



BEAUMONT-CHERRY VALLEY WATER DISTRICT
560 Magnolia Avenue, Beaumont, CA 92223

**NOTICE AND AGENDA
MEETING OF THE PERSONNEL COMMITTEE**

*This meeting is hereby noticed pursuant to
California Government Code Section 54950 et. seq.*

Tuesday, April 16, 2024 - 5:30 p.m.
560 Magnolia Avenue, Beaumont, CA 92223

TELECONFERENCE NOTICE

*The BCVWD Personnel Committee members will attend in person at the
BCVWD Administrative Office*

This meeting is available to the public via Zoom teleconference

To access the Zoom conference, use the link below:

<https://us02web.zoom.us/j/85792068838?pwd=cFArZHZ4aHRSUmJLeTBCZVpnUGRmdz09>

To telephone in, please dial: (669) 900-9128
Enter Meeting ID: 857 9206 8838 • Enter Passcode: 457586

*For Public Comment, use the “**Raise Hand**” feature if on
the video call when prompted. If dialing in, please **dial *9 to**
“**Raise Hand**” when prompted*

Meeting materials will be available on the BCVWD’s website:

<https://bcvwd.org/document-category/personnel-committee-agendas/>

PERSONNEL COMMITTEE MEETING – APRIL 16, 2024

Call to Order: Chair Covington

Roll Call

	John Covington, Chair
	Andy Ramirez

	Lona Williams (alternate)
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PERSONNEL COMMITTEE MEETING – APRIL 16, 2024 - *continued*

Public Comment

PUBLIC COMMENT: RAISE HAND OR PRESS *9 to request to speak when prompted. At this time, any person may address the Personnel Committee on matters within its jurisdiction which are not on the agenda. However, non-agenda matters that require action will be referred to Staff for a report and possible action at a subsequent meeting. **Please limit your comments to three minutes.** Sharing or passing time to another speaker is not permitted.

1. **Adjustments to the Agenda:** In accordance with Government Code Section 54954.2, additions to the agenda require a 2/3 vote of the legislative body, or if less than 2/3 of the members are present, a unanimous vote of those members present, which makes the determination that there is a need to take action, and the need to take action arose after the posting of the agenda.
 - a. Item(s) to be removed or continued from the Agenda
 - b. Emergency Item(s) to be added to the Agenda
 - c. Changes to the order of the Agenda
2. **Acceptance of Personnel Committee Meeting minutes**
Minutes may be accepted by consensus
 - a. March 19, 2024 Regular Meeting (pages 4 - 9)

ACTION ITEMS

3. **Report / Update from BCVWD Employees Association** (no staff report)

Association Representatives		
Andrew Becerra	Tommy Lamont	Luis Lomeli

4. **Report / Update from BCVWD Exempt Employees** (no staff report)
5. **Human Resources Department Report** (pages 10 - 11)
6. **Policies and Procedures Manual Updates / Revisions**

a.	Policy 3150	District Vehicle Usage	Pages 12 - 19
b.	Policy 3085	Sick Leave	Pages 20 - 31
c.	Policy 3180	Nepotism, Employment of Relatives and Fraternalization	Pages 32 - 43
d.	Policy 3060	Continuity of Service	Pages 44 - 49
e.	Policy 3215	Personnel Action Form	Pages 50 - 59
f.	Policy 3240	Dress Code and Personal Standards	Pages 60 - 74

7. Update on Policy Tracking Matrix (pages 75 - 78)

- a. Status of Policy Revisions / Updates

8. Action List for Future Meetings

- a. Employee Association topics
- b. Policy manual updates (ongoing)

9. Next Meeting Date: May 21, 2024

10. Adjournment

AVAILABILITY OF AGENDA MATERIALS - Agenda exhibits and other writings that are disclosable public records distributed to all or a majority of the members of the Beaumont-Cherry Valley Water District Personnel Committee in connection with a matter subject to discussion or consideration at a meeting of the Personnel Committee are available for public inspection in the District's office, at 560 Magnolia Avenue, Beaumont, California ("District Office") during business hours, Monday through Thursday from 7:30 a.m. to 5 p.m. If such writings are distributed to members of the Board less than 72 hours prior to the meeting, they will be available from the District Office at the same time or within 24 hours' time as they are distributed to all or a majority of the Board of Directors, except that if such writings are distributed one hour prior to, or during the meeting, they can be made available in the Board Room at the District Office. Materials may also be available on the District's website <https://bcvwd.gov/>.

REVISIONS TO THE AGENDA - In accordance with §54954.2(a) of the Government Code (Brown Act), revisions to this Meeting Agenda may be made up to 72 hours before the Committee Meeting, if necessary, after mailings are completed. Interested persons wishing to receive a copy of the set Agenda may pick one up at the District's Main Office, located at 560 Magnolia Avenue, Beaumont, California, up to 72 hours prior to the Committee Meeting, or download from the District's website: <https://bcvwd.gov/>.

REQUIREMENTS RE: DISABLED ACCESS - In accordance with §54954.2(a), requests for a disability related modification or accommodation, including auxiliary aids or services, in order to attend or participate in a meeting, should be made to the District Office, at least 48 hours in advance of the meeting to ensure availability of the requested service or accommodation. The District Office may be contacted by telephone at (951) 845-9581, email at info@bcvwd.gov or in writing at the Beaumont-Cherry Valley Water District, 560 Magnolia Avenue, Beaumont, California 92223.

CERTIFICATION OF POSTING: A copy of the foregoing notice was posted near the regular meeting place of the Board of Directors of Beaumont-Cherry Valley Water District and to its website at least 72 hours in advance of the meeting (Government Code §54956(a)).



BEAUMONT-CHERRY VALLEY WATER DISTRICT AGENDA
560 Magnolia Avenue, Beaumont, CA 92223

MINUTES OF THE PERSONNEL COMMITTEE MEETING
Tuesday, March 19, 2024, at 5:30 p.m.

CALL TO ORDER

Chair Covington called the meeting to order at 5:33 p.m.

Attendance. Directors Covington and Ramirez attended in person.

<i>Directors present:</i>	<i>Covington, Ramirez</i>
<i>Directors absent:</i>	<i>None</i>
<i>Staff present:</i>	<i>General Manager Dan Jagers Assistant Director of Finance and Administration Sylvia Molina Director of Operations James Bean Human Resources Manager Ren Berioso Director of Information Technology Robert Rasha Water Utility Worker I Joshua Rogers Executive Assistant Lynda Kerney</i>
<i>BCVWD Employee Association reps:</i>	<i>Customer Service Representative II Luis Lomeli</i>

PUBLIC COMMENT: None.

ACTION ITEMS

- 1. Adjustments to the Agenda:** None.
- 2. Acceptance of the Personnel Committee Meeting minutes**
 - a. January 16, 2024, Regular Meeting

The Committee accepted the minutes of the Personnel Committee meeting by the following vote:

MOVED: Covington	SECONDED: Ramirez	APPROVED
AYES:	Covington, Ramirez	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

3. Report / Update from BCVWD Employees Association:

- a. Field staff facilities / restrooms / base of operations – update: General Manager Dan Jagers reported that the employees’ request is being investigated and there may be several different approaches. A potential solution is expected to be developed in the next couple of weeks. In response to questions from Chair Covington, Mr. Jagers indicated that portable facilities are being considered, but a permanent location and permanent facilities are desired.

4. Report / Update from BCVWD Exempt Employees: None.

5. Report from Human Resources Department

Human Resources Manager Ren Berioso presented highlights of the report:

- Currently 44 employees
- Recruitment has been busy with 13 positions opened and all but one filled

6. Policies and Procedures Manual Updates / Revisions

Human Resources Manager Ren Berioso presented the proposed revisions.

- a. Policy 2015 Harassment

This policy was carried over from January, Chair Covington reminded.

Mr. Berioso provided a brief background from the January meeting and reviewed changes based on proposals from the Personnel Committee.

- Other Forms removed per legal counsel
- Removed Department Director and Director of Finance and Administration from the complaint process
- Added language allowing Personnel Committee to hire an outside firm or consultant if the complaint involves the General Manager

Chair Covington commented that the changes made were consistent with the recommendations made by the Committee.

In response to Director Ramirez, Mr. Berioso confirmed that if the complaint is about the GM, it will be directed to the Personnel Committee, which may recommend to the Board the hiring of a consultant to investigate. If a supervisor has a complaint against a director, the item goes to the GM. Mr. Jagers reminded about a case when HR Dynamics was consulted and provided a level of professionalism.

The Committee recommended this policy for consideration by the Board of Directors by the following vote:

MOVED: Covington	SECONDED: Ramirez	APPROVED
AYES:	Covington, Ramirez	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

- b. Policy 3085 Sick Leave
(Tabled at the January 16, 2024, meeting)

Mr. Berioso provided an overview of the proposed changes to improve the language, bring it into compliance with California labor law, and mitigate risks of Workers Compensation.

- AB 1041 adds a “designated person”
- SB 616 increases sick leave accrual for those reaching the 200th day of employment from 24 hours to 40 hours (applicable to temporary and part time employees)
- Supervisors may require a doctor’s note for those employees absent from work due to illness beyond three days
- May use paid sick leave for preventative care
- Part time employees may carry over only 40 hours of paid sick leave to the next year
- Sick leave is only paid out upon retirement
- Sick leave accrual reset upon rehire
- 90-day waiting period to use sick leave
- 50 percent of accrued sick leave can be used for a family member

Director Ramirez asked about the longevity of temporary employees, and Mr. Berioso indicated that employees have been temporary for up to seven or eight months. Mr. Jagers noted the goal is six months. The administrative approach is based on need, he explained.

The Personnel Committee discussed sick leave accrual and carryover, the requirement of a doctor’s note to return to work, and notification requirements.

The Committee recommended the following amendments to the draft policy:

1. District **shall not** pay out unused sick leave upon separation, with the exception of retirement
2. ... unless the employee is rehired within ~~one year~~ six months of separation
3. Notification of supervisor at least two hours prior to the time for beginning the regular workday. Extenuating circumstances will be reviewed and approved by management
4. Medical certification to return to work after sick leave absence in excess of three days shall be required. Extenuating circumstances will be reviewed and approved by management

Chair Covington tabled the item. Staff will prepare an updated redline version.

- c. Policy 3170 Smoke Free Workplace and Tobacco Use

Mr. Berioso introduced the consolidation of Policy Part I Section 40 and Section 41. Chair Covington and Director Ramirez supported updates aimed at promoting a healthier workplace, leading to a consolidation of existing policies.

The Committee recommended this policy for consideration by the Board of Directors by the following vote:

MOVED: Covington	SECONDED: Ramirez	APPROVED
AYES:	Covington, Ramirez	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

d. Policy 3150 District Vehicle Usage

The revisions aimed to improve safety measures and reduce liability were reviewed, with Chair Covington facilitating a focused discussion on enhancing policy clarity and accountability. The Committee held a detailed discussion related to employees being insurable.

The Committee directed staff to amend the draft policy to reflect “Employees who are required to drive District-owned vehicles who become uninsurable shall be terminated pending review of extenuating circumstances by the General Manager” or similar language to be provided by legal counsel.

e. Policy 3151 Personal Vehicle Usage

It was noted the policy was misnumbered on the agenda.

Mr. Berioso explained the revisions to Policy Manual Part I Section 38.

In response to a comments, Assistant Director of Finance and Administration Sylvia Molina indicated that tolls were not reimbursable.

The Committee recommended this policy for consideration by the Board of Directors by the following vote:

MOVED: Covington	SECONDED: Ramirez	APPROVED
AYES:	Covington, Ramirez	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

f. Policy 3220 Recruitment, Selection and Onboarding

It was noted the policy was misnumbered on the agenda.

Mr. Berioso explained additions to the existing policy including compliance with SB 700 (cannabis use and preemployment medical exam), employment eligibility verification, and more detailed procedures. Director Ramirez examined the implications of the new cannabis regulations, ensuring comprehensive and compliant policy revisions.

The Committee recommended this policy for consideration by the Board of Directors by the following vote:

MOVED: Ramirez	SECONDED: Covington	APPROVED
AYES:	Covington, Ramirez	
NOES:	None.	
ABSTAIN:	None.	
ABSENT:	None.	

- g. Policy 5095 District Residences and Facility Emergency Policy
It was noted the policy was misnumbered on the agenda.

General Manager Jagers introduced the policy. Staff has made no revisions and will take direction from the Committee, he noted.

Chair Covington said he had just one possible amendment requested an update on the policy action items in Section 5095.9. Mr. Jagers stated he believed all occupied residences are in compliance with the provisions. Issues that were present have been addressed, he assured. No lapses have been identified.

Chair Covington pointed to the procedures related to the Monthly Maintenance Fee and said he would like to see the procedures included in the policy. He recommended an audit of the restricted funds every three years. Mr. Jagers reminded that the report has been brought to the Board every year.

The recalculation of the 2.5 percent recovery basis is slated for every 10 years, Covington noted. Mr. Jagers noted that Policy Section 5095.8(5) indicates there will be an annual escalator applied to the Monthly Maintenance Fee, which triggers looking at the recovery basis. Ms. Molina explained that for home values, the 2022 valuations are applied, and could be looked at each year. Director Ramirez noted the estimated home value to be recalculated and the 2.5 percent cost recovery vs. the annual escalator tied to the CPI, suggesting it appeared to be contradictory. Mr. Jagers clarified.

Chair Covington stated that had amendments been needed, a redline could be brought back at a future meeting, but he had no recommended amendments.

7. Update on Policy Tracking Matrix

Mr. Berioso reviewed the dashboard and advised that progress had been made to 59.49 percent completeness for HR policies, and 40.14 percent overall.

Berioso requested direction from the Committee regarding Policy 324 Dress Code and Personal Standards. Mr. Jagers stated the goal was to have a professional appearance without severe restrictions and making some accommodations to not limit staffing. The Committee suggested a draft policy using tables for discussion purposes, with legal review prior to bringing it to the Committee.

8. Consideration of “Great Place to Work” or other Survey Tool

Mr. Jagers noted that surveys have been taken every year per direction of the Personnel Committee in 2017. The intent is to continue the third-party activity to report back for the Committee and the Board.

Mr. Berioso explained that other platforms are being considered. The Committee directed staff to come back with a recommendation.

9. Action List for Future Meetings

- Employee Association topics
 - Restroom facilities for field crew
 - Permanent operations center (move forward in 2024)
- Policy manual updates (ongoing)
- Policy Updates related to travel and per diem (requested by Dir. Williams)

10. Next Meeting Date:

- Regular Meeting Tuesday, April 16, 2024, at 5:30 p.m.

ADJOURNMENT: 7:10 p.m.

Attest:

DRAFT UNTIL APPROVED

John Covington, Chairman
to the Personnel Committee of the Beaumont-Cherry Valley Water District

DRAFT



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
April 16, 2024**

Item 5

HUMAN RESOURCES REPORT

TO: Personnel Committee
FROM: Ren Berioso, Human Resources Manager
SUBJECT: Human Resources Department Report for the Month of March 2024

Table 1: Personnel

The below table represents the District’s current Workforce.
 As of March 31, 2024

Total Current Employees (Excluding Board Members)	45
Full-Time Employees	42
Part-Time	1
Temporary	2
Interns	0
Separations	0
Retired Employee(s)	0

Table 2: New Hires

The below table represents new hires.
 As of March 31, 2024

Employee Name	Job Title	Department
Khalid Sebai	Assistant Engineer	Engineering
Ceejay Stafford	Customer Service Rep I	Finance and Administration

Table 3: Anniversaries*

The below table represents BCVWD employee anniversaries.
 As of March 31, 2024

Employee Name	Department	Years of Service
Jonathan Medina	Operations	19 years
Daniel Jagers	Executive	12 years

**Work Anniversaries for the purposes of this report are calculated from the hire date and do not determine employment conditions or terms. This report does not include elected officials.*



Table 4: Promotions or Division/Title Change

The below table represents promotions or Division/Title Changes.

As of March 31, 2024

Employee Name	Former Title	Changed to
None		

Table 5: Recruitment

The below table represents active/closed recruitment(s).

As of March 31, 2024

Position	Department	Update
Engineering Assistant	Engineering	Position filled 3/1/2024. Start Date 3/11/2024.
Customer Service Representative I	Finance and Administration	Position filled 3/6/2024. Start Date 3/18/2024
Management Analyst I	Finance and Administration	Posting Closed 02/23/2024. Offer Letter Issued
Temporary Water Utility Worker I	Operations	2 Positions filled 3/5/2024. Start Date April 1 and 8, 2024
Customer Service Representative II	Operations	Posting Opened 03/27/2024. Posting Closes 4/12/2024

Table 6: Separation/Retirement

The below table represents employees separating from BCVWD.

As of March 31, 2024

Employee Name	Position Held	Department	Last Day
None			

Table 7: Communications

The below table represents HR communications to BCVWD employees.

As of March 31, 2024

Communication	Topic
Job Bulletin – Customer Service Representative II	Personnel
Mandatory Local Agency Ethics Training	Personnel

Staff Report Prepared by Ren Berioso, Human Resources Manager



**Beaumont-Cherry Valley Water District
Personnel Committee
April 16, 2024**

Item 6a

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: Policies and Procedures Manual Updates / Revisions Replacing Part I Section 37 District Vehicle Usage with Policy 3150 District Vehicle Usage

Staff Recommendation

Approve the replacement of Policy Number 37 District Vehicle Usage as Policy Number 3150 District Vehicle Usage Policy and to move said forward policy to the next Board of Directors meeting with the following revisions outline in Table 1, Summary of Policy Changes, or direct staff as desired.

Executive Summary

At the March 19, 2024 Meeting, the Personnel Committee reviewed and proposed changes to the draft policy for District Vehicle Usage presented by Human Resources (HR) staff, with discussions regarding the proper use of the assigned District vehicle during work and on-call shifts, employee's responsibility for tickets, safety while driving and accident and theft reporting. The Personnel Committee also directed staff to revise the language regarding termination or possible reassignment of an uninsurable employee, and to review this with legal counsel for possible legal ramifications.

Background

At the March 19, 2024 Personnel Committee meeting, staff presented changes to the District Vehicle Usage by dividing the policy into two sections, including responsibility of the employee assigned with a District vehicle to and from work, and responsibility of the employee assigned with a District vehicle while during work hours. Staff also proposed additional sections pertaining to the employee's responsibility for incurring tickets, safety while driving, accident and theft reporting and employee insurability as a condition of employment. The Personnel Committee directed staff to revise the driver's insurability section adding language that if the employee driving a District vehicle becomes uninsurable the General Manager, or Personnel Committee may review his or her employment for possible termination or re-assignment of duties not involving driving. Staff was directed to check with legal counsel if said changes will have legal ramifications.

