain on the District's operation and create an unfair burden on other employees.~~

The District monitors and records each employee's attendance in a fair and consistent manner. Employees are required to notify the District well in advance when they are unable to report for work as scheduled.

In compliance with federal and state laws, all non-exempt employees must accurately record their hours worked daily. If for any reason you are unable to report to work as scheduled, it is your responsibility to notify the office no later than sixty (60) minutes prior to your scheduled starting time. In the event the office is not yet open you will be expected to leave a message in the office message line at (650) 421-2155. Any employee retrieving messages from the office message line

Sequoia Healthcare District
Employee Handbook
Page 50

concerning an employee's absence should forward the messages to the CEO. Asking a friend, relative or another employee to call for you is not an acceptable alternative, unless you are incapable of communicating directly. In the event you anticipate that you will be absent more than one (1) day you should leave a message for the CEO prior to 5:00 PM.

If your absence continues for more than one day, it is important to keep the CEO informed daily so that arrangements can be made to handle your work while you are absent.

Please notify the CEO of any planned absence (scheduled appointments) as soon as you are aware of the need for being off work. You should make every effort to schedule your appointments (medical or personal) outside your normal working hours.

Absences due to illness or injury in excess of three (3) days may require certification from your physician or medical provider. The District reserves the right to request medical certification for less than three (3) days or at any time it deems appropriate.

7.04 __-Tardiness

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An essential obligation of every employee is to be ready for work at the scheduled starting time. This includes returning from meal periods and breaks. If an employee expects to be late in arriving at the office, they must contact the office as soon as possible. If it is not within normal business hours, you should leave a message in the General Mail Box indicating your anticipated time of arrival. While everyone on rare occasions may be late, routine tardiness is not acceptable and is grounds for disciplinary action up to and including termination. Any early departure must be scheduled in advance with the CEO.

7.05 __-Expense Reimbursement and District Credit Cards

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This policy establishes standards for Sequoia Healthcare District employees who incur expenses during the course of business activities on behalf of or at the request of District. The policy also defines the documentation necessary to support reimbursement for business travel, out-of-pocket and entertainment expenses.

Employees will be reimbursed for mileage at the rate allowed by the Internal Revenue Service. Meals will be reimbursed upon presentation of valid receipts. Personal cell phones used in the course of District business upon presentation of a valid invoice will be reimbursed up to \$75/month.

Employees are to exercise good judgment in incurring business travel and entertainment expenses. Reimbursement will be made for authorized business expenses that are reasonable, necessary and appropriately documented.

A. Business Travel Expenses

Business travel expenses are reasonable and necessary expenses that an employee incurs while

traveling away from home on District business or related activities approved by District. This Section A applies to basic expenses associated with travel on District business. Section B contains separate requirements related to business entertainment expenses.

1) Hotel Accommodations - Employees should use hotels that balance the needs for convenience, safety, and lower cost. Employees may not stay at luxury hotels such as Ritz Carlton, Four Seasons or utilize similarly expensive lodging unless it is a designated conference hotel. Employees will not be reimbursed for bottled water, in-room movies or mini-bar expenses.

2) Airfare - Employees must travel coach/economy class at the most economical rate available to reasonably accommodate business schedules.

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Use of the long-term parking lots and/or off airport parking is encouraged to reduce overall travel costs.

3) Mileage/Ground Transportation - When it is more practical to use a personal automobile when traveling on business, reimbursement will be made at the currently established IRS rate per mile for the actual miles necessary to conduct the relevant business.

Other ground transportation (e.g. taxi, bus, subway, rail, etc.) will be reimbursed if it relates to District business.

Other costs associated with ground transportation such as parking and bridge tolls will be reimbursed.

4) Rental Cars - Luxury and premium cars are not reimbursable.

5) Meals - District will reimburse reasonable meal expenses incurred by employees traveling out-of-town on District business. Such meals should not exceed ~~\$20~~\$30 for breakfast, \$30 for lunch and \$40 for dinner.

6) Telephone Calls/Faxes/Mail Service While Traveling - Necessary business related telephone calls, faxes or mail service and business use of personal cell phone, home phone or faxes will be reimbursed with appropriate documentation.

Personal calls while traveling, such as reasonable calls to home, family members, baby sitters, etc., are allowable business expenses.

7) Spouse Travel - No reimbursement is allowed for travel expenses, (including, but not limited to, airfare, hotel, meals, transportation, tips, etc.) paid or incurred by an employee with respect to a spouse, dependent or other individual -accompanying an employee on a business trip.

B. Business Entertainment Expenses (including meals and gifts)

Business entertainment expenses are those expenses incurred by the employee while (i) conducting/discussing District business and (ii) meeting with other District employees (including subordinates) and/or other persons who directly (or through another entity) do business with or support the District.

1) Business Meals - Business entertainment and meal expenses are the same as outlined in 5) above.

District will only reimburse meal expenses involving District-only participants when a significant amount of the discussion/purpose of the meal is business related – whether the meeting takes place in a restaurant or the office. Employees are reminded that they represent the District while on company business and that alcohol use, if any, must be responsible and in conjunction with a

meal.

