



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, September 17, 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=cFArZHZ4aHRlSUJLeTBCZVpnUGRmdz09>

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 – SEPTEMBER 17, 2024

Call to Order: Chair Covington

Roll Call

	John Covington, Chair
	Andy Ramirez

	Lona Williams (alternate)
--	----------------------------------

PERSONNEL COMMITTEE MEETING – SEPT. 17, 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. August 20, 2024 Regular Meeting (pages 4 - 7)

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. **Report / Update from General Manager** (page 8)
6. **Policies and Procedures Manual Updates / Revisions**

a.	Policy 3136	Succession and Workforce Planning	pages 9 - 18
b.	Policy 3176	Transfers and Voluntary Demotion	pages 19 - 24
c.	Policy 3255	Other Mandated Leaves of Absence	pages 25 - 47
d.	Policy 5025	Illness and Injury Prevention Program	pages 48 - 84

7. **Update on Policy Tracking Matrix** (pages 85 - 90)
 - a. Status of Policy Revisions / Updates
8. **Human Resources Department Report** (pages 91 - 92)

9. Action List for Future Meetings

- a. Employee Association topics
- b. Policy manual updates (ongoing)
- c. Policy Updates related to travel and per diem (requested by Dir. Williams)
- d. General Manager's job description

10. Next Meeting Date: October 15, 2024

11. 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, August 20, 2024, at 5:30 p.m.

CALL TO ORDER

Chair Covington called the meeting to order at 5:45 p.m.

ROLL CALL

<i>Directors present:</i>	<i>John Covington, Lona Williams (alternate)</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 Information Technology Robert Rasha Human Resources Manager Ren Berioso Executive Assistant Lynda Kerney</i>
<i>BCVWD Employee Association reps:</i>	<i>None</i>

PUBLIC COMMENT: None.

ACTION ITEMS

- 1. Adjustments to the Agenda:** Mr. Jagers pointed to some handouts.
- 2. Acceptance of the Personnel Committee Meeting minutes**
 - a. July 16, 2024, Regular Meeting

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

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

- 3. Report / Update from BCVWD Employees Association:** None.
- 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 46 employees
- One separation
- Hiring of a Temporary Water Utility Worker I
- An email was distributed on health care benefits

6. Policies and Procedures Manual Updates / Revisions

Human Resources Manager Ren Berioso presented the proposed revisions to the following policies:

a. Policy 3130 Employee Training, Education and Conferences

Mr. Berioso reviewed the replacement of Part I Section 33 with Policy 3130 Employee Training, Education and Conferences. He noted the lack of consensus at the previous meeting, and the input of the Employee Group. This is a major overhaul of the policy, to align with other policies, e.g., Policy 4170 for the Board of Directors.

Per the last discussion, the expenses section was condensed and divided, Berioso continued. He pointed to the travel and transportation expenses, noting the District will pay the lesser expense of transportation. Non-reimbursable expenses were reviewed. Legal counsel recommended striking the proposed section on Reimbursement Expense Recovery Conditions.

In response to Chair Covington, Mr. Jagers explained that online training is used whenever possible as it is the most economical. This policy applies mostly to guide employees when they are away from the organization. Section 3130.1 verbiage was adjusted to include reference to online training.

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

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

b. Policy 3175 Disciplinary Action or Termination

Mr. Berioso explained replacement of Part I Section 42 with the addition of the five days for the Skelly hearing as discussed at the previous meeting.

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

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

c. Policy 5020 Environmental Health and Safety Program

Mr. Berioso recommended replacement of Part III Section 4 with Policy 5020. A top priority of the District is to ensure the wellbeing of the community and employees. Working with the Director of Operations, only two major changes were suggested: add HR as the entity to conduct investigations for any safety issue, and add a section on non-retaliation, he explained.

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

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

d. Policy 5005 Emergency Preparedness

Mr. Berioso explained the replacement of Part III Section I with Policy 5005. This policy is intended to provide an immediate program in the case of an emergency resulting from natural disasters. There are no major changes, but the timeframe for ratification by the Board of Directors has been updated to seven (7) days from 14 days per Government Code Section 8630.

After discussion, the Committee recommended the policy for consideration by the full Board, subject to potential minor adjustments to language in Section 5005.3 that may be recommended by the General Manager.

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

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

e. Policy 3045 Executive Officer

Mr. Berioso introduced the revision of Part I Section 17 and handouts were provided featuring Part II Section I which also pertained to the duties of the Executive Officer, and the General Manager's Job Description which was prepared by the HR consultant.

Ms. Kerney noted some duplication and suggested the Executive Officer section might be better placed in Part II of the Manual. General Manager Jagers pointed out that the Manual is being restructured by different sections. He suggested tabling this item for further review by staff.

Item 6e was tabled.

7. Update on Policy Tracking Matrix

Mr. Berioso reviewed the dashboard and advised that progress had been made to 86.96 percent completeness for HR policies, and 51.79 percent overall. Major changes in IT policies caused a reduction in completion rate for other policies. Operations and Engineering policies will be combined, he noted.

If the Executive Officer policy moves out of Part I, that will leave only four more policies remaining to present to the Personnel Committee meeting.

Director of Information Technology Robert Rasha explained the IT policy handbook. The distinction between Board-approved policy and written routine procedures / best practices was pointed out. Anything related to District security would not be, historically, public information and are retained internally. Should the Board desire to review those, Rasha recommended a Board closed session.

Chair Covington concurred that operational policies would flow right through the Personnel Committee to the Board and acknowledged that routine operational and best practices would be merely procedures, not policies for Board approval. Those pertaining to the security of the IT system and would not normally be subject to public disclosure, should they need to be ratified by the Board, they would have to be addressed in a closed session as determined by legal counsel.

Director Williams noted that the procedures provided to employees upon onboarding were fine, but other policy items would need discussion.

8. Action List for Future Meetings

- Employee Association topics
- Policy manual updates (ongoing)
- Policy Updates related to travel and per diem (requested by Dir. Williams)
- General Manager's job description (HR Manager and Chair Covington to work on the document and bring it back to the Personnel Committee for attachment to the GM's contract)

9. Next Meeting Date:

Regular Meeting Tuesday, September 17, 2024, at 6 p.m.

ADJOURNMENT: 7:50 p.m.

Attest:

DRAFT UNTIL APPROVED

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



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
September 17, 2024**

Item 5

STAFF REPORT

TO: Personnel Committee
FROM: Dan Jagers, General Manager
SUBJECT: Report / Update from General Manager

Staff Recommendation

Direct staff to agendize personnel topics for the September 26, 2024 Engineering Workshop.

Summary

The General Manager has been approached by the Memorandum of Understanding (MOU) representatives who communicated that a vote was held to consider unionizing the non-exempt employees at Beaumont-Cherry Valley Water District due to a request by some members for that action to be considered by the non-exempt MOU employee group. The results of that vote were posted by the MOU covered employee group and the results of that vote are as follows:

- 10 votes in favor of a union
- 20 votes against a union
- 1 undecided

Background

The currently in effect Memorandum of Understanding (MOU) with the Employee Group was approved by the Board of Directors at its meeting of April 20, 2022 for the term of January 1, 2022 to December 31, 2026.

Further MOU items to note are:

MOU Article 37: Reopener: specifies that the District may reopen the MOU *“for the purpose of negotiating health insurance benefits, and related provisions as necessary,”* but does not provide for the Employee Group to reopen the MOU.

MOU Article 39 specifies that the District will *“conduct an internal compensation survey every third year, and an external compensation study, conducted by an outside consultant, every ninth year, to facilitate salary range discussions to be considered for rate calculations and for the next term.”*

Said internal compensation survey is underway in advance of the rate study activities being performed at this time.

Fiscal Impact

Unknown at this time.

Staff Report prepared by Dan Jagers, General Manager and Lynda Kerney, Executive Assistant



**Beaumont-Cherry Valley Water District
Personnel Committee
September 17, 2024**

Item 6a

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: **Policies and Procedures Manual Updates/Revisions establishing new Policy 3136 Succession and Workforce Planning**

Staff Recommendation

Approve to move forward the establishment of new Policy 3136 Succession and Workforce Planning to the next Board of Directors meeting, or direct staff as desired.

Executive Summary

Staff is proposing to establish Policy 3136 Succession and Workforce Planning, which includes a section that allows Human Resources, in consultation with the General Manager to initiate and manage a comprehensive succession and workforce planning program. This program is designed to proactively address the District's need for high-quality replacements in key leadership and technical positions, ensuring business continuity in the event of both expected and unexpected turnover. Additionally, the policy aims to promote career growth and advancement for District personnel by identifying and nurturing high-potential employees, thereby aligning individual development with the District's long-term strategic goals.

Background

Succession and workforce planning are essential to maintaining the stability and effectiveness of the District, particularly in the specialized field of water management. This new policy addresses the potential for vacancies in key roles due to retirements, turnover, or unforeseen circumstances by systematically anticipating and planning for the future. Staff is proposing creating sections that outline the role of Human Resources, in collaboration with the General Manager or his/her designee, in identifying and developing high-potential employees to fill critical leadership and technical positions. Additionally, staff is recommending including a section on the continuous usage and updating of the Succession and Workforce Planning program alongside employee performance evaluations, ensuring alignment with the District's strategic goals and readiness for future staffing needs.

As part of the ongoing review process of all District policies, staff presented the proposed draft version to Legal Counsel to ensure compliance with applicable labor laws (if any), and to promote clarity and completeness.

Discussion

Table A, Summary of Policy Changes, outlines the proposed Succession and Workforce Planning (policy) that are in reference to the redline draft version attached herewith.

Table A – Summary of Policy Draft Overview



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	No Section	None	Management acknowledges the need for succession and workforce planning, but does not have guidance in place.	3136.1 Define the purpose of the District's succession planning program to nurture high-potential individuals and to prepare for the future in case of a turnover.	No fiscal impact.
2	No Section	None	Human Resources is the division responsible for the program.	3136.2 Identify Human Resources (HR), in consultation with the General Manager or his/her designee, as the administrator of the program.	No fiscal impact.
3	No Section	None	District has currently no process.	3136.3 Create a section that discusses the assessment of critical positions by HR, General Manager and Department Head.	No fiscal impact.
4	No Section	None	District has currently no process.	3136.4 Identify that high potential employee to undergo Individual Assessment Plan (IDP)	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
5	No Section	None	District has currently no process.	3136.5 Execute the development plan for high potential employees for career growth and development, and for future District needs.	No fiscal impact.
6	No Section	None	District has currently no process.	3136.6 Allow HR to utilize the Development Plan for future District's staffing needs and in parallel with employee performance evaluations.	No fiscal impact.
7	No Section	None	District has currently no process.	3136.6 Remind mentors that succession planning tasks must not be used to delegate essential functions to mentees. Identifies that 20% of the time stated in IDP should be allotted for training.	No fiscal impact.

Fiscal Impact

There is no fiscal impact in the revision of this policy.

Attachments

1. Redline draft version of 3136 Succession and Workforce Planning
2. Side-by-Side version of 3136 Succession and Workforce Planning
3. Clean draft version of 3136 Succession and Workforce Planning
4. Sample Individual Development Plan (IDP)

Staff Report prepared by Ren Berioso, Human Resources Manager

POLICY TITLE: SUCCESSION AND WORKFORCE PLANNING**POLICY NUMBER: 3136**

3136.1 Purpose. To ensure high-quality replacements for those individuals who currently hold positions that are key to the District's success. The positions targeted will be key leadership positions, positions requiring a high level of technical knowledge, and/or positions based on District need. Succession and workforce planning will be conducted to identify high potential individuals and to nurture their advancement.

3136.2 Responsibility. The Succession and Workforce Planning program will be initiated and managed by Human Resources in consultation with the General Manager or his/her designee.

3136.3 Process. All positions will be reviewed and assessed regarding the essential functions performed and their knowledge, skills, and abilities required. Positions identified as having the potential to become vacant in the next three (3) years due to retirement, or imminent due to a turnover or those critical to the success of the District will be targeted for succession planning. An initial plan will be developed and then reviewed periodically by Human Resources in collaboration with the General Manager or his/her designee and the Department Heads for any needed adjustments. Each Department Head will initially, and then annually, review their departmental structure and provide input as to the succession plan needs of the District.

3136.4 High Potential Employees Assessment. All employees will be assessed by their immediate supervisors accordingly. Although all employees may voluntarily complete an Individual Development Plan (IDP), only the high potential employees needed for progression into the targeted positions and leadership at the District may be approached regarding their desire to participate in an IDP based on their actual performance and the annual performance review. The assessment shall be reviewed by the General Manager or his/her designee, Department Head and Human Resources to determine fitness. Although there is no guarantee of a particular position or promotion, employees will have the opportunity to work toward becoming more qualified and prepared should they apply for openings that may become available. Not being selected for the succession plan under this policy are not disciplinary and do not incur any due process or appeal rights.

3136.5 Development Plan Execution. Upon review of submitted IDPs, identified high potential employees that want to participate in employee development and assume a greater or differing role of responsibility in the future will be assisted in the execution of their IDPs by their supervisors and the Human Resources. Development plans will provide realistic goals and action steps to be taken in the next months and years to prepare high potential employees for future roles.

3136.6 Ongoing Utilization. The Succession and Workforce plan will be utilized by the Human Resources on an ongoing basis as a guide to proactively prepare for future job opening needs. IDPs are completely voluntary and will be reviewed in parallel with employee performance evaluations.

3136.7 Mentor-Mentee Task Allocation and Scope. Succession Planning must not be used as a way for mentors or supervisors to assign mentorship-related tasks as essential job functions for the mentee. Tasks assigned through the mentorship program should be focused on development and should not exceed 20% of the employee mentee's work time. These tasks must be agreed upon by both the mentor and mentee through the Individual Development Plan (IDP) to ensure alignment with the mentee's growth and organizational objectives. Regular reviews between mentor and mentee are encouraged to maintain a balance between regular job duties and developmental tasks.

Adopted by Resolution XXX

Attachment 2

PROPOSED POLICY

POLICY TITLE: SUCCESSION AND WORKFORCE PLANNING
POLICY NUMBER: 3136

3136.1 **Purpose.** To ensure high-quality replacements for those individuals who currently hold positions that are key to the District's success. The positions targeted will be key leadership positions, positions requiring a high level of technical knowledge, and/or positions based on District need. Succession and workforce planning will be conducted to identify high potential individuals and to nurture their advancement.

3136.2 **Responsibility.** The Succession and Workforce Planning program will be initiated and managed by Human Resources in consultation with the General Manager or his/her designee.

3136.3 **Process.** All positions will be reviewed and assessed regarding the essential functions performed and their knowledge, skills, and abilities required. Positions identified as having the potential to become vacant in the next three (3) years due to retirement, or imminent due to a turnover or those critical to the success of the District will be targeted for succession planning. An initial plan will be developed and then reviewed periodically by Human Resources in collaboration with the General Manager or his/her designee and the Department Heads for any needed adjustments. Each Department Head will initially, and then annually, review their departmental structure and provide input as to the succession plan needs of the District.

3136.4 **High Potential Employees Assessment.** All employees will be assessed by their immediate supervisors accordingly. Although all employees may voluntarily complete an Individual Development Plan (IDP), only the high potential employees needed for progression into the targeted positions and leadership at the District may be approached regarding their desire to participate in an IDP based on their actual performance and the annual performance review. The assessment shall be reviewed by the General Manager or his/her designee, Department Head and Human Resources to determine fitness. Although there is no guarantee of a particular position or promotion, employees will have the opportunity to work toward becoming more qualified and prepared should they apply for openings that may become available. Not being selected for the succession plan under this policy are not disciplinary and do not incur any due process or appeal rights.

3136.5 **Development Plan Execution.** Upon review of submitted IDPs, identified high potential employees that want to participate in employee development and assume a greater or differing role of responsibility in the future will be assisted in the execution of their IDPs by their supervisors and the Human Resources. Development plans will provide realistic goals and action steps to be taken in the next months and years to prepare high potential employees for future roles.

3136.6 **Ongoing Utilization.** The Succession and Workforce plan will be utilized by the Human Resources on an ongoing basis as a guide to proactively prepare for future job opening needs. IDPs are completely voluntary and will be reviewed in parallel with employee performance evaluations.