The proposed redline draft version only includes changes from the March 19th Personnel Committee meeting, which have been reviewed by Legal Counsel. Said changes were made to ensure that liability is mitigated if not avoided, and to improve District's guidelines in using the assigned District vehicle. Should the policy be approved to move forward to the Regular Board Meeting the draft policy will reflect all the changes discussed with the Personnel Committee.



Discussion

Table 1, Summary of Policy Changes, outlines the proposed changes to the current District Vehicle Usage policy that are in reference to the redline draft version attached herewith.

Table 1 – Summary of Policy Changes

Row Number	Policy Section	State / Federal Law requirement	BCVWD current practice	Options to Consider	Fiscal Impact of Option
1	No Section	None	No written policy and we have not had an incident in the past where we hired an uninsurable employee.	<p>3150.7 Requiring “all” employees to be insurable as a condition of employment. Those that become uninsurable shall be reviewed by the General Manager or Personnel Committee for possible termination or assignment to a non-driving duty.</p> <p>Legal counsel states that there is no legal ramification especially if driving is a bonafide qualification.</p>	No fiscal impact.

Fiscal Impact

There is no fiscal in the proposed changes to this policy.

Attachments

1. Redline draft version of 3150 District Vehicle Usage Policy
2. Clean draft of 3150 District Vehicle Usage Policy
3. Side-by-side version of 3150 District Vehicle Usage Policy

Staff Report prepared by Ren Berioso, Human Resources Manager

6a - Attachment 1

POLICY TITLE: DISTRICT VEHICLE USAGE
POLICY NUMBER: 3150

3150.1 – District Vehicle Usage Policy for Employees who Drive Assigned District Vehicles to and from Work.

- A. Application. This policy applies to all management, supervisory and field employees who drive an assigned District vehicle to and from work.
- B. Exceptions. Other than de minimis use while commuting to and from work or emergency where there is a threat to life or property, the employee shall not use the District vehicle for any personal business and shall not transport non-District employees not conducting District business. No alcohol shall be purchased while driving a District vehicle.
- C. Limitations. Other than the foregoing uses, District vehicles will not be used for any other personal purposes without prior written approval from the immediate supervisor or General Manager, or if it is stipulated in the employment agreement.

3150.2 – District Vehicle Usage Policy for Employees who Drive Assigned District Vehicles During their Assigned Work Shift.

- A. Application. This policy applies to all employees who drive a District vehicle during the course of their assigned duties and during their assigned work shift.
- B. Exceptions. During working hours, District vehicles may not be used for personal purposes. Employees may use the assigned vehicle for the permitted meal period, or for rest breaks within close proximity of the assigned work location. District Vehicle may also be used for emergency situations where there is an imminent threat to life or property. No alcohol shall be purchased while driving a District vehicle.
- C. Limitations. Other than the foregoing uses District vehicles will not be used for any other personal purposes without prior written approval from the immediate supervisor or General Manager, or if it is stipulated in the employment agreement.

3150.3 – Responsibility for Vehicle and Tickets. Employees who drive a vehicle on District business must exercise due diligence to drive safely and maintain the security of the vehicle and its contents. Employees are responsible for any driving infractions or fines as a result of their driving.

3150.4 – Reimbursement for Expenses. Employees driving on District business while driving a District vehicle may claim reimbursement for parking fees and tolls actually incurred.

3150.5 – Safety While Driving. Employees are not permitted, under any circumstances, to operate a District vehicle when any physical or mental impairment causes the employee to be unable to drive safely. This prohibition includes, but is not limited to, circumstances in which the employee is temporarily unable to operate a vehicle safely or legally because of illness, medication, or intoxication. Employees must follow all District rules and laws related to use of technology while driving a District vehicle.

Adopted by Resolution 20-XX, Date

3150.6 – Accidents and Theft. Employees must report any accident, theft, or damage involving a District vehicle to their supervisor and the Human Resources Manager, regardless of the extent of damage or lack of injuries. Employees are expected to cooperate fully with authorities in the event of an accident. However, they should not make any statements other than in reply to questions of investigating officers.

3150.7 – Insurance. All ~~new~~ employees who are assigned or required to drive District-owned vehicles shall be insurable by the District's insurance carrier, as a condition of employment. Regular full-time, part-time, and temporary employees who are assigned or required to drive District-owned vehicle and become uninsurable shall be reviewed accordingly by the General Manager, or Personnel Committee, for possible termination or may be terminated, or may be temporarily assigned to duties which do not require the operation of a District-owned vehicle, ~~with approval of the Department Head and General Manager, or designee~~. Refer to District policy on Driver Training and Record Review, Disciplinary Procedures for more information on this topic.

Adopted by Resolution 20-XX, Date

CURRENT POLICY

37. DISTRICT VEHICLE USAGE

- A. Application. This policy applies to employees who drive District vehicles to and from work.
- B. Exceptions. During working hours, trips for personal purposes will be avoided. Occasionally, stopping at a store en route to a business destination, or going to a restaurant (within close proximity of your work location) for lunch is permitted. While going to or from work, occasionally stopping to buy groceries, pick up laundry, medications, etc., is also permitted. No alcohol shall be purchased while driving a District vehicle.
- C. Limitation. Other than the foregoing uses, district vehicles will not be used for any other personal purposes without prior written approval. This means that weekend or after-hours trips to the store (regardless of how close to home), trips back to the office to retrieve forgotten personal items, or any other non-business usage will not be permitted.

PROPOSED POLICY

POLICY TITLE: DISTRICT VEHICLE USAGE
POLICY NUMBER: 3150

3150.1 – District Vehicle Usage Policy for Employees who Drive Assigned District Vehicles to and from Work.

- A. Application. This policy applies to all management, supervisory and field employees who drive an assigned District vehicle to and from work.
- B. Exceptions. Other than de minimis use while commuting to and from work or emergency where there is a threat to life or property, the employee shall not use the District vehicle for any personal business and shall not transport non-District employees not conducting District business. No alcohol shall be purchased while driving a District vehicle.
- C. Limitations. Other than the foregoing uses, District vehicles will not be used for any other personal purposes without prior written approval from the immediate supervisor or General Manager, or if it is stipulated in the employment agreement.

3150.2 – District Vehicle Usage Policy for Employees who Drive Assigned District Vehicles During their Assigned Work Shift.

- A. Application. This policy applies to all employees who drive a District vehicle during the course of their assigned duties and during their assigned work shift.
- B. Exceptions. During working hours, District vehicles may not be used for personal purposes. Employees may use the assigned vehicle for the permitted meal period, or for rest breaks within close proximity of the assigned work location. District Vehicle may also be used for emergency situations where there is an imminent threat to life or property. No alcohol shall be purchased while driving a District vehicle.
- C. Limitations. Other than the foregoing uses District vehicles will not be used for any other personal purposes without prior written approval from the immediate supervisor or General Manager, or if it is stipulated in the employment agreement.

3150.3 – Responsibility for Vehicle and Tickets. Employees who drive a vehicle on District business must exercise due diligence to drive safely and maintain the security of the vehicle and its contents. Employees are responsible for any driving infractions or fines as a result of their driving.

3150.4 – Reimbursement for Expenses. Employees driving on District business while driving a District vehicle may claim reimbursement for parking fees and tolls actually incurred.

3150.5 – Safety While Driving. Employees are not permitted, under any circumstances, to operate a District vehicle when any physical or mental impairment causes the employee to be unable to drive safely. This prohibition includes, but is not limited to, circumstances in which the employee is temporarily unable to operate a vehicle safely or legally because of illness, medication, or intoxication. Employees must follow all District rules and laws related to use of technology while driving a District vehicle.

3150.6 – Accidents and Theft. Employees must report any accident, theft, or damage involving a District vehicle to their supervisor and the Human Resources Manager, regardless of the extent of damage or lack of injuries. Employees are expected to cooperate fully with authorities in the event of an accident. However, they should not make any statements other than in reply to questions of investigating officers.

3150.7 – Insurance. All ~~new~~ employees who are assigned or required to drive District-owned vehicles shall be insurable by the District's insurance carrier, as a condition of employment. Regular full-time, part-time, and temporary employees who are assigned or required to drive District-owned vehicle and become uninsurable shall be reviewed accordingly by the General Manager, or Personnel Committee, for possible termination or may be terminated, or may be temporarily assigned to duties which do not require the operation of a District-owned vehicle, with approval of the Department Head and General Manager, or designee. Refer to District policy on Driver Training and Record Review, Disciplinary Procedures for more information on this topic.

6a Attachment 3

POLICY TITLE: DISTRICT VEHICLE USAGE

POLICY NUMBER: 3150

3150.1 – District Vehicle Usage Policy for Employees who Drive Assigned District Vehicles to and from Work.

- A. Application. This policy applies to all management, supervisory and field employees who drive an assigned District vehicle to and from work.
- B. Exceptions. Other than de minimis use while commuting to and from work or emergency where there is a threat to life or property, the employee shall not use the District vehicle for any personal business and shall not transport non-District employees not conducting District business. No alcohol shall be purchased while driving a District vehicle.
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Adopted by Resolution 20-XX, Date

medication, or intoxication. Employees must follow all District rules and laws related to use of technology while driving a District vehicle.

3150.6 – Accidents and Theft. Employees must report any accident, theft, or damage involving a District vehicle to their supervisor and the Human Resources Manager, regardless of the extent of damage or lack of injuries. Employees are expected to cooperate fully with authorities in the event of an accident. However, they should not make any statements other than in reply to questions of investigating officers.

3150.7 – Insurance. All employees who are assigned or required to drive District-owned vehicles shall be insurable by the District's insurance carrier, as a condition of employment. Regular full-time, part-time, and temporary employees who are assigned or required to drive District-owned vehicle and become uninsurable shall be reviewed accordingly by the General Manager, or Personnel Committee, for possible termination or be temporarily assigned to duties which do not require the operation of a District-owned vehicle. Refer to District policy on Driver Training and Record Review, Disciplinary Procedures for more information on this topic.

DRAFT

Adopted by Resolution 20-XX, Date



**Beaumont-Cherry Valley Water District
Personnel Committee
April 16, 2024**

Item 6b

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: Policies and Procedures Manual Updates / Revisions Regarding Policy 3085 Sick Leave

Staff Recommendation

Approve the updated 3085 Sick Leave policy to move forward to the next Board of Directors meeting with the revisions outlined on Table 1, Summary of Policy Changes, or direct staff as desired.

Executive Summary

At the March 19, 2024 Personnel Committee Meeting, Human Resources (HR) staff proposed updates to the current Sick Leave policy to align with the legal requirements of California AB 1041, and SB 616, and added language that may allow supervisors to require their employees provide a medical certification for absence beyond three (3) working days. The Personnel Committee directed the HR staff to add a section that defines excused and unexcused absences, and a section regarding disciplinary action for excessive absenteeism resulting from 2 or more unexcused absences to provide guidance to managers in the policy implementation and to avoid employees in abusing paid sick leave benefits.

Background

At the March 19, 2024 Personnel Committee meeting, HR staff proposed adding language which legally complies with the new California labor statutes namely: CA AB 1041, which took effect on January 1, 2023, adding "Designated Persons" to the list of the eligible reasons an employee can utilize paid sick leave; and SB 616, effective January 1, 2024, which provides "all CA employees with a minimum paid sick leave of 40 hours a year once they reached their 200th day of employment". HR staff also added a section that allows the District to ask for a doctor's note for an absence of three (3) workdays, or more, to prevent or mitigate potential risks to the District in lieu of workers' compensation. All the proposed changes were approved by the Personnel Committee, however HR staff was directed to add sections that address excused and unexcused absences, and disciplinary action for excessive absenteeism resulting from two or more occurrences of unexcused absences.

The proposed redline draft version includes the requests from the Personnel Committee, which were reviewed by Legal Counsel. Changes were made to ensure that legal risks are mitigated and to provide complete guidance to managers in the implementation of the proposed sick leave policy.



Discussion

Table 1, Summary of Policy Changes, outlines the directions by the Personnel Committee and the proposed changes to the current Sick Leave policy, as determined by the Legal Counsel, which are referenced by the redline draft version attached herewith.

Table 1 – Summary of Policy Changes

		State / Federal Law requirement	BCVWD current practice	Personnel Committee / Legal Counsel Proposal	Fiscal Impact of Option
1	3085.8	AB 1041, Sec 245.5 (a)(4)(c)(8). Addition of Designated Person.	Designated Person is not listed in the current policy.	Legal Counsel reworded the section for clarity.	No fiscal impact.
2	3085.11	None.	No language in the current policy.	Legal counsel added language that for absence fewer than 5 days that the District may require a medical note for reasonable suspicion of paid sick leave abuse. HR staff maintained 3 workdays as directed by the Personnel Committee.	No fiscal impact
3	3085.11	None	No language in the current policy.	HR staff added “subject to review by Management” as directed by the Personnel Committee.	No fiscal impact.



		State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
4	3085.13	None	No language in the current policy.	Personnel Committee proposed adding a section that discusses "Excused Absence"	No fiscal Impact.
5	3085.14	None.	No language in the current policy.	Personnel Committee proposed adding a section that discusses "Unexcused Absence"	No fiscal impact.
6	3085.15	None.	No language in the current policy.	Personnel Committee proposed adding a section that provides disciplinary action for excessive absenteeism for 2 or more unexcused absence in a 30-day period.	No fiscal impact.

Fiscal Impact

There is no fiscal impact with the proposed policy changes.

Attachments

1. Redline draft version of 3085 Sick Leave with Legal Counsel notes.
2. Clean draft of 3085 Sick Leave
3. Side-by-Side version of 3085 Sick Leave

Staff Report prepared by Ren Berioso, Human Resources Manager

POLICY TITLE: SICK LEAVE
POLICY NUMBER: 3085

6b Attachment 1

3085.1 Application. This policy shall apply to employees in all classifications who work at least 30 days within a year in accordance with the Healthy Workplaces, Healthy Families Act.

3085.2 Definition. Sick leave is defined as absence from work due to mental or physical illness; non-industrial injury or health condition; or quarantine due to exposure to a contagious disease any of which prevents the employee from working; ~~or~~ to obtain medical diagnoses, care, or treatment, as well as preventative medical, vision and dental care. for the employee, employee's family member, or designated person, as defined by the Labor Code; or for specified purposes for victims of domestic violence, sexual abuse, or stalking, as defined by the Labor Code.-

3085.3 Accrual for Regular, Full-Time Employees. Employees shall accumulate sick leave at the rate of one (1) day, or ten (10) hours per month. There are no established limits for sick leave accruals, and employees may carry over from one (1) year of employment to the next any unused balance.

3085.4 Accrual for Temporary and Part-Time Employees. A temporary or part-time employee will accrue sick leave at the rate of one (1) hour for every thirty (30) hours worked. The District shall provide a minimum of three (3) days, or twenty-four (24) hours of paid sick leave by the employee's 120th calendar day of employment, and a minimum of five (5) days, or forty (40) hours of paid sick leave by the employee's 200th calendar day of employment. A temporary or part-time employee may accrue a maximum of ten (10) days or eighty (80) hours. Part-time employees may carry over from one (1) year of employment to the next up to five (5) days or forty (40) hours.

3085.5. Payout. The District is not required to pay-out unused sick leaves upon separation from employment, with the exception of retirement. The sick leave accrual shall also reset at the time of rehire, unless the employee is rehired within one year of separation, in which case all previously accrued and unused sick leave will be restored to the employee upon rehire.

3085.6 Waiting Period. There is no waiting period before regular, full-time new hires are eligible to use accrued sick leave. Temporary and Part-time employees have a ninety (90) day waiting period.

3085.7 Use. Sick leave shall be used in hourly increments. Each employee may use up to fifty percent (50%) of their accrued sick leave as kin care leave. It is also provided for those circumstances where the employee must take time off to care for a family member, regardless of the seriousness of the illness. Employees should notify their supervisor in advance to the extent feasible, or as soon as practicable, in order to avoid disruptions in the work schedule as a result of use of sick leave and kin care time. Family members covered include parents, children, spouses, registered domestic partners, grandparents, grandchildren, siblings, and designated persons for whom the employee provides care.

1. A "child" means a biological, adopted, or foster child, a stepchild, a legal ward, or a child for whom an employee stands in loco parentis, regardless of age or dependency status.
2. A "parent" means a biological, foster, or adoptive parent, a stepparent, legal guardian, or person who stood in loco parentis when the employee was a minor child. Mothers-in-law and fathers-in-law are also considered "parents" for the purposes of this definition.

3. The term “spouse” applies only to an individual to whom the employee is legally married.
4. A “registered domestic partnership” shall be established in California when both persons file a Declaration of Domestic Partnership and are registered with the Secretary of State.
5. A “sibling” includes any person with whom the employee shares a biological, foster, adoptive, or step parent.
6. Any other definition of “family member” that in the future the Legislature deems covered by paid sick leave law.
7. A “designated person” shall be the person for which the employee provides care. This is any individual related by blood or whose association with the employee is the equivalent of a family member.

3085.8 Designated Person. An employee can only ~~utilize sick leave to care for a~~ designate one “designated person” ~~once~~ in a 12-month period, with the roll-over commencing at the time ~~this was used~~ a person was designated. Supervisors are not allowed to inquire as to the nature of the employee’s relationship to the designated person a paid sick leave is to be used for.

3085.9 Other Use. An employee may also use sick leave to seek relief or services as a victim of domestic violence, sexual assault, or stalking, as described under Labor Code sections 230(c) and 230.1(a).

3085.10 Notice. In order to receive compensation while on sick leave, the employee shall notify a supervisor prior to the time for beginning the regular workday, or as soon thereafter as practicable~~le~~.

3085.11 Medical Certification. For absence in excess of ~~three~~ ~~three~~ ~~five~~ (335) workdays due to the employee’s physical or mental illness, the District ~~shall~~ ~~may~~ require a medical certification from a licensed medical provider prior to returning to work and must be submitted to Human Resources Department ~~and subject to review by the Management.~~ ~~The District may, in its discretion, require medical certification for absences fewer than three (3) five workdays if the District reasonable suspects abuse of sick leave.~~

3085.12 No Retaliation or Discrimination. Retaliation or discrimination against employees for use of sick leave is prohibited. The District shall not treat sick leave usage as an absence to support an employee’s discipline, discharge, demotion, or suspension, unless such use is found to have been an inappropriate use or abuse of the granted paid time off.

3085.13. Excused Absence. Excused absence occurs when all the following conditions are met:

1. The employee provides to his or her supervisor sufficient notice in advance of the absence.
2. The absence request is approved by the employee’s supervisor.
3. The employee has sufficient accrued sick leave to cover the absence.

3085.14 Unexcused Absence. Employees who are unable to report to work without prior approval from their supervisor and fail to communicate the circumstance of their absence within a reasonable time shall be deemed as unexcused absence. Employees who leave their post without prior notice and approval from their direct supervisor are considered an unexcused absence.