2) Business Gifts - Modest business gifts to non-employees (including board members and sponsors) will be reimbursed with the approval of the District's CEO or Board President and appropriate documentation.

3) Gifts to Employees - Generally, the District will not reimburse an employee for gifts (including flowers) to subordinates, peers, or supervisors, including events such as a birthday, holiday (e.g., Christmas), wedding, special days (i.e., secretary day), birth of child or other life event.

With the CEO's or Board President prior approval, an employee may expense a gift to a District employee or board member for exceptional performance, as a thank you for a special effort, as a going away gift, or as an acknowledgement for completing a degree or training program. In addition, an employee may expense flowers or another appropriate and reasonable gift sent to a subordinate, peer, supervisor, or board member in the event of the death of an employee or immediate family member, the hospitalization of the employee or employee family member or other family crisis.

C. Expense Reporting and Documentation Requirements for the Paper Process

Expense reports must be completed in accordance with the requirements of this policy.

1) Expense Reporting Signature and Approvals - Expense reports must be signed by the employee and approved by the employee's supervisor or the Board President. By signing the expense reports, employees and the individual approving reports are representing and confirming that the expense report complies with these standards.

2) Forms to be Used - Employees must use the current District expense report form for reimbursement of out-of-pocket expenses and mileage.

3) Attachments to Forms - When preparing expense reports, receipts should be attached.

4) Substantiation of Expenses - Generally, a receipt should be provided in support of out of pocket expense items. Exceptions to this general requirement include bridge tolls, highway tolls, modest bus or subway fares, and tips to baggage handlers in hotels, airports. A receipt should accompany all ~~District~~ credit card purchases.

D. District Credit Cards

Employees must follow the above requirements for allowable charges to District credit cards.

1) Credit Card Statement Approvals – Credit card statements must be signed by the employee and approved by the CEO or Board President. By signing the statement, employees and the individual approving reports are representing and confirming that the expense report complies with District policy for valid, allowable expenses.

2) Attachment and explanation of receipts - When you submit your credit card statement for

payment, all receipts should be attached. If you are missing bridge tolls, highway tolls, bus or subway fares, and tips to drivers, servers, baggage handlers, etc. you will need to attach an explanation of the charge. In addition, you must specify which budget line item the charge should be billed against (i.e. office supplies, grants administration, etc.).

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7.06 ~~Use of~~ District Property

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~~The use of District equipment and facilities for non-District uses is not permitted unless prior approval is received from the CEO of the District. Employees who utilize the District's equipment and facilities without proper authorization may be subject to disciplinary action.~~

~~Furniture, Machinery, tools, desks, phones, fax and copy equipment, computers equipment and software, vehicles, and any other Sequoia Healthcare District property records in all formats and similar property provided by the District for the performance of job duties should be~~must be maintained and kept clean and are to be used only for work-related purposes. No such property may be removed from the premises without prior authorization. The District reserves the right to ~~by way of inspection~~ all District property including computer or phone data or messages to ensure compliance with its rules and regulations, with or without notice to the employee ~~ensure compliance with this and other policies relating to employee conduct and work regulations.~~

The use of District equipment and facilities for non-District uses is not permitted unless prior approval is received from the CEO of the District. Employees who utilize the District's equipment and facilities without proper authorization may be subject to disciplinary action.

~~Computers and software and all other electronic devices and systems are to be used only for District business purposes. The District reserves the right to monitor and inspect all employee use of such devices including email communications for compliance with this rule with or without notice to any employee involved.~~

~~Employees are not authorized to establish security codes on computer or electronic transmission devices. All codes are issued by and are the property of the District and may be changed or overridden at any time by the District.~~

Computers and software and all other electronic devices and systems are to be used only for District business purposes. The District reserves the right to monitor and inspect all employee use of such devices ~~including communications to ensure for~~ compliance with this rule, with or without notice to ~~any~~ the employee ~~involved and at any time, not necessarily in the employee's presence.~~

District voice mail and/or electronic mail (e-mail) including texting and mobile email are to be used for business purposes. Sequoia Healthcare District reserves the right to monitor voice mail

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messages, and e-mail messages, and texts to ensure compliance with this rule, with or without notice to the employee and at any time, not necessarily in the employee's presence.

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Employees should have no expectation of privacy with regard to any information that is communicated through or stored on any District computers or in its voicemail system.

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The District also requires employees to use email in a way that respects the confidential and proprietary information of others. Employees are prohibited from copying, downloading or distributing copyrighted material on District equipment. Employees should consult CEO and the systems administrator before emailing highly sensitive or confidential information.