3136.7 **Mentor-Mentee Task Allocation and Scope.** Succession Planning must not be used as a way for mentors or supervisors to assign mentorship-related tasks as essential job functions for the mentee. Tasks assigned through the mentorship programs should be focused on development and should not exceed 20% of the employee mentee's work time. These tasks must be agreed upon by both the mentor and mentee through the Individual Development Plan (IDP) to ensure alignment with the mentee's growth and organizational objectives. Regular reviews between mentor and mentee are encouraged to maintain a balance between regular job duties and developmental tasks.

CURRENT POLICY

NO POLICY IN PLACE

POLICY TITLE: SUCCESSION AND WORKFORCE PLANNING**POLICY NUMBER: 3136**

3136.1 **Purpose.** To ensure high-quality replacements for those individuals who currently hold positions that are key to the District's success. The positions targeted will be key leadership positions, positions requiring a high level of technical knowledge, and/or positions based on District need. Succession and workforce planning will be conducted to identify high potential individuals and to nurture their advancement.

3136.2 **Responsibility.** The Succession and Workforce Planning program will be initiated and managed by Human Resources in consultation with the General Manager or his/her designee.

3136.3 **Process.** All positions will be reviewed and assessed regarding the essential functions performed and their knowledge, skills, and abilities required. Positions identified as having the potential to become vacant in the next three (3) years due to retirement, or imminent due to a turnover, or those critical to the success of the District will be targeted for succession planning. An initial plan will be developed and then reviewed periodically by Human Resources in collaboration with the General Manager or his/her designee and the Department Heads for any needed adjustments. Each Department Head will initially, and then annually, review their departmental structure and provide input as to the succession plan needs of the District.

3136.4 **High Potential Employees Assessment.** All employees will be assessed by their immediate supervisors accordingly. Although all employees may voluntarily complete an Individual Development Plan (IDP), only the high potential employees needed for progression into the targeted positions and leadership at the District may be approached regarding their desire to participate in an IDP based on their actual performance and the annual performance review. The assessment shall be reviewed by the General Manager or his/her designee, Department Head and Human Resources to determine fitness. Although there is no guarantee of a particular position or promotion, employees will have the opportunity to work toward becoming more qualified and prepared should they apply for openings that may become available. Not being selected for the succession plan under this policy is not disciplinary and does not incur any due process or appeal rights.

3136.5 **Development Plan Execution.** Upon review of submitted IDPs, identified high potential employees who want to participate in employee development and assume a greater or differing role of responsibility in the future will be assisted in the execution of their IDPs by their supervisors and Human Resources. Development plans will provide realistic goals and action steps to be taken in the next months and years to prepare high potential employees for future roles.

3136.6 **Ongoing Utilization.** The Succession and Workforce plan will be utilized by the Human Resources on an ongoing basis as a guide to proactively prepare for future job opening needs. IDPs are completely voluntary and will be reviewed in parallel with employee performance evaluations.

3136.7 **Mentor-Mentee Task Allocation and Scope.** Succession Planning must not be used as a way for mentors or supervisors to assign mentorship-related tasks as essential job functions for the mentee. Tasks assigned through the mentorship program should be focused on development and should not exceed 20% of the employee mentee's work time. These tasks must be agreed upon by both the mentor and mentee through the Individual Development Plan (IDP) to ensure alignment with the mentee's growth and organizational objectives. Regular reviews between mentor and mentee are encouraged to maintain a balance between regular job duties and developmental tasks.

Adopted by Resolution XXX



BCVWD Individual Development Plan

Part 1: Personal Information

DATE:

EMPLOYEE NAME

CURRENT POSITION

SUPERVISOR / MANAGER

DEPARTMENT

Part 2: Career Goals and Objectives

Short Term Career Goals (1 – 2 years)

Long-term Career Goals (3 – 5 years)

Part 3: Skills Assessment: Current Skills and Competencies

1. Technical Skills

2. Leadership Skills

3. Interpersonal Skills

4. Other Relevant Skills

5. Skills to Develop

Part 4a: Development Activities: Training and Education

1. Courses / Workshops / Seminars
2. Certifications / Degrees

Part 4b: On-the-Job Experience

1. Special Projects / Assignments
2. Job Rotation / Shadowing

Part 4c: Development Activities: Mentorship and Coaching

1. Mentor / Coach Name: _____
2. Areas of Focus:
3. Other Development Activities

Part 5: Action Plan: Development Goal 1

Objective:
Activities:
Resources Needed:

Timeline:
Success Criteria:

Part 5: Action Plan: Development Goal 2

Objective:
Activities:
Resources Needed:
Timeline:
Success Criteria:

Part 5: Action Plan: Development Goal 3

Objective:
Activities:
Resources Needed:
Timeline:
Success Criteria:

Part 6: Progress Review and Feedback

Review Dates:

Progress Notes:

Feedback from Supervisor / Manager:

Adjustments to Plan:

SAMPLE

Part 7: Acknowledgement and Signatures

EMPLOYEE SIGNATURE

DATE

SUPERVISOR / MANAGER SIGNATURE

DATE

2024 IDP RB:lj



**Beaumont-Cherry Valley Water District
Personnel Committee
September 17, 2024**

Item 6b

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: Policies and Procedures Manual Updates/Revisions establishing new Policy 3176 Transfers and Voluntary Demotion

Staff Recommendation

Approve to move forward the establishment of new Policy 3176 Transfers and Voluntary Demotion to the next Board of Directors meeting, or direct staff as desired.

Executive Summary

Staff is proposing the establishment of Policy 3176 Transfers and Voluntary Demotion to provide a clear framework for handling employee transfers and voluntary demotions within the District. The policy draft contains sections that define the roles and responsibilities of Human Resources, Department Heads, and the General Manager, or his/her designee, in reviewing and approving such requests. Additionally, the proposed policy draft outlines the eligibility criteria and conditions under which transfers and voluntary demotions may occur, ensuring a transparent and consistent process that supports employee development and operational efficiency.

Background

At the November 21, 2023 Personnel Committee Meeting, Human Resources (HR) staff proposed to add Policy 3176 Transfers and Voluntary Demotions to be added to the Policy Tracking Matrix, which was approved by the Personnel Committee.

The Transfers and Voluntary Demotions policy is vital for enhancing employee retention, development, and operational flexibility within the District. While the District has allowed transfers and demotions in the past, there has been no formal policy in place to provide a clear roadmap for leaders and employees navigating these processes. This lack of structure has created ambiguity, leaving room for inconsistent practices and uncertainty in handling such events. HR crafted the policy to provide clear guidelines for employee transfers and voluntary demotions, enabling smooth transitions into new roles while addressing the District's changing needs. By creating a transparent process, the policy draft ensures consistency and fairness, minimizing uncertainty for employees seeking job changes.

The proposed sections in the policy draft assign clear accountability to Human Resources, Department Heads, and the General Manager, ensuring decisions align with the District's best interests. With input from Legal Counsel, the policy clarifies that transfers and voluntary demotions are non-disciplinary, fostering a positive and supportive workplace environment. Additionally, HR included sections on probationary periods to effectively manage transitions and minimize disruptions. The policy draft outlines eligibility criteria, conditions, and procedures for requesting transfers or voluntary demotions, ensuring that each request is thoroughly vetted. Overall, this policy is essential for aligning staff with organizational objectives while promoting



employee growth and satisfaction. It mitigates risks related to poor job fitness and strengthens workforce stability.

As part of the ongoing review process of all District policies, HR staff presented the proposed redline version to Legal Counsel to ensure compliance with applicable labor laws (if any), and to promote clarity and completeness. Changes were also made to modernize the policy language, and to keep up with the industry standards.

Discussion

Table A, Summary of Policy Changes, outlines the proposed Transfers and Voluntary Demotions (policy) that are in reference to the redline draft version attached herewith.

Table A – Summary of Policy Draft Overview

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	No Section	None	The District allows transfers and voluntary demotions for employee development and District interest.	3176.1 Add policy statement for why the District supports transfers and demotions.	No fiscal impact.
2	No Section	None	The District had a few instances in the past that allowed voluntary demotions but has no official process in place.	3176.2 Add Voluntary Demotion section that covers the definition, process and the probation period. Legal counsel added that this is not a form of a disciplinary action as this is voluntary.	No fiscal impact.
3	No Section	None	The District had a few instances in the past that allowed voluntary transfers but has no official process in place.	3176.3 Add Voluntary Transfer section that covers the definition, process and the probation period. Legal counsel added that this is not a form of a disciplinary action as this is voluntary.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
4	No Section	None	Similar to promotions, transfers and demotions automatically place an approved employee on a 6-month probation unless waived by the General Manager or his/her designee.	3176.4 Add this process to the policy. Also add the conditions and eligibility criteria for when a transferred employee's performance is poor such as Performance Improvement Plan (PIP) or progressive discipline.	No fiscal impact.
5	No Section	None	There is no official procedure for transfers and demotions in the District. Transfers happened during job openings and successful interviews.	3176.5 Add a process for transfer and demotion including a review by HR and the receiving Department Head.	No fiscal impact.
6	No Section	None	All requests are approved or denied by the General Manager or designee through a justification of selection and Personnel Action Form (PAF).	3176.6 Add the General Manager or designee as the authorized individual to approve transfer or demotion requests.	No fiscal impact.

Fiscal Impact

There is no fiscal impact in the revision of this policy.

Attachments

1. Redline draft version of Policy 3176 Transfers and Voluntary Demotion
2. Side-by-side version of Policy 3176 Transfers and Voluntary Demotion
3. Clean draft version of Policy 3176 Transfers and Voluntary Demotion

Staff Report prepared by Ren Berioso, Human Resources Manager

POLICY TITLE: TRANSFER AND VOLUNTARY DEMOTION
POLICY NUMBER: 3176

Attachment 1

3176.1 Policy. Transfers, voluntary demotions, and job changes are used to retain employees or to change assignments as needed in the best interests of the District. In addition, such actions are used for proper placement of personnel for employee development.

3176.2 Voluntary Demotion. A voluntary demotion of an employee from an incumbent position to a position in a different classification, for which the maximum rate of pay is lower and where the employee has voluntarily requested or agreed to such appointment in writing. A demoted employee shall serve a six (6) month probationary period from the appointment date, unless the employee will return to his/her previous position held or if the probationary period is waived by the General Manager or his/her designee with a recommendation from the Department Head and Human Resources requested in writing by the demoting employee. Demotions under this policy are not disciplinary and do not incur any due process or appeal rights.

3176.3 Transfer. A transfer involves moving an employee from their current position under one supervisor to a position, either in the same or a different department or division, under a different supervisor. This may be within the same or a different job classification. To be eligible for placement on the transfer list, employees must have successfully completed a six (6) month probationary period in their current classification. Transfers are not disciplinary and do not incur any due process or appeal rights.

3176.4 Probationary Period and Conditions for Employee Transfers. When an employee transfers to a different job classification, a six (6) month probationary period will commence from the date of the transfer, unless waived by the General Manager or his/her designee upon written request from the immediate supervisor or employee, with the support of the Department Head. During this probationary period, if the employee's performance is deemed below acceptable standards by the immediate supervisor or Department Head, the employee shall be returned to their previous classification/position if available, needed or if budgeted within the current fiscal year. If the former position is unavailable, the employee may be placed on a Performance Improvement Plan (PIP), subjected to progressive corrective action, or, if necessary, terminated. Employees who request and are granted a return to their former classification/position will not be eligible for another transfer for one (1) year following their return, unless there is sufficient justification for the Department Head or General Manager, or his/her designee, to waive this one (1) year restriction.

3176.5 Transfer/Voluntary Demotion Procedure. An employee may submit a written request for a transfer or voluntary demotion to their immediate supervisor. The request will be reviewed by the Department Head in collaboration with Human Resources and, if appropriate, forwarded to the receiving department/division's supervisor and/or Department Head for interview and selection. This will occur if the employee's work history and qualifications align with the requirements of the new position, or if the employee has previously held regular status in the requested classification. All subsequent actions will follow the procedures outlined in Policy Number 3215.5 (Personnel Action Form).

3176.6 Approval Authority. The General Manager or his/her designee has the authority to approve transfers and voluntary demotions, based on a written recommendation from the receiving Department Head and Human Resources after a successful selection process.

Adopted by Resolution 20-XX, Date

Attachment 2

CURRENT POLICY

PROPOSED POLICY

NO POLICY IN PLACE

POLICY TITLE: TRANSFER AND VOLUNTARY DEMOTION
POLICY NUMBER: 3176

3176.1 Policy. Transfers, voluntary demotions, and job changes are used to retain employees or to change assignments as needed in the best interests of the District. In addition, such actions are used for proper placement of personnel for employee development.

3176.2 Voluntary Demotion. A voluntary demotion of an employee from an incumbent position to a position in a different classification, for which the maximum rate of pay is lower and where the employee has voluntarily requested or agreed to such appointment in writing. A demoted employee shall serve a six (6) month probationary period from the appointment date, unless the employee will return to his/her previous position held or if the probationary period is waived by the General Manager or his/her designee with a recommendation from the Department Head and Human Resources requested in writing by the demoting employee. Demotions under this policy are not disciplinary and do not incur any due process or appeal rights.

3176.3 Transfer. A transfer involves moving an employee from their current position under one supervisor to a position, either in the same or a different department or division, under a different supervisor. This may be within the same or a different job classification. To be eligible for placement on the transfer list, employees must have successfully completed a six (6) month probationary period in their current classification. Transfers are not disciplinary and do not incur any due process or appeal rights.

3176.4 Probationary Period and Conditions for Employee Transfers. When an employee transfers to a different job classification, a six (6) month probationary period will commence from the date of the transfer, unless waived by the General Manager or his/her designee upon written request from the immediate supervisor or employee, with the support of the Department Head. During this probationary period, if the employee's performance is deemed below acceptable standards by the immediate supervisor or Department Head, the employee shall be returned to their previous classification/position if available, needed or if budgeted within the current fiscal year. If the former position is unavailable, the employee may be placed on a Performance Improvement Plan (PIP), subjected to progressive corrective action, or, if necessary, terminated. Employees who request and are granted a return to their former classification/position will not be eligible for another transfer for one (1) year following their return, unless there is sufficient justification for the Department Head or General Manager, or his/her designee, to waive this one (1) year restriction.

3176.5 Transfer/Voluntary Demotion Procedure. An employee may submit a written request for a transfer or voluntary demotion to their immediate supervisor. The request will be reviewed by the Department Head in collaboration with Human Resources and, if appropriate, forwarded to the receiving department/division's supervisor and/or Department Head for interview and selection. This will occur if the employee's work history and qualifications align with the requirements of the new position, or if the employee has previously held regular status in the requested classification. All subsequent actions will follow the procedures outlined in Policy Number 3215.5 (Personnel Action Form).

3176.6 Approval Authority. The General Manager or his/her designee has the authority to approve transfers and voluntary demotions, based on a written recommendation from the receiving Department Head and Human Resources after a successful selection process.

POLICY TITLE: TRANSFER AND VOLUNTARY DEMOTION**POLICY NUMBER: 3176**

3176.1 Policy. Transfers, voluntary demotions, and job changes are used to retain employees or to change assignments as needed in the best interests of the District. In addition, such actions are used for proper placement of personnel for employee development.

3176.2 Voluntary Demotion. A voluntary demotion of an employee from an incumbent position to a position in a different classification for which the maximum rate of pay is lower and where the employee has voluntarily requested or agreed to such appointment in writing. A demoted employee shall serve a six (6) month probationary period from the appointment date, unless the probationary period is waived by the General Manager or his/her designee with a recommendation from the Department Head and Human Resources requested in writing by the demoting employee. Demotions under this policy are not disciplinary and do not incur any due process or appeal rights.

3176.3 Transfer. A transfer involves moving an employee from their current position under one supervisor to a position, either in the same or a different department or division, under a different supervisor. This may be within the same or a different job classification. To be eligible for placement on the transfer list, employees must have successfully completed a six (6) month probationary period in their current classification. Transfers are not disciplinary and do not incur any due process or appeal rights.

3176.4 Probationary Period and Conditions for Employee Transfers. When an employee transfers to a different job classification, a six (6) month probationary period will commence from the date of the transfer, unless the employee will return to his/her previous position held or if the 6-month probation is waived by the General Manager or his/her designee upon written request from the immediate supervisor or employee, with the support of the Department Head. During this probationary period, if the employee's performance is deemed below acceptable standards by the immediate supervisor or Department Head, the employee shall be returned to their previous classification/position if available, needed or budgeted within the current fiscal year. If the former position is unavailable, the employee may be placed on a Performance Improvement Plan (PIP), subjected to progressive corrective action, or, if necessary, terminated. Employees who request and are granted a return to their former classification/position will not be eligible for another transfer for one (1) year following their return, unless there is sufficient justification for the Department Head or General Manager, or his/her designee, to waive this one (1) year restriction.