3085.15 Disciplinary Action. Excessive absenteeism is defined as two or more occurrences of unexcused absence in a 30-day period and may result in disciplinary action.

3085.1~~63~~ Buy-Back.

1. Incentive Plan A. An employee not using any sick leave for twelve (12) consecutive months may convert his/her accrued sick hours to cash at a rate of half (.5) times his/her regular hourly rate. Sick hours may be “cashed out” at the employee’s request no more than two (2) times per calendar year. Employees must maintain a balance of at least forty (40) hours of sick leave.

2. Incentive Plan B. Upon retirement or death, an employee, or his/her beneficiary, shall be entitled to receive fifty percent (50%) of all accumulated sick leave not compensated for in Incentive Plan A above. The beneficiary shall be the individual indicated on the employee’s Life Insurance Beneficiary Form.

6b Attachment 2

CURRENT POLICY

POLICY TITLE: SICK LEAVE
POLICY NUMBER: 3085

3085.1 **Application.** This policy shall apply to employees in all classifications who work at least 30 days within a year in accordance with the Healthy Workplaces, Healthy Families Act of 2014 (AB 1522).

3085.2 **Definition.** Sick leave is defined as absence from work due to illness, non-industrial injury, or quarantine due to exposure to a contagious disease. In addition, dentist and doctor appointments and prescribed sickness prevention measures shall be subject to sick leave when prior notice is provided to the supervisor.

3085.3 **Accrual.** Employees shall accumulate sick leave at the rate of 1 day per month. A temporary or part-time employee will accrue sick leave at the rate of 1 hour for every 30 hours worked.

3085.4 There is no waiting period before new hires are eligible to use accrued sick leave.

3085.5 **Use.** Each employee may use accrued sick leave as kin care leave, to care for sick family members. It is provided for those circumstances where the employee must take time off to care for a sick family member, regardless of the seriousness of the illness. Employees should notify their supervisor to the extent feasible in order to avoid disruptions in work schedule as a result of use of kin care time. Family members covered include parents, children, spouses, registered domestic partners, grandparents, grandchildren, and siblings.

1. A "child" means a biological, adopted, or foster child, a stepchild, a legal ward, or a child for whom an employee stands *in loco parentis*, regardless of age or dependency status.
2. A "parent" means a biological, foster, or adoptive parent, a stepparent, legal guardian, or person who stood *in loco parentis* when the employee was a minor child. Mothers-in-law and fathers-in-law are also considered "parents" for the purposes of this definition.
3. The term "spouse" applies only to an individual to whom the employee is legally married.
4. A registered domestic partnership shall be established in California when both persons file a Declaration of Domestic Partnership and are registered with the Secretary of State.
5. A sibling includes any person with whom the employee shares a biological, foster, adoptive, or step parent.
6. Any other definition of "family member" that in the future the Legislature deems covered by paid sick leave law.

3085.6 An employee may also use sick leave to seek relief or services as a victim of domestic violence, sexual assault, or stalking, as described under Labor Code sections 230(c) and 230.1(a).

3085.7 **Notice.** In order to receive compensation while on sick leave, the employee shall notify a supervisor prior to the time for beginning the regular workday, or as soon thereafter as practical.

3085.8 **Evidence.** If absence from duty by reason of illness occurs, satisfactory evidence may be required by the employee's immediate supervisor or Human Resources. Such evidence may include but is not limited to a medical certification from a licensed physician.

3085.9 Retaliation against employees for use of sick leave is prohibited.

PROPOSED POLICY

POLICY TITLE: SICK LEAVE
POLICY NUMBER: 3085

3085.1 Application. This policy shall apply to employees in all classifications who work at least 30 days within a year in accordance with the Healthy Workplaces, Healthy Families Act.

3085.2 Definition. Sick leave is defined as absence from work due to mental or physical illness; non-industrial injury or health condition; or quarantine due to exposure to a contagious disease any of which prevents the employee from working; ~~or~~ to obtain medical diagnoses, care, or treatment, as well as preventative medical, vision and dental care— for the employee, employee's family member, or designated person, as defined by the Labor Code, or for specified purposes for victims of domestic violence, sexual abuse, or stalking, as defined by the Labor Code.

3085.3 Accrual for Regular, Full-Time Employees. Employees shall accumulate sick leave at the rate of one (1) day, or ten (10) hours per month. There are no established limits for sick leave accruals, and employees may carry over from one (1) year of employment to the next any unused balance.

3085.4 Accrual for Temporary and Part-Time Employees. A temporary or part-time employee will accrue sick leave at the rate of one (1) hour for every thirty (30) hours worked. The District shall provide a minimum of three (3) days, or twenty-four (24) hours of paid sick leave by the employee's 120th calendar day of employment, and a minimum of five (5) days, or forty (40) hours of paid sick leave by the employee's 200th calendar day of employment. A temporary or part-time employee may accrue a maximum of ten (10) days or eighty (80) hours. Part-time employees may carry over from one (1) year of employment to the next up to five (5) days or forty (40) hours.

3085.5. Payout. The District is not required to pay-out unused sick leaves upon separation from employment, with the exception of retirement. The sick leave accrual shall also reset at the time of rehire, unless the employee is rehired within one year of separation, in which case all previously accrued and unused sick leave will be restored to the employee upon rehire.

3085.6 Waiting Period. There is no waiting period before regular, full-time new hires are eligible to use accrued sick leave. Temporary and Part-time employees have a ninety (90) day waiting period.

3085.7 Use. Sick leave shall be used in hourly increments. Each employee may use up to fifty percent (50%) of their accrued sick leave as kin care leave. It is also provided for those circumstances where the employee must take time off to care for a family member, regardless of the seriousness of the illness. Employees should notify their supervisor in advance to the extent feasible, or as soon as practicable, in order to avoid disruptions in the work schedule as a result of use of sick leave and kin care time. Family members covered include parents, children, spouses, registered domestic partners, grandparents, grandchildren, siblings, and designated persons for whom the employee provides care.

1. A "child" means a biological, adopted, or foster child, a stepchild, a legal ward, or a child for whom an employee stands *in loco parentis*, regardless of age or dependency status.
2. A "parent" means a biological, foster, or adoptive parent, a stepparent, legal guardian, or person who stood *in loco parentis* when the employee was a minor child. Mothers-in-law and fathers-in-law are also considered "parents" for the purposes of this definition.

3085.10 **Buy-Back.**

1. **Incentive Plan A.** An employee not using any sick leave for 12 consecutive months may convert his/her accrued sick hours to cash at a rate of half (5) times his/her regular hourly rate. Sick hours may be "cashed out" at the employee's request no more than 2 times per calendar year. Employees must maintain a balance of at least 40 hours of sick leave.
2. **Incentive Plan B.** Upon retirement or death, an employee, or his/her beneficiary, shall be entitled to receive 50% of all accumulated sick leave not compensated for in Incentive Plan A above. The beneficiary shall be the individual indicated on the employee's Life Insurance Beneficiary Form.

3. The term "spouse" applies only to an individual to whom the employee is legally married.
4. A "registered domestic partnership" shall be established in California when both persons file a Declaration of Domestic Partnership and are registered with the Secretary of State.
5. A "sibling" includes any person with whom the employee shares a biological, foster, adoptive, or step parent.
6. Any other definition of "family member" that in the future the Legislature deems covered by paid sick leave law.
7. A "designated person" shall be the person for which the employee provides care. This is any individual related by blood or whose association with the employee is the equivalent of a family member.

3085.8 Designated Person. An employee can only utilize sick leave to care for a designate one "designated person" once in a 12-month period, with the roll-over commencing at the time this was used a person was designated. Supervisors are not allowed to inquire as to the nature of the employee's relationship to the designated person a paid sick leave is to be used for.

3085.9 Other Use. An employee may also use sick leave to seek relief or services as a victim of domestic violence, sexual assault, or stalking, as described under Labor Code sections 230(c) and 230.1(a).

3085.10 Notice. In order to receive compensation while on sick leave, the employee shall notify a supervisor prior to the time for beginning the regular workday, or as soon thereafter as practicalle.

3085.11 Medical Certification. For absence in excess of three-three five (335) workdays due to the employee's physical or mental illness, the District shall require a medical certification from a licensed medical provider prior to returning to work and must be submitted to Human Resources Department and subject to review by the Management. The District may, in its discretion, require medical certification for absences of more fewer than three (3) five workdays if the District reasonable suspects abuse of sick leave.

3085.12 No Retaliation or Discrimination. Retaliation or discrimination against employees for use of sick leave is prohibited. The District shall not treat sick leave usage as an absence to support an employee's discipline, discharge, demotion, or suspension, unless such use is found to have been an inappropriate use or abuse of the granted paid time off.

3085.13. Excused Absence. Excused absence occurs when all the following conditions are met:
1. The employee provides to his or her supervisor sufficient notice in advance of the absence.
2. The absence request is approved by the employee's supervisor.
3. The employee has sufficient accrued sick leave to cover the absence.

3085.14 Unexcused Absence. Employees who are unable to report to work without prior approval from their supervisor and fail to communicate the circumstance of their absence within a reasonable time shall be deemed as unexcused absence. Employees who leave their post without prior notice and approval from their direct supervisor are considered an unexcused absence.

3085.15 Disciplinary Action. Excessive absenteeism is defined as two or more occurrences of unexcused absence in a 30-day period and may result in disciplinary action.

3085.163 Buy-Back.

1. Incentive Plan A. An employee not using any sick leave for twelve (12) consecutive months may convert his/her accrued sick hours to cash at a rate of half (.5) times his/her regular hourly rate. Sick hours may be "cashed out" at the employee's request no more than two (2) times per calendar year. Employees must maintain a balance of at least forty (40) hours of sick leave.
2. Incentive Plan B. Upon retirement or death, an employee, or his/her beneficiary, shall be entitled to receive fifty percent (50%) of all accumulated sick leave not compensated for in Incentive Plan A above. The beneficiary shall be the individual indicated on the employee's Life Insurance Beneficiary Form.

POLICY TITLE: SICK LEAVE
POLICY NUMBER: 3085

6b Attachment 3

3085.1 Application. This policy shall apply to employees in all classifications who work at least 30 days within a year in accordance with the Healthy Workplaces, Healthy Families Act.

3085.2 Definition. Sick leave is defined as absence from work due to mental or physical illness; non-industrial injury or health condition; or quarantine due to exposure to a contagious disease any of which prevents the employee from working; to obtain medical diagnoses, care, or treatment, as well as preventative medical, vision and dental care for the employee, employee's family member, or designated person, as defined by the Labor Code; or for specified purposes for victims of domestic violence, sexual abuse, or stalking, as defined by the Labor Code.

3085.3 Accrual for Regular, Full-Time Employees. Employees shall accumulate sick leave at the rate of one (1) day, or ten (10) hours per month. There are no established limits for sick leave accruals, and employees may carry over from one (1) year of employment to the next any unused balance.

3085.4 Accrual for Temporary and Part-Time Employees. A temporary or part-time employee will accrue sick leave at the rate of one (1) hour for every thirty (30) hours worked. The District shall provide a minimum of three (3) days, or twenty-four (24) hours of paid sick leave by the employee's 120th calendar day of employment, and a minimum of five (5) days, or forty (40) hours of paid sick leave by the employee's 200th calendar day of employment. A temporary or part-time employee may accrue a maximum of ten (10) days or eighty (80) hours. Part-time employees may carry over from one (1) year of employment to the next up to five (5) days or forty (40) hours.

3085.5. Payout. The District is not required to pay-out unused sick leaves upon separation from employment, with the exception of retirement. The sick leave accrual shall also reset at the time of rehire, unless the employee is rehired within one year of separation, in which case all previously accrued and unused sick leave will be restored to the employee upon rehire.

3085.6 Waiting Period. There is no waiting period before regular, full-time new hires are eligible to use accrued sick leave. Temporary and Part-time employees have a ninety (90) day waiting period.

3085.7 Use. Sick leave shall be used in hourly increments. Each employee may use up to fifty percent (50%) of their accrued sick leave as kin care leave. It is also provided for those circumstances where the employee must take time off to care for a family member, regardless of the seriousness of the illness. Employees should notify their supervisor in advance to the extent feasible, or as soon as practicable, in order to avoid disruptions in the work schedule as a result of the use of sick leave and kin care time. Family members covered include parents, children, spouses, registered domestic partners, grandparents, grandchildren, siblings, and designated persons for whom the employee provides care.

1. A "child" means a biological, adopted, or foster child, a stepchild, a legal ward, or a child for whom an employee stands in loco parentis, regardless of age or dependency status.
2. A "parent" means a biological, foster, or adoptive parent, a stepparent, legal guardian, or person who stood in loco parentis when the employee was a minor child. Mothers-in-law and fathers-in-law are also considered "parents" for the purposes of this definition.

3. The term “spouse” applies only to an individual to whom the employee is legally married.
4. A “registered domestic partnership” shall be established in California when both persons file a Declaration of Domestic Partnership and are registered with the Secretary of State.
5. A “sibling” includes any person with whom the employee shares a biological, foster, adoptive, or step parent.
6. Any other definition of “family member” that in the future the Legislature deems covered by paid sick leave law.
7. A “designated person” shall be the person for which the employee provides care. This is any individual related by blood or whose association with the employee is the equivalent of a family member.

3085.8 Designated Person. An employee can only designate one “designated person” in a 12-month period, with the roll-over commencing at the time a person was designated. Supervisors are not allowed to inquire as to the nature of the employee’s relationship to the designated person a paid sick leave is to be used for.

3085.9 Other Use. An employee may also use sick leave to seek relief or services as a victim of domestic violence, sexual assault, or stalking, as described under Labor Code sections 230(c) and 230.1(a).

3085.10 Notice. In order to receive compensation while on sick leave, the employee shall notify a supervisor prior to the time for beginning the regular workday, or as soon thereafter as practicable.

3085.11 Medical Certification. For absence in excess of three (3) workdays due to the employee’s physical or mental illness, the District shall require a medical certification from a licensed medical provider prior to returning to work and must be submitted to Human Resources Department and subject to review by the Management. The District may, in its discretion, require medical certification for absences of more than three (3) workdays if the District reasonably suspects abuse of sick leave.

3085.12 No Retaliation or Discrimination. Retaliation or discrimination against employees for use of sick leave is prohibited. The District shall not treat sick leave usage as an absence to support an employee’s discipline, discharge, demotion, or suspension, unless such use is found to have been an inappropriate use or abuse of the granted paid time off.

3085.13. Excused Absence. Excused absence occurs when all the following conditions are met:

1. The employee provides to his or her supervisor sufficient notice in advance of the absence.
2. The absence request is approved by the employee’s supervisor.
3. The employee has sufficient accrued sick leave to cover the absence.

3085.14 Unexcused Absence. Employees who are unable to report to work without prior approval from their supervisor and fail to communicate the circumstance of their absence within a reasonable time shall be deemed as unexcused absence. Employees who leave their post without prior notice and approval from their direct supervisor are considered an unexcused absence.

3085.15 Disciplinary Action. Excessive absenteeism is defined as two or more occurrences of unexcused absence in a 30-day period and may result in disciplinary action.

3085.16 Buy-Back.

1. Incentive Plan A. An employee not using any sick leave for twelve (12) consecutive months may convert his/her accrued sick hours to cash at a rate of half (.5) times his/her regular hourly rate. Sick hours may be "cashed out" at the employee's request no more than two (2) times per calendar year. Employees must maintain a balance of at least forty (40) hours of sick leave.
2. Incentive Plan B. Upon retirement or death, an employee, or his/her beneficiary, shall be entitled to receive fifty percent (50%) of all accumulated sick leave not compensated for in Incentive Plan A above. The beneficiary shall be the individual indicated on the employee's Life Insurance Beneficiary Form.

DRAFT



**Beaumont-Cherry Valley Water District
Personnel Committee
April 16, 2024**

Item 6c

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: **Policies and Procedures Manual Updates / Revisions Replacing Part I, Section 43 Nepotism/Employment of Relatives with Policy Number 3180 Nepotism / Employment of Relatives and Fraternization**

Staff Recommendation

Approve the updated 3180 Nepotism/Employment of Relatives and Fraternization policy to move forward to the Board of Directors with the revisions stated in Table 1, Summary of Policy Changes.

Executive Summary

Staff is proposing changes to the Nepotism/Employment of Relatives and Fraternization policy to include language that defines nepotism and fraternization and adds sections that provide the District leadership thorough guidance in hiring, promoting, or transferring a candidate or employee when there a potential conflict of interest. Staff is proposing these changes to comply with Section 87 of California Code of Regulations (CCR) regarding nepotism and personal relationship within the public sector agencies, and to establish a fair, ethical, transparent, and unbiased work environment in the District's hiring, transfer, and promotion practices.

Background

In past years, the District had a history of employing individuals in familial and marital relationships that created unfair, biased, and unethical work practices and standards. The previous leadership acted upon these instances and put in place the current Nepotism policy to ensure equal opportunities for all District employees, and as a preventive measure for future occurrences. Nepotism and Fraternization create an environment where conflict of interest exists, and instills distrust towards the District leadership because of unfair, biased, and unethical standards in hiring, transfer and promotion practices.

Staff is proposing a revised draft that includes the District's commitment to create an environment of equal opportunity for all employees by setting clear guidelines in hiring, promoting and maintaining employees in all classifications regardless of their familial, fraternal and/or marital relationships. The revised policy draft also includes language that provides guidance for Human Resources and Department Heads to identify a potential conflict of interest through a list of considerations. Staff is also proposing sections to provide the General Manager with decision power to deny employment if such occurrence constitutes nepotism or fraternization, to require potential hires and current employees to disclose conflict of interest resulting from nepotism or fraternization, and to impose possible disciplinary actions in violation of said policy upon a thorough investigation by Human Resources, in partnership with the Department Head.



The proposed redline draft version includes recommendations from the HR staff, the HR consultant, and Legal Counsel. Changes were made to ensure that legal requirements are met, risks are mitigated, and to ensure integrity of the District’s practices.

Discussion

Table 1, Summary of Policy Changes, outlines the proposed changes to the current Nepotism-Employment of Relatives policy that are in reference to the redline draft version attached herewith.