~~The District strongly discourages the storage of a large number of email messages, picture files and music files. Retention of messages, pictures and music takes up a large amount of space on the server and can slow down system performance. In addition, because email messages can contain confidential information, it is desirable to limit the number, distribution, and availability of such messages. Employees must comply with the District instructions concerning storage limits.~~

~~The District reserves the right to access an employee's voicemail (outgoing and incoming) and email messages, as well as all information stored on computers at any time. Therefore, an employee's outgoing voicemail message must not indicate to the caller that his/her incoming message will be confidential or private. The existence of a password on either system is not intended to indicate that messages will remain private, and all employees must make passwords known to the District. Employees must comply with District instructions concerning the use of passwords. Employees should have no expectation of privacy with regard to any information that is communicated through or stored on any District computers or in its voicemail system.~~

~~Encrypting email messages or attached files sent, stored, or received on the District's system is prohibited except where explicitly authorized. Employees are prohibited from using or installing any encryption software without prior written permission from the District's system administrator. Employees with a business need to encrypt messages should submit a written request to the system administrator with a copy sent to their supervisor.~~

Employees should be aware that even when a message has been erased or deleted, it still may be possible to retrieve it from a backup system. Therefore, employees should not rely on the erasure of messages to assume a message has remained private.

~~Messages on the voicemail and email systems are to be accessed only by the intended recipient and by others at the direct request of the intended recipient. However, the District reserves the right to access messages on both systems at any time. Any attempt by persons other than the above to access messages on either system will constitute a serious violation of District policy.~~

Employees should remember that any messages or information sent on District-provided facilities via an electronic network such as Internet mailing lists, bulletin boards, social networking sites and on-line services are statements identifiable and attributable to the District. Therefore, employees must limit their discussion to matters of fact and avoid expressing opinions while using the District's systems or District provided account. Communications must not reveal any

information about the District processes, techniques, trade secrets, or confidential information and must not otherwise violate this or other District policies. You are not to use District property for non-job related appeals or petitions or solicitation for commercial, religious or personal causes.

Messages on the District's voicemail and email systems are subject to the same policies regarding harassment and discrimination as are any other workplace communications. Offensive, harassing or discriminatory content in such messages and data will not be tolerated.

~~The District is concerned about the unauthorized use of computer software.~~ You may not duplicate for your personal use or the use of another person any software that is licensed to the District. You must be prepared to confirm your right to any software not provided by the District that is used by you while working on equipment belonging to the District (such use will be by authorization of the District).

All work originated or created on the District's premises or created using any materials or equipment owned, leased or provided by the District, or originated, created or worked on during the employee's work hours are the exclusive property and/or intellectual property of the District.

7.07 __-Use of Telephones

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District telephones are our vital links in serving the interests of the District and our residents. Frequently the first contact a visitor has with the District is via the telephone. It is imperative that all members of the District practice excellent telephone courtesy at all times. This includes identifying yourself by name when answering the telephone.

Occasionally a personal call may be necessary, but we require our employees' cooperation in limiting such calls to emergencies or essential personal business and keeping them as brief as possible.

7.08 __-Solicitation and Distribution of Literature

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Persons not employed by the District may not solicit or distribute literature on District property at any time for any reason. Furthermore, solicitation by one employee of another employee is prohibited while either is on working time. Distribution by employees of non-District literature is prohibited at any time within the work area. The terms of these regulations are defined below:

- Solicitation includes: requests for signatures, seeking contributions for charities, seeking support for political activities or organizations, or requests for purchase of merchandise.
- Distribution includes: distributing pamphlets, leaflets, literature, or printed matter of all kinds.

For purposes of this Solicitation and Distribution policy, “working time” refers to the hours of both the employee(s) engaging in the activity and the employee(s) at whom the activity is directed. Working time does not include off-duty periods, such as break and meal periods.

7.09 __-Proprietary Information/Confidentiality

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The importance of confidentiality cannot be overemphasized. Each District employee is responsible for safeguarding all proprietary or confidential information obtained during employment. Proprietary or confidential information includes but is not limited to information about the District, its operations, processes, plans, pricing strategies, contracts, know-how, designs or research; vendor lists; business plans; marketing plans and fund-raising strategies; technical information; employee names, lists and job descriptions; and any other information about the District employees.

You may not disclose by any means any proprietary or confidential information. In addition, you are not to release any proprietary or confidential information in written form or remove from the office any records or files unless there is a clear instruction to do so from your supervisor. If you have any question as to whether certain information is proprietary or confidential, consult your supervisor.

This policy is best protected by your use of good judgment. To indicate your understanding and intended compliance with this policy, you will be asked to sign a Confidentiality Agreement.

7.10 __-Conflicts of Interest

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Conflicts of interest are defined as circumstances that have the immediate or long-term potential of compromising the interests of the District with respect to, suppliers, other employees or other persons or entities associated with the District’s business.

Circumstances that compromise the District’s interests may include, but are not limited to, personal relationships, other business relationships, acceptance of favors, gratuities or services that compromise the employee or jeopardize the employee’s ability to exercise the best judgment on behalf of the District.

Employees must avoid any actual or potential conflict of interest or compromising situation, and must report any such situation(s) to the CEO as soon as possible should they arise.

7.11 __-Acceptance of Gifts and Gratuities

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It is very important that all employees of the District maintain the highest standards of integrity in dealings with all persons outside the District so that we can preserve their trust and confidence.