3176.5 Transfer/Voluntary Demotion Procedure. An employee may submit a written request for a transfer or voluntary demotion to their immediate supervisor. The request will be reviewed by the Department Head in collaboration with Human Resources and, if appropriate, forwarded to the receiving department/division's supervisor and/or Department Head for interview and selection. This will occur if the employee's work history and qualifications align with the requirements of the new position, or if the employee has previously held regular status in the requested classification. All subsequent actions will follow the procedures outlined in Policy Number 3215.5 (Personnel Action Form).

3176.6 Approval Authority. The General Manager or his/her designee has the authority to approve transfers and voluntary demotions, based on a written recommendation from the receiving Department Head and Human Resources after a successful selection process.

Adopted by Resolution 20-XX, Date



**Beaumont-Cherry Valley Water District
Personnel Committee
September 17, 2024**

Item 6c

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: Policies and Procedures Manual Updates/Revisions establishing new Policy 3255 Other Mandated Leaves of Absence

Staff Recommendation

Approve to move forward the establishment of Policy 3255 Other Mandated Leaves of Absence to the next Board of Directors meeting, or direct staff as desired.

Executive Summary

Staff is proposing the establishment of Policy 3255 Other Mandated Leaves of Absence, which outlines various mandated leaves in compliance with California Labor Laws, to ensure legal compliance and mitigate potential legal risks for the District. The policy draft includes sections discussing Civil Air Patrol Leave, School Activities / School Appearance Leave, Volunteer Firefighter Leave, Voting Leave, Organ and Bone Marrow Donation Leave, and Reproductive Loss Leave. Legally mandated by the State, these leaves are crucial as they allow employees to address personal, civic, and health-related responsibilities while ensuring job security.

Background

The Other Mandated Leaves of Absence policy is crucial as it ensures legal compliance with California labor laws by providing employees with necessary time off for personal, civic, and health-related matters, such as voting, organ donation, and emergency service duties. It prioritizes employee wellbeing by protecting job security during critical life events like reproductive loss and health emergencies, allowing employees to focus on their personal needs without fear of retaliation or termination. Human Resources (HR) staff is proposing to establish this policy, which outlines various mandated leaves to ensure compliance with California Labor Laws and mitigate potential legal risks for the District.

The policy draft includes sections such as Civil Air Patrol Leave, providing up to 10 days of unpaid leave for emergency response by volunteers, and School Activities/School Appearance Leave, offering up to 40 hours of unpaid leave for parents with school-age children. The policy draft also covers Volunteer Firefighter Leave for emergency responders, Voting Leave of up to 4 hours of paid time off for state and local elections, Organ and Bone Marrow Donation Leave for life-saving donations, and Reproductive Loss Leave, allowing up to 20 days of protected leave for employees facing reproductive health challenges. In the past, there have been several instances where employees needed to take time off under this policy, but managers lacked guidance on how the process should work. This policy will provide a clear structure, promoting a supportive workplace, fostering trust, boosting morale, and ensuring consistency and fairness in handling leave requests.



As part of the ongoing review of District policies, HR staff conducted a thorough consultation with multiple legal sources to ensure the policy language aligns with current labor laws. Additionally, the proposed redline version was submitted to Legal Counsel for further review, ensuring the policy meets all legal standards and is fully compliant with state regulations. This comprehensive review process helps safeguard the District against potential legal risks while providing clear and lawful guidelines for both employees and management.

Discussion

Table A, Summary of Policy Changes, outlines the proposed Other Mandated Leaves of Absence (policy) that are in reference to the redline draft version attached herewith.

Table A – Summary of Policy Draft Overview

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	No Section	None	The District values work-life balance for all its employees and follows the law if applicable.	3255.1 Create purpose statement to address the importance of the policy while in compliance with the law.	No fiscal impact.
2	No Section	CA Labor Code § 1503	The District follows the law for Civil Air Patrol Leave if employees request it.	3255.2 Create a section for Civil Air Patrol leave for up to 10 days in a year, with not exceeding 3 days per emergency. Not required to use available accrued leaves.	The hourly rate of the employees opting to use their accrued vacation or admin leave, which is already included in the annual budget.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
3	No Section	CA Labor Code § 230.8	The District follows the law for School Activities/School Appearance Leave if employees request it.	3255.3 Create section for School Activities/School Appearance Leave for up to 40 hours a year with 8 hours per month with documentation. Required to use accrued vacation leave.	The hourly rate of the employees required to use their accrued vacation or admin leave, which is already included in the annual budget.
4	No Section	CA Labor Code § 230.3- 230.4	The District follows the law for Volunteer Firefighters, Peace Officers and Emergency Personnel Leave if employees request it.	3255.4 Create a section for Emergency Personnel requests for unpaid time off as needed without requiring to use accrued leaves. 3255.4.1 Add section to establish qualifications to be considered an emergency volunteer.	The hourly rate for the employees who request to utilize their accrued vacation or admin leave, which is already included in the annual budget.
5	No Section	CA Election Code § 14000	The District follows the law for paid time off for Voting.	3255.5 Create section for Voting Leave for up to 4 paid hours without requiring to use accrued leave if extension is approved.	The hourly rate of the employees taking a paid time off of 4 hours to vote, which is already included in the annual budget.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
6	No Section	CA Labor Code §1508- 1513	The District follows the law for Organ and Bone Marrow Donation leave although we have not had situations in the past.	3255.6 Add section for Organ Donation leave of up to paid 30 days leave, and Bone Marrow Donation leave of up to paid 5 days leave.	The hourly rate of the employees taking a paid leave of either 30 or 5 days for either donation, which is already included in the annual budget.
7	No Section	CA Fair Employment and Housing Act (FEHA)	The District follows the Reproductive Loss Leave if employees request it.	3255.7 Create section for Reproductive Loss Leave for up to 20 working days per year and 5 workdays per reproductive loss event requiring use of sick, vacation or admin leave with documentation from the healthcare provider.	The hourly rate of the employees taking a paid leave of up to 20 days in the event of a reproductive health loss, which is already included in the annual budget.
8	No Section	None	The District follows the rule that employees does not need to seek approval from the General Manager when using their protected leaves similar to FMLA/CFRA.	3255.8 Create section that General Manager does not need to approve, but employees are required, to provide notice to their supervisor and HR (for paperwork). If no notice was given, it may be construed as job abandonment under Policy 3185.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
9	No Section	All CA Labor Code sections stated above.	The District does not retaliate against any employee taking protected leave in compliance with the law.	3255.9 Create section that employees taking this leave shall not be retaliated against.	No fiscal impact.

Fiscal Impact

Fiscal Impact is the computation of the hourly rate of the employees taking the applicable paid leave/time-off or if they are required to utilize their available accrued leaves, which are all accounted for in the annual operating budget.

Attachments

1. Redline draft version of Policy 3255 Other Mandated Leaves of Absence
2. Side-by-side version of Policy 3255 Other Mandated Leaves of Absence
3. Clean draft version of Policy 3255 Other Mandated Leaves of Absence
4. California Labor Code § 1503 – Civil Air Patrol Leave
5. California Labor Code § 230.8 – School Activities/Appearance Leave
6. California Labor Code § 230.3 – Volunteer Firefighters, Peace Officers and Emergency Personnel Leave
7. California Election Code §14000 – Time-off To Vote
8. California Labor Code §1508-1513 - Organ and Bone Marrow Donation leave
9. Fair Employment and Housing Act (FEHA) – Reproductive Loss Leave

Staff Report prepared by Ren Berioso, Human Resources Manager

Attachment 1

BEAUMONT-CHERRY VALLEY WATER DISTRICT

SECTION TITLE

POLICY TITLE: OTHER MANDATED LEAVES OF ABSENCE

POLICY NUMBER: 3255

3255.1 Purpose. This policy is designed to provide employees with the necessary time off to address important personal, civic, and health-related matters, ensuring they can fulfill these responsibilities while maintaining job security. These leaves are legally required under California law and are intended to support employees in emergencies, civic duties, family care, and personal health without fear of losing their employment.

3255.2 Civil Air Patrol Leave. All full-time and part-time employees regardless of his/her tenure at the District who are also volunteer members of the Civil Air Patrol are entitled to up to ten (10) days of unpaid leave in a year for Civil Air Patrol duty to respond to an emergency operation mission. Leave for a single emergency should not exceed three (3) workdays. Employees using Civil Air Patrol leave are not required to use their available accrued vacation or administrative leave hours. Employees are required to provide at least 2 weeks' as much notice as possible to Human Resources and must also submit written certification of the need for leave from the appropriate Civil Air Patrol authority.

Commented [BR(1): CA Labor Code Section 1503

3255.3 School Activities/School Appearance Leave. All full-time and part-time employees who have worked in the District for at least six (6) months are entitled to up to unpaid forty (40) hours per calendar year to attend or to participate in school activities or the required parent appearance of a natural biological, step or foster child, legal ward, person to whom the parent stands in loco parentis, or grandchild. For this type of leave, a year is measured from the employee's hire date. The child must be enrolled in kindergarten through the twelfth (12th) grade, or in a licensed day-care facility. The amount of unpaid leave cannot exceed eight (8) hours within a calendar month, unless the need for leave is to address a child care provider or school emergency, and may be taken either as a full day or in smaller increments as needed. The employee must provide reasonable advanced notice of the planned absence to their immediate supervisor, supported with documentation of attendance or participation from the school authority or licensed day-care facility. Where both parents are employed by the District and request leave for the same child's activity, the employee who asks first will be given the leave. Employees are required to use their available accrued vacation or administrative leave hours when using this type of leave.

Commented [BR(2): CA Labor Code Section 230.8

3255.4 Volunteer Firefighters, Peace Officers, and Emergency Personnel Leave. All qualified full-time and part-time employees regardless of his/her tenure at the District may take unpaid time off as needed in the duration of emergency situations to perform emergency duty as a volunteer firefighter, peace officer, or emergency rescue personnel. If an employee is an official volunteer firefighter, peace officer, or emergency rescue personnel, the employee shall alert their supervisor about the potential to take time off for emergency duty. When taking time off for emergency duty, the employee is required to alert their supervisor before doing so when possible. Employees are not required to use their available accrued vacation or administrative leave hours when using this type of leave.

Commented [BR(3): Required by Labor Code section 230.3 and 230.4. This is okay. Law did not require a time frame as long as the emergency situation exists. No certification required from the authority.

3255.4.1 Qualifications. The eligibility to perform these civic duties is determined by the District provided that the responder meets certain qualifications:

- a. Must be at least 18 years old.
- b. Must pass a physical agility test.
- c. Completion of basic firefighting or law enforcement training.
- d. Satisfactory drug test.
- e. Valid California driver's license is required to drive District-owned vehicles.

Commented [RTG4]: Do you want to include the leave provided in Labor Code section 230.4, to attend emergency services training? It applies to employers with 50 or more employees, so I'm not sure if that applies to the District.

Adopted by Resolution 20-XX, Date

3255.5 Voting Leave. All full-time and part-time employees regardless of his/her tenure at the District and are unable to vote outside working hours due to a work schedule conflict are entitled to up to four (4) hours of paid time off within work hours to vote in local or statewide elections. The voter must be a California resident. The time should be taken at the beginning or end of the work shift, whichever minimizes disruption. Employees must notify the District two (2) working days in advance and provide documentation of their voting leave. Once the paid hours are exhausted, any additional time needed will be unpaid. Employees are not required to use their available accrued vacation or administrative leave hours provided the additional unpaid time is approved by the General Manager or his/her designee.

Commented [BR(5): Yes. Required under California Election Code Section 14000

3255.6 Organ and Bone Marrow Donation Leave. All full-time and part-time employees regardless of their tenure who have worked in the District for at least 30 days and are organ donors are entitled to up to thirty (30) days of paid leave, and up to an additional 30 days of unpaid leave, within a one (1) year period for the purpose of donating an organ to another person. All full-time and part-time employees regardless of their tenure who have been employed for at least 30 days from their date of hire and are bone marrow donors are entitled to up to five (5) days of paid leave within a one (1) year period for the purpose of donating bone marrow to another person. Group health insurance is maintained during the leave period. For these types of leave, a year is measured as twelve (12) consecutive months from the date leave begins. These leaves do not run concurrently with FMLA and/or CFRA leave. Employees are encouraged required to provide at least 2 weeks' notice to Human Resources and to supply documentation from a licensed healthcare provider supporting the leave request. After the paid leave days are exhausted, employees are required to use their available accrued sick, vacation or administrative leave hours, when taking this type of leave.

Commented [RTG6R5]: Section 14000 requires only two hours of paid leave. However, the District can provide additional paid leave. I just wanted to clarify this - I'm not suggesting you change the policy.

3255.7 Reproductive Loss Leave. All full-time and part-time employees who have worked in the District for at least 30 days are entitled to five (5) workdays per reproductive loss and for up to 240 working days of protected leave per year, to be taken consecutively or intermittently, in the event of a miscarriage, stillbirth, failed surrogacy, failed adoption or other reproductive loss unsuccessful assisted reproduction. For this type of leave, a year is measured as twelve (12) consecutive months from the date leave begins. Employees are encouraged to provide advance notice whenever possible, and if not feasible, they should inform their supervisor as soon as practicable, supported with a required documentation from a healthcare provider. Employees are required to use their available accrued sick, vacation, administrative or sick leave hours when using this type of leave. The District maintains strict confidentiality regarding an employee's reproductive loss and any related leave taken under this policy.

Commented [RTG7]: The two-week notice requirement is not part of the statute. You can probably enforce it, but keep in mind an employee may challenge that requirement if the need to take leave arises on an emergency basis and notice is not possible.

Commented [BR(8): California Labor Code Sections 1508-1513

Commented [RTG9]: You may limit the leave to 5 days per reproductive loss event, but you must provide 20 days per year if the employee experiences multiple losses.

3255.8 Approval Process for Legally Protected Leaves. All protected leaves of absence do not require approval from the General Manager or his/her designee prior to being taken. However, employees are required to provide reasonable notice to the District through its Human Resources when feasible, and they must be allowed to take these leaves when necessary and supported by documentation. exercising their rights under this policy should report the matter to Human Resources immediately. Any form of retaliation is subject to disciplinary action, up to and including termination. Any form of retaliation is subject to disciplinary action, up to and including termination. For more information, please refer to the Separation Policy.

Commented [BR(10): Distinct from CFRA and enforced by CA Civil Rights Department (CRD) which is under FEHA.

Commented [BR(11): Covered by Separation Policy

3255.9 Non-Retaliation. The District strictly prohibits retaliation against any employee who takes leave under this policy. Employees who believe they have been retaliated against for

exercising their rights under this policy should report the matter to Human Resources immediately. Any form of retaliation is subject to disciplinary action, up to and including termination.

Attachment 2

CURRENT POLICY

PROPOSED POLICY

NO POLICY IN PLACE

POLICY TITLE: OTHER MANDATED LEAVES OF ABSENCE
POLICY NUMBER: 3255

3255.1 Purpose. This policy is designed to provide employees with the necessary time off to address important personal, civic, and health-related matters, ensuring they can fulfill these responsibilities while maintaining job security. These leaves are legally required under California law and are intended to support employees in emergencies, civic duties, family care, and personal health without fear of losing their employment.

3255.2 Civil Air Patrol Leave. All full-time and part-time employees regardless of his/her tenure at the District who are also volunteer members of the Civil Air Patrol are entitled to up to ten (10) days of unpaid leave in a year for Civil Air Patrol duty to respond to an emergency operation mission. Leave for a single emergency should not exceed three (3) workdays. Employees using Civil Air Patrol leave are not required to use their available accrued vacation or administrative leave hours. Employees are required to provide at least 2 weeks as much notice as possible to Human Resources and must also submit written certification of the need for leave from the appropriate Civil Air Patrol authority.