Table 1 – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	3180.1	California Code of Regulations, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.1 Add the District's commitment to create a fair, unbiased and transparent work environment.	No fiscal impact.
2	3180.2	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.2 Legal Counsel added sexual relationships as the instance that should be free from discrimination in the selection process when this policy is implemented.	No fiscal impact.
3	None	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.2 Add language that include a recusal of the District employee in the hiring and selection process if the applicant is a relative or is involved in a romantic relationship.	No fiscal impact.
4	Section 43, A	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the policy to define the process.	3180.2 Add language that the Department Head shall consult HR Manager for any conflict of interest in the hiring or promotional opportunity. Consider adding a list of considerations that constitutes conflict of interest.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
5	Section 43, B	None	The General Manager shall review any potential conflict of interest for potential hiring or termination of an employee.	3180.3 Broaden the section discussing the process for completeness and accuracy.	No fiscal impact.
6	Section 43, C	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.4 Add domestic partner to the list of relationships that may constitute conflict of interest. Legal Counsel recommends deleting the paragraph of California Civil Code 4100 as this is outdated.	No fiscal impact.
7	Section 43, D	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.5 Add all employee classifications for completeness.	No fiscal impact.
8	Section 43, E and J	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.6 Add language that an employee may not be placed in the same department with a supervisor he/she has romantic relationships with.	No fiscal impact.
9	None	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.7 Add the Disclosure Requirement if conflict of interest exists.	No fiscal impact.
10	Section 43, F	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.8 Add language that relatives may be eligible for promotion or transfer based on merit and reviewed by the general manager.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
11	None	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.9 Add a section for Prohibition of Fraternization between direct supervisor and employee supervised.	No fiscal impact.
12	None	None	No language in the current policy.	3180.12 Add a section to immediately report any violation of this policy to HR Department for investigation.	No fiscal impact.
13	None	CCR, Title 2, Sections 83.5, 83.6 and 87	No language in the current policy.	3180.13 Add a section for disciplinary measures in violation of this policy as recommended by the Legal Counsel.	No fiscal impact.

Fiscal Impact

There is no fiscal impact in the implementation of the said policy changes.

Attachments

1. Redline draft version of 3180 Nepotism/Employment of Relatives and Fraternization
2. Side-by-side version of 3180 Nepotism/Employment of Relatives and Fraternization
3. Clean draft version of 3180 Nepotism/Employment of Relatives and Fraternization
4. California Code of Regulations Title I, Sections 83.5, 83.6 and 87

Staff Report prepared by Ren Berioso, Human Resources Manager

6c Attachment 1

BEAUMONT-CHERRY VALLEY WATER DISTRICT

PERSONNEL

POLICY TITLE: NEPOTISM/EMPLOYMENT OF RELATIVES AND FRATERNIZATION

POLICY NUMBER: 3180

3180.1 Policy. The Nepotism-Employment of Relatives and Fraternization Policy is established to maintain a fair, transparent, and unbiased work environment by addressing the employment of relatives and persons who are engaged in a romantic and/or sexual relationship with a current employee or Board Member within the organization. The purpose is to prevent conflicts of interest, ensure equal opportunities for applicants and all employees, and maintain the integrity of the District's hiring and promotion processes.

3180.2 Selection Process/Equal Opportunity. It is the policy of the District to seek the best possible candidates for its staff through appropriate recruitment search procedures. It is also the policy of the District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial status, as well as romantic and/or sexual relationships with a current District employee. Employment actions include, but are not limited to, hiring promotion, transfer, disciplinary action, and termination.

Relatives, and persons engaged in a romantic and/or sexual relationship with a current employee or Board Member may be considered for employment, provided that they meet the required qualifications and standards for the position. All hiring decisions will be based on merit, qualifications, and the needs of the District. When a relative or a person who is engaged in a romantic and/or sexual relationship with a District employee or Board Member is being considered for employment, promotion, or transfer, the District employee shall have no involvement in the recruitment, employment, promotion, or transfer of the person, either directly or indirectly, nor shall that employee take any action that would directly or indirectly impact the employment of the relative or individual with whom there exists a romantic and/or sexual relationship.

Furthermore, the District retains the right to refuse to appoint, promote, or transfer a person to a position in the same department, division or facility, wherein his/her familial, marital, or romantic/sexual relationship to another employee or Board Member has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The department head/Department Head, in consultation with the Human Resources Manager, shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist. Considerations shall include the following:

- A. The two (2) employees having a direct or indirect supervisory relationship.
- B. The two (2) employees handling financial transactions together.
- C. The two (2) employees having regular job duties which require performance of shared duties or the same or related work assignment.
- D. The two (2) employees having the same immediate supervisor.
- E. An actual or perceived conflict of interest or having an adverse impact on supervision, safety, security, morale, or efficiency of the workplace that cannot be adequately mitigated.

3180.32 Determination. ——— Where the department head/Department Head, in conjunction with the Human Resources Manager, has made a determination based upon the above stated factors that such adverse impact does not exist, this determination shall be reviewed by the General Manager, prior to any appointment being made. If the General Manager may deny employment based on adverse impact, or hire any potential employee who has a relative or romantic and/or sexual relationship with an employee currently working for the District.

3180.43 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships: spouse, child, step-children, parent, step-parent, grandparent, grandchild,

brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. A spouse is a partner in marriage as defined in California Civil Code 4100. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision ~~exempt~~ except as stated herein.

Commented [RTG1]: I am not sure what the intended statute is, but this one does not apply to marriage. Perhaps a different statute was supposed to be cited? I don't think a legal cite is necessary but wouldn't you want to include domestic partnerships too?

3180.54 Applicability. This policy shall apply to all full-time, part time, temporary and contracted employees of the District. ~~It shall also apply to all temporary, part time employees, and contract employees of the District.~~

3180.65 Supervisory Relationship. For purposes of this policy, "supervisory employee" or "supervisor" means any employee, regardless of job description or title, having authority in the interest of the District to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or responsibility to direct them, or to adjust their grievances, or effectively to recommend this action, if, in the connection with the foregoing, the exercise of this authority is not merely routine or clerical nature, but requires the use of independent judgement. Employees may not be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship.

3180.7 Disclosure Requirement. Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an employee at the District shall disclose the relationship to the Human Resources Director at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.

3180.86 Conflict of Interest Management. When two (2) existing employees marry, and/or engage in a romantic and/or sexual relationship, and a determination has been made that the potential for creating adverse impact as described above exists, the Personnel Committee in conjunction with the General Manager, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager that one of the employees must separate from District employment within sixty (60) days. The choice of who shall separate from District service shall be made by the General Manager. Relatives may be eligible for promotion or transfer based on their qualifications and performance. Decisions regarding promotions or transfers will be made objectively, considering the best interest of the District by the General Manager.

3180.9 Fraternalization Defined. Fraternalization means a romantic and/or sexual relationship between a supervisor and subordinate employee within the direct chain of command or same Department.

3180.109 Access to District Funds. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct, indirect, physical or electronic access to district funds or any advisory input for the management of district funds.

3180.1109 Volunteers. Non-paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be determined and appointed by the General Manager.

~~3180.10 No employee of the District shall have supervision over a relative.~~

3180.12 Violation of Policy. In a conflict of interest or other threat to the efficient operation of the District should develop, it is the duty of the involved employees to immediately notify the applicable Department Head and the Human Resources Manager. The District reserves the right to reasonably investigate the situation to determine whether a violation of this policy exists and therefore threatens the working conditions at the District. If the District determines that the proscribed violation of this policy exists, remedial and/or disciplinary measures, including but limited to a transfer, re-assignment, or dismissal, shall be utilized to mitigate issues that arise relevant to the enforcement of this policy. In such cases, the District shall apply applicable due process procedures.

3180.130 Consequences of Violation. Violations of this policy will may result in disciplinary action, up to and including termination of employment. The severity of the consequences will depend on the nature and impact of the violation.

6c Attachment 2

CURRENT POLICY

PROPOSED POLICY

43. NEPOTISM - EMPLOYMENT OF RELATIVES

- A. It is the policy of the District to seek the best possible candidates for its staff through appropriate search procedures. It is also the policy of District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial status. Furthermore, the District retains the right to refuse to appoint a person to a position in the same department, division or facility, wherein his/her relationship to another employee has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The department head shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist.

POLICY TITLE: NEPOTISM/EMPLOYMENT OF RELATIVES AND FRATERNIZATION
POLICY NUMBER: 3180

3180.1 Policy. The Nepotism-Employment of Relatives and Fraternization Policy is established to maintain a fair, transparent, and unbiased work environment by addressing the employment of relatives and persons who are engaged in a romantic and/or sexual relationship with a current employee or Board Member within the organization. The purpose is to prevent conflicts of interest, ensure equal opportunities for applicants and all employees, and maintain the integrity of the District's hiring and promotion processes.

3180.2 Selection Process/Equal Opportunity. It is the policy of the District to seek the best possible candidates for its staff through appropriate recruitment search procedures. It is also the policy of the District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial status, as well as romantic and/or sexual relationships with a current District employee. Employment actions include, but are not limited to, hiring, promotion, transfer, disciplinary action, and termination.

Relatives, and persons engaged in a romantic and/or sexual relationship with a current employee or Board Member may be considered for employment, provided that they meet the required qualifications and standards for the position. All hiring decisions will be based on merit, qualifications, and the needs of the District. When a relative or a person who is engaged in a romantic and/or sexual relationship with a District employee or Board Member is being considered for employment, promotion, or transfer, the District employee shall have no involvement in the recruitment, employment, promotion, or transfer of the person, either directly or indirectly, nor shall that employee take any action that would directly or indirectly impact the employment of the relative or individual with whom there exists a romantic and/or sexual relationship.

Furthermore, the District retains the right to refuse to appoint, promote, or transfer a person to a position in the same department, division or facility, wherein his/her familial, marital, or romantic/sexual relationship to another employee or Board Member has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The department head/Department Head, in consultation with the Human Resources Manager, shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist. Considerations shall include the following:

- A. The two (2) employees having a direct or indirect supervisory relationship.
- B. The two (2) employees handling financial transactions together.
- C. The two (2) employees having regular job duties which require performance of shared duties or the same or related work assignment.
- D. The two (2) employees having the same immediate supervisor.
- E. An actual or perceived conflict of interest or having an adverse impact on supervision, safety, security, morale, or efficiency of the workplace that cannot be adequately mitigated.

3180.32 Determination. Where the department head/Department Head, in conjunction with the Human Resources Manager, has made a determination based upon the above stated factors that such adverse impact does not exist, this determination shall be reviewed by the General Manager prior to any appointment being made. If the General Manager may deny employment based on adverse impact, or hire any potential employee who has a relative or romantic and/or sexual relationship with an employee currently working for the District.

3180.43 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships: spouse, child, step-children, parent, step-parent, grandparent, grandchild,

- B. Where the department head has made a determination that such adverse impact does not exist, this determination shall be reviewed by the General Manager prior to any appointment being made. If the General Manager determines that an adverse impact would in fact occur, the Personnel Committee shall be notified.
- C. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships: spouse, child, step-children, parent, step-parent, grandparent, grandchild, brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. A spouse is a partner in marriage as defined in California Civil Code 4100. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined in this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.
- D. This policy shall apply to all employees of the District. It shall also apply to all part time employees and contract employees of the District.
- E. For purposes of this policy, "supervisory employee" or "supervisor" means any employee, regardless of job description or title, having authority in the interest of the District to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or responsibility to direct them, or to adjust their grievances, or effectively to recommend this action, if, in the connection with the foregoing, the exercise of this authority is not of a merely routine or clerical nature, but requires the use of independent judgment.
- F. When two existing employees marry, and a determination has been made that the potential for creating adverse impact as described above exists, the Personnel Committee in conjunction with the General Manager, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager that one of the employees must separate from District employment within 60 days. The choice of who shall separate from District service shall be made by the General Manager.
- G. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct, indirect, physical or electronic access to district funds or any advisory input for the management of district funds.
- H. The hiring of all future employees who have a relative working for the District shall be subject to the approval of the District's Personnel Committee, which shall take into consideration whether such employment would violate this policy.
- I. Non paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be approved by the General Manager.

brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. A spouse is a partner in marriage as defined in California Civil Code 4100. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision ~~except~~ except as stated herein.

3180.54 Applicability. This policy shall apply to all full-time, part time, temporary and contracted employees of the District. ~~It shall also apply to all temporary, part time employees, and contract employees of the District.~~

3180.65 Supervisory Relationship. For purposes of this policy, "supervisory employee" or "supervisor" means any employee, regardless of job description or title, having authority in the interest of the District to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or responsibility to direct them, or to adjust their grievances, or effectively to recommend this action, if, in the connection with the foregoing, the exercise of this authority is not merely routine or clerical nature, but requires the use of independent judgement. Employees may not be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship.

3180.7 Disclosure Requirement. Current employees and applicants for employment are required to disclose the existence of a relative working within the organization to Human Resources on the applicable form at the time of application for employment or promotion is made. Current employees and applicants for employment who are engaged in a romantic and/or sexual relationship with an employee at the District shall disclose the relationship to the Human Resources Director at the time of interview, or when the relationship begins, if it occurs after hire. Failure to disclose such relationships may result in disciplinary action for any such District employee, and disqualification of a candidate.

3180.86 Conflict of Interest Management. When two (2) existing employees marry, and/or engage in a romantic and/or sexual relationship, and a determination has been made that the potential for creating adverse impact as described above exists, the Personnel Committee in conjunction with the General Manager, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager that one of the employees must separate from District employment within sixty (60) days. The choice of who shall separate from District service shall be made by the General Manager. Relatives may be eligible for promotion or transfer based on their qualifications and performance. Decisions regarding promotions or transfers will be made objectively, considering the best interest of the District by the General Manager.

3180.9 Fraternalism Defined. Fraternalism means a romantic and/or sexual relationship between a supervisor and subordinate employee within the direct chain of command or same Department.

3180.109 Access to District Funds. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct, indirect, physical or electronic access to district funds or any advisory input for the management of district funds.

3180.1109 Volunteers. Non-paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be determined and appointed by the General Manager.

J. No employee of the District shall have supervision over a relative

~~3180.10 No employee of the District shall have supervision over a relative.~~

3180.12 Violation of Policy. In a conflict of interest or other threat to the efficient operation of the District should develop, it is the duty of the involved employees to immediately notify the applicable Department Head and the Human Resources Manager. The District reserves the right to reasonably investigate the situation to determine whether a violation of this policy exists and therefore threatens the working conditions at the District. If the District determines that the proscribed violation of this policy exists, remedial and/or disciplinary measures, including but limited to a transfer, re-assignment, or dismissal, shall be utilized to mitigate issues that arise relevant to the enforcement of this policy. In such cases, the District shall apply applicable due process procedures.

3180.130 Consequences of Violation. Violations of this policy will may result in disciplinary action, up to and including termination of employment. The severity of the consequences will depend on the nature and impact of the violation.

6c Attachment 3

BEAUMONT-CHERRY VALLEY WATER DISTRICT

PERSONNEL

POLICY TITLE: NEPOTISM/EMPLOYMENT OF RELATIVES AND FRATERNIZATION
POLICY NUMBER: 3180

3180.1 Policy. The Nepotism-Employment of Relatives and Fraternization Policy is established to maintain a fair, transparent, and unbiased work environment by addressing the employment of relatives and persons who are engaged in a romantic and/or sexual relationship with a current employee or Board Member within the organization. The purpose is to prevent conflicts of interest, ensure equal opportunities for applicants and all employees, and maintain the integrity of the District's hiring and promotion processes.

3180.2 Selection Process/Equal Opportunity. It is the policy of the District to seek the best possible candidates for its staff through appropriate recruitment procedures. It is also the policy of the District not to discriminate in its employment and personnel actions with respect to its employees and applicants on the basis of marital or familial status, as well as romantic and/or sexual relationships with a current District employee. Employment actions include, but are not limited to, hiring promotion, transfer, disciplinary action, and termination.

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Furthermore, the District retains the right to refuse to appoint, promote, or transfer a person to a position in the same department, division or facility, wherein his/her familial, marital, or romantic/sexual relationship to another employee or Board Member has the potential for creating adverse impact on supervision, safety, security or morale, or involves a potential conflict of interest. The Department Head, in consultation with the Human Resources Manager, shall have the authority and responsibility for determining if such a potential for adverse impact exists or does not exist. Considerations shall include the following:

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- B. The two (2) employees handling financial transactions together.
- C. The two (2) employees having regular job duties which require performance of shared duties or the same or related work assignment.
- D. The two (2) employees having the same immediate supervisor.
- E. An actual or perceived conflict of interest or having an adverse impact on supervision, safety, security, morale, or efficiency of the workplace that cannot be adequately mitigated.

3180.3 Determination. Where the Department Head, in conjunction with the Human Resources Manager, has made a determination based upon the above stated factors that such adverse impact does not exist, this determination shall be reviewed by the General Manager. The General Manager may deny employment based on adverse impact; or hire any potential employee who has a relative or romantic and/or sexual relationship with an employee currently working for the District.

3180.4 Relatives Defined. This policy applies to individuals who are related by blood, marriage or adoption including the following relationships: spouse, child, step-children, parent, step-parent, grandparent, grandchild,

brother, sister, half-brother, half-sister, aunt, uncle, niece, nephew, parent-in-law, daughter-in-law, son-in-law, brother-in-law and sister-in-law. A spouse is a partner in marriage as defined in California Civil Code 4100. In implementing this policy, it is lawful to ask an applicant to state whether he or she has a spouse or relative as defined by this policy who is presently employed by the District, but such information may not be used as a basis for an employment decision except as stated herein.

3180.5 Applicability. This policy shall apply to all full-time, part time, temporary and contracted employees of the District..

3180.6 Supervisory Relationship. For purposes of this policy, "supervisory employee" or "supervisor" means any employee, regardless of job description or title, having authority in the interest of the District to hire, transfer, suspend, layoff, recall, promote, discharge, assign, reward, or discipline other employees, or responsibility to direct them, or to adjust their grievances, or effectively to recommend this action, if, in the connection with the foregoing, the exercise of this authority is not merely routine or clerical nature, but requires the use of independent judgement. Employees may not be placed in a position where they directly supervise or manage a relative or an individual with whom they have a romantic or sexual relationship.

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3180.8 Conflict of Interest Management. When two (2) existing employees marry, and/or engage in a romantic and/or sexual relationship, and a determination has been made that the potential for creating adverse impact as described above exists, the Personnel Committee in conjunction with the General Manager, shall make reasonable efforts to minimize problems of supervision, or safety, security or morale through reassignment of duties, relocation or transfer. If the District is unable to make an acceptable accommodation, then the two individuals will be notified by the General Manager that one of the employees must separate from District employment within sixty (60) days. The choice of who shall separate from District service shall be made by the General Manager. Relatives may be eligible for promotion or transfer based on their qualifications and performance. Decisions regarding promotions or transfers will be made objectively, considering the best interest of the District by the General Manager.

3180.9 Fraternalization Defined. Fraternalization means a romantic and/or sexual relationship between a supervisor and subordinate employee within the direct chain of command or same Department.