Therefore, it is the policy of the District to prohibit any employee from accepting from any suppliers, other employees or other persons or entities associated with the District's business a gift or gratuity, which has a value in excess of \$50. If at any time you believe that acceptance of a gift would be appropriate and would benefit the District, you must request and obtain advance approval from the CEO of the District. Examples where such approval might be granted may include attendance at certain sporting events or other gatherings or acceptance of novelties such as pens, calendars, other gifts of modest value or edible products to be shared among employees.

7.12 __-Outside Employment

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We expect that while at work, you will devote all your productive time, ability and attention to the business of the District. We require that you not engage in other business duties, pursuits or services during this time, whether for compensation or otherwise, as an employee, independent contractor or consultant. We ask that you think seriously about the effects extra work outside the District may place on your endurance, overall personal health and effectiveness.

Outside work must not interfere in any way with the production and completion of the District-related projects or the employee may be subject to discipline up to and including termination of employment.

7.13 __-Appearance

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The District values its employees and makes ongoing efforts to provide a work environment that is comfortable and conducive to productivity. Employees need to adhere to exceptional appearance standards, which include appropriate attire and grooming.

Safety is a primary concern, and the District may establish restrictions on clothing, hairstyle and length, adornments, eyewear and footwear that are deemed to be hazards to employee safety.

Your position with the District and the potential for direct contact with outside parties will determine what is acceptable attire.

Extreme styles while perhaps popular or in current "fashion" can be inappropriate for a business environment. Some examples of inappropriate attire for our work environment would include but not be limited to:

- Clothing that exposes midriffs and/or shorts or skirts/dresses that are more appropriate for the beach or a nightclub;
- Clothing that is exceptionally worn, torn or faded;
- Bare feet or beach-style footwear;

- Articles of clothing displaying offensive or lewd language or pictures.

Management reserves the right to direct employees who are not appropriately attired and groomed to leave the premises to rectify the appearance standard violation. Time taken to rectify appearance standard violations will be unpaid.

7.14 Security

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Employment at the District involves people working together on business property that must be managed for the benefit and security of all. It is our policy to protect employee safety and security on the District property and to protect the property and interests of the District.

Office security and personal safety is each employee's responsibility. Each employee who is issued keys to the office is responsible for keeping office entrances secure at all times. The District keys may not be duplicated or loaned to anyone. Should your key(s) be lost or stolen, you must report the loss to the District immediately.

Be aware of persons loitering for no apparent reason in parking areas, walkways, entrances and exits, and service areas. Report any suspicious persons or activities to the CEO and/or Office Manager. Secure your desk or office at the end of the day. When called away from your work area for an extended length of time, do not leave valuable and/or personal articles in or around your workstation that may be accessible. The security of facilities as well as the welfare of our employees depends upon the alertness and sensitivity of every individual to potential security risks. You should immediately notify the CEO and/or Office Manager when unknown persons are acting in a suspicious manner in or around the facilities, or when your key is lost or stolen. If you are in the office and feel threatened by unknown persons call 911 for assistance. This policy includes the following controls:

- ~~Persons who enter the District property without authorization are trespassers and will be removed promptly;~~
- ~~Employees may not enter the District property except while on duty and for a brief time before or after duty hours. Visits at other times require the authorization of the CEO of the District;~~
- ~~Employees must observe access restrictions to areas that are identified as secured;~~
- ~~No materials or items are permitted on the District property other than usual and customary personal possessions or those related to performance of job duties;~~
- ~~The District may conduct inspections to enforce this prohibition where there is reasonable cause for such action;~~
- ~~Solicitations of any kind, hand billing, or the posting of written or graphic notices and information are prohibited on the property unless specifically authorized by the CEO of the District in writing.~~

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7.15- Personal Property

Respect for and protection of the personal property of our employees is of concern to the District. For security reasons, employees should not leave personal belongings of value in the workplace. While we will attempt to provide a secure area in which you can store your personal property, we can make no assurances about security. We discourage the storage of personal items of value. If personal property is missing or damaged, you should immediately make a report to the District.

7.16 Electronic and Social Media

This policy is intended to protect the District's computer systems and electronic information.

For purposes of these policies, the following definitions apply: "Computers" are defined as desktop computers, laptops, handheld devices (including but not limited to iPhones, smart phones, iPads, and other electronic tablets and cell phones), computer software/hardware and servers.

Sequoia Healthcare District also uses various forms of "electronic communication." "Electronic communications" includes e-mail, text messages, telephones, cell phones and other handheld devices (such as cell phones, smart phones, writing tablets or iPads), fax machines, and online services including the Internet.

"Electronic information" is any information created by an employee using computers or any means of electronic communication, including but not limited to, data, messages, multimedia data, and files.

The following general policies apply:

- Computers and all data transmitted through Sequoia Healthcare District servers are District property owned by the District for the purpose of conducting District business. These items must be maintained according to Sequoia Healthcare District rules and regulations. Computers must be kept clean and employees must exercise care to prevent loss and damage. Prior authorization must be obtained before any District property may be removed from the premises.
- All electronic communications also remain the sole property of Sequoia Healthcare District and are to be used for District business. For example, email messages are considered District records.
- Electronic information created by an employee using any computer or any means of electronic communication is also the property of Sequoia Healthcare District and remains the property of the District.
- Information stored in Sequoia Healthcare District computers and file servers, including without limitation is the property of the District and may not be distributed outside the District in any form whatsoever without the written permission of the CEO.