3255.3 School Activities/School Appearance Leave. All full-time and part-time employees who have worked in the District for at least six (6) months are entitled to up to unpaid forty (40) hours per calendar year to attend or to participate in school activities or the required parent appearance of a natural biological, step or foster child, legal ward, person to whom the parent stands in loco parentis, or grandchild. For this type of leave, a year is measured from the employee's hire date. The child must be enrolled in kindergarten through the twelfth (12th) grade, or in a licensed day-care facility. The amount of unpaid leave cannot exceed eight (8) hours within a calendar month, unless the need for leave is to address a child care provider or school emergency, and may be taken either as a full day or in smaller increments as needed. The employee must provide reasonable advanced notice of the planned absence to their immediate supervisor, supported with documentation of attendance or participation from the school authority or licensed day-care facility. Where both parents are employed by the District and request leave for the same child's activity, the employee who asks first will be given the leave. Employees are required to use their available accrued vacation or administrative leave hours when using this type of leave.

3255.4 Volunteer Firefighters, Peace Officers, and Emergency Personnel Leave. All qualified full-time and part-time employees regardless of his/her tenure at the District may take unpaid time off as needed in the duration of emergency situations to perform emergency duty as a volunteer firefighter, peace officer, or emergency rescue personnel. If an employee is an official volunteer firefighter, peace officer, or emergency rescue personnel, the employee shall alert their supervisor about the potential to take time off for emergency duty. When taking time off for emergency duty, the employee is required to alert their supervisor before doing so when possible. Employees are not required to use their available accrued vacation or administrative leave hours when using this type of leave.

3255.4.1 Qualifications. The eligibility to perform these civic duties is determined by the District provided that the responder meets certain qualifications:
a. Must be at least 18 years old.
b. Must pass a physical agility test.
c. Completion of basic firefighting or law enforcement training.
d. Satisfactory drug test.
e. Valid California driver's license is required to drive District-owned vehicles.

3255.5 Voting Leave. All full-time and part-time employees regardless of his/her tenure at the District and are unable to vote outside working hours due to a work schedule conflict are entitled to up to four (4) hours of paid time off within work hours to vote in local or statewide elections. The voter must be a California resident. The time should be taken at the beginning or end of the work shift, whichever minimizes disruption. Employees must notify the District two (2) working days in advance and provide documentation of their voting leave. Once the paid hours are exhausted, any additional time needed will be unpaid. Employees are not required to use their available accrued vacation or administrative leave hours provided the additional unpaid time is approved by the General Manager or his/her designee.

3255.6 Organ and Bone Marrow Donation Leave. All full-time and part-time employees regardless of their tenure who have worked in the District for at least 30 days and are organ donors are entitled to up to thirty (30) days of paid leave, and up to an additional 30 days of unpaid leave, within a one (1) year period for the purpose of donating an organ to another person. All full-time and part-time employees regardless of their tenure who have been employed for at least 30 days from their date of hire and are bone marrow donors are entitled to up to five (5) days of paid leave within a one (1) year period for the purpose of donating bone marrow to another person. Group health insurance is maintained during the leave period. For these types of leave, a year is measured as twelve (12) consecutive months from the date leave begins. These leaves do not run concurrently with FMLA and/or CFRA leave. Employees are encouraged to provide at least 2 weeks' notice to Human Resources and to supply documentation from a licensed healthcare provider supporting the leave request. After the paid leave days are exhausted, employees are required to use their available accrued sick, vacation or administrative leave hours, when taking this type of leave.

3255.7 Reproductive Loss Leave. All full-time and part-time employees who have worked in the District for at least 30 days are entitled to five (5) workdays per reproductive loss and for up to 240 working days of protected leave per year, to be taken consecutively or intermittently in the event of a miscarriage, stillbirth, failed surrogacy, failed adoption or other reproductive-lesuccessful assisted reproduction. For this type of leave, a year is measured as twelve (12) consecutive months from the date leave begins. Employees are encouraged to provide advance notice whenever possible, and if not feasible, they should inform their supervisor as soon as practicable, supported with a required documentation from a healthcare provider. Employees are required to use their available accrued sick, vacation, administrative or sick leave hours when using this type of leave. The District maintains strict confidentiality regarding an employee's reproductive loss and any related leave taken under this policy.

3255.8 Approval Process for Legally Protected Leaves. All protected leaves of absence do not require approval from the General Manager or his/her designee prior to being taken. However, employees are required to provide reasonable notice to the District through its Human Resources when feasible, and they must be allowed to take these leaves when necessary and supported by documentation without the risk of disciplinary action. Any leave of absence from work, either full or partial workdays, taken without prior notice to the District may subject the employee to disciplinary action up to including termination of employment. Failure of an employee to report for work more than three (3) consecutive days without notice to the District shall be deemed as job abandonment by the employee as of the date on which the employee last worked. For more information, please refer to Policy 3185 Employee Separation.

3255.9 Non-Retaliation. The District strictly prohibits retaliation against any employee who takes leave under this policy. Employees who believe they have been retaliated against for Any form of retaliation is subject to disciplinary action, up to and including termination.

POLICY TITLE: OTHER MANDATED LEAVES OF ABSENCE**POLICY NUMBER: 3255**

3255.1 Purpose. This policy is designed to provide employees with the necessary time off to address important personal, civic, and health-related matters, ensuring they can fulfill these responsibilities while maintaining job security. These leaves are legally required under California law and are intended to support employees in emergencies, civic duties, family care, and personal health without fear of losing their employment.

3255.2 Civil Air Patrol Leave. All full-time and part-time employees regardless of his/her tenure at the District who are also volunteer members of the Civil Air Patrol are entitled to up to ten (10) days of unpaid leave in a year for Civil Air Patrol duty to respond to an emergency operation mission. Leave for a single emergency should not exceed three (3) workdays. Employees using Civil Air Patrol leave are not required to use their available accrued vacation or administrative leave hours. Employees are required to provide as much notice as possible to Human Resources and must also submit written certification of the need for leave from the appropriate Civil Air Patrol authority.

3255.3 School Activities/School Appearance Leave. All full-time and part-time employees who have worked in the District for at least six (6) months are entitled to up to unpaid forty (40) hours per calendar year to attend or to participate in school activities or the required parent appearance of a biological, step or foster child, legal ward, person to whom the parent stands in loco parentis, or grandchild. For this type of leave, a year is measured from the employee's hire date. The child must be enrolled in kindergarten through the twelfth (12th) grade, or in a licensed day-care facility. The amount of unpaid leave cannot exceed eight (8) hours within a calendar month, unless the need for leave is to address a child care provider or school emergency, and may be taken either as a full day or in smaller increments as needed. The employee must provide reasonable advanced notice of the planned absence to their immediate supervisor, supported with documentation of attendance or participation from the school authority or licensed day-care facility. Where both parents are employed by the District and request leave for the same child's activity, the employee who asks first will be given the leave. Employees are required to use their available accrued vacation or administrative leave hours when using this type of leave.

3255.4 Volunteer Firefighters, Peace Officers, and Emergency Personnel Leave. All qualified full-time and part-time employees regardless of his/her tenure at the District may take unpaid time off as needed in the duration of emergency situations to perform emergency duty as a volunteer firefighter, peace officer, or emergency rescue personnel. If an employee is an official volunteer firefighter, peace officer, or emergency rescue personnel, the employee shall alert their supervisor about the potential to take time off for emergency duty. When taking time off for emergency duty, the employee is required to alert their supervisor before doing so when possible. Employees are not required to use their available accrued vacation or administrative leave hours when using this type of leave.

3255.4.1 Qualifications. The eligibility to perform these civic duties is determined by the District provided that the responder meets certain qualifications:

- a. Must be at least 18 years old.
- b. Must pass a physical agility test.
- c. Completion of basic firefighting or law enforcement training.
- d. Satisfactory drug test.
- e. Valid California driver's license is required to drive District-owned vehicles.

Adopted by Resolution 20-XX, Date

3255.5 Voting Leave. All full-time and part-time employees regardless of his/her tenure at the District and are unable to vote outside working hours due to a work schedule conflict are entitled to up to four (4) hours of paid time off within work hours to vote in local or statewide elections. The voter must be a California resident. The time should be taken at the beginning or end of the work shift, whichever minimizes disruption. Employees must notify the District two (2) working days in advance and provide documentation of their voting leave. Once the paid hours are exhausted, any additional time needed will be unpaid. Employees are not required to use their available accrued vacation or administrative leave hours provided the additional unpaid time is approved by the General Manager or his/her designee.

3255.6 Organ and Bone Marrow Donation Leave. All full-time and part-time employees regardless of their tenure and are organ donors are entitled to up to thirty (30) days of paid leave, and up to an additional 30 days of unpaid leave, within a one (1) year period for the purpose of donating an organ to another person. All full-time and part-time employees regardless of their tenure and are bone marrow donors are entitled to up to five (5) days of paid leave within a one (1) year period for the purpose of donating bone marrow to another person. Group health insurance is maintained during the leave period. For these types of leave, a year is measured as twelve (12) consecutive months from the date leave begins. These leaves do not run concurrently with FMLA and/or CFRA leave. Employees are encouraged to provide at least 2 weeks' notice to Human Resources and to supply documentation from a licensed healthcare provider supporting the leave request. After the paid leave days are exhausted, employees are required to use their available accrued sick, vacation or administrative leave hours, when taking this type of leave.

3255.7 Reproductive Loss Leave. All full-time and part-time employees who have worked in the District for at least 30 days are entitled to five (5) workdays per reproductive loss and for up to 20 working days of protected leave per year, to be taken consecutively or intermittently, in the event of a miscarriage, stillbirth, failed surrogacy, failed adoption or other unsuccessful assisted reproduction. For this type of leave, a year is measured as twelve (12) consecutive months from the date leave begins. Employees are encouraged to provide advance notice whenever possible, and if not feasible, they should inform their supervisor as soon as practicable, supported with a required documentation from a healthcare provider. Employees are required to use their available accrued sick, vacation, administrative or sick leave hours when using this type of leave. The District maintains strict confidentiality regarding an employee's reproductive loss and any related leave taken under this policy.

3255.8 Approval Process for Legally Protected Leaves. All protected leaves of absence do not require approval from the General Manager or his/her designee prior to being taken. However, employees are required to provide reasonable notice to the District through its Human Resources when feasible, and they must be allowed to take these leaves when necessary and supported by documentation without the risk of disciplinary action. Any leave of absence from work, either full or partial workdays, taken without prior notice to the District may subject the employee to disciplinary action up to including termination of employment. Failure of an employee to report for work more than three (3) consecutive days without notice to the District shall be deemed as job abandonment by the employee as of the date on which the employee last worked. For more information, please refer to Policy 3185 Employee Separation.

3255.9 Non-Retaliation. The District strictly prohibits retaliation against any employee who takes leave under this policy. Employees who believe they have been retaliated against for exercising their rights under this policy should report the matter to Human Resources immediately. Any form of retaliation is subject to disciplinary action, up to and including termination.

Adopted by Resolution 20-XX, Date

Attachment 4**JUSTIA**[Go to previous versions of this Section](#)

2023 California Code

Labor Code - LAB

DIVISION 2 - EMPLOYMENT

REGULATION AND SUPERVISION

PART 5 - Civil Air Patrol

Section 1503.

Universal Citation:CA Labor Code § 1503 (2023) [← Previous](#)[Next >](#)

1503. (a) (1) An employer shall provide not less than 10 days per calendar year of unpaid Civil Air Patrol leave to an employee responding to an emergency operational mission of the California Wing of the Civil Air Patrol. Civil Air Patrol leave for a single emergency operational mission shall not exceed three days, unless an extension of time is granted by the governmental entity that authorized the emergency operational mission, and the extension of the leave is approved by the employer.

(2) Notwithstanding paragraph (1), an employer is not required to grant Civil Air Patrol leave to an employee who is required to respond to either the same or other simultaneous emergency operational mission as a first responder or disaster service worker for a local, state, or federal agency.

(b) (1) An employee shall give the employer as much notice as possible of the intended dates upon which the Civil Air Patrol leave will begin and end.

(2) An employer may require certification from the proper Civil Air Patrol authority to verify the eligibility of the employee for the leave requested or taken. The employer may deny the leave to be taken as Civil Air Patrol leave if the employee fails to provide the required certification.

(c) An employee taking leave under this part shall not be required to exhaust all accrued vacation leave, personal leave, compensatory leave, sick leave, disability leave, and any other leave that may be available to the employee in order to take Civil Air Patrol leave.

(d) Nothing in this act prevents an employer from providing paid leave for leave taken pursuant to this part.

(Added by Stats. 2009, Ch. 242, Sec. 1. (AB 485) Effective January 1, 2010.)

[◀ Previous](#)

[Next ▶](#)

Disclaimer: These codes may not be the most recent version. California may have more current or accurate information. We make no warranties or guarantees about the accuracy, completeness, or adequacy of the information contained on this site or the information linked to on the state site. Please check official sources.

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

**Attachment 5**[Go to previous versions of this Section](#)

2023 California Code

Labor Code - LAB

DIVISION 2 - EMPLOYMENT

REGULATION AND SUPERVISION

PART 1 - COMPENSATION

CHAPTER 1 - Payment of Wages

ARTICLE 1 - General Occupations

Section 230.8.

Universal Citation:CA Labor Code § 230.8 (2023) [◀ Previous](#)[Next ▶](#)

230.8. (a) (1) An employer who employs 25 or more employees working at the same location shall not discharge or in any way discriminate against an employee who is a parent of one or more children of the age to attend kindergarten or grades 1 to 12, inclusive, or a licensed child care provider, for taking off up to 40 hours each year, for the purpose of either of the following child-related activities:

(A) To find, enroll, or reenroll his or her child in a school or with a licensed child care provider, or to participate in activities of the school or licensed child care provider of his or her child, if the employee, prior to taking the time off, gives reasonable notice to the

employer of the planned absence of the employee. Time off pursuant to this subparagraph shall not exceed eight hours in any calendar month of the year.

(B) To address a child care provider or school emergency, if the employee gives notice to the employer.

(2) If more than one parent of a child is employed by the same employer at the same worksite, the entitlement under paragraph (1) of a planned absence as to that child applies, at any one time, only to the parent who first gives notice to the employer, such that another parent may take a planned absence simultaneously as to that same child under the conditions described in paragraph (1) only if he or she obtains the employer's approval for the requested time off.

(b) (1) The employee shall utilize existing vacation, personal leave, or compensatory time off for purposes of the planned absence authorized by this section, unless otherwise provided by a collective bargaining agreement entered into before January 1, 1995, and in effect on that date. An employee also may utilize time off without pay for this purpose, to the extent made available by his or her employer. The entitlement of any employee under this section shall not be diminished by any collective bargaining agreement term or condition that is agreed to on or after January 1, 1995.

(2) Notwithstanding paragraph (1), in the event that all permanent, full-time employees of an employer are accorded vacation during the same period of time in the calendar year, an employee of that employer may not utilize that accrued vacation benefit at any other time for purposes of the planned absence authorized by this section.

(c) The employee, if requested by the employer, shall provide documentation from the school or licensed child care provider as proof that he or she engaged in child-related activities permitted in subdivision (a) on a specific date and at a particular time. For purposes of this subdivision, "documentation" means whatever written verification of parental participation the school or licensed child care provider deems appropriate and reasonable.

(d) Any employee who is discharged, threatened with discharge, demoted, suspended, or in any other manner discriminated against in terms and conditions of employment by his or her employer because the employee has taken time off to engage in child-related activities permitted in subdivision (a) shall be entitled to reinstatement and reimbursement for lost wages and work benefits caused by the acts of the employer. Any employer who willfully refuses to rehire, promote, or otherwise restore an employee or former employee who has

been determined to be eligible for rehiring or promotion by a grievance procedure, arbitration, or hearing authorized by law shall be subject to a civil penalty in an amount equal to three times the amount of the employee's lost wages and work benefits.

(e) For purposes of this section, the following terms have the following meanings:

(1) "Parent" means a parent, guardian, stepparent, foster parent, or grandparent of, or a person who stands in loco parentis to, a child.

(2) "Child care provider or school emergency" means that an employee's child cannot remain in a school or with a child care provider due to one of the following:

(A) The school or child care provider has requested that the child be picked up, or has an attendance policy, excluding planned holidays, that prohibits the child from attending or requires the child to be picked up from the school or child care provider.

(B) Behavioral or discipline problems.

(C) Closure or unexpected unavailability of the school or child care provider, excluding planned holidays.

(D) A natural disaster, including, but not limited to, fire, earthquake, or flood.