3180.10 Access to District Funds. With regard to related employees and the Beaumont-Cherry Valley Water District's funds: One related employee only shall have access to district funds, provided it is part of their employment duties. The other employee(s) related to the above shall have no direct, indirect, physical or electronic access to district funds or any advisory input for the management of district funds.

3180.11 Volunteers. Non-paid volunteers working for the District may have relatives employed by the District. Their work assignment shall be determined and appointed by the General Manager.

Commented [RTG1]: I am not sure what the intended statute is, but this one does not apply to marriage. Perhaps a different statute was supposed to be cited? I don't think a legal cite is necessary but wouldn't you want to include domestic partnerships too?



**Beaumont-Cherry Valley Water District
Personnel Committee
April 16, 2024**

Item 6d

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: Policies and Procedures Manual Updates / Revisions replacing Part I Section 20 Continuity of Service with Policy 3060 Continuity of Service

Staff Recommendation

Approve the replacement of Part I Section 20 Continuity of Service with Policy 3060 Continuity of Service and to move said policy forward to the next Board of Directors meeting with the revisions outlined in Table 1, Summary of Policy Changes, or direct staff as desired.

Executive Summary

Staff is proposing changes to the Continuity of Service policy to include language that adds part-time and temporary employees as these classifications accrue sick leave from their hire date, in addition to regular, full-time employees. Staff is also proposing additional language that restores a rehired regular employee's seniority, including their accrued vacation rate and previously accrued sick leaves, within 12 months from the date of separation.

Background

Upon review of the policy, opportunities for clarification were identified. The revised draft includes application of the proposed policy to part-time and temporary employee classifications since they both accrue sick leave. Staff is also proposing language that includes application of this policy to rehired regular employees who already passed their probation status in restoring their seniority level at the District, including their previously accrued vacation rate at the time of resignation and their previously accrued sick leave, within twelve (12) months from the date of separation. This would not apply to part-time or temporary employees.

As part of the ongoing review process of all District policies, staff presented the draft policy to the HR consultant as well as Legal Counsel to ensure completeness. The proposed redline draft version includes recommendations from the HR staff that were also reviewed by Legal Counsel. Changes were made to ensure that legal risks are mitigated, to modernize the policy language, and to keep up with the industry standards.

Discussion

Table 1, Summary of Policy Changes, outlines the proposed changes to the current Continuity of Service policy that are in reference to the redline draft version attached herewith.



Table 1 – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	Section 20, A	None	Applies to probationary and regular employees.	3060.1 Apply this policy to part-time and temporary employees as they also accrue sick leave.	Fiscal Impact is the hourly rate of the rehired employee's restored previous sick leave accruals.
2	Section 20, C, subsections i and iii	None	No language	3060.3.1 Add occupational disability (workers compensation) 3060.3.3 Add Jury or Witness Duty as this is a protected leave. 3060.3.4 Add authorized leave per federal, state or local laws.	No fiscal impact.
3	Section 20, D	None	Language used is "Non- Permanent"	3064.4 Change the word to "Temporary" to provide exact definition.	No fiscal impact.



TABLE A	Policy Section	State Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
4	Section 20, E	None	The language used in the current policy just pertains to “length of service”	3060.5 Add language that provides restoration of the accrued vacation rate and previously accrued sick leaves to a rehired regular employee who has passed their probation period within 12 months from the date of separation.	Fiscal Impact is the hourly rate of the rehired employee’s restored previous sick leave accruals.

Fiscal Impact

The fiscal impact will be based on the hourly rate of the rehired employee’s previously accrued vacation rate and sick leave accruals as the default for any new position, in the Annual Operating Budget, is for those rates to be applied at the first-year tier.

Attachments

1. Redline draft version of 3060 Continuity of Service (policy)
2. Side-by-side version of 3060 Continuity of Service (policy)
3. Clean draft version of 3060 Continuity of Service (policy)

Staff Report prepared by Ren Berioso, Human Resources Manager

POLICY TITLE: CONTINUITY OF SERVICE
POLICY NUMBER: 3060

6d - Attachment 1

3060.1 **Application.** For ~~probationary and~~ regular, part-time, and temporary employees of all classifications, length of continuous service with the District will be used as the basis for determining benefits such as sick leave and vacation time. Length of continuous service will also be one of the considerations in promotions, demotions and when a reduction in the workforce is implemented.

3060.2 **Limitations.** Continuous service with the District will start with the date of employment and continue until one of the following occurs:

1. An employee is discharged,
2. An employee voluntarily terminates his/her employment; or,
3. An employee is otherwise separated from employment.

3060.3 **Accrual.** Continuity of an employee's service will not be broken by absence for the following reasons, and their length of service will accrue for the period of such absence:

1. Absence by reason of industrial or occupational disability,
2. Authorized absence without pay for less than 30 days in a calendar year; or
3. Absences governed by applicable state and/or federal laws such as military or National Guard service, jury or witness duty; or
4. Authorized leave of absence according to federal, state, or local law.

3060.4 **Temporary Non-Permanent Employees.** Temporary employees who are hired for a position having regular status will have previously earned length-of-service maintained in their employment service records.

3060.5 **Rehiring.** Previous regular, part-time, and temporary employees who are rehired within twelve (12) months of their last date of employment shall have their employment service records restored to include previously earned length-of-service. Regular full-time employees who have passed probation status and are rehired within twelve (12) months from the date of separation shall restore their level of seniority including their vacation accrual rate and previously accrued sick leaves. Refer to Policy 3085 Sick Leave.

Adopted by Resolution 2019-08, 08/14/2019

6d Attachment 2

CURRENT POLICY

20. CONTINUITY OF SERVICE

- A. For probationary and regular employees in all classifications, length of continuous service with the District will be used as the basis for determining benefits such as sick leave and vacation time. Length of continuous service will also be one of the considerations in promotions, demotions and when a reduction in the workforce is implemented.
- B. **Limitation.** Continuous service with the District will start with the date of employment and continue until one of the following occurs:
- i. An employee is discharged.
 - ii. An employee voluntarily terminates his/her employment; or,
 - iii. An employee is otherwise separated from employment.
- C. **Accrual.** Continuity of an employee's service will not be broken by absence for the following reasons, and his/her length of service will accrue for the period of such absence:
- i. Absence by reason of industrial disability;
 - ii. Authorized absence without pay for less than 30 days in a calendar year; or,
 - iii. Absences governed by applicable state and/or federal laws such as military or National Guard service.
- D. **Non-Permanent Employees.** Part-time and temporary employees who are hired for a position having regular status will have previously earned length-of-service maintained in their employment service records.
- E. **Rehiring.** Previous temporary employees who are rehired within twelve (12) months of their last date of employment shall have their employment service records restored to include previously earned length-of-service.

PROPOSED POLICY

POLICY TITLE: CONTINUITY OF SERVICE

POLICY NUMBER: 3060

3060.1 **Application.** For ~~probationary and~~ regular, part-time, and temporary employees of all classifications, length of continuous service with the District will be used as the basis for determining benefits such as sick leave and vacation time. Length of continuous service will also be one of the considerations in promotions, demotions and when a reduction in the workforce is implemented.

3060.2 **Limitations.** Continuous service with the District will start with the date of employment and continue until one of the following occurs:

1. An employee is discharged,
2. An employee voluntarily terminates his/her employment; or,
3. An employee is otherwise separated from employment.

3060.3 **Accrual.** Continuity of an employee's service will not be broken by absence for the following reasons, and their length of service will accrue for the period of such absence:

1. Absence by reason of industrial or occupational disability,
2. Authorized absence without pay for less than 30 days in a calendar year; or
3. Absences governed by applicable state and/or federal laws such as military or National Guard service, jury or witness duty; or
4. Authorized leave of absence according to federal, state, or local law.

3060.4 **Temporary Non-Permanent Employees.** Temporary employees who are hired for a position having regular status will have previously earned length-of-service maintained in their employment service records.

3060.5 **Rehiring.** Previous regular, part-time, and temporary employees who are rehired within twelve (12) months of their last date of employment shall have their employment service records restored to include previously earned length-of-service. Regular full-time employees who have passed probation status and are rehired within twelve (12) months from the date of separation shall restore their level of seniority including their vacation accrual rate and previously accrued sick leaves. Refer to Policy 3085 Sick Leave.

POLICY TITLE: CONTINUITY OF SERVICE
POLICY NUMBER: 3060

6d Attachment 3

3060.1 **Application.** For regular, part-time, and temporary employees of all classifications, length of continuous service with the District will be used as the basis for determining benefits such as sick leave and vacation time. Length of continuous service will also be one of the considerations in promotions, demotions and when a reduction in the workforce is implemented.

3060.2 **Limitations.** Continuous service with the District will start with the date of employment and continue until one of the following occurs:

1. An employee is discharged,
2. An employee voluntarily terminates his/her employment; or,
3. An employee is otherwise separated from employment.

3060.3 **Accrual.** Continuity of an employee's service will not be broken by absence for the following reasons, and their length of service will accrue for the period of such absence:

1. Absence by reason of industrial or occupational disability,
2. Authorized absence without pay for less than 30 days in a calendar year; or
3. Absences governed by applicable state and/or federal laws such as military or National Guard service, jury or witness duty; or
4. Authorized leave of absence according to federal, state, or local law.

3060.4 **Temporary Employees.** Temporary employees who are hired for a position having regular status will have previously earned length-of-service maintained in their employment service records.

3060.5 **Rehiring.** Previous regular, part-time, and temporary employees who are rehired within twelve (12) months of their last date of employment shall have their employment service records restored to include previously earned length-of-service. Regular full-time employees who have passed probation status and are rehired within twelve (12) months from the date of separation shall restore their level of seniority including their vacation accrual rate and previously accrued sick leaves. Refer to Policy 3085 Sick Leave.

Adopted by Resolution 2019-08, 08/14/2019



**Beaumont-Cherry Valley Water District
Personnel Committee
April 16, 2024**

Item 6e

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: **Policies and Procedures Manual Updates / Revisions Replacing Part I Section 50 Personnel Action Form (PAF) Policy and Procedure with Policy 3215 Personnel Action Form (PAF)**

Staff Recommendation

Approve the replacement of Part I Section 50 Personnel Action Form (PAF) Policy and Procedure with Policy 3125 Personnel Action Form (PAF) to move forward to the Board of Directors with the revisions stated in Table 1, Summary of Policy Changes, or direct staff as desired.

Executive Summary

Staff is proposing changes to the Part I Section 50 Personnel Action Form (PAF) as Policy 3125 Personnel Action Form (PAF) to include a section that provides additional types of actions in the PAF, and to align with the current process of initiating a PAF starting from the Human Resources Department, with the approval of the Direct Supervisor, Director of Finance and Administration and the General Manager. The new process included in the revised draft ensures completeness of the information stated in the PAF, and promotes accountability of the each individual responsible in approving changes to an employee's status at the District.

Background

At the August 19, 2019 meeting, the Board of Directors adopted new Policies and Procedures Manual Part I Section 50 Personnel Action Form (PAF) Policy and Procedure.

Staff is proposing a revised draft version that includes additional types of actions in creating a PAF to ensure completeness and revised the "Process" section that aligns with the current District's process in creating a PAF, and getting approval signatures from the Direct Supervisor, the Director of Finance and Administration, and the General Manager, for any employee status changes. Staff is also proposing deleting the Procedure Section of the policy as procedure-based language should be under the General Manager's discretion and therefore should not be included in the Policy Manual.

As part of the ongoing review process of all District policies, staff presented the policy to the HR consultant as well as Legal Counsel to ensure clarity and cohesiveness. The proposed redline draft version includes recommendations from the HR staff that were also reviewed by Legal Counsel. Changes were made to ensure that legal risks are mitigated, to modernize the policy language, and to keep up with the industry standards.



Discussion

Table 1, Summary of Policy Changes, outlines the proposed changes to the current Personnel Action Form (PAF) policy that are in reference to the redline draft version attached herewith.

Table 1 – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	Section 50, B, from subsections i to ix	None	No language in the current policy.	3215.1 Add Rehire, Return from Leave of Absence, Layoff, Retirement, End of Temporary Work/Probation, Reclassification, Change of Budget Allocation Number in the section.	No fiscal impact.
2	Section 50, B	None	Current process starts with Direct Supervisor and approved by Human Resources Department before going to the General Manager.	3215.3 Change the process to start with Human Resources and approved by Direct Supervisor, Director of Finance and Admin and General Manager to align with current process.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
3	Section 50, E	None	Current Merit Increase PAF process starts with Direct Supervisor before going through Human Resources Department.	3215.6 Change the Performance Evaluation to be submitted by the Direct Supervisor and approved by the General Manager before HR initiates the PAF for approval signatures.	No fiscal impact.
4	Section 50, I	None	No language in the policy to define the process.	3215.10 Add language that the Direct Supervisor should submit the appropriate documentation to HR before PAF can be initiated.	No fiscal impact.
5	Section 50, J	None	The current process is that HR and General Manager approves the separation recommendation before PAF can be initiated by Direct Supervisor.	3215.11 Change the language that HR will review the separation recommendation and must be approved by the General Manager before PAF can be initiated.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
6	None	None	The procedure for creating and processing PAF are listed in the current policy. The form is also attached in the policy.	Proposal to delete HR Dynamics Recommendation of adding Sections 3215.12 and 3215.13 as the procedure section and the form section are under the General Manager's discretion for any changes / revisions.	No fiscal impact.

Fiscal Impact

There is no fiscal impact in the proposed changes to this policy.

Attachments

1. Redline draft version of 3215 Personnel Action Form (PAF)
2. Side-by-side version of 3215 Personnel Action Form (PAF)
3. Clean draft version of 3215 Personnel Action Form (PAF)

Staff Report prepared by Ren Berioso, Human Resources Manager

POLICY TITLE: PERSONNEL ACTION FORM (PAF) POLICY ~~AND PROCEDURE~~
POLICY NUMBER: 3215

6e Attachment 1

3215.1 **Purpose.** To define procedures for approving Personnel Action Forms (PAFs) and to ensure that all actions are consistent with District policy.

3215.2 **Policy.** The Personnel Action Form (PAF) is the official form that the District uses to initiate, document, approve and process actions related to an employee's employment history. PAFs are used for the following types of actions:

1. Appointment/[Rehire](#)
2. Promotion
3. Transfer
4. Merit Increases/Denial of Merit Increases
5. Leave of Absence/[Return from Leave of Absence](#)
6. Disciplinary action Involving Suspension or Reduction in Pay
7. Status [Change](#)
8. Separation/[Layoff/Retirement](#)
9. [End of Temporary Work/End of Probation](#)
10. [Reclassification](#)
- ~~8.~~11. [Change of Budget Allocation Number](#)
- ~~9.~~12. [Other/Miscellaneous](#)

3215.3 **Process.** PAFs shall be prepared by the ~~department head, and submitted to~~ Human Resources ~~Department and submitted to the employee's Direct Supervisor for approval signature.~~ ~~Department heads~~ [The Human Resources Manager](#) shall ensure that all fields are filled out necessary ~~for identifying to identify~~ the proposed changes to an employee's status and/or compensation. It is ~~further~~ the responsibility of the ~~department head~~ [Direct Supervisor, Director of Finance and Administration and the General Manager](#) ~~to ensure that proposed actions are consistent with District policy before signing the PAF.~~ All proposed actions effecting an employee's status or compensation should first be discussed with Human Resources to ensure that the action is consistent with policy, past practices, and that non-routine items are discussed with the General Manager prior to initiating the action with an employee.

3215.4 **Appointments and Promotions.** PAFs involving an Appointment or Promotion shall be as a result of a recruitment/selection process, consistent with the District's Recruitment/Selection and On-Boarding Policy and Procedure. Compensation offers shall ~~be~~ first ~~be~~ discussed with Human Resources [Manager](#) and approved by the General Manager in advance of initiating the PAF.

3215.5 **Transfers.** PAFs involving a Transfer shall be as a result of a recruitment/selection process, or an accommodation as a result of an employee injury following an Interactive Process in accordance with the American's with Disabilities Act ([ADA](#)). Transfers shall be first discussed with Human Resources and approved by the General Manager in advance of initiating the PAF.

3215.6 **Merit Increases.** PAFs involving a Merit Increase shall be as a result of a satisfactory or higher performance evaluation. The completed performance evaluation shall be submitted [by the Direct Supervisor and approved by the General Manager along with the PAF before Human Resources will initiate the PAF to be signed by the Direct Supervisor, Director of Finance and Administration, and approved by the General Manager.](#) The PAF shall provide for a merit increase in an amount consistent with District policy. A PAF shall be submitted for the

denial of a merit increase to make formal record within the employee's employment history of the action.

3215.7 **Leave of Absence.** PAFs involving a Leave of Absence shall be as a result of any leave requested by an employee to document the start and end date of such leave. These dates assist with tracking leave entitlements in accordance with policy and various State and Federal laws. Leaves of Absence without pay must be approved in accordance with District policy. Leaves ~~with Pay~~ are most often associated with protected leaves such as Family and Medical Leave and require coordination with Human Resources to ensure that additional leave forms are completed. Other leave types requiring a PAF include Military Leave. Leaves which are of short duration such as Jury Duty or Witness Appearance do not require a PAF.

3215.8 **Disciplinary Action.** PAFs involving a disciplinary action shall be as a result of a formal disciplinary process involving a Skelly hearing and post-Skelly determination. The PAF form shall indicate the type of discipline, e.g. Reduction in Pay, or Demotion and the length of the action, which can be for an established period of time or indeterminate. PAFs involving disciplinary action must be coordinated with Human Resources.

3215.9 **Status.** PAFs involving a status change shall be as a result of a change from temporary to regular status, or a change from part-time to full-time. Such changes should be discussed with and approved by Human Resources and the General Manager prior to initiating the action.

3215.10 **Other/Miscellaneous.** PAFs involving other miscellaneous actions may include the initiation of various pay types such as certificate pay, educational incentive pay, etc. ~~PAFs should be submitted with a~~ appropriate documentation to justify the proposed action should be submitted by the Direct Supervisor to Human Resources before PAF can be initiated.

4. 3215.11 **Separation.** PAFs involving separation from employment shall be as a result of a voluntary resignation, termination, retirement, or death of an employee. PAFs shall be submitted reflecting the effective date as the last day worked. The PAF should be submitted along with the employee's resignation if the separation is voluntary. Any proposed separation of an employee as a result of discipline must be ~~reviewed~~ approved by Human Resources and approved by the General Manager in advance of any action taken and be the result of a Skelly hearing and post-Skelly determination.