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- Violation of any of the provisions of this policy, whether intentional or not, will subject District employees to disciplinary action, up to and including termination.

Monitoring of District Property

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Sequoia Healthcare District reserves the right to inspect all District property to ensure compliance with its rules and regulations, without notice to the employee and at any time, not necessarily in the employee's presence. Sequoia Healthcare District computers and all electronic communications and electronic information are subject to monitoring and no one should expect privacy regarding such use. The District reserves the right to access, review and monitor electronic files, information, messages, text messages, e-mail, Internet history, browser-based webmail systems and other digital archives and to access, review and monitor the use of computers, software, and electronic communications to ensure that no misuse or violation of District policy or any law occurs. E-mail may be monitored by the District and there is no expectation of privacy. Assume that e-mail may be accessed, forwarded, read or heard by someone other than the intended recipient, even if marked as "private."

Employee passwords may be used for purposes of security but the use of a password does not affect the District's ownership of the electronic information or ability to monitor the information. The District may override an employee's password for any reason.

Employees are not permitted to access the electronic communications of other employees or third parties unless directed to do so by the District's management.

Prohibited Use

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All existing District policies apply to employee use of computers, electronic communications, electronic information, and the Internet. This includes policies that deal with misuse of District assets or resources. It is a violation of Sequoia Healthcare District policy to use computers, electronic communications, electronic information, or the Internet, in a manner that: is discriminatory harassing or obscene; constitutes copyright or trademark infringement; violates software licensing rules; is illegal; or is against the District's policy. It is also a violation of policy to use computers, electronic communications, electronic information, or the Internet to communicate confidential or sensitive information or trade secrets.

The display of any kind of sexually explicit multimedia content, message, or document on any District computer is a violation of the District's policy against sexual harassment. This description of prohibited usage is not exhaustive and it is within the discretion of the District to determine if there has been a violation of this policy. Employees that engage in prohibited use will be subject to discipline and/or immediate termination.

This policy is not intended to limit the ability of employees to discuss with other employees the terms and conditions of their employment, including such topics as wages, job performance, workload, supervisors, or staffing.

Computer and Internet Use

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Sequoia Healthcare District provides computers, electronic communications, electronic information and information technology resources, including the Internet, to its employees to help them do their job. District provided computers; electronic communications, electronic information and the Internet are only to be used only for work-related purposes. No personal use of this District property is permitted at any time. However, this policy is not intended to limit the ability of employees to use District email systems to communicate with other employees regarding the terms and conditions of their employment, including such topics as wages, job performance, workload, supervisors or staffing.

Social Media

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Sequoia Healthcare District uses social media in limited circumstances for defined business purposes. Social media is a set of Internet tools that aid in the facilitation of interaction between people online. If you have specific questions about which programs the District deems to be social media, consult with office manager.

Use of Internet based programs such as Facebook, Linked In, and Twitter (this is not meant to be an exhaustive list) may be used in furtherance of District goals. However, only authorized individuals are allowed to speak/write in the name of Sequoia Healthcare District using the social media tools of the District such as the District Facebook and Twitter page.

The CEO will authorize you in writing if you can use these District social media tools to perform your job duties. Authorized individuals using the District social media tools shall identify themselves honestly, accurately and completely and comply with all District policies in using this media.

Your authorization is limited to business purposes and personal use of these District social media tools or programs is prohibited and can result in discipline up to and including termination. All policies relating to monitoring usage of District property apply.

Employees can use their own personal devices to engage in social media during non-working times, such as breaks and meal periods; however, all other District policies against inappropriate usage, including the District's no tolerance for discrimination, harassment or retaliation in the workplace, and protection of confidential and trade secret information apply.

Nothing in the District's social media policy is designed to interfere with, restrain or prevent employee communications regarding wages, hours or other terms and conditions of employment.

Employee-owned Devices

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Employees' own computers (including handheld devices) and electronic communications are not to be used during work time on the work premises. Employees may use personal devices during non-working times, such as breaks and meal periods; however, all other District policies against inappropriate usage, including the District's no tolerance for discrimination, harassment or retaliation in the workplace, apply.

7.17 News Media Contacts

Employees may be approached for interviews or comments by the news media. Only contact people designated by the CEO may comment to news reporters on Sequoia Healthcare District policy or events relevant to the District.

This policy does not limit your right to discuss the terms and conditions of his or her employment, or to try and improve these conditions.

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PERFORMANCE, CORRECTIVE DISCIPLINE AND TERMINATION

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8.01 ~~4~~ Performance Appraisals

An employee's performance appraisal serves an important purpose for the District and for individual employees. The fundamental objective of conducting a performance appraisal is to improve job performance by communicating directly with each employee with regard to important aspects of his or her employment.

The District's Performance Appraisal process has been developed to improve job performance, improve coaching on job performance, and provide assistance and backup data for making management decisions regarding transfers and promotions.