(Amended by Stats. 2015, Ch. 802, Sec. 1. (SB 579) Effective January 1, 2016.)

[◀ Previous](#)

[Next ▶](#)

Disclaimer: These codes may not be the most recent version. California may have more current or accurate information. We make no warranties or guarantees about the accuracy, completeness, or adequacy of the information contained on this site or the information linked to on the state site. Please check official sources.

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

**Attachment 6**[Go to previous versions of this Section](#)

2023 California Code

Labor Code - LAB

DIVISION 2 - EMPLOYMENT

REGULATION AND SUPERVISION

PART 1 - COMPENSATION

CHAPTER 1 - Payment of Wages

ARTICLE 1 - General Occupations

Section 230.4.

Universal Citation:CA Labor Code § 230.4 (2023) [◀ Previous](#)[Next ▶](#)

230.4. (a) An employee who performs duty as a volunteer firefighter, a reserve peace officer, or as emergency rescue personnel, as defined in Section 230.3, and who works for an employer employing 50 or more employees, shall be permitted to take temporary leaves of absence, not to exceed an aggregate of 14 days per calendar year, for the purpose of engaging in fire, law enforcement, or emergency rescue training.

(b) An employee who works for an employer employing 50 or more employees who is discharged, threatened with discharge, demoted, suspended, or in any other manner discriminated against in the terms and conditions of employment by his or her employer because the employee has taken time off to engage in fire, law enforcement, or emergency

rescue training as provided in subdivision (a), is entitled to reinstatement and reimbursement for lost wages and work benefits caused by the acts of the employer.

(c) An employee seeking reinstatement and reimbursement pursuant to this section may file a complaint with the Division of Labor Standards Enforcement in accordance with Section 98.7 and, upon receipt of this type of complaint, the Labor Commissioner shall proceed as provided in that section.

(Amended by Stats. 2014, Ch. 71, Sec. 108. (SB 1304) Effective January 1, 2015.)

◀ Previous

Next ▶

Disclaimer: These codes may not be the most recent version. California may have more current or accurate information. We make no warranties or guarantees about the accuracy, completeness, or adequacy of the information contained on this site or the information linked to on the state site. Please check official sources.

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.


[Home](#)
[Bill Information](#)
[California Law](#)
[Publications](#)
[Other Resources](#)
[My Subscriptions](#)
[My Favorites](#)

 Code:

 Section:



[Up^](#) [Add To My Favorites](#)

ELECTIONS CODE - ELEC

DIVISION 14. ELECTION DAY PROCEDURES [14000 - 14443] (*Division 14 enacted by Stats. 1994, Ch. 920, Sec. 2.*)

CHAPTER 1. Privileges of Voters [14000 - 14004] (*Chapter 1 enacted by Stats. 1994, Ch. 920, Sec. 2.*)

14000. (a) If a voter does not have sufficient time outside of working hours to vote at a statewide election, the voter may, without loss of pay, take off enough working time that, when added to the voting time available outside of working hours, will enable the voter to vote.

(b) No more than two hours of the time taken off for voting shall be without loss of pay. The time off for voting shall be only at the beginning or end of the regular working shift, whichever allows the most free time for voting and the least time off from the regular working shift, unless otherwise mutually agreed.

(c) If the employee on the third working day prior to the day of election, knows or has reason to believe that time off will be necessary to be able to vote on election day, the employee shall give the employer at least two working days' notice that time off for voting is desired, in accordance with this section.

(*Enacted by Stats. 1994, Ch. 920, Sec. 2.*)

14001. Not less than 10 days before every statewide election, every employer shall keep posted conspicuously at the place of work, if practicable, or elsewhere where it can be seen as employees come or go to their place of work, a notice setting forth the provisions of Section 14000.

(*Enacted by Stats. 1994, Ch. 920, Sec. 2.*)

14002. Sections 14000, 14001, and 14004 shall apply to all public agencies and the employees thereof, as well as to employers and employees in private industry.

(*Amended by Stats. 2019, Ch. 223, Sec. 2. (AB 17) Effective January 1, 2020.*)

14003. Except in time of war or public danger, no voter is obliged to perform militia duty on any election day.

(*Enacted by Stats. 1994, Ch. 920, Sec. 2.*)

14004. (a) An employer shall not require or request that an employee bring the employee's vote by mail ballot to work or vote the employee's vote by mail ballot at work.

(b) This section does not prohibit an employer from encouraging an employee to vote.

(*Added by Stats. 2019, Ch. 223, Sec. 3. (AB 17) Effective January 1, 2020.*)


[Home](#)
[Bill Information](#)
[California Law](#)
[Publications](#)
[Other Resources](#)
[My Subscriptions](#)
[My Favorites](#)

 Code:

 Section:



[Up^](#) [Add To My Favorites](#)

LABOR CODE - LAB

DIVISION 2. EMPLOYMENT REGULATION AND SUPERVISION [200 - 2699.8] (*Division 2 enacted by Stats. 1937, Ch. 90.*)

PART 5.5. ORGAN AND BONE MARROW DONATION [1508 - 1513]

 (*Part 5.5 added by Stats. 2010, Ch. 646, Sec. 1.*)

1508. This part shall be known and may be cited as the Michelle Maykin Memorial Donation Protection Act.

(*Added by Stats. 2010, Ch. 646, Sec. 1. (SB 1304) Effective January 1, 2011.*)

1509. For purposes of this part, the following terms have the following meanings:

(a) "Employee" and "employee benefits" have the same meanings set forth in Section 1501.

(b) "Employer" means any person, partnership, corporation, association, or other business entity that employs 15 or more employees.

(*Amended by Stats. 2011, Ch. 296, Sec. 195. (AB 1023) Effective January 1, 2012.*)

1510. (a) Subject to subdivision (c), an employer shall grant to an employee the following paid leaves of absence:

(1) A leave of absence, not exceeding 30 business days in a one-year period, to an employee who is an organ donor, for the purpose of donating the employee's organ to another person. The one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months.

(2) A leave of absence, not exceeding five business days in a one-year period, to an employee who is a bone marrow donor, for the purpose of donating the employee's bone marrow to another person. The one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months.

(b) Subject to subdivision (c), an employer shall grant an additional unpaid leave of absence, not exceeding 30 business days in a one-year period, to an employee who is an organ donor, for the purpose of donating the employee's organ to another person. The one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months.

(c) In order to receive a leave of absence pursuant to subdivision (a) or (b) an employee shall provide written verification to the employer that the employee is an organ or bone marrow donor and that there is a medical necessity for the donation of the organ or bone marrow.

(d) Any period of time during which an employee is required to be absent from the employee's position by reason of being an organ or bone marrow donor is not a break in the employee's continuous service for the purpose of the employee's right to salary adjustments, sick leave, vacation, paid time off, annual leave, or seniority. During any period that an employee takes leave pursuant to subdivision (a), the employer shall maintain and pay for coverage under a group health plan, as defined in Section 5000(b) of the Internal Revenue Code of 1986, for the full duration of the leave, in the same manner the coverage would have been maintained if the employee had been actively at work during the leave period.

(e) This part does not affect the obligation of an employer to comply with a collective bargaining agreement or employee benefit plan that provides greater leave rights to employees than the rights provided under this part.

(f) The rights provided under this part shall not be diminished by a collective bargaining agreement or employee benefit plan entered into on or after January 1, 2011.

(g) An employer may require, as a condition of an employee's initial receipt of bone marrow or organ donation leave, that an employee take up to five days of earned but unused sick leave, vacation, or paid time off for bone

marrow donation and up to two weeks of earned but unused sick leave, vacation, or paid time off for organ donation, unless doing so would violate the provisions of any applicable collective bargaining agreement.

(h) Notwithstanding existing law, bone marrow and organ donation leave shall not be taken concurrently with any leave taken pursuant to the federal Family and Medical Leave Act of 1993 (29 U.S.C. Sec. 2601 et seq.) or the Moore-Brown-Roberti Family Rights Act (Sections 12945.2 and 19702.3 of the Government Code).

(i) Leave provided for pursuant to this section may be taken in one or more periods, but in no event shall exceed the amount of leave prescribed in subdivisions (a) and (b).

(Amended by Stats. 2019, Ch. 316, Sec. 6. (AB 1223) Effective January 1, 2020.)

1511. An employer shall, upon expiration of a leave authorized by this part, restore an employee to the position held by him or her when the leave began or to a position with equivalent seniority status, employee benefits, pay, and other terms and conditions of employment. An employer may decline to restore an employee as required in this section because of conditions unrelated to the exercise of rights under this part by the employee.

(Added by Stats. 2010, Ch. 646, Sec. 1. (SB 1304) Effective January 1, 2011.)

1512. (a) An employer shall not interfere with, restrain, or deny the exercise or the attempt to exercise a right established by this part.

(b) An employer shall not discharge, fine, suspend, expel, discipline, or in any other manner discriminate against an employee who does either of the following:

- (1) Exercises a right provided under this part.
- (2) Opposes a practice made unlawful by this part.

(Added by Stats. 2010, Ch. 646, Sec. 1. (SB 1304) Effective January 1, 2011.)

1513. (a) An employee may bring a civil action in the superior court of the appropriate county to enforce this part.

(b) The court may enjoin any act or practice that violates this part and may order any equitable relief necessary and appropriate to redress the violation or to enforce this part.

(Added by Stats. 2010, Ch. 646, Sec. 1. (SB 1304) Effective January 1, 2011.)

LEAVE FROM WORK AFTER A REPRODUCTIVE LOSS



Civil Rights
Department
STATE OF CALIFORNIA

FACT SHEET

Attachment 9

The Fair Employment and Housing Act (FEHA), enforced by the Civil Rights Department (CRD), protects the right of most California employees to take up to five days of leave from work after a reproductive loss. This fact sheet discusses who is eligible to take reproductive loss leave, when they can take it, how much leave is available to them, and whether they can get paid while they are out. It also covers protections against retaliation related to reproductive loss leave and what an employee can do if their employer does not follow the law. For more information, see [Government Code section 12945.6](#).

DEFINITIONS

A reproductive loss event is any of the following:

- Miscarriage
- Stillbirth
- Failed adoption – for example, if a birth mother or legal guardian breaches or dissolves an adoption agreement, or if an adoption is not finalized for another reason
- Failed surrogacy – for example, if a surrogate breaches or dissolves a surrogacy agreement, or if an embryo transfer fails
- Unsuccessful assisted reproduction – for example, a failed intrauterine insemination or embryo transfer

ELIGIBILITY

- Employees who work for public employers of any size – or private employers with five or more employees – and have worked for the employer for at least 30 days before taking leave are eligible.
- An employee can take leave following their own reproductive loss event or that of another person – such as a spouse or

partner – if the employee would have been the parent of the child born or adopted.

- It is against the law for an employer to interfere with or deny an employee's right to take leave after a reproductive loss if they meet the above criteria.

TIMING AND DURATION OF LEAVE

The law requires employers to provide eligible employees with a minimum of five days of leave for a reproductive loss event. Employees can, but do not have to, take their leave days consecutively. This means they can choose to take all five days at once or break up the days over a longer period, as long as their leave is completed within three months of the reproductive loss event.

If an employer has an existing leave policy that applies to reproductive loss events, the employee must take reproductive loss leave according to that policy. An employer's policy may provide for more leave than the legally required minimum.

When a single reproductive loss event occurs over several days, the law treats it as one event.

If an employee experiences more than one reproductive loss event in a year, they are entitled to no more than 20 days of reproductive loss leave in that one-year period unless an individual employer's leave policy provides for more time.

Reproductive loss leave is separate from, and in addition to, other types of leave to which employees are entitled. Examples include, leave to care for one's own serious health condition or that of certain family members available under the California Family Rights Act ([CFRA](#)) and Family and Medical Leave Act (FMLA), or leave for disabilities related to [pregnancy or childbirth](#) available under FEHA. If an employee is on

REPRODUCTIVE LOSS LEAVE



Civil Rights
Department
STATE OF CALIFORNIA

FACT SHEET

another type of leave during the reproductive loss event, they can take reproductive loss leave within three months of finishing the other form of leave.

PAY DURING REPRODUCTIVE LOSS LEAVE

Some employers have paid leave policies that cover reproductive losses. Employers that do not have an applicable paid leave policy must let employees use any available vacation time, sick days, personal days, or PTO to cover their reproductive loss leave so they can get paid. Otherwise, reproductive loss leave may be unpaid.

RIGHT TO CONFIDENTIALITY

In general, employers are required to keep confidential any information an employee provides when exercising their right to reproductive loss leave. Employers are, however, allowed to disclose this information when required by law or to internal personnel or legal counsel when necessary. The law does not require an employee to submit documentation in support of their leave request.

UNLAWFUL RETALIATION

It is against the law for an employer to retaliate against an employee who exercises their right to reproductive loss leave. This means an employer cannot fire, demote, fine, suspend, discipline, or otherwise discriminate against someone for requesting or taking reproductive loss leave.

In addition, an employer cannot retaliate against an employee for testifying about their own – or someone else's – reproductive loss leave during a legal proceeding involving this right.

FILING A COMPLAINT

If an employee thinks their employer violated their right to reproductive loss leave, or retaliated against them in relation to this type of leave, they have three years to file a complaint with CRD. CRD will issue a right-to-sue so the employee can pursue their case in civil court. They cannot file an employment discrimination lawsuit in court without receiving a right-to-sue from CRD. CRD may also investigate the complaint.

If, after an investigation, CRD finds reasonable cause that the employer broke the law, it may require the parties to go to mediation in order to try reach a settlement and, if the complaint can't be settled, CRD may file a lawsuit on behalf of the employee. Possible remedies include:

- Forcing the employer to change its policies or practices
- Getting the worker hired or re-hired
- Requiring the employer to undergo training
- Damages (money) for emotional distress

An employee can file a complaint in one of three ways:

- Online by creating an account and using our interactive [California Civil Rights System \(CCRS\)](#)
- By mail using a printable [intake form](#)
- By calling our communication center at 800.884.1684 (Toll Free), 800.700.2320 (TTY), or California's Relay Service at 711

CRD can provide reasonable accommodations for people with disabilities during the complaint process.

For translations of this guidance, visit: calcivilrights.ca.gov/posters/employment



**Beaumont-Cherry Valley Water District
Personnel Committee
September 17, 2024**

Item 6d

STAFF REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: **Policies and Procedures Manual Updates/Revisions replacing Part III, Section 5 Illness and Injury Prevention Program (IIPP) and existing Policy 3120 with Policy 5025 Illness and Injury Prevention Program (IIPP)**

Staff Recommendation

Approve to move forward the replacement of Part III, Section 5 Illness and Injury Prevention Program (IIPP) and Policy 3120 Occupational Illness and Injury Prevention Program as Policy 5025 Illness and Injury Prevention Program (IIPP) to the next Board of Directors meeting with the revisions stated in Table A, Summary of Policy Changes, or direct staff as desired.

Executive Summary

Staff is proposing replacement of Part III, Section 5 Illness and Injury Prevention Program (IIPP) and existing Policy 3120 with Policy 5025 Illness and Injury Prevention Program (IIPP) to eliminate duplication, modernize the policy language, and emphasize the role of Human Resources in managing the IIPP in collaboration with the Department Heads. Additionally, the proposed combined policies aim to promote a safe and healthy working environment for employees while being legally compliant with the reporting and recordkeeping guidelines.

Background

The IIPP policy is required by law and ensures the safety and wellbeing of all employees, which is fundamental to maintaining a productive and efficient workforce. By proactively identifying and mitigating potential hazards, the policy reduces the risk of workplace injuries and illnesses, thereby minimizing downtime and associated costs.

Staff is proposing sections in compliance with Cal/OSHA standards not only to protect employees but also to shield the District from potential legal liabilities and penalties. The policy draft covers the responsibilities of HR, the General Manager or his/her designee, and the Director of Operations in the implementation of the IIPP. Additionally, HR is also proposing adding sections such as non-retaliation and accident investigation that foster a culture of safety, where employees are encouraged to report hazards without fear of retaliation, leading to a more engaged and conscientious workforce. The revised draft also includes structured communication, training, and regular safety assessments to help maintain a high standard of operational safety, which is essential for the reliable delivery of services to the community. Ultimately, the IIPP policy supports BCVWD's commitment to being a responsible and safety-conscious organization, ensuring both employee welfare and service continuity.