6e Attachment 2

CURRENT POLICY

50. Personnel Action Form (PAF)

- A. **Purpose.** To define procedures for approving Personnel Action Forms (PAFs) and to ensure that all actions are consistent with District policy.
- B. **Policy.** The Personnel Action Form (PAF) is the official form that the District uses to initiate, document, approve and process actions related to an employee's employment history. PAFs are used for the following types of actions:
 - i. Appointment
 - ii. Promotion
 - iii. Transfer
 - iv. Merit Increases/Denial of Merit Increases
 - v. Leave of Absence
 - vi. Disciplinary Action Involving Suspension or Reduction in Pay
 - vii. Status
 - viii. Separation
 - ix. Other/Miscellaneous

PAFs shall be prepared by the department head, and submitted to Human Resources. Department heads shall ensure that all fields are filled out necessary for identifying the proposed changes to an employee's status and/or compensation. It is further the responsibility of the department head to ensure that proposed actions are consistent with District policy. All proposed actions effecting an employee's status or compensation should first be discussed with Human Resources to ensure that the action is consistent with policy, past practices, and that non-routine items are discussed with the General Manager prior to initiating the action with an employee.

PROPOSED POLICY

POLICY TITLE: PERSONNEL ACTION FORM (PAF) POLICY ~~AND PROCEDURE~~
POLICY NUMBER: 3215

3215.1 **Purpose.** To define procedures for approving Personnel Action Forms (PAFs) and to ensure that all actions are consistent with District policy.

3215.2 **Policy.** The Personnel Action Form (PAF) is the official form that the District uses to initiate, document, approve and process actions related to an employee's employment history. PAFs are used for the following types of actions:

1. Appointment/~~Rehire~~
2. Promotion
3. Transfer
4. Merit Increases/Denial of Merit Increases
5. Leave of Absence/~~Return from Leave of Absence~~
6. Disciplinary action Involving Suspension or Reduction in Pay
7. Status ~~Change~~
8. ~~Separation/Layoff/Retirement~~
9. ~~End of Temporary Work/End of Probation~~
10. ~~Reclassification~~
- 8-11. ~~Change of Budget Allocation Number~~
- 9-12. ~~Other/Miscellaneous~~

3215.3 **Process.** PAFs shall be prepared by the ~~department head, and submitted to~~ Human Resources ~~Department and submitted to the employee's Direct Supervisor for approval signature. Department heads~~ The Human Resources Manager shall ensure that all fields are filled out necessary ~~for identifying to identify~~ the proposed changes to an employee's status and/or compensation. It is ~~further~~ the responsibility of the ~~department head Direct Supervisor, Director of Finance and Administration and the General Manager~~ to ensure that proposed actions are consistent with District policy ~~before signing the PAF~~. All proposed actions effecting an employee's status or compensation should first be discussed with Human Resources to ensure that the action is consistent with policy, past practices, and that non-routine items are discussed with the General Manager prior to initiating the action with an employee.

3215.4 **Appointments and Promotions.** PAFs involving an Appointment or Promotion shall be ~~as a result of~~ a recruitment/selection process, consistent with the District's Recruitment/Selection and On-Boarding Policy and Procedure. Compensation offers shall ~~be first be~~ discussed with Human Resources Manager and approved by the General Manager in advance of initiating the PAF.

3215.5 **Transfers.** PAFs involving a Transfer shall be as a result of a recruitment/selection process, or an accommodation as a result of an employee injury following an Interactive Process in accordance with the American's with Disabilities Act (ADA). Transfers shall be first discussed with Human Resources and approved by the General Manager in advance of initiating the PAF.

3215.6 **Merit Increases.** PAFs involving a Merit Increase shall be ~~as a result of a satisfactory or higher performance evaluation. The completed performance evaluation shall be submitted by the Direct Supervisor and approved by the General Manager along with the PAF before Human Resources will initiate the PAF to be signed by the Direct Supervisor, Director of Finance and Administration, and approved by the General Manager.~~ The PAF shall provide for a merit increase in an amount consistent with District policy. A PAF shall be submitted for the

- C. **Appointments and Promotions.** PAFs involving an Appointment or Promotion shall be as a result of a recruitment/selection process, consistent with the District's Recruitment/Selection and On-Boarding Policy and Procedure. Compensation offers shall be first discussed with Human Resources and approved by the General Manager in advance of initiating the PAF.
- D. **Transfers.** PAFs involving a Transfer shall be as a result of a recruitment/selection process, or an accommodation as a result of an employee injury following an Interactive Process in accordance with the American's with Disabilities Act. Transfers shall be first discussed with Human Resources and approved by the General Manager in advance of initiating the PAF.
- E. **Merit Increases.** PAFs involving a Merit Increase shall be as a result of a satisfactory or higher performance evaluation. The completed performance evaluation shall be submitted along with the PAF. The PAF shall provide for a merit increase in an amount consistent with District policy. A PAF shall be submitted for the denial of a merit increase to make formal record within the employee's employment history of the action.
- F. **Leave of Absence.** PAFs involving a Leave of Absence shall be as a result of any leave requested by an employee to document the start and end date of such leave. These dates assist with tracking leave entitlements in accordance with policy and various State and Federal laws. Leaves of Absence without pay must be approved in accordance with District policy. Leaves with Pay are most often associated with protected leaves such as Family and Medical Leave and require coordination with Human Resources to ensure that additional leave forms are completed. Other leave types requiring a PAF include Military Leave. Leaves which are of short duration such as Jury Duty or Witness Appearance do not require a PAF.
- G. **Disciplinary Action.** PAFs involving a disciplinary action shall be as a result of a formal disciplinary process involving a Skelly hearing and post-Skelly determination. The PAF form shall indicate the type of discipline E.g. Reduction in Pay, or Demotion and the length of the action, which can be for an established period of time or indeterminate. PAFs involving disciplinary action must be coordinated with Human Resources.
- H. **Status.** PAFs involving a status change shall be as a result of a change from temporary to regular status, or a change from part-time to full-time. Such changes should be discussed with and approved by Human Resources and the General Manager prior to initiating the action.
- I. **Other/Miscellaneous.** PAFs involving other miscellaneous actions may include the initiation of various pay types such as certificate pay, educational incentive pay, etc. PAFs should be submitted with appropriate documentation to justify the proposed action.
- J. **Separation.** PAFs involving separation from employment shall be as a result of a voluntary resignation, termination, retirement, or death of an employee. PAFs shall be submitted reflecting the effective date as the last day worked. The PAF should be submitted along with the employee's resignation if the separation is voluntary. Any proposed separation of an employee as a result of discipline must be approved by Human Resources and the General Manager in advance of any action taken and be the result of a Skelly hearing and post-Skelly determination.

denial of a merit increase to make formal record within the employee's employment history of the action.

3215.7 **Leave of Absence.** PAFs involving a Leave of Absence shall be as a result of any leave requested by an employee to document the start and end date of such leave. These dates assist with tracking leave entitlements in accordance with policy and various State and Federal laws. Leaves of Absence without pay must be approved in accordance with District policy. Leaves with Pay are most often associated with protected leaves such as Family and Medical Leave and require coordination with Human Resources to ensure that additional leave forms are completed. Other leave types requiring a PAF include Military Leave. Leaves which are of short duration such as Jury Duty or Witness Appearance do not require a PAF.

3215.8 **Disciplinary Action.** PAFs involving a disciplinary action shall be as a result of a formal disciplinary process involving a Skelly hearing and post-Skelly determination. The PAF form shall indicate the type of discipline, e.g. Reduction in Pay, or Demotion and the length of the action, which can be for an established period of time or indeterminate. PAFs involving disciplinary action must be coordinated with Human Resources.

3215.9 **Status.** PAFs involving a status change shall be as a result of a change from temporary to regular status, or a change from part-time to full-time. Such changes should be discussed with and approved by Human Resources and the General Manager prior to initiating the action.

3215.10 **Other/Miscellaneous.** PAFs involving other miscellaneous actions may include the initiation of various pay types such as certificate pay, educational incentive pay, etc. PAFs should be submitted with appropriate documentation to justify the proposed action should be submitted by the Direct Supervisor to Human Resources before PAF can be initiated.

4. 3215.11 **Separation.** PAFs involving separation from employment shall be as a result of a voluntary resignation, termination, retirement, or death of an employee. PAFs shall be submitted reflecting the effective date as the last day worked. The PAF should be submitted along with the employee's resignation if the separation is voluntary. Any proposed separation of an employee as a result of discipline must be reviewed and approved by Human Resources and approved by the General Manager in advance of any action taken and be the result of a Skelly hearing and post-Skelly determination.

POLICY TITLE: PERSONNEL ACTION FORM (PAF) POLICY
POLICY NUMBER: 3215

6e
Attachment 3

3215.1 **Purpose.** To define procedures for approving Personnel Action Forms (PAFs) and to ensure that all actions are consistent with District policy.

3215.2 **Policy.** The Personnel Action Form (PAF) is the official form that the District uses to initiate, document, approve and process actions related to an employee's employment history. PAFs are used for the following types of actions:

1. Appointment/Rehire
2. Promotion
3. Transfer
4. Merit Increases/Denial of Merit Increases
5. Leave of Absence/Return from Leave of Absence
6. Disciplinary action Involving Suspension or Reduction in Pay
7. Status Change
8. Separation/Layoff/Retirement
9. End of Temporary Work/End of Probation
10. Reclassification
11. Change of Budget Allocation Number
12. Other/Miscellaneous

3215.3 **Process.** PAFs shall be prepared by the Human Resources Department and submitted to the employee's Direct Supervisor for approval signature. The Human Resources Manager shall ensure that all fields are filled out necessary to identify the proposed changes to an employee's status and/or compensation. It is the responsibility of the Direct Supervisor, Director of Finance and Administration and the General Manager to ensure that proposed actions are consistent with District policy before signing the PAF. All proposed actions effecting an employee's status or compensation should first be discussed with Human Resources to ensure that the action is consistent with policy, past practices, and that non-routine items are discussed with the General Manager prior to initiating the action with an employee.

3215.4 **Appointments and Promotions.** PAFs involving an Appointment or Promotion shall be as a result of a recruitment/selection process, consistent with the District's Recruitment/Selection and On-Boarding Policy and Procedure. Compensation offers shall first be discussed with Human Resources Manager and approved by the General Manager in advance of initiating the PAF.

3215.5 **Transfers.** PAFs involving a Transfer shall be as a result of a recruitment/selection process, or an accommodation as a result of an employee injury following an Interactive Process in accordance with the American's with Disabilities Act (ADA). Transfers shall be first discussed with Human Resources and approved by the General Manager in advance of initiating the PAF.

3215.6 **Merit Increases.** PAFs involving a Merit Increase shall be as a result of a satisfactory or higher performance evaluation. The completed performance evaluation shall be submitted by the Direct Supervisor and approved by the General Manager before Human Resources will initiate the PAF to be signed by the Direct Supervisor, Director of Finance and Administration, and approved by the General Manager. The PAF shall provide for a merit increase in an amount consistent with District policy. A PAF shall be submitted for the denial of a merit increase to make formal record within the employee's employment history of the action.

Adopted by Resolution 2019-08, 08/14/2019

3215.7 **Leave of Absence.** PAFs involving a Leave of Absence shall be as a result of any leave requested by an employee to document the start and end date of such leave. These dates assist with tracking leave entitlements in accordance with policy and various State and Federal laws. Leaves of Absence without pay must be approved in accordance with District policy. Leaves are most often associated with protected leaves such as Family and Medical Leave and require coordination with Human Resources to ensure that additional leave forms are completed. Other leave types requiring a PAF include Military Leave. Leaves which are of short duration such as Jury Duty or Witness Appearance do not require a PAF.

3215.8 **Disciplinary Action.** PAFs involving a disciplinary action shall be as a result of a formal disciplinary process involving a Skelly hearing and post-Skelly determination. The PAF form shall indicate the type of discipline, e.g. Reduction in Pay, or Demotion and the length of the action, which can be for an established period of time or indeterminate. PAFs involving disciplinary action must be coordinated with Human Resources.

3215.9 **Status.** PAFs involving a status change shall be as a result of a change from temporary to regular status, or a change from part-time to full-time. Such changes should be discussed with and approved by Human Resources and the General Manager prior to initiating the action.

3215.10 **Other/Miscellaneous.** PAFs involving other miscellaneous actions may include the initiation of various pay types such as certificate pay, educational incentive pay, etc. Appropriate documentation to justify the proposed action should be submitted by the Direct Supervisor to Human Resources before PAF can be initiated.

3215.11 **Separation.** PAFs involving separation from employment shall be as a result of a voluntary resignation, termination, retirement, or death of an employee. PAFs shall be submitted reflecting the effective date as the last day worked. The PAF should be submitted along with the employee's resignation if the separation is voluntary. Any proposed separation of an employee as a result of discipline must be reviewed by Human Resources and approved by the General Manager in advance of any action taken and be the result of a Skelly hearing and post-Skelly determination.



**Beaumont-Cherry Valley Water District
Personnel Committee
April 16, 2024**

Item 6f

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: Policies and Procedures Manual Updates / Revisions Replacing Part I Section 32 - A Uniforms and Protective Clothing with Policy 3240 Dress Code and Personal Standards

Staff Recommendation

Approve the replacement of Part I Section 32 - A Uniforms and Protective Clothing with Policy 3240 Dress Code and Personal Standards, or direct staff as desired.

Executive Summary

At the March 19, 2024 Meeting, the Personnel Committee provided Human Resources (HR) staff direction to present a policy draft of the Dress Code and Personal Standards with pertinent feedback from both the Memorandum of Understanding (MOU) group and the exempt employees. The objective of this approach is to create a dress code policy which is inclusive to all District staff, and to keep up with the industry trends across all public sector agencies that enforce same dress code rules, while ensuring that staff is presented in an ethical and professional manner.

Background

At the May 10, 2023 Regular Board Meeting, the Board of Directors adopted the new Policy 3125 Uniforms and Protective Clothing replacing the former Part I Section 32 - B Uniforms and Protective Clothing. Section 32-A, "Employee Appearance and Dress" was not included in the revision, leaving said section to still be in effect as the Dress Code and Personal Standards policy to date.

At the March 19, 2024 Personnel Committee meeting, HR staff was given a directive by the Committee to create a dress code and personal standards policy draft that includes language that is more inclusive and holistic for all District employees. Several District staff members have provided feedback that the language of the current policy has not given any consideration for those employees having tattoos that are not vulgar or hostile, or for those wearing visible piercings, other than in the ears, that are not detracting from the District's professional appearance. Additionally, the current policy does not provide comprehensive guidelines regarding acceptable and unacceptable clothing, footwear, proper hygiene and grooming, or reasonable accommodation for medical and/or religious reasons.

Staff consulted several sources and these dress code considerations have been widely accepted in other public agencies that are in the same business as the District. While these suggestions are taken into consideration, the purpose and intent of this draft policy is to create a dress code and personal standards policy that is presentable and acceptable to the public, and to maintain professionalism in the District. As there is no legal statute that governs this type of policy, the employer may enforce a dress code and personal standards rules through its written policies and



procedures, or negotiations with the MOU group. The Americans with Disabilities (ADA) and Fair Employment and Housing Act (FEHA) only require reasonable accommodations regarding dress code and personal standards for when an employee invokes medical needs or religious practices. Additionally, Cal/OSHA requires certain safety standards in the dress code when using moving equipment or working in the field for safety reasons.

The proposed redline draft includes recommendations from the District Management, HR staff and Legal Counsel. Changes were made to ensure that the policy draft aligned with current industry trends, attracting talent, and creating an inclusive environment while promoting professionalism and safety in the District.

Discussion

Table 1, Summary of Policy Changes, outlines the proposed changes to the current Policy Number 32 Uniforms and Protective Clothing Policy, Section A that are in reference to the redline draft version attached herewith.

Table 1 – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	None	None	Employees are expected to maintain a neat, clean, and well-groomed appearance.	3240.1 Add District's commitment to maintain professional image through clothing and appearance.	No fiscal impact.
2	None	CA Government Code 12940	It is expected that the District enforces anti-discrimination laws though there's no language in the policy.	3240.2 Add the section for Non-Discrimination to legally comply with the State law.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
3	None	None	It is in practice that employees are expected to have a good judgment when choosing attire though there's no language in the policy.	3240.3 Add the section to remind employees of their responsibility to use good judgment in their attires and appearance.	No fiscal impact.
4	Section 32, A, i	Cal/OSHA	Hair, beard and mustache must be of style and length and must avoid contact with moving equipment	3240.8 1 and 2 Moved this section and add language of hair color must be within range of natural hair colors.	No fiscal impact.
5	Section 32, A, ii	None.	Employees are expected to dress in a manner that is normally acceptable in similar business establishments. Wearing jeans, tennis shoes, western boots and t-shirts are prohibited.	3240.4, 1 to 3 Add sections that provides attire should be professional and able to perform work, and "Acceptable Clothing", "Unacceptable Clothing" standards.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
6	Section 32, A, ii	None	Wearing jeans, tennis shoes, western boots and t-shirts are prohibited.	3240.5 Add a section discussing footwear guidelines.	No fiscal impact.
7	Section 32, A, iii	None	Exception when approved by manager to wear non-professional clothing or days designated by the General Manager as “casual days”.	3240.9 Add the section that the General Manager can make exemptions temporarily or permanently on a case-to-case basis or special events.	No fiscal impact.
8	Section 32, A, iv	None	No visible piercings or gauges shall be worn while on duty.	3240.7 Add a section that allows extremely small nose studs provided this should not be worn when facing customers or external stakeholders.	No fiscal impact.



TABLE A	Policy Section	State Federal Law requirement /	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
9	Section 32, A, v	None	Any visible tattoos should be covered while on duty.	3240.6 Add a section that tattoos on the head, face and neck must be covered. Any tattoos besides these parts may be allowed as long as they are not vulgar, sexually explicit, obscene or violent.	No fiscal impact.
10	Section 32, A, vi and Section 32, C, i and ii	None	Employees may be asked to leave the premises and non-exempt employees are not going to be compensated. There will be disciplinary actions for repeated offenses.	3240.11 Moved this section and added that managers and Department Heads are responsible for explaining and enforcing this policy. Moved this section and added that supervisors, managers and Department Heads are responsible for explaining and enforcing the Dress Code policy.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
11	None	Americans with Disabilities Act (ADA) and Fair Employment and Housing Act (FEHA)	No language in the current policy.	3240.10 Add a section that allows the District to provide “Reasonable Accommodations” in the event of a medical necessity or religious creed provided it does not pose an undue hardship to the District.	No fiscal impact.

Fiscal Impact

There is no fiscal impact in the implementation of the said policy changes.