The employee will receive a written performance appraisal at the end of the introductory period, and annually thereafter, or as frequently as is necessary to communicate achievement of established performance standards.

Salary adjustments are at the District's discretion and may or may not coincide with performance evaluations.

8.02 ~~5~~ Standards of Conduct

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The District is committed to maintaining a work environment based on mutual understanding, respect, and cooperation. To contribute toward that environment and to avoid misunderstandings, guidelines as to the standards of conduct expected by the District are summarized below.

The following list itemizes examples of inappropriate conduct, which may result in discipline and/or termination. It is not meant to be an exhaustive list. Other inappropriate conduct not referred to may also result in disciplinary action, up to and including termination.

- Excessive tardiness or absenteeism.
- Absence from work without permission from, or notification of the CEO.
- Misusing, damaging or destroying any property of the District or its employees.
- Removing any of the District property or property of other employees from the premises without proper authorization.
- Leaving the work place during paid work hours without permission.
- Inappropriate release or use of employees' confidential records.
- Failure to report immediately to the CEO any accidents, injuries or potential workplace hazards.
- Any verbal or physical abuse or threat of harm to any District employee, ~~client~~ or visitor.
- Sleeping on the premises or during work time.
- Harassment of a co-worker or visitor or conduct that is prohibited by the harassment policies of the District.
- Falsification of documents, including omission of material information.

- Breach of confidentiality.
- Manufacture or unauthorized distribution, dispensation, possession or use of a controlled substance.
- Failure to comply with any District policy.
- Theft or misuse of District property.
- Any other situation that, in the opinion of management, is detrimental to the operation of the District or inconsistent with our stated values.

Nothing in this section alters the at-will nature of your employment.

8.03 – Counseling and Discipline

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The District believes self-discipline is the key to both individual and organizational success. We expect employees to exhibit self-discipline, take pride in their work and continue to look for improvements. However, when an employee does not meet the performance expectations, it may be necessary to bring these issues to the employee's attention.

Under most circumstances, employees with a performance problem will be subject to the progressive disciplinary process listed below:

- Oral Counseling
- Written Counseling
- Disciplinary Suspension - Final Written Warning - Probation
- Termination

Sequoia Healthcare District may, in its sole discretion, utilize whatever form of discipline is deemed appropriate under the circumstances, up to, and including, immediate termination of employment. The District's policy of progressive discipline in no way limits or alters the at-will employment relationship.~~In a specific case however, the District has the right to decide not to use one or more of these steps, and may in certain instances of job abandonment or gross misconduct immediately terminate an employee's employment relationship.~~

Employees may be represented by an attorney at any evidentiary hearing conducted by the Board of Directors in open or closed session and in such other circumstances as required by state or federal law.

The CEO shall make a written summary of all disciplinary proceedings. The CEO shall report all disciplinary actions, other than oral counseling, to the Board President. The Board President shall inform the other Board of Directors of such discipline when appropriate

8.04 __-Resignation

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In the event of a voluntary resignation, you are asked to submit a written, signed letter of resignation, indicating the date of resignation and the reason for resignation two (2) weeks in advance. Unless authorized by management, accrued vacation may not be used after resignation notice has been given. All District-owned property, including computers, keys, and credit cards, must be returned immediately upon termination of employment.

ACKNOWLEDGEMENT OF RECEIPT OF EMPLOYEE HANDBOOK

~~I have received a copy of the District Employee Handbook and understand that it contains important information on the general personnel policies of the organization and on my privileges and obligations as an employee. I understand and agree that it is my responsibility to read and familiarize myself with the policies and procedures in the handbook and understand that my employment is governed by its contents. I understand that if I have questions regarding the content of this handbook, I may direct my questions to the CEO.~~

~~I understand that except for my employment at will status, any and all employment policies or practices can be changed at any time by the District. I further understand that the employment relationship is terminable at will, and that either the District or I can terminate the employment relationship at will, with or without cause or advance notice.~~

Employee Signature: _____ Date: _____

Print or type Employee's Name _____

Confirmation of Harassment Discrimination and Retaliation Prevention Policy

I have received a copy of the District's Harassment, Discrimination and Retaliation Prevention policy. I understand and agree that it is my responsibility to read and familiarize myself with this policy.

I understand that the District is committed to providing a work environment that is free from harassment, discrimination, and retaliation. My signature certifies that I understand that I must conform to and abide by the rules and requirements described in this policy.

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Employee's Signature _____

Employee's Printed Name _____

Date _____

Confirmation of Handbook Receipt

I have received a copy of the District's employee handbook. I understand and agree that it is my responsibility to read and familiarize myself with the policies and procedures contained in the handbook.

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I understand and agree that nothing in the employee handbook creates or is intended to create a promise or representation of continued employment and that employment at Sequoia HealthCare District is employment at-will; employment may be terminated at the will of either the District or myself. My signature certifies that I understand that the foregoing agreement on at-will status is the sole and entire agreement between Sequoia Healthcare District and myself concerning the duration of my employment and the circumstances under which my employment may be terminated. It supersedes all prior agreements, understandings, and representations concerning my employment with Sequoia Healthcare District.