As part of the ongoing review process of all District policies, HR, together with the Director of Operations, reviewed the proposed revisions with Legal Counsel to ensure compliance with



applicable labor laws (if any), and to promote clarity and completeness. Changes were also made to modernize the policy language, and to keep up with the industry standards.

Discussion

During research and preparation to update the IIPP policy, staff identified duplication of two existing sections of the Policy Manual:

- A. Part III, Section 5 Illness and Injury Prevention Program (IIPP) existed at the creation of the Manual in 2009 and has not been superseded
- B. Part I Section 31 Occupational Illness and Injury Prevention Program of the Policy Manual was superseded with a revision adopted by the Board on February 8, 2023

Upon analysis, staff recognized that many of the provisions of these separate policy sections were duplicative and used resources to combine the existing sections. Staff then produced a redline document using the combined policies with the proposed new revisions.

Table A, Summary of Policy Changes, outlines the proposed changes to the current Illness and Injury Prevention Program (IIPP) (policy) that are in reference to the redline draft version attached herewith.

Table A – Summary of Policy Changes

TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
1	Part III, Section 5, A to H and 3120.1	None	The General Manager is the sole authority.	5025.1 to 5025.10 Add General Manager’s designee	No fiscal impact.
2	Part III, Section 1, B and 3120.2	None	HR and Director of Operations currently are the responsible departments for IIPP.	5025.2 Identify responsibility for IIPP is through HR and Director of Operations.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
3	Part III, Section 5, C and 3120.3	Cal/OSHA Procedure CCR Title 8, Chapter 4	HR is responsible for reporting to Cal/OSHA any injuries and illnesses through annual OSHA 300 report.	5025.3 Add HR as the responsible department and also add the correct time frame to report OSHA 300 annually. Delete Record Maintenance per CCR Title 8, Chapter 4.	No fiscal impact.
4	Part III, Section 5, D and 3120.4	CCR Title 8, Chapter 4	IIPP activities i.e. inspections and training are maintained by HR.	5025.4 Add HR as the responsible department. Change recordkeeping to 1 year per CCR Title 8, Chapter 4	No fiscal impact.
5	Part III, Section E, vi and viii and 3120.5.6	None	Whenever there is a new equipment, training is conducted both at the time of acquisition and periodically.	5025.5.6 and 8 Add periodical training whenever there is a new equipment acquisition. Also delete news article as this is not being done at the District.	No fiscal impact.
6	Part III, Section F and 3120.6	None	HR and Director of Operations jointly conduct periodic safety inspections.	5025.6 Add HR and Director of Operations as the responsible departments for safety inspections.	No fiscal impact.
7	Part III, Section G and 3120.7	None	HR and Director of Operations jointly conduct accident investigations.	5025.7 Add HR and Director of Operations as the responsible departments for investigations.	No fiscal impact.



TABLE A	Policy Section	State / Federal Law requirement	BCVWD current practice	Option/s to Consider	Fiscal Impact of Option
8	Part III, Section H, i to xxxiv and 3120.11	None	Chain of command for reporting matters of Code of Safety is the competent person on the jobsite.	5025.8 Add the competent person on the jobsite for proper chain of command in reporting an injury or incident. Also added references to other policies in relation to IIPP.	No fiscal impact.
9	None	None	The District does not tolerate any form of retaliation for reporting an incident or safety issues.	5025.9 Add a section to define the competent person on the job in order of hierarchy.	No fiscal impact.
10	None	None	The District does not tolerate any form of retaliation for reporting an incident or safety issues.	5025.11 Add a section for non-retaliation.	No fiscal impact.

Fiscal Impact

There is no fiscal impact in the revision of this policy.

Attachments

1. Redline draft version of Policy 5025 Illness and Injury Prevention Program (IIPP) combining Part III, Section 5 and existing Policy 3120
2. Side-by-side version of Policy 5025 Illness and Injury Prevention Program (IIPP) combining Part III, Section 5 and existing Policy 3120
3. Clean draft version of Policy 5025 Illness and Injury Prevention Program (IIPP) combining Part III, Section 5 and existing Policy 3120
4. Original existing Policy 3120 (adopted by Reso 2023-05)

Staff Report prepared by Ren Berioso, Human Resources Manager

Combined version on Policy 3120 and Part III Section 5

POLICY TITLE: ~~Occupational Injury and Illness Prevention Program~~ ILLNESS AND
INJURY PREVENTION PROGRAM

POLICY NUMBER: ~~3120~~ 5025

5025.1. General Policy Statement

Program Goal and Outline. ~~The District prioritizes accident prevention in all aspects of operation and administration. It is the goal of the District~~ is to provide safe and ~~healthful~~ healthy working conditions for all employees. Therefore, the District will maintain a safety and health program that conforms conforming to the best practices, ~~reduces the potential and frequency of injuries, and ensures compliance with all relevant agencies of this type. The District's safety laws and standards.~~ The health program ~~includes~~ will include:

- 1. Safeguards. Providing mechanical and physical safeguards to the maximum extent possible.
- 2. Inspections. Conducting ~~regular~~ a program of safety and health inspections to ~~identify~~ find and eliminate unsafe working conditions or practices, to control health hazards, and to comply fully with the safety and health standards and law for every job.
- 3. Training. Training all employees in good safety and health practices.
- 4. Equipment. Providing necessary personal protective equipment (PPE), and instructions for ~~its proper~~ use and care.
- ~~4. Rule Enforcement.~~ Training all employees in good safety and health practices.
- 5. Developing and enforcing safety and health rules, ~~with employee cooperation required~~ and requiring that employees cooperate with these rules as a condition of employment.
- 6. Investigations. Investigating ~~accidents promptly and thoroughly to identify causes and implement corrective actions to prevent future occurrences, every accident to determine its cause and correct the problem as indicated so it will not happen again.~~
- 7. Establishing Recognition. Developing a system ~~for~~ of recognition and awards for outstanding safety service and/or performance.

5025.2. Program Responsibility

~~The General Manager or their designee holds. Although the District recognizes that the responsibility for safety and health is shared, the District through its Human Resources and Department of Operations will be responsible and have full authority for implementing this policy and the District's Injury and Illness Prevention Program (IIPP). The District accepts responsibility for leading and continuously improving the program while ensuring safe working conditions.~~

- 1. Responsibility. The District through its Human Resources and Department of Operations accepts responsibility for leadership of the safety and health program, for its effectiveness and improvements, and for providing the safeguards required to ensure safe conditions.
- 2. Supervisors: Supervisory and management personnel are responsible for promoting safe practices and developing proper attitudes toward safety and health for themselves and in those they supervise, and for ensuring that all operations are conducted performed with employee safety in mind, the utmost regard for the safety and health of all personnel involved, including themselves and in accordance with the District's Injury and Illness Prevention Program (IIPP).
- 3. Compliance. No employee will be required to work at a job he/she knows is not safe

Adopted by Resolution XXX

or healthy. Employees: All employees are responsible for following safety whole-hearted, genuine operation of all aspects of the safety and health program-including compliance with all rules and regulations,--and for continuously practicing safety while performing their duties. Any employee found not practicing safety while performing their duties will be subject to appropriate discipline.

5025.3 **Injury and Illness Records.** The Human Resources Department shall manage the reporting unsafe conditions, and helping fellow employees. No employee should engage in work that they know is unsafe, and any accidents or and serve as the custodian for all Injury and Illness records. The District's record keeping system for its Injury and Illness Prevention Program shall conform to Cal/OSHA standards. Records shall be used to measure and evaluate the success of said program.

1. **Reporting.** A report shall be obtained on every injury or illness requiring medical treatment.
2. **Recording.** Each injury or illness shall be recorded on the "Cal/OSHA Log and Summary of Occupational Injuries and Illnesses," Cal/OSHA Form 300A, according to its instructions.
3. **Supplemental Record.** A supplementary record of the occupational injuries and illnesses shall be prepared on OSHA Form 5020, "Employer's Report of Injury or Illness," with the same information as in subsection 5025.2, above.
4. **Annual Preparation.** Annually, the summary Cal/OSHA Form 300 shall be prepared and posted no later than February 1 in a place easily observable by employees. Said form shall remain posted until April 30 of the same year.

5025.4 **Documentation of Activities.** Records shall be maintained by the Human Resources Department of steps taken to establish and maintain the District's Injury and Illness Prevention Program. They shall include:

1. **Inspection Records.** Records of scheduled and periodic inspections as required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] to identify unsafe conditions and work practices. The documentation must include the name of the person(s) conducting the inspection, the unsafe conditions and work practices identified, and the action taken to correct the unsafe conditions ~~must~~ and work practices. The records are to be maintained for at least one(1) year.
2. **Training Documentation.** Documentation of safety and health training required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] for each employee. The documentation must specifically include employee name or other identifier, training dates, type(s) of training and the name of the training provider. These records must also be kept for at least one (1) year.

5025.5 **Program Communication System.** Readily understandable communication shall be maintained with all affected employees on matters relating to occupational safety and health, including provisions designed to encourage employees to inform the District of hazards at the worksite without fear of reprisal. Communications with employees shall include meetings, training programs, posted written information, and a system of anonymous notification by employees about hazards.

1. **Communication.** Written communications to employees shall be in a language they can understand. If an employee cannot read in any language, said communication shall be made orally in a language he/she can readily understand.
2. **Conspicuous Posting.** The District's Code of Safe Practices, below, shall be posted at a conspicuous location in the District's maintenance office, and shall be provided to each supervisory employee who shall keep it readily available.

Adopted by Resolution XXX

3. **Meetings.** Periodic meetings (at least one per quarter) of supervisory employees shall be held under the direction of the General Manager or his/her designee for the discussion of safety problems and accidents that have occurred. Documentation of these meetings shall be maintained for three (3) years.
4. **Supervisor Meetings.** Supervisory employees shall conduct "toolbox" or "tailgate" safety meetings, or equivalent, with their crew(s) at least every ten (10) working days to emphasize safety. Documentation of these meetings shall be maintained for three (3) years.
5. **General Meetings.** General employee meetings shall be conducted monthly at which safety is freely and openly discussed by those present. Such meetings should be regular, scheduled, and announced to all employees so that maximum employee attendance can be achieved. Documentation of these meeting shall be maintained for three (3) years. Discussions at these meetings should concentrate on:
 - a. **Accident History.** Occupational accident and injury history within the District, including possible comparisons to other agencies.
 - b. **Feedback.** Feedback from employees.
 - c. **Guest Speakers.** Guest speakers from the District's workers compensation insurance carrier or other agencies concerned with safety.
 - d. **Materials.** Brief audio-visual materials that relate to the District's operations.
6. **Training Programs.** Training programs shall be conducted every six (6) months or when new equipment, machinery or tools are purchased. Employees shall be instructed in the safe operation of said equipment, machinery or tools. Documentation of training programs shall be maintained for three (3) years.
 - a. **New Employees.** New employees shall be trained by their supervisor in the safe operation of the equipment, machinery and tools with which they will be working prior to being allowed to work independently. Documentation of new employee training shall be maintained for three (3) years.
7. **Posters/Bulletins.** Posters and bulletins relating to and encouraging safe and healthy practices shall be posted on a rotational basis at a conspicuous location in the District's maintenance office.

5025.6 **Hazard Assessment and Control.** Periodic safety inspections shall be conducted to identify existing hazards in the workplace, or conditions, equipment and procedures that could be potentially hazardous. The inspections shall be conducted jointly by Human Resources and Director of Operations or his/her designee who, through experience or training, are able to identify actual and potential hazards and who understand safe work practices.

1. **Observe.** Safety inspectors will observe if safe work practices are being followed and will ensure that unsafe conditions or procedures are identified and corrected properly.
2. **Quarterly.** Safety inspections will be conducted at least quarterly. The frequency of the inspections will depend on the operations involved, the magnitude of the hazards, the proficiency of employees, changes in equipment or work processes, and the history or workplace injuries and illnesses.
3. **Written Assessment.** A written assessment shall be prepared after said inspections which will document identified hazards and prescribe procedures for the elimination of same, and measures that can be taken to prevent their recurrence.
4. **Assessment Review.** The General Manager or his/her designee will review written inspection reports and/or assessments prepared by Human Resources and will assist in prioritizing actions and verify completion of previous corrective actions. He/she shall also review the overall inspection program to determine trends.

Adopted by Resolution XXX

5025.7 **Accident Investigation.** All accidents shall be thoroughly and properly investigated jointly by the Human Resources and Director of Operations or his/her designee, with the primary focus of understanding why the accident or near-miss occurred and what actions can be taken to preclude recurrence. A written report of said investigation shall be prepared which adequately identifies the cause(s) of the accident or near-miss occurrence.

1. **Obtain Facts.** The investigation must obtain all the facts surrounding the occurrence: what caused the situation to occur; who was involved; was/were the employee(s) qualified to perform the functions involved in the accident or near-miss; were they properly trained; were proper operating procedures established for the task involved; were procedures followed, and if not, why not; where else this or a similar situation might exist, and how it can be corrected.
2. **Locate Problems.** The accident investigator must determine which aspects of the operation or process require additional attention (what type of constructive action can eliminate the cause(s) of the accident or near-miss).
3. **Note Previous Actions.** Actions already taken to reduce or eliminate the exposures being investigated should be noted, along with those remaining to be addressed.
4. **Note Interim Procedures.** Any interim or temporary precautions should also be noted. Any pending corrective action and reason for delaying its implementation should be identified.
5. **Identify Corrective Action.** Corrective action should be identified in terms of not only how it will prevent a recurrence of the accident or near-miss, but also how it will improve the overall operation. The solution should be a means of achieving not only accident control, but also total operation control.

5025.8 **Code of Safe Practices.**

1. All employees shall follow the safe practices rules identified in the District's Injury and Illness Prevention Program (IIPP), render every possible aid to safe operations, and report all unsafe conditions or practices to the immediate supervisor, Department Head, Human Resources or General Manager.
2. Supervising employees shall insist on employees observing and obeying every rule, regulation, and order as is necessary to the safe conduct of the work, and shall take such action as necessary to obtain observance. Each employee should be safety minded and encourage co-workers to do the same.
3. Anyone known to be under the influence of drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job while in that condition, and will be subject to the discipline specified in Policy 3205 Substance Abuse addressing Drug and Alcohol Abuse.
4. Horseplay, scuffling, and other acts which tend to have an adverse influence on the safety or well-being of the employees shall be prohibited.
5. Work shall be well planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
6. No one shall knowingly be permitted or required to work while the employee's ability or alertness is so impaired by fatigue, illness, or other causes that it might unnecessarily expose the employee or others to injury.
7. Employees shall not enter manholes, underground vaults, chambers or other similar places that receive little ventilation, unless it has been determined that it is safe to enter.
8. Employees shall be instructed to ensure that all guards and other protective devices

Adopted by Resolution XXX

- are in proper places and adjusted, and shall report deficiencies promptly to the Competent Person on the jobsite
9. Crowding or pushing when boarding or leaving any vehicle or other conveyance shall be prohibited.
 10. Workers shall not handle or tamper with any electrical equipment, machinery, or air or water lines in a manner not within the scope of their duties, unless they have received instructions from the Competent Person on the jobsite , or other responsible managing employee.
 11. All injuries shall be reported promptly to the Competent Person on the jobsite , or other responsible managing employee, so that arrangements can be made for medical or first aid treatment.
 12. When lifting heavy objects, the large muscles of the leg instead of the smaller muscles of the back shall be used.
 13. Materials, tools, or other objects shall not be thrown from buildings or structures until proper precautions are taken to protect others from falling objects.
 14. Employees shall cleanse thoroughly after handling hazardous or unhealthy substances, and follow special instructions from authorized sources and in accordance with the Safety Data Sheet (SDS).
 15. Work shall be so arranged that employees are able to face a ladder and use both hands while climbing.
 16. Gasoline shall not be used for cleaning purposes.
 17. No burning, welding, or other source of ignition shall be applied to any enclosed tank or vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authority for the work is obtained from the Water Utility Superintendent, Director of Operations or his/her designee, or other responsible managing employee.
 - ~~•18. Any damage to scaffolds, false work, shoring or other supporting structures shall be immediately. Failure to comply with safety rules may result in disciplinary action reported to the Competent Person on the jobsite , or other responsible managing employee.~~

~~3. Injury and Illness Records~~

~~The District will maintain injury and illness records that comply with Cal/OSHA standards. These records are essential for evaluating the effectiveness of the safety program.~~