Attachments

1. Redline draft version of 3240 Dress Code and Personal Standards
2. Side-by-side version of 3240 Dress Code and Personal Standards
3. Clean draft version of 3240 Dress Code and Personal Standards
4. California Code of Regulations Title I, Sections 83.5, 83.6 and 87

Staff Report prepared by Ren Berioso, Human Resources Manager

POLICY TITLE: UNIFORMS AND PROTECTIVE CLOTHING DRESS CODE AND PERSONAL STANDARDSPOLICY NUMBER: 3240**6f Attachment 1**

3240.1 **Employee Appearance and Dress Commitment.** Employees are expected to maintain a neat, clean and well-groomed appearance. A professional image is important and is maintained, in part, by the image that employees present to customers, visitors, vendors, co-workers and others. The District is a professional workplace and desires to maintain a professional image with the general public and co-workers. Employees of all classifications, including contractual, and are expected to use good judgment in determining their dress and appearance. Clothing and appearance should always be neat, clean, appropriate for their job site, and not constitute a safety hazard when conducting District-related business or meeting with customers. Employees shall dress in accordance with general standards and guidelines designed to promote professionalism in the workplace internally and externally. Dress shall be suitable for both the work location and the job duties.

3240.2 **Non-Discrimination.** It is the intent of the District to comply with Government Code §12940 prohibiting discrimination.

3240.3 **Responsibilities.** Employees who are not provided with uniforms are expected to use good judgment and to choose appropriate work attire. Good judgment includes consideration of factors including tastefulness, anticipated requirement for public contact, the nature of the job and working conditions. Department Heads may exercise reasonable discretion to determine appropriateness in employee dress and appearance. Every situation involving attire and appearance cannot be addressed in a policy; therefore, the following is not to be considered a complete list of acceptable or unacceptable attire or appearance.

3240.4 **Clothing.** Employees are expected to dress in a manner that is normally acceptable in similar business establishments. The wearing of suggestive attire or of dungarees, jeans, shorts, sandals, tennis shoes, western boots, T-shirts and similar items of casual attire is not permitted as they do not present a businesslike appearance. Dress worn by employees must comply with the following:

1. Attire should be aligned with the dignity and image of a professional office. Employees should always be neat and clean in appearance, dressed in reasonably professional attire.
2. Allow the employee to perform all duties within the job classification safely and without creating disruption or complaints by co-workers or supervisors. Any complaints must be reported to the Human Resources Department or General Manager for review.
3. Supervisors will assist employees to determine what is considered appropriate attire for any particular situation. The following is offered as general guidelines:

Examples of Acceptable Clothing

- a. Slacks/pants – Wool and cotton or solid-colored slacks or pants are acceptable provided they are clean and wrinkle free. Slacks or pants with moderate design are acceptable.
- b. Shirts – Buttoned-up shirts and BCVWD approved logo attire are acceptable at the office. Casual shirts with collars, polo shirts, sweaters and turtlenecks can be worn on dress-down Thursdays. Shirts made of cotton and blends are appropriate.
- c. Dresses/Skirts – Casual dresses and skirts with modest hemlines are acceptable but should be at a length at which you can sit comfortably in public (generally, this is no shorter than 4 inches above the knee). Dresses that are sleeveless but do not have the shoulders bare are acceptable.

Adopted by Resolution 2019-08, 08/14/2019

d. Field Work Attire (All Times): Field or facility work may require special uniforms. Employees shall consult with a supervisor on requirements in advance.

e. Participation in Board & Special Meetings - Business Attire. Generally, will include professional dresses, blouses, skirts of modest length, suits, sport coats, dress shirt and tie and dress slacks.

Examples of Unacceptable Clothing

a. Mini-skirts

b. Clothing which is discolored, worn-out, ripped, frayed, or stained

c. Bleached or faded jeans, or pants which are excessively worn-out or faded

d. Crop tops, tank tops, tops which show midriffs, halter tops, muscle shirts and spaghetti straps not covered by jacket or sweater

e. Casual t-shirts, gym or workout attire, shorts, sweatpants, sweatshirts or running/jogging suits

f. Leggings/spandex pants

g. Clothing that reveals too much cleavage, back, chest, or under garments

h. Overalls/coveralls except for field staff performing a specific task

i. Camouflage shirts and pants

j. Any clothing that has words, terms, or pictures that may be offensive to others

k. Sports team, university, and fashion brand names on clothing are generally unacceptable if the logo is large and dominates the article of clothing

3240.5 **Footwear.** Footwear is expected to be appropriate for professional attire. Shoes must be kept clean and in good condition.

1. Items such as loafers, boots, flats, leather or canvas casual shoes are acceptable. Colored tennis or running shoes are acceptable on dress-down Thursdays. Thong sandals without a back strap, and slippers are considered unacceptable.

2. Beach type or casual flip flops, Birkenstock-type sandals and Crocs-type plastic shoes are unacceptable.

3240.6 **Tattoos.** Any visible tattoos should be covered while on duty. No visible tattoos are allowed anywhere on the head, face or neck, unless for religious reasons or purposes that the employee professes or provides information of religious affiliation or association. Any visible tattoos cannot be violent, obscene, sexually explicit, controversial, hostile or otherwise violate the District's policy against unlawful harassment or discrimination. Extremist or gang-related tattoos are also not permitted. All non-conforming tattoos stated herein must be covered with clothing or a bandage while at work.

3240.7 **Jewelries and Piercings.** No facial piercings or gauges shall be worn while on duty. All jewelry worn by employees must be appropriate and not detract from the professional appearance. Visible piercings other than in the ears are prohibited. Exceptions may be authorized by the General Manager for extremely small, single nose studs except when an employee is facing a customer or an external stakeholder (vendors, contractors, etc.). Any non-conforming piercing shall be removed, covered with a bandage, or replaced with a clear, plastic spacer while the employee is working.

3240.8 **Hair and Personal Hygiene.** Hair, beard and mustache must be of length to avoid coming into contact with moving equipment. Loose clothing is not be work when operating equipment.

1. Hair styles must be professional and appropriate. Hair must be safely restrained when working conditions require, (e.g. wearing hard hats, working around machinery with moving parts, etc.). Hair coloring must

Adopted by Resolution 2019-08, 08/14/2019

be within the range of natural hair colors. Modest color varying from naturally acceptable are accepted as long as they are not distracting and do not reflect as non-professional.

2. Beards, sideburns, and mustaches must be kept clean and neatly groomed. Facial hair of extreme length must be restrained when working conditions require.

3. Personal hygiene is essential. All employees must maintain a clean, presentable appearance. Personal hygiene includes a regular bath or shower, use of deodorant and proper oral hygiene.

4. Strong odors caused by perfumes or colognes, scented hair sprays, and aftershave lotion can be offensive and/or cause allergic reactions for some and therefore must be used in moderation.

3240.9 **Exceptions.** The exception occurs when prior approval has been given by the manager to wear non-professional clothing to complete a specific duty or special function or on day designated by the General Manager as 'casual days.' The General Manager can make exceptions to this policy on a permanent or temporary basis due to the nature of the work, special events and/or departmental moves or clean up.

3240.10 **Reasonable Accommodation.** In compliance with the Americans with Disabilities Act (ADA) and California Fair Employment and Housing Act (FEHA), upon receiving notice from an employee, the District will review and reasonably accommodate:

1. The documented medical needs of employees

2. The religious beliefs or observances of employees regarding their religious dress practices and religious grooming practices in the workplace.

Religious dress practices may include wearing or carrying religious clothing, as well as head or face coverings, jewelry, artifacts and any other items that is part of an individual's observance of his or her religious creed.

Medical related accommodations may include working with the employee to determine acceptable clothes that the employee can wear as a reasonable accommodation that meet the medical needs of the employee, while still identifying the individual as an employee, and enabling the individual to present a professional appearance.

The District is not obligated to provide reasonable accommodation if it causes an undue hardship or if such accommodation would violate other laws that prohibit discrimination.

3240.11 **Non-Compliance.** Any work time missed because of failure to comply with the dress policy will not be compensated, and repeated (30 violations of this policy will be cause for disciplinary actions. Any field employee not wearing a complete uniform, while performing District functions, is subject to disciplinary action. Employees who are inappropriately dressed may be sent home and directed to return to work in the proper attire. Non-exempt employees will not be compensated for the time away from work. Supervisors, managers and Department Heads are responsible for explaining and enforcing this Dress Code and Personal Standards Policy and will counsel anyone whose attire and/or personal appearance is not consistent with this policy. Employees who repeatedly violate District dress code policy or grooming standards will be subject to corrective action and/or disciplinary action, up to and including termination of employment.

a. Any employee who does not meet the standards of this policy will be required to take corrective action, which may include leaving the premises.

b. Uniformed are not be worn for personal use.

6f Attachment 2

CURRENT POLICY

PROPOSED POLICY

32. UNIFORMS AND PROTECTIVE CLOTHING

- A. **Employee Appearance and Dress.** Employees are expected to maintain a neat, clean and well-groomed appearance.
 - i. Hair, beard and mustaches must be of style and length to avoid coming into contact with moving equipment. Loose clothing is not to be work when operating equipment.
 - ii. Employees are expected to dress in a manner that is normally acceptable in similar business establishments. The wearing of suggestive attire or of dungarees, jeans, shorts, sandals, tennis shoes, western boots, T-Shirts and similar items of casual attire is not permitted as they do not present a businesslike appearance.
 - iii. The exception occurs when prior approval has been given by a manager to wear non-professional clothing to complete a specific duty or special function or on days designated by the General Manager as "casual days."
 - iv. No facial piercing or gauges shall be worn while on duty.
 - v. Any visible tattoos should be covered while on duty.
 - vi. Any work time missed because of failure to comply with the dress policy will not be compensated, and repeated (3) violations of this policy will be cause for disciplinary actions.

POLICY TITLE: ~~UNIFORMS AND PROTECTIVE CLOTHING~~ DRESS CODE AND PERSONAL STANDARDS

POLICY NUMBER: 3240

~~3240.1 **Employee Appearance and Dress-Commitment** Employees are expected to maintain a neat, clean and well-groomed appearance. A professional image is important and is maintained, in part, by the image that employees present to customers, visitors, vendors, co-workers and others. The District is a professional workplace and desires to maintain a professional image with the general public and co-workers. Employees of all classifications, including contractual, and are expected to use good judgment in determining their dress and appearance. Clothing and appearance should always be neat, clean, appropriate for their job site, and not constitute a safety hazard when conducting District-related business or meeting with customers. Employees shall dress in accordance with general standards and guidelines designed to promote professionalism in the workplace internally and externally. Dress shall be suitable for both the work location and the job duties.~~

~~3240.2 **Non-Discrimination.** It is the intent of the District to comply with Government Code §12940 prohibiting discrimination.~~

~~3240.3 **Responsibilities.** Employees who are not provided with uniforms are expected to use good judgment and to choose appropriate work attire. Good judgment includes consideration of factors including tastefulness, anticipated requirement for public contact, the nature of the job and working conditions. Department Heads may exercise reasonable discretion to determine appropriateness in employee dress and appearance. Every situation involving attire and appearance cannot be addressed in a policy; therefore, the following is not to be considered a complete list of acceptable or unacceptable attire or appearance.~~

~~3240.4 **Clothing.** Employees are expected to dress in a manner that is normally acceptable in similar business establishments. The wearing of suggestive attire or of dungarees, jeans, shorts, sandals, tennis shoes, western boots, T-shirts and similar items of casual attire is not permitted as they do not present a businesslike appearance. Dress worn by employees must comply with the following:~~

1. Attire should be aligned with the dignity and image of a professional office. Employees should always be neat and clean in appearance, dressed in reasonably professional attire.
2. Allow the employee to perform all duties within the job classification safely and without creating disruption or complaints by co-workers or supervisors. Any complaints must be reported to the Human Resources Department or General Manager for review.
3. Supervisors will assist employees to determine what is considered appropriate attire for any particular situation. The following is offered as general guidelines:

Examples of Acceptable Clothing

- a. Slacks/pants – Wool and cotton or solid-colored slacks or pants are acceptable provided they are clean and wrinkle free. Slacks or pants with moderate design are acceptable.
- b. Shirts – Buttoned-up shirts and BCVWD approved logo attire are acceptable at the office. Casual shirts with collars, polo shirts, sweaters and turtlenecks can be worn on dress-down Thursdays. Shirts made of cotton and blends are appropriate.
- c. Dresses/Skirts – Casual dresses and skirts with modest hemlines are acceptable but should be at a length at which you can sit comfortably in public (generally, this is no shorter than 4 inches above the knee). Dresses that are sleeveless but do not have the shoulders bare are acceptable.

C. **Compliance.** Any field employee not wearing the complete uniform, while performing District functions, is subject to disciplinary action.

- i. Any employee who does not meet the standards of this policy will be required to take corrective action, which may include leaving the premises.
- ii. Uniforms are not to be worn for personal use.

- d. Field Work Attire (All Times): Field or facility work may require special uniforms. Employees shall consult with a supervisor on requirements in advance.
- e. Participation in Board & Special Meetings - Business Attire. Generally, will include professional dresses, blouses, skirts of modest length, suits, sport coats, dress shirt and tie and dress slacks.

— Examples of Unacceptable Clothing

- a. Mini-skirts
- b. Clothing which is discolored, worn-out, ripped, frayed, or stained
- c. Bleached or faded jeans, or pants which are excessively worn-out or faded
- d. Crop tops, tank tops, tops which show midriffs, halter tops, muscle shirts and spaghetti straps not covered by jacket or sweater
- e. Casual t-shirts, gym or workout attire, shorts, sweatpants, sweatshirts or running/jogging suits
- f. Leggings/spandex pants
- g. Clothing that reveals too much cleavage, back, chest, or under garments
- h. Overalls/coveralls except for field staff performing a specific task
- i. Camouflage shirts and pants
- j. Any clothing that has words, terms, or pictures that may be offensive to others
- k. Sports team, university, and fashion brand names on clothing are generally unacceptable if the logo is large and dominates the article of clothing

3240.5 Footwear. Footwear is expected to be appropriate for professional attire. Shoes must be kept clean and in good condition.

1. Items such as loafers, boots, flats, leather or canvas casual shoes are acceptable. Colored tennis or running shoes are acceptable on dress-down Thursdays. Thong sandals without a backstrap, and slippers are considered unacceptable.

2. Beach type or casual flip flops, Birkenstock-type sandals and Crocs-type plastic shoes are unacceptable.

3240.6 Tattoos. Any visible tattoos should be covered while on duty. No visible tattoos are allowed anywhere on the head, face or neck, unless for religious reasons or purposes that the employee professes or provides information of religious affiliation or association. Any visible tattoos cannot be violent, obscene, sexually explicit, controversial, hostile or otherwise violate the District's policy against unlawful harassment or discrimination. Extremist or gang-related tattoos are also not permitted. All non-conforming tattoos stated herein must be covered with clothing or a bandage while at work.

3240.7 Jewelries and Piercings. No facial piercings or gauges shall be worn while on duty. All jewelry worn by employees must be appropriate and not detract from the professional appearance. Visible piercings other than in the ears are prohibited. Exceptions may be authorized by the General Manager for extremely small, single nose studs except when an employee is facing a customer or an external stakeholder (vendors, contractors, etc.). Any non-conforming piercing shall be removed, covered with a bandage, or replaced with a clear, plastic spacer while the employee is working.

3240.8 Hair and Personal Hygiene. Hair, beard and mustache must be of length to avoid coming into contact with moving equipment. Loose clothing is not to be worn when operating equipment.

1. Hair styles must be professional and appropriate. Hair must be safely restrained when working conditions require, (e.g. wearing hard hats, working around machinery with moving parts, etc.). Hair coloring must

be within the range of natural hair colors. Modest color varying from naturally acceptable are accepted as long as they are not distracting and do not reflect as non-professional.

2. Beards, sideburns, and mustaches must be kept clean and neatly groomed. Facial hair of extreme length must be restrained when working conditions require.

3. Personal hygiene is essential. All employees must maintain a clean, presentable appearance. Personal hygiene includes a regular bath or shower, use of deodorant and proper oral hygiene.

4. Strong odors caused by perfumes or colognes, scented hair sprays, and aftershave lotion can be offensive and/or cause allergic reactions for some and therefore must be used in moderation.

3240.9 **Exceptions.** The exception occurs when prior approval has been given by the manager to wear non-professional clothing to complete a specific duty or special function or on day designated by the General Manager as 'casual days.' The General Manager can make exceptions to this policy on a permanent or temporary basis due to the nature of the work, special events and/or departmental moves or clean up.

3240.10 **Reasonable Accommodation.** In compliance with the Americans with Disabilities Act (ADA) and California Fair Employment and Housing Act (FEHA), upon receiving notice from an employee, the District will review and reasonably accommodate:

1. The documented medical needs of employees

2. The religious beliefs or observances of employees regarding their religious dress practices and religious grooming practices in the workplace.

Religious dress practices may include wearing or carrying religious clothing, as well as head or face coverings, jewelry, artifacts and any other items that is part of an individual's observance of his or her religious creed.

Medical related accommodations may include working with the employee to determine acceptable clothes that the employee can wear as a reasonable accommodation that meet the medical needs of the employee, while still identifying the individual as an employee, and enabling the individual to present a professional appearance.

The District is not obligated to provide reasonable accommodation if it causes an undue hardship or if such accommodation would violate other laws that prohibit discrimination.

3240.11 **Non-Compliance.** Any worktime missed because of failure to comply with the dress policy will not be compensated, and repeated (30) violations of this policy will be cause for disciplinary actions. Any field employee not wearing a complete uniform, while performing District functions, is subject to disciplinary action. Employees who are inappropriately dressed may be sent home and directed to return to work in the proper attire. Non-exempt employees will not be compensated for the time away from work. Supervisors, managers and Department Heads are responsible for explaining and enforcing this Dress Code and Personal Standards Policy and will counsel anyone whose attire and/or personal appearance is not consistent with this policy. Employees who repeatedly violate District dress code policy or grooming standards will be subject to corrective action and/or disciplinary action, up to and including termination of employment.

a. Any employee who does not meet the standards of this policy will be required to take corrective action, which may include leaving the premises.

b. Uniformed are not be worn for personal use.

POLICY TITLE: DRESS CODE AND PERSONAL STANDARDS

POLICY NUMBER: 3240

3240.1 **Commitment.** A professional image is important and is maintained, in part, by the image that employees present to customers, visitors, vendors, co-workers and others. The District is a professional workplace and desires to maintain a professional image with the general public and co-workers. Employees of all classifications, including contractual, and are expected to use good judgment in determining their dress and appearance. Clothing and appearance should always be neat, clean, appropriate for their job site and not constitute a safety hazard when conducting District-related business or meeting with customers. Employees shall dress in accordance with general standards and guidelines designed to promote professionalism in the workplace internally and externally. Dress shall be suitable for both the work location and the job duties.

3240.2 **Non-Discrimination.** It is the intent of the District to comply with Government Code §12940 prohibiting discrimination.