I understand that except for employment at-will status, any and all policies or practices can be changed at any time by the District. Sequoia Healthcare District reserves the right to change my hours, wages, and working conditions at any time. I understand and agree that other than the CEO of Sequoia Healthcare District, no manager, supervisor, or representative of the District has authority to enter into any agreement, express or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will; only the CEO has the authority to make any such agreement and then only in writing, signed by the CEO.

Employee's Signature _____

Employee's Printed Name _____

Date _____

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Sequoia Healthcare District

CEO Report December 2022

Pamela Kurtzman

BUSINESS AND FINANCIAL UPDATE:

Financial Summary

- **Tax income-** Actuals at 4 months in, was just over of \$677,000. The 4-month budget is \$640,000 so actuals are close to target. We typically receive large distributions in December and February
- **Investment income-** Our investments continue to perform poorly, particularly compared to the huge gains of the past few years. In September we had losses to the tune of \$375k in that month alone, but then October had a moderate gain of \$246. The combined 4-month actuals total - \$424k (negative) in losses. We budgeted for a moderate gain of \$28 at this point (\$80k for the year) so we are down \$396k relative to our 4-month proposed budget. Important to keep in mind is that our funds are directed to the most conservative, low risk investments and are in compliance with the CA local agency investment guidelines. We keep a close watch on our performance, as are our portfolio managers, who are poised to respond to the markets accordingly to maximize any gains possible.
- **Expenses-** at October's end total just over \$2M. The 4-month actuals are relatively consistent with the 4-month budgeted total, aside from the few items indicated in red on the month-to-month financial statements where I have explanations noted.
- **Audit-** Heidi and I (mostly Heidi) have been working with the new auditors to get them the preliminary operational information they need to begin the audit process. They have been good to work with so far and they've requested a significant amount of detailed information which makes me confident that they will do a very thorough job.

HSI

- Director of School Health update: I have interviewed a total of six candidates and have narrowed them down to two. I am close to making an offer to one exceptional candidate and will keep the board informed when things move forward. I anticipate the new school director would begin their role in January, after the holidays.
- To maintain momentum with school wellness leads, Jenny and I have co-led two monthly meetings and have the third one scheduled in January.
 - Jenny began the 2022-23 DEI school grants rollout last month and Luz just finished with the next HSI school newsletter. Things are NOT at a standstill.

COMMUNICATIONS

- **Community Grants and Other Initiatives**
 - Jenny is constantly making improvements to the grants process and will update the Board in her staff report

- **Sequoia Smart**- Jenny met with San Carlos Parks & Rec and chose two classes to pilot our Sequoia Smart and **Sequoia Strong** lineup of classes. See her report for more on this.
- **Sequoia Safe**- We hosted our first CPR and disaster prep classes provided by our new partners, American Red Cross. The classes both went well as evident by the feedback from participants. The instructors were exceptional and very attentive to the participants. We are holding off on new offerings until after the holidays and will post new class dates soon. Eventbrite pages for our new partnership with the American Red Cross CPR and Get Ready classes can be found here:
 - Hands Only CPR Eventbrite link: <https://www.eventbrite.com/e/422950796217>
 - Be Red Cross Ready Eventbrite link: <https://www.eventbrite.com/e/422965851247>

OTHER UPDATES AND ACTIVITIES

ACHD

- ACHD will begin hosting regional meetings throughout the year for additional opportunities to network and learn about other districts within the region
- I will chair the ACHD Education Committee again this year. The next meeting of the committee is later this month
- I will continue to participate on the ACHD Board. Our next meeting is December 12th via Zoom and in person in Feb 2023
- Heidi just completed the arduous process of recertifying our District with ACHD. Only two items remain outstanding which we are working to obtain.

APHA Conference: Attended the American Public Health Association Conference in Boston along with 10,000 other attendees. I will send a separate narrative to the Board with more information about what I learned and how it could enhance the work we do at SHD.

COMMUNITY INVOLVEMENT

- **Redwood City Together (formerly RWC 2020)** Executive meeting and attend both Executive and Leadership committee meetings.
- Member of the **County Recovery Coordination Council**. These bi-weekly meetings are intended to inform, advise, and foster dialogue as the county develops its strategic plan to recover from the pandemic. My participation will help ensure that the District is informed and aligned with the larger recovery efforts to collaborate and leverage our resources.
- Participate in monthly meetings of the **County Covid Communications and Equity Workgroup**
- I continue to participate in discussions hosted by **Stanford Social Innovation** related to race and racism and on forums hosted by County Health Policy and Planning around implementing.

Jenny Bratton Staff Report - December 2022

Grants

Versaic is finalizing the new mid-year scoring module, which follows a successful launch of the LOI and full-app scoring modules. Jenny will start testing late December and will coordinate training for the grant committee members in early January after receipt and processing of the mid-year reports from 1-year grantees which are due Dec. 15th.