- ~~• A report will be obtained for every injury or illness requiring medical treatment.~~
- ~~• Injuries or illnesses will be recorded on Cal/OSHA Form 300.~~
- ~~• A supplementary report will be filed on OSHA Form 5020.~~
- ~~• The summary Form 300A will be posted in employee areas from February 1 to March 1 each year.~~
- ~~• Records will be retained for at least five years after preparation.~~

~~4. Documentation of Activities~~

~~The District will maintain records of all activities related to the IIPP:~~

- ~~• **Inspections:** Periodic inspections, required by Cal/OSHA, will be documented, including details of unsafe conditions and corrective actions. Records will be kept for a minimum of three years.~~

Adopted by Resolution XXX

- ~~**Training:** Training sessions, including the type of training, date, and trainer information, will be documented and kept for at least three years.~~

5. Communication

~~The District will maintain clear, open communication with employees regarding occupational health and safety. This will include:~~

- ~~Regular safety meetings, at least quarterly, where employees can openly discuss safety issues.~~
- ~~**Supervisors:** Supervisors will conduct safety meetings (e.g., toolbox or tailgate meetings) at least every ten working days to emphasize safe practices.~~
- ~~**General Safety Meetings:** General meetings will be held monthly, focusing on accident history, employee feedback, and guest presentations from safety experts.~~
- ~~Written safety information will be made available in employee break rooms, and new employees will receive safety training during their orientation.~~

6. Training Programs

~~All employees will receive safety training appropriate to their duties:~~

- ~~New employees will be trained on safety protocols before starting work.~~
- ~~Employees will receive additional training if they are assigned new duties or equipment.~~
- ~~Periodic safety training sessions will reinforce existing protocols and address any new hazards.~~
- ~~Documentation of training will be maintained for at least three years.~~

7. Safety Inspections

~~Regular safety inspections will be conducted to identify hazards and unsafe practices. Inspections will be:~~

- ~~Conducted quarterly or as needed (e.g., after an accident or when new equipment is introduced).~~
- ~~Documented with a Hazard Checklist, signed and dated by the inspector. Corrective actions must be taken and documented.~~
- ~~Conducted by qualified personnel or external consultants as necessary.~~

8. Accident Investigations

~~All accidents and near misses will be thoroughly investigated by trained personnel to identify causes and implement preventive measures. A written report will be prepared, and corrective actions will include:~~

- ~~Additional training or disciplinary measures.~~
- ~~Changes to equipment, processes, or staffing.~~

9. Unsafe Conditions and Work Practices

~~The District will ensure prompt correction of unsafe conditions:~~

Adopted by Resolution XXX

- ~~• Hazards will be prioritized based on severity.~~
- ~~• Protective measures such as lockout/tagout will be used to eliminate immediate dangers.~~
- ~~• Records of hazard corrections will be kept for at least three years.~~

10. Recordkeeping

As a local government entity, the District will maintain all required records related to the IIPP for at least five years, in compliance with Cal/OSHA standards.

11. Code of Safe Practices

All employees are expected to follow the Code of Safe Practices, which includes:

- ~~• Reporting all unsafe conditions and accidents immediately.~~
- ~~• Using proper lifting techniques and following safe work practices.~~
- ~~• Avoiding horseplay, drugs, or other impairments that could compromise safety.~~
- ~~• Ensuring equipment is in good working condition, with any defects reported and tagged as "DEFECTIVE."~~
- ~~• Following lockout/tagout procedures when necessary.~~
- ~~• Supervisors are responsible for enforcing safety rules and ensuring all employees comply.~~

19. All tools and equipment shall be maintained in good condition.

20. Damaged tools or equipment shall be removed from service and tagged "DEFECTIVE."

21. Pipe wrenches shall not be used as a substitute for other wrenches.

22. Only appropriate tools shall be used for the job.

23. Wheelbarrows shall not be used with handles in an upright position.

24. Portable electric tools shall not be lifted or lowered by means of the power cord. Ropes shall be used for this purpose.

25. In locations where the use of a portable power tool is difficult, the tool shall be supported by means of a rope or similar support of adequate strength.

26. Only authorized persons shall operate machinery or equipment.

27. Loose or frayed clothing, or long hair, dangling ties, finger rings, etc. shall not be worn around moving machinery or other sources of entanglement.

28. Machinery shall not be serviced, repaired or adjusted while in operation, nor shall oiling of moving parts be attempted, except on equipment that is designed or fitted with safeguards to protect the person performing the work.

29. Where appropriate, lock-out/block-out procedures shall be used.

30. Employees shall not work under vehicles supported by jacks or chain hoists, without protective blocking that will prevent injury if jacks or hoists should fail.

31. Air hoses shall not be disconnected at compressors until hose line has been bled.

32. All excavations shall be visually inspected before backfilling, to ensure that it is safe to backfill.

Adopted by Resolution XXX

33. Excavating equipment shall not be operated near tops of cuts, banks, and cliffs if employees are working below.
34. Tractors, backhoes and other similar equipment shall not operate where there is a possibility of overturning in dangerous areas like edges of deep fills, cut banks, and steep slopes.

5025.9 **Competent Person.** For the purpose of defining the competent person on the jobsite, the order of hierarchy is listed as: Water Production II or Senior Water Utility Worker, Water Production, Cross-Connection Non-Potable Water or Water Utility Supervisor, Water Utility Superintendent and Director of Operations. Such designation must be listed on the essential functions of the job description of each position.

5025.10 **Implementation.** An Injury and Illness Prevention Program, which will conform to the requirements of SB 198 and the Standards promulgated in response thereto by the California Occupational Safety and Health Standards Board, will require more than just the implementation of a policy similar to the foregoing example. Full compliance will require an in-depth and individualized assessment of an agency's current workplace conditions, practices and problems. Said assessment must be documented and include a safety and health survey, workplace assessment, evaluation of assessment information, development of an action plan, implementation of said plan, and ongoing maintenance of the program. The District encourages its members to take full advantage of Cal/OSHA's Consultation Service. In addition to suggesting both governmental and private sources for information, Cal/OSHA has a publication entitled, "Guide to Developing Your Workplace Injury & Illness Prevention Program with Checklists for Self-Inspection." This document and other information can be obtained from the nearest Cal/OSHA Consultation Service Offices.

5025.11 **Non-Retaliation.** The District is committed to ensuring a safe work environment where employees can report injuries, illnesses, safety concerns, or policy violations without fear of retaliation. Retaliation in any form, including harassment or discrimination, is strictly prohibited. Employees who believe they have been retaliated against for reporting safety-related issues should immediately report the incident to Human Resources. The District will investigate all claims of retaliation and take appropriate action, including disciplinary measures if necessary.

Adopted by Resolution XXX

Attachment 2

CURRENT POLICY

5. ILLNESS AND INJURY PREVENTION PROGRAM

A. **Program Goal and Outline.** The goal of the District is to provide safe and healthful working conditions for all of its employees. Therefore, the District will maintain a safety and health program conforming to the best practices of agencies of this type. The District's safety and health program will include:

- i. **Safeguards.** Providing mechanical and physical safeguards to the maximum extent possible.
- ii. **Inspections.** Conducting a program of safety and health inspections to find and eliminate unsafe working conditions or practices, to control health hazards, and to comply fully with the safety and health standards and law for every job.
- iii. **Training.** Training all employees in good safety and health practices.
- iv. **Equipment.** Providing necessary personal protective equipment, and instructions for use and care.
- v. **Rule Enforcement.** Developing and enforcing safety and health rules, and requiring that employees cooperate with these rules as a condition of employment.
- vi. **Investigations.** Investigating promptly and thoroughly, every accident to determine its cause and correct the problem as indicated so it will not happen again.
- vii. **Recognition.** Developing a system of recognition and awards for outstanding safety service and/or performance.

B. **Program Responsibility.** Although the District recognizes that the responsibility for safety and health is shared, the General Manager will be responsible and have full authority for implementing this policy and the District's Injury and Illness Prevention Program.

- i. **Responsibility.** The District accepts responsibility for leadership of the safety and health program, for its effectiveness and improvements, and for providing the safeguards required to ensure safe conditions.
- ii. **Supervisors.** Supervisory personnel are responsible for developing proper attitudes toward safety and health for themselves and in those they supervise, and for ensuring that all operations are performed with the utmost regard for the safety and health of all personnel involved, including themselves.

PROPOSED POLICY

Combined version on Policy 3120 and Part III Section 5

POLICY TITLE: Occupational Injury and Illness Prevention Program ILLNESS AND INJURY PREVENTION PROGRAM POLICY NUMBER: 3120 5025

5025.1- General Policy Statement

Program Goal and Outline. The District prioritizes accident prevention in all aspects of operation and administration. It is the goal of the District is to provide safe and healthful working conditions for all employees. Therefore, the District will maintain a safety and health program that conforms to the best practices, reduces the potential and frequency of injuries, and ensures compliance with all relevant agencies of this type. The District's safety laws and standards. The health program includes will include:

1. Safeguards. Providing mechanical and physical safeguards to the maximum extent possible.
2. Inspections. Conducting regular program of safety and health inspections to identify and eliminate unsafe working conditions or practices, to control health hazards, and to comply fully with the safety and health standards and law for every job.
3. Training. Training all employees in good safety and health practices.
4. Equipment. Providing necessary personal protective equipment (PPE), and instructions for its proper use and care.
5. Rule Enforcement. Developing and enforcing safety and health rules, with employee cooperation required and requiring that employees cooperate with these rules as a condition of employment.
6. Investigations. Investigating accidents promptly and thoroughly to identify causes and implement corrective actions to prevent future occurrences, every accident to determine its cause and correct the problem as indicated so it will not happen again.
7. Establishing Recognition. Developing a system for recognition and awards for outstanding safety service and/or performance.

5025.2- Program Responsibility

The General Manager or their designee holds. Although the District recognizes that the responsibility for safety and health is shared, the District through its Human Resources and Department of Operations will be responsible and have full authority for implementing this policy and the District's Injury and Illness Prevention Program (IIPP). The District accepts responsibility for leading and continuously improving the program while ensuring safe working conditions.

1. Responsibility. The District through its Human Resources and Department of Operations accepts responsibility for leadership of the safety and health program, for its effectiveness and improvements, and for providing the safeguards required to ensure safe conditions.
2. Supervisors. Supervisory and management personnel are responsible for promoting safe practices and developing proper attitudes toward safety and health for themselves and in those they supervise, and for ensuring that all operations are conducted and performed with employee safety in mind the utmost regard for the safety and health of all personnel involved, including themselves and in accordance with the District's Injury and Illness Prevention Program (IIPP).
3. Compliance. No employee will be required to work at a job he/she knows is not safe

iii. **Compliance.** No employee will be required to work at a job he/she knows is not safe or healthful. Employees are responsible for wholehearted, genuine operation of all aspects of the safety and health program - including compliance with all rules and regulations - and for continuously practicing safety while performing their duties. Any employee found not practicing safety while performing their duties will be subject to appropriate discipline.

C. **Injury and Illness Records.** The District's record keeping system for its injury and illness Prevention Program shall conform to Cal/OSHA standards. Records shall be used to measure and evaluate the success of said program.

i. **Reporting.** A report shall be obtained on every injury or illness requiring medical treatment.

ii. **Recording.** Each injury or illness shall be recorded on the "Cal/OSHA Log and Summary of Occupational Injuries and Illnesses," Cal/OSHA Form 300A, according to its instructions.

iii. **Supplemental Record.** A supplementary record of the occupational injuries and illnesses shall be prepared on OSHA Form 5020, "Employer's Report of Injury or Illness," with the same information as in Section C, ii, above.

iv. **Annual Preparation.** Annually, the summary Cal/OSHA Form 300 shall be prepared and posted no later than February 1 in a place easily observable by employees. Said form shall remain posted until March 1.

v. **Record Maintenance.** All records specified in this section shall be maintained in the District's files for a minimum of five years after their preparation.

D. **Documentation of Activities.** Records shall be maintained of steps taken to establish and maintain the District's Injury and Illness Prevention Program. They shall include:

i. **Inspection Records.** Records of scheduled and periodic inspections as required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] to identify unsafe conditions and work practices. The documentation must include the name of the person(s) conducting the inspection, the unsafe conditions and work practices identified, and the action taken to correct the unsafe conditions and work practices. The records are to be maintained for at least three (3) years.

ii. **Training Documentation.** Documentation of safety and health training required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] for each employee. The documentation must specifically include employee name or other identifier, training dates, type(s) of training and the name of the training provider. These records must also be kept for at least three (3) years.

E. **Program Communication System.** Readily understandable communication shall be maintained with all affected employees on matters relating to occupational safety and

or health. Employees are responsible for following safety-wholehearted, genuine operation of all aspects of the safety and health program-including compliance with all rules and regulations-and for continuously practicing safety while performing their duties. Any employee found not practicing safety while performing their duties will be subject to appropriate discipline.

5025.3 **Injury and Illness Records.** The Human Resources Department shall manage the reporting unsafe conditions, and helping fellow employees. No employee should engage in work that they know is unsafe, and any accidents or and serve as the custodian for all Injury and Illness records. The District's record keeping system for its injury and illness Prevention Program shall conform to Cal/OSHA standards. Records shall be used to measure and evaluate the success of said program.

1. **Reporting.** A report shall be obtained on every injury or illness requiring medical treatment.

2. **Recording.** Each injury or illness shall be recorded on the "Cal/OSHA Log and Summary of Occupational Injuries and Illnesses," Cal/OSHA Form 300A, according to its instructions.

3. **Supplemental Record.** A supplementary record of the occupational injuries and illnesses shall be prepared on OSHA Form 5020, "Employer's Report of Injury or Illness," with the same information as in subsection 5025.2, above.

4. **Annual Preparation.** Annually, the summary Cal/OSHA Form 300 shall be prepared and posted no later than February 1 in a place easily observable by employees. Said form shall remain posted until April 30 of the same year.

5025.4 **Documentation of Activities.** Records shall be maintained by the Human Resources Department of steps taken to establish and maintain the District's Injury and Illness Prevention Program. They shall include:

1. **Inspection Records.** Records of scheduled and periodic inspections as required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] to identify unsafe conditions and work practices. The documentation must include the name of the person(s) conducting the inspection, the unsafe conditions and work practices identified, and the action taken to correct the unsafe conditions and work practices. The records are to be maintained for at least one(1) year.

2. **Training Documentation.** Documentation of safety and health training required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] for each employee. The documentation must specifically include employee name or other identifier, training dates, type(s) of training and the name of the training provider. These records must also be kept for at least one (1) year.

5025.5 **Program Communication System.** Readily understandable communication shall be maintained with all affected employees on matters relating to occupational safety and health, including provisions designed to encourage employees to inform the District of hazards at the worksite without fear of reprisal. Communications with employees shall include meetings, training programs, posted written information, and a system of anonymous notification by employees about hazards.

1. **Communication.** Written communications to employees shall be in a language they can understand. If an employee cannot read in any language, said communication shall be made orally in a language he/she can readily understand.

2. **Conspicuous Posting.** The District's Code of Safe Practices, below, shall be posted at a conspicuous location in the District's maintenance office, and shall be provided to each supervisory employee who shall keep it readily available.

health, including provisions designed to encourage employees to inform the District of hazards at the worksite without fear of reprisal. Communications with employees shall include meetings, training programs, posted written information, and a system of anonymous notification by employees about hazards.