3240.3 **Responsibilities.** Employees who are not provided with uniforms are expected to use good judgement and to choose appropriate work attire. Good judgment includes consideration of factors including tastefulness, anticipated requirement for public contact, the nature of the job and working conditions. Department Heads may exercise reasonable discretion to determine appropriateness in employee dress and appearance. Every situation involving attire and appearance cannot be addressed in a policy; therefore, the following is not to be considered a complete list of acceptable or unacceptable attire or appearance.

3240.4 **Clothing.** Employees are expected to dress in a manner that is normally acceptable in similar business establishments. Dress worn by employees must comply with the following:

1. Attire should be aligned with the dignity and image of a professional office. Employees should always be neat and clean in appearance, dressed in reasonably professional attire.
2. Allow the employee to perform all duties within the job classification safely and without creating disruption or complaints by co-workers or supervisors. Any complaints must be reported to the Human Resources Department or General Manager for review.
3. Supervisors will assist employees to determine what is considered appropriate attire for any particular situation. The following is offered as general guidelines:

Examples of Acceptable Clothing

- a. Slacks/pants – Wool and cotton or solid-colored slacks or pants are acceptable provided they are clean and wrinkle free. Slacks or pants with moderate design are acceptable.
- b. Shirts – Buttoned-up shirts and BCVWD approved logo attire are acceptable at the office. Casual shirts with collars, polo shirts, sweaters and turtlenecks can be worn on dress-down Thursdays. Shirts made of cotton and blends are appropriate.
- c. Dresses/Skirts – Casual dresses and skirts with modest hemlines are acceptable but should be at a length at which you can sit comfortably in public (generally, this is no shorter than 4 inches above the knee). Dresses that are sleeveless but do not have the shoulders bare are acceptable.
- d. Field Work Attire (All Times): Field or facility work may require special uniforms. Employees shall consult with a supervisor on requirements in advance.
- e. Participation in Board & Special Meetings - Business Attire. Generally, will include professional dresses, blouses, skirts of modest length, suits, sport coats, dress shirt and tie and

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dress slacks.

Examples of Unacceptable Clothing

- a. Mini-skirts
- b. Clothing which is discolored, worn-out, ripped, frayed, or stained
- c. Bleached or faded jeans, or pants which are excessively worn-out or faded
- d. Crop tops, tank tops, tops which show midribs, halter tops, muscle shirts and spaghetti straps not covered by jacket or sweater
- e. Casual t-shirts, gym or workout attire, shorts, sweatpants, sweatshirts or running/jogging suits
- f. Leggings/spandex pants
- g. Clothing that reveals too much cleavage, back, chest, or under garments
- h. Overalls/coveralls except for field staff performing a specific task
- i. Camouflage shirts and pants
- j. Any clothing that has words, terms, or pictures that may be offensive to others
- k. Sports team, university, and fashion brand names on clothing are generally unacceptable if the logo is large and dominates the article of clothing

3240.5 **Footwear.** Footwear is expected to be appropriate for professional attire. Shoes must be kept clean and in good condition.

1. Items such as loafers, boots, flats, leather or canvas casual shoes are acceptable. Colored tennis or running shoes are acceptable on dress-down Thursdays. Thong sandals without a back strap, and slippers are considered unacceptable.

2. Beach type or casual flip flops, Birkenstock-type sandals and Crocs-type plastic shoes are unacceptable.

3240.6 **Tattoos.** No visible tattoos are allowed anywhere on the head, face or neck, unless for religious reasons or purposes that the employee professes or provides information of religious affiliation or association. Any visible tattoos cannot be violent, obscene, sexually explicit, controversial, hostile or otherwise violate the District's policy against unlawful harassment or discrimination. Extremist or gang-related tattoos are also not permitted. All non-conforming tattoos stated herein must be covered with clothing or a bandage while at work.

3240.7 **Jewelries and Piercings.** All jewelry worn by employees must be appropriate and not detract from the professional appearance. Visible piercings other than in the ears are prohibited. Exceptions may be authorized by the General Manager for extremely small, single nose studs except when an employee is facing a customer or an external stakeholder (vendors, contractors, etc.). Any non-conforming piercing shall be removed, covered with a bandage, or replaced with a clear, plastic spacer while the employee is working.

3240.8 **Hair and Personal Hygiene.**

1. Hair styles must be professional and appropriate. Hair must be safely restrained when working conditions require, (e.g. wearing hard hats, working around machinery with moving parts, etc.). Hair coloring must be within the range of natural hair colors. Modest color varying from naturally acceptable are accepted as long as they are not distracting and do not reflect as non-professional.

2. Beards, sideburns, and mustaches must be kept clean and neatly groomed. Facial hair of extreme length must be restrained when working conditions require.

3. Personal hygiene is essential. All employees must maintain a clean, presentable appearance. Personal hygiene includes a regular bath or shower, use of deodorant and proper oral hygiene.

4. Strong odors caused by perfumes or colognes, scented hair sprays, and aftershave lotion can be offensive and/or cause allergic reactions for some and therefore must be used in moderation.

3240.9 **Exceptions.** The General Manager can make exceptions to this policy on a permanent or temporary

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basis due to the nature of the work, special events and/or departmental moves or clean up.

3240.10 Reasonable Accommodation. In compliance with the Americans with Disabilities Act (ADA) and California Fair Employment and Housing Act (FEHA), upon receiving notice from an employee, the District will review and reasonably accommodate:

1. The documented medical needs of employees
2. The religious beliefs or observances of employees regarding their religious dress practices and religious grooming practices in the workplace.

Religious dress practices may include wearing or carrying religious clothing, as well as head or face coverings, jewelry, artifacts and any other items that is part of an individual's observance of his or her religious creed.

Medical related accommodations may include working with the employee to determine acceptable clothes that the employee can wear as a reasonable accommodation that meet the medical needs of the employee, while still identifying the individual as an employee, and enabling the individual to present a professional appearance.

The District is not obligated to provide reasonable accommodation if it causes an undue hardship or if such accommodation would violate other laws that prohibit discrimination.

3240.11 Non-Compliance. Employees who are inappropriately dressed may be sent home and directed to return to work in the proper attire. Non-exempt employees will not be compensated for the time away from work. Supervisors, managers and Department Heads are responsible for explaining and enforcing this Dress Code and Personal Standards Policy and will counsel anyone whose attire and/or personal appearance is not consistent with this policy. Employees who repeatedly violate District dress code policy or grooming standards will be subject to corrective action and/or disciplinary action, up to and including termination of employment.

Adopted by Resolution 2019-08, 08/14/2019



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
April 16, 2024**

Item 7

STAFF REPORT

TO: Personnel Committee
FROM: Ren Berioso, Human Resources Manager
SUBJECT: Policy Tracking Matrix Progress Dashboard

Staff Recommendation

Approve the policies pending review in the next one to two months identified on Table 3, Policy to Work on for Subsequent Meetings, or to direct staff as desired.

Background

At the October 17, 2023 meeting, staff was directed by the Personnel Committee to create a dashboard to outline the progress of the Policies and Procedures Manual updates since year 2021. At the November 21, 2023 meeting, the Personnel Committee approved a dashboard presented by staff which highlights the summary of all policies approved and drafted, and those policies that staff are working on for subsequent meetings.

Discussion:

Table 1-Summary of Policy Approval Tracking (All Policies)

Department	On Matrix	Draft Created	Committee Reviewed Drafts	Board Approved	% Complete
HR	79	73	51	49	62.03%
Finance	13	12	4	4	30.76%
Administration	24	23	6	6	25.00%
IT	19	14	0	0	0.00%
Operations	4	2	0	0	0.00%
Engineering	3	1	0	0	0.00%
TOTALS	142	125	60	59	41.55%

Note: The sections highlighted are under the purview of the Personnel Committee. The other policies may be subject to the Finance and Audit Committee of the full Board of Directors.

Table 2 – Recommended Policies to be Added in the Worksheet

Item	Policy Subject	Policy Contents
None		



Table 3 – Policies To Work on for Subsequent Meetings

Item	Policy No.	Priorities Listed	Draft Size	Selected for Processing	Estimated Committee Presentation
1	3085	Sick Leave	3 pages	January	April
2	3180	District Vehicle Usage	2 pages	February	April
3	3180	Personnel Action Form (PAF)	2 pages	March	April
4	3060	Continuity of Service	1 page	March	April
5	3180	Nepotism/Employment of Relatives and Fraternization	3 pages	March	April
6	3240	Dress Code and Personal Standards	Draft Table	March	April
7	3240	Reduction in Force	1 page	April	May
8	3050	Volunteer Personnel Workers' Compensation Insurance	2 pages	April	May
9	3160	HIPAA Compliance and Security Officer	1 page	April	May
10	3285	Confidentiality in Resignation	1 page	April	May
11	3200	Grievance Procedures	2 pages	April	May

Numbered for ease of selection and reference, not for level of priority.

Fiscal Impact

There is no financial impact.

Attachments

1. Policy Approval Tracking Matrix 4.4.2024

Staff Report prepared by Ren Berioso, Human Resources Manager

Policy Approval Tracking BCVWD Policy Manual Project

Attachment 1

Policy Number	New Policy Number	Section	Policy Name	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Personnel Committee	Provisionally Approved by Personnel Committee	Presented to Board of Directors	Approved by Board of Directors	Adoption Date	Resolution Number
N/A	3225	Personnel	Employee Leave Donation Program and Policy	Human Resources	Yes	2019	2019	2019	10/9/2019	10/9/2019	10/9/2019	19-011
1	1000	General	Definitions	Human Resources	Yes	2/16/2021	2/22/2021	2/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
2	1005	General	Contractual Provisions	Human Resources	Yes	2/16/2021	2/22/2021	2/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
N/A	1010	General	Policy Manual	Human Resources	Yes	2/16/2021	2/22/2021	2/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
3	2000	Administration	Equal Opportunity	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
5	2010	Administration	Access to Personnel Records	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
6	2015	Administration	Harassment	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	24-002
7	2020	Administration	Sexual Harassment	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
N/A	2025	Administration	Whistleblower Protection	Human Resources	Yes	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
8	3000	Personnel	Employee Status	Human Resources	Yes	4/12/2021	7/19/2021	7/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
N/A	3001	Personnel	Employee Information and Emergency Data	Human Resources	Yes	4/12/2021	6/21/2021	6/21/2021	10/13/2021	10/13/2021	10/13/2021	21-018
N/A	3002	Personnel	Employee Groups	Human Resources	Yes	4/12/2021	5/17/2021	5/17/2021	10/13/2021	10/13/2021	10/13/2021	21-018
9	3005	Personnel	Compensation	Human Resources	Yes	7/13/2021	7/19/2021	7/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
N/A	3006	Personnel	Prevailing Wage-Public Works Contractor-Employee Relations	Human Resources	Yes	7/13/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
10 & 49	3010	Personnel	Employee Performance Evaluation	Human Resources	Yes	7/13/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
11	3015	Personnel	Performance Evaluation-General Manager	Human Resources	Yes	8/3/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
			Definitions	Human Resources	Additional Edits	6/28/2021	7/19/2021	7/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
N/A	5095	Operations	District Residences and Facility Emergency Policy	Human Resources	Yes	7/21/2020	6/21/2021	Requested edits, sent to Board for review	10/13/2021	10/28/2021	10/28/2021	21-019
			Policy Manual	Human Resources	Additional Edits	Separate Report	N/A	N/A-directed to Board	3/9/2022	3/9/2022	3/9/2022	22-006
13	3025	Personnel	Pay Periods	Human Resources	Yes	10/12/2021	11/15/2021	11/15/2021	5/11/2022	5/11/2022	5/11/2022	22-016
14	3030	Personnel	Gift Acceptance Guidelines	Human Resources	Yes	12/10/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016
15	3035	Personnel	Outside Employment	Human Resources	Yes	10/12/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016
48	3205	Personnel	Substance Abuse (In Conformance with Department of Transportation Guidelines)	Human Resources	Yes	12/6/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016
N/A	3206	Personnel	FMCSA Clearinghouse Registration	Human Resources	No	12/6/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016
12	3020	Personnel	Health and Welfare Benefits	Human Resources	Yes	5/10/2022	5/17/2022	5/17/2022	6/8/2022	6/8/2022	6/8/2022	22-019
27	3100	Personnel	Bereavement Leave	Human Resources	Yes	5/10/2022	5/17/2022	5/17/2022	6/8/2022	6/8/2022	6/8/2022	22-019
19	3055	Personnel	Work Hours, Overtime, and Standby Program	Human Resources	Yes	6/14/2022	7/19/2022	7/19/2022 with revisions	9/14/2022	9/14/2022	9/14/2022	22-028
24	3085	Personnel	Sick Leave	Human Resources	Yes	7/14/2022	8/16/2022	8/16/2022 with revisions	9/14/2022	9/14/2022	9/14/2022	22-028
34	3135	Personnel	Occupational Certification and Education	Human Resources	Yes	6/14/2022	8/16/2022	8/16/2022	9/17/2022	9/17/2022	9/14/2022	22-028
25	3090	Personnel	Family and Medical Leave	Human Resources	Yes	8/31/2022	10/18/2022	Move to Board for discussion, w/ counsel	12/14/2022	12/14/2022	12/14/2022	22-043
26	3095	Personnel	Pregnancy Disability Leave	Human Resources	Yes	9/1/2022	9/20/2022	9/20/2022	12/14/2022	12/14/2022	12/14/2022	22-043
N/A	3096	Personnel	Lactation Accommodation	Human Resources	Yes	8/25/2022	9/20/2022	9/20/2022	12/14/2022	12/14/2022	12/14/2022	22-043
N/A	3111	Personnel	Leave for Crime Victims and Family Members	Human Resources	Yes	9/29/2022	10/18/2022	10/18/2022	12/14/2022	12/14/2022	12/14/2022	22-043
2	5010	Operations	Emergency Response Guideline for Hostile or Violent Incidents	Human Resources	Yes	11/8/2022	11/15/2022	11/15/2022	12/14/2022	12/14/2022	12/14/2022	22-043
22	3075	Personnel	Vacation	Human Resources	Yes	11/8/2022	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	23-005
30	3115	Personnel	Return to Work Policy	Human Resources	Yes	1/11/2023	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	23-005
31	3120	Personnel	Occupational Injury and Illness Prevention Program	Human Resources	Yes	1/11/2023	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	23-005
N/A	3121	Personnel	Infectious Disease Control	Human Resources	Yes	2/2/2023	2/21/2023	2/21/2023	3/15/2023	3/15/2023	3/15/2023	23-009
N/A	3122	Personnel	Workplace Violence	Human Resources	Yes	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	24-002
36	3145	Personnel	Driver Training and Record Review	Human Resources	Yes	3/14/2023	3/21/2023	3/21/2023	4/12/2023	4/12/2023	4/12/2023	23-010
32	3125	Personnel	Uniforms and Protective Clothing (will be in Dress Code and Personal Standards)	Human Resources	Yes	3/14/2023	3/21/2023	4/18/2023	5/10/2023	5/10/2023	5/10/2023	23-013

Priority Legend:

Yellow Highlight = Highest Priority
Light Blue Highlight = Lowest Priority

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N/A	3230	Personnel	Workers' Compensation	Human Resources	Yes	5/9/2023	5/16/2023	5/16/2023	6/14/2023	6/14/2023	6/14/2023	23-017
N/A	3231	Personnel	Accommodations for Disability	Human Resources	No	5/9/2023	5/16/2023	5/16/2023	6/14/2023	6/14/2023	6/14/2023	23-017
17	3045	Personnel	Executive Officer	Human Resources	Yes							
N/A	3003	Personnel	Employment Agreements	Human Resources	Yes	5/10/2022	5/17/2022	Tabled				
16	3040	Personnel	Letters of Recommendation	Human Resources	Yes							
18	3050	Personnel	Volunteer Personnel Workers' Compensation Insurance	Human Resources	Yes							
20	3060	Personnel	Continuity of Service	Human Resources	Yes							
20 (incorrect numbering)	3065	Personnel	Reduction in Force	Human Resources	Yes							
21	3070	Personnel	Holidays	Human Resources	Yes	1/2/2024						
23	3080	Personnel	Pre-Employment Physical Examination	Human Resources	Yes							
28	3105	Personnel	Personal Leave of Absence	Human Resources	Yes							
29	3110	Personnel	Jury and Witness Duty	Human Resources	Yes	10/5/2023	10/17/2023	11/21/2023	12/13/2023	12/13/2023	1/10/2024	23-031
Proposed Addition	3176	Personnel	Transfers and Voluntary Demotion	Human Resources								
Proposed Addition	3177	Personnel	Resignations and Job Abandonment	Human Resources								
33	3130	Personnel	Conferences	Human Resources	Yes							
N/A	3136	Personnel	Succession and Workforce Planning	Human Resources	Yes							
35	3140	Personnel	Respiratory Protection Program	Human Resources	Yes							
37	3150	Personnel	District Vehicle Usage	Human Resources	Yes	2/5/2024						
38	3151	Personnel	Personal Vehicle Usage	Human Resources		2/5/2024						
39	3160	Personnel	HIPAA Compliance and Security Officer	Human Resources	Yes							
40	3165	Personnel	Tobacco Use	Human Resources	Yes	2/5/2024						
41	3170	Personnel	Smoke Free Workplace	Human Resources	Yes	2/5/2024						
42	3175	Personnel	Disciplinary Action or Terminations	Human Resources	Yes							
43	3180	Personnel	Nepotism-Employment of Relatives	Human Resources	Yes							
44	3185	Personnel	Confidentiality Regarding Resignations	Human Resources	Yes							
47	3200	Personnel	Grievance Procedures	Human Resources	Yes							
50	3215	Personnel	Personnel Action Form (PAF)	Human Resources	Yes							
51	3220	Personnel	Recruitment, Selection and Onboarding	Human Resources	Yes	2/5/2024						
N/A	3235	Personnel	Military Leave	Human Resources	Yes	6/14/2023	8/15/2023	11/21/2023	12/13/2023	12/13/2023	1/10/2024	23-031
N/A	3240	Personnel	Dress Code and Personal Standards	Human Resources	Yes							
N/A	3245	Personnel	Non-Solicitation	Human Resources	No							
N/A	3250	Personnel	Telecommuting	Human Resources	No							
N/A	3255	Personnel	Time off for School Activities	Human Resources	No							
N/A	3260	Personnel	Time off to Vote	Human Resources	No							
1	5005	Operations	Emergency Preparedness	Human Resources	Yes							
4	5020	Operations	Environmental Health and Safety Compliance Program	Human Resources	Yes							
5	5025	Operations	Illness and Injury Prevention Program	Human Resources	Yes							
2	6010	Miscellaneous	Adoption, Amendment of Policies	Human Resources	Yes		N/A	Direct to Full Board				
3	6015	Miscellaneous	Public Complaints	Human Resources	Yes		N/A	Direct to Full Board				
4	6020	Miscellaneous	Claims Against the District	Human Resources	Yes		N/A	Direct to Full Board				

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