The grant committee will be welcoming some new members to the 2023-24 grants committee as some of the current grant committee members will be transitioning on. The 2023-24 grants committee roster will be finalized late December.

The new grant cycle starts in January, 2023: The Healthy Schools Initiative (HSI) grant information session is scheduled for Wednesday, January 11, 2023. There will be a virtual morning session followed by an afternoon in-person session. The Caring Community information session is scheduled for Thursday, January 12, 2023, with a corresponding morning virtual session followed by an afternoon in-person session.

We will be transitioning the remainder of the returning 1-year grantees into a 2-year cycle, so that we will end up with 3 cohorts: returning 2-year (2022-24) grantees, returning 2-year (2023-25) grantees and new (2023-24) 1-year grantees. The final outcome is more efficiency with more attention to each grantee by the grants committee in reviewing their applications and reports, and also increased relationship building by Jenny. We will be scheduling our yearly partner site visits from January-April.

The checks (\$45,000) for Holiday Food Grants were sent out to the 5 food grant recipients the week before Thanksgiving. The remainder \$45,000 will be mailed out by Dignity Health Sequoia Hospital on December 1, 2022. We are proud of this collaborative effort to reach out to more residents and expand our sphere of influence with this life-affirming grant.

Healthy Schools Initiative

The last three monthly meetings (Sept-Nov) have been co-facilitated by Jenny, Jo-Ann Byrne Sockolov, and Pamela. The HSI Wellness Team welcomed its newest member in October, Celeste Lukrich, who is a temporary replacement for Javier Gutierrez at Sequoia Union High School District (SUHSD) while he is out on medical leave. The team has exciting things to share in the fall edition of the HSI newsletter (see Luz's staff report). We welcome the Board to share the newsletter broadly to their communities.

Strategic Planning:

- **DEI:** Jenny is currently crafting a self-assessment tool with a DEI component and will be inviting Board members upon its completion and approval by Pamela.
- **Advocacy:** Jenny is currently sitting on both the Governance and Advocacy Committees. The Advocacy Committee is convening a mental health working group, and Jenny has expressed her interest in taking an active role in this group by proposing the group use the advocacy white

paper “Mental Health Policy and Practice Reform” by Bzyak and Fache as a platform of discussion. (A copy of this paper can be provided upon request.)

- **Innovation:** SHD is piloting a new program Sequoia Smart (education) and Strong (fitness) with two San Carlos Parks and Rec classes: Balance & Brains and Chair Yoga by fully funding these classes (approximately \$4,000) in order to promote fitness and well-being to our aging residents. We will revisit the effectiveness of this overall strategy and overall sustainability after a review of the data and findings from the final report due in April, 2023.
- **Communication:**
 - Our last **Town Hall** was held in August, 2022 by RWC Fire Marshall on fire proofing as part of our endeavor to promote disaster prep as part of our Sequoia Safe initiative. We are targeting 4-6 Town Halls in 2023, beginning in February around Heart Health. Recordings of past town halls can be found on our website as well as accessed through Parent Venture’s Youtube channel: <https://www.youtube.com/c/parenteducationseries/about>. The Board is invited to submit ideas to Jenny around current events or issues of significant community interest, panel, or lead a Town Hall.
 - Thank you for your feedback on this year’s **Annual Report**. The print copy should be ready by the end of the week and landing in your mailboxes over the next week. We added 16 new carrier routes in the San Mateo (94403) and Foster City (94404) and approximately 9,500 additional mailers. Moving forward, the goal is to tighten the deadline and have the Annual Report ready for Board review by August, 2023.

December Staff Report

Luz Garcia — Communications Specialist & Sequoia Strong Program Coordinator

HSI Newsletter

The [Fall 2022 HSI Newsletter](#) is now published. This issue includes important updates from our local school districts in the HSI program. A few highlights include the school's vaccine response, new mental health/wellness initiatives, and engaging community events (Fun runs, Dia de los Muertos, etc.).

To help spread the word about the HSI newsletter both through our channels and among each of the Districts, I created and shared a [Marketing toolkit](#) with our wellness coordinators. The toolkit includes content in both English and Spanish.

Partner Communications

In October, I piloted a new component of the District communications plan - sending monthly newsletter announcements to District partners. Each newsletter contains relevant and timely information on District activities including upcoming events and grant deadlines. These newsletters are designed to build further rapport with and among our community partners and serve as a valuable tool to help spread the word about our work.

You can read our [October](#) and [November](#) newsletter by clicking their respective links provided here.

Marketing

Communications Planning

I am currently developing a 2023 District communications plan that will incorporate both digital and print media to help maximize community engagement across all our platforms.

Social Media

As part of the 2023 Communications plan, I established a Nextdoor & Youtube account for the District.

Webinars

1. Special District Socialites: Learning from the districts leading on social media — dos, don'ts, and best practices Webinar

Learned how to remain compliant with District requirements on social media and how to best communicate with our audience across different platforms.

2. Safely Combatting Misinformation on Social Media

Learned how to prevent and manage potential misinformation on social media that may impact our District.

3. Designing Your Digital Doorstep: Website best practices for special districts Webinar

Learned how to better our website user experience.