- i. **Communication.** Written communications to employees shall be in a language they can understand. If an employee cannot read in any language, said communication shall be made orally in a language he/she can readily understand.
- ii. **Conspicuous Posting.** The District's Code of Safe Practices, below, shall be posted at a conspicuous location in the District's maintenance office, and shall be provided to each supervisory employee who shall keep it readily available.
- iii. **Meetings.** Periodic meetings (at least one per quarter) of supervisory employees shall be held under the direction of the General Manager for the discussion of safety problems and accidents that have occurred. Documentation of these meetings shall be maintained for three (3) years.
- iv. **Supervisor Meetings.** Supervisory employees shall conduct "toolbox" or "tailgate" safety meetings, or equivalent, with their crew(s) at least every ten working days to emphasize safety. Documentation of these meetings shall be maintained for three (3) years.
- v. **General Meetings.** General employee meetings shall be conducted monthly at which safety is freely and openly discussed by those present. Such meetings should be regular, scheduled, and announced to all employees so that maximum employee attendance can be achieved. Documentation of these meetings shall be maintained for three (3) years. Discussions at these meetings should concentrate on:
 - a. **Accident History.** Occupational accident and injury history within the District, including possible comparisons to other agencies.
 - b. **Feedback.** Feedback from employees.
 - c. **Guest Speakers.** Guest speakers from the District's workers' compensation insurance carrier or other agencies concerned with safety.
 - d. **Materials.** Brief audio-visual materials that relate to the District's operations.
- vi. **Training Programs.** Training programs shall be conducted when new equipment, machinery or tools are purchased. Employees shall be instructed in the safe operation of said equipment, machinery or tools. Documentation of training programs shall be maintained for three (3) years.
 - a. **New Employees.** New employees shall be trained by their supervisor in the safe operation of the equipment, machinery and tools with which they will

3. **Meetings.** Periodic meetings (at least one per quarter) of supervisory employees shall be held under the direction of the General Manager or his/her designee for the discussion of safety problems and accidents that have occurred. Documentation of these meetings shall be maintained for three (3) years.
4. **Supervisor Meetings.** Supervisory employees shall conduct "toolbox" or "tailgate" safety meetings, or equivalent, with their crew(s) at least every ten (10) working days to emphasize safety. Documentation of these meetings shall be maintained for three (3) years.
5. **General Meetings.** General employee meetings shall be conducted monthly at which safety is freely and openly discussed by those present. Such meetings should be regular, scheduled, and announced to all employees so that maximum employee attendance can be achieved. Documentation of these meetings shall be maintained for three (3) years. Discussions at these meetings should concentrate on:
 - a. **Accident History.** Occupational accident and injury history within the District, including possible comparisons to other agencies.
 - b. **Feedback.** Feedback from employees.
 - c. **Guest Speakers.** Guest speakers from the District's workers compensation insurance carrier or other agencies concerned with safety.
 - d. **Materials.** Brief audio-visual materials that relate to the District's operations.
6. **Training Programs.** Training programs shall be conducted every six (6) months or when new equipment, machinery or tools are purchased. Employees shall be instructed in the safe operation of said equipment, machinery or tools. Documentation of training programs shall be maintained for three (3) years.
 - a. **New Employees.** New employees shall be trained by their supervisor in the safe operation of the equipment, machinery and tools with which they will be working prior to being allowed to work independently. Documentation of new employee training shall be maintained for three (3) years.
7. **Posters/Bulletins.** Posters and bulletins relating to and encouraging safe and healthy practices shall be posted on a rotational basis at a conspicuous location in the District's maintenance office.
 - 5025.6 **Hazard Assessment and Control.** Periodic safety inspections shall be conducted to identify existing hazards in the workplace, or conditions, equipment and procedures that could be potentially hazardous. The inspections shall be conducted jointly by Human Resources and Director of Operations or his/her designee who, through experience or training, are able to identify actual and potential hazards and who understand safe work practices.
 1. **Observe.** Safety inspectors will observe if safe work practices are being followed and will ensure that unsafe conditions or procedures are identified and corrected properly.
 2. **Quarterly.** Safety inspections will be conducted at least quarterly. The frequency of the inspections will depend on the operations involved, the magnitude of the hazards, the proficiency of employees, changes in equipment or work processes, and the history or workplace injuries and illnesses.
 3. **Written Assessment.** A written assessment shall be prepared after said inspections which will document identified hazards and prescribe procedures for the elimination of same, and measures that can be taken to prevent their recurrence.
 4. **Assessment Review.** The General Manager or his/her designee will review written inspection reports and/or assessments prepared by Human Resources and will assist in prioritizing actions and verify completion of previous corrective actions. He/she shall also review the overall inspection program to determine trends.

be working prior to being allowed to work independently. Documentation of new employee training shall be maintained for three (3) years.

- vii. **Posters/ Bulletins.** Posters and bulletins relating to and encouraging safe and healthy practices shall be posted on a rotational basis at a conspicuous location in the District's maintenance office.
 - viii. **News Articles/ Publications.** News articles and publications devoted to safety shall be distributed to employees. This policy shall also be distributed to all employees upon its adoption, to all new employees at the time of their hiring, and annually thereafter.
- F. **Hazard Assessment and Control.** Periodic safety inspections shall be conducted to identify existing hazards in the workplace, or conditions, equipment and procedures that could be potentially hazardous. The inspections shall be conducted by personnel who, through experience or training, are able to identify actual and potential hazards and who understand safe work practices.
- i. **Observe.** Safety inspectors will observe if safe work practices are being followed and will ensure that unsafe conditions or procedures are identified and corrected properly.
 - ii. **Quarterly.** Safety inspections will be conducted at least quarterly. The frequency of the inspections will depend on the operations involved, the magnitude of the hazards, the proficiency of employees, changes in equipment or work processes, and the history of workplace injuries and illnesses.
 - iii. **Written Assessment.** A written assessment shall be prepared after said inspections which will document identified hazards and prescribe procedures for the elimination of same, and measures that can be taken to prevent their recurrence.
 - iv. **Assessment Review.** The General Manager will review written inspection reports and/or assessments and will assist in prioritizing actions and verify completion of previous corrective actions. He/ she shall also review the overall inspection program to determine trends.

G. **Accident Investigation.** All accidents shall be thoroughly and properly investigated by the Field Operations Superintendent, with the primary focus of understanding why the accident or near-miss occurred and what actions can be taken to preclude recurrence. A written report of said investigation shall be prepared which adequately identifies the cause(s) of the accident or near-miss occurrence.

- i. **Obtain Facts.** The investigation must obtain all the facts surrounding the occurrence: what caused the situation to occur; who was involved; was/were the employee(s) qualified to perform the functions involved in the accident or near-miss; were they properly trained; were proper operating procedures established for the task involved; were procedures followed, and if not, why not; where else this or a similar situation might exist, and how it can be corrected.

5025.7. **Accident Investigation.** All accidents shall be thoroughly and properly investigated jointly by the Human Resources and Director of Operations or his/her designee, with the primary focus of understanding why the accident or near-miss occurred and what actions can be taken to preclude recurrence. A written report of said investigation shall be prepared which adequately identifies the cause(s) of the accident or near-miss occurrence.

- 1. **Obtain Facts.** The investigation must obtain all the facts surrounding the occurrence: what caused the situation to occur, who was involved, was/were the employee(s) qualified to perform the functions involved in the accident or near-miss; were they properly trained; were proper operating procedures established for the task involved, were procedures followed, and if not, why not, where else this or a similar situation might exist, and how it can be corrected.
- 2. **Locate Problems.** The accident investigator must determine which aspects of the operation or process require additional attention (what type of constructive action can eliminate the cause(s) of the accident or near-miss).
- 3. **Note Previous Actions.** Actions already taken to reduce or eliminate the exposures being investigated should be noted, along with those remaining to be addressed.
- 4. **Note Interim Procedures.** Any interim or temporary precautions should also be noted. Any pending corrective action and reason for delaying its implementation should be identified.
- 5. **Identify Corrective Action.** Corrective action should be identified in terms of not only how it will prevent a recurrence of the accident or near-miss, but also how it will improve the overall operation. The solution should be a means of achieving not only accident control, but also total operation control.

5025.8

Code of Safe Practices.

- 1. All employees shall follow the safe practices rules identified in the District's Injury and Illness Prevention Program (IIPP), render every possible aid to safe operations, and report all unsafe conditions or practices to the immediate supervisor, Department Head, Human Resources or General Manager.
- 2. Supervising employees shall insist on employees observing and obeying every rule, regulation, and order as is necessary to the safe conduct of the work, and shall take such action as necessary to obtain observance. Each employee should be safely minded and encourage co-workers to do the same.
- 3. Anyone known to be under the influence of drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job while in that condition, and will be subject to the discipline specified in Policy 3205 Substance Abuse addressing Drug and Alcohol Abuse.
- 4. Horseplay, scuffling, and other acts which tend to have an adverse influence on the safety or well-being of the employees shall be prohibited.
- 5. Work shall be well planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
- 6. No one shall knowingly be permitted or required to work while the employee's ability or alertness is so impaired by fatigue, illness, or other causes that it might unnecessarily expose the employee or others to injury.
- 7. Employees shall not enter manholes, underground vaults, chambers or other similar places that receive little ventilation, unless it has been determined that it is safe to enter.
- 8. Employees shall be instructed to ensure that all guards and other protective devices

- are in proper places and adjusted, and shall report deficiencies promptly to the Competent Person on the jobsite
9. Crowding or pushing when boarding or leaving any vehicle or other conveyance shall be prohibited.
 10. Workers shall not handle or tamper with any electrical equipment, machinery, or air or water lines in a manner not within the scope of their duties, unless they have received instructions from the Competent Person on the jobsite, or other responsible managing employee.
 11. All injuries shall be reported promptly to the Competent Person on the jobsite, or other responsible managing employee, so that arrangements can be made for medical or first aid treatment.
 12. When lifting heavy objects, the large muscles of the leg instead of the smaller muscles of the back shall be used.
 13. Materials, tools, or other objects shall not be thrown from buildings or structures until proper precautions are taken to protect others from falling objects.
 14. Employees shall cleanse thoroughly after handling hazardous or unhealthy substances, and follow special instructions from authorized sources and in accordance with the Safety Data Sheet (SDS).
 15. Work shall be so arranged that employees are able to face a ladder and use both hands while climbing.
 16. Gasoline shall not be used for cleaning purposes.
 17. No burning, welding, or other source of ignition shall be applied to any enclosed tank or vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authority for the work is obtained from the Water Utility Superintendent, Director of Operations or fisher designee, or other responsible managing employee.
 18. Any damage to scaffolds, false work, shoring or other supporting structures shall be immediately repaired. Failure to comply with safety rules may result in disciplinary action reported to the Competent Person on the jobsite, or other responsible managing employee.
- 3- Injury and Illness Records**
 The District will maintain injury and illness records that comply with Cal/OSHA standards. These records are essential for evaluating the effectiveness of the safety program.
- A report will be obtained for every injury or illness requiring medical treatment.
 - Injuries or illnesses will be recorded on Cal/OSHA Form 300.
 - A supplementary report will be filed on OSHA Form 300A.
 - The summary Form 300A will be posted in employee areas from February 1 to March 1 each year.
 - Records will be retained for at least five years after preparation.
- 4- Documentation of Activities**
 The District will maintain records of all activities related to the IIPP:
- **Inspections:** Periodic inspections, required by Cal/OSHA, will be documented, including details of unsafe conditions and corrective actions. Records will be kept for a minimum of three years.

- ii. **Locate Problems.** The accident investigator must determine which aspects of the operation or process require additional attention (what type of constructive action can eliminate the cause(s) of the accident or near-miss).
 - iii. **Note Previous Actions.** Actions already taken to reduce or eliminate the exposures being investigated should be noted, along with those remaining to be addressed.
 - iv. **Note Interim Precautions.** Any interim or temporary precautions should also be noted. Any pending corrective action and reason for delaying its implementation should be identified.
 - v. **Identify Corrective Action.** Corrective action should be identified in terms of not only how it will prevent a recurrence of the accident or near-miss, but also how it will improve the overall operation. The solution should be a means of achieving not only accident control, but also total operation control.
- H. Code of Safe Practices.**
- i. All employees shall follow these safe practices rules, render every possible aid to safe operations, and report all unsafe conditions or practices to the Foreman, Field Operations Supervisor, or General Manager.
 - ii. Supervising employees shall insist on employees observing and obeying every rule, regulation, and order as is necessary to the safe conduct of the work, and shall take such action as necessary to obtain observance. Each employee should be safety minded and encourage co-workers to do the same.
 - iii. Anyone known to be under the influence of drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job while in that condition, and will be subject to the discipline specified in the Paragraph addressing Drug and Alcohol Abuse.
 - iv. Horseplay, scuffling, and other acts which tend to have an adverse influence on the safety or well-being of the employees shall be prohibited.
 - v. Work shall be well planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
 - vi. No one shall knowingly be permitted or required to work while the employee's ability or alertness is so impaired by fatigue, illness, or other causes that it might unnecessarily expose the employee or others to injury.
 - vii. Employees shall not enter manholes, underground vaults, chambers or other similar places that receive little ventilation, unless it has been determined that it is safe to enter.

- viii. Employees shall be instructed to ensure that all guards and other protective devices are in proper places and adjusted, and shall report deficiencies promptly to the Foreman or Field Operations Superintendent.
- ix. Crowding or pushing when boarding or leaving any vehicle or other conveyance shall be prohibited.
- x. Workers shall not handle or tamper with any electrical equipment, machinery, or air or water lines in a manner not within the scope of their duties, unless they have received instructions from the Foreman or Field Operations Superintendent, or other responsible managing employee.
- xi. All injuries shall be reported promptly to the Foreman or Field Operations Superintendent, or other responsible managing employee, so that arrangements can be made for medical or first aid treatment.
- xii. When lifting heavy objects, the large muscles of the leg instead of the smaller muscles of the back shall be used.
- xiii. Materials, tools, or other objects shall not be thrown from buildings or structures until proper precautions are taken to protect others from the falling objects.
- xiv. Employees shall cleanse thoroughly after handling hazardous or unhealthy substances, and follow special instructions from authorized sources.
- xv. Work shall be so arranged that employees are able to face a ladder and use both hands while climbing.
- xvi. Gasoline shall not be used for cleaning purposes.
- xvii. No burning, welding, or other source of ignition shall be applied to any enclosed tank or vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authority for the work is obtained from the Field Operations Superintendent, or other responsible managing employee.
- xviii. Any damage to scaffolds, false work, shoring or other supporting structures shall be immediately reported to the Foreman or Field Operations Superintendent, or other responsible managing employee.
- xix. All tools and equipment shall be maintained in good condition.
- xx. Damaged tools or equipment shall be removed from service and tagged "DEFECTIVE."
- xxi. Pipe or Stillson wrenches shall not be used as substitute for other wrenches.
- xxii. Only appropriate tools shall be used for the job.

- **Training:** Training sessions, including the type of training, date, and trainer information, will be documented and kept for at least three years.

5. Communication

The District will maintain clear, open communication with employees regarding occupational health and safety. This will include:

- **Regular safety meetings,** at least quarterly, where employees can openly discuss safety issues.
- **Supervisors:** Supervisors will conduct safety meetings (e.g., toolbox or tailgate meetings) at least every ten working days to emphasize safe practices.
- **General Safety Meetings:** General meetings will be held monthly, focusing on accident history, employee feedback, and guest presentations from safety experts.
- **Written safety information** will be made available in employee break rooms, and new employees will receive safety training during their orientation.

6. Training Programs

All employees will receive safety training appropriate to their duties:

- **New employees** will be trained on safety protocols before starting work.
- **Employees** will receive additional training if they are assigned new duties or equipment.
- **Periodic safety training sessions** will reinforce existing protocols and address any new hazards.
- **Documentation of training** will be maintained for at least three years.

7. Safety Inspections

Regular safety inspections will be conducted to identify hazards and unsafe practices. Inspections will be:

- **Conducted quarterly or as needed** (e.g., after an accident or when new equipment is introduced).
- **Documented with a Hazard Checklist,** signed and dated by the inspector. Corrective actions must be taken and documented.
- **Conducted by qualified personnel or external consultants** as necessary.

8. Accident Investigations

All accidents and near-misses will be thoroughly investigated by trained personnel to identify causes and implement preventive measures. A written report will be prepared, and corrective actions will include:

- **Additional training or disciplinary measures.**
- **Changes to equipment, processes, or staffing.**

9. Unsafe Conditions and Work Practices

The District will ensure prompt correction of unsafe conditions:

- Hazards will be prioritized based on severity.
 - Protective measures such as lockout/tagout will be used to eliminate immediate dangers.
 - Records of hazard corrections will be kept for at least three years.
- 10. Recordkeeping**
- As a local government entity, the District will maintain all required records related to the LPP for at least five years, in compliance with Cal/OSHA standards:
- 11. Code of Safe Practices**
- Reporting all unsafe conditions and accidents immediately.
 - Using proper lifting techniques and following safe work practices.
 - Avoiding horseplay, drugs, or other impairments that could compromise safety.
 - Ensuring equipment is in good working condition, with any defects reported and tagged as "DEFECTIVE."
 - Following lockout/tagout procedures when necessary.
 - Supervisors are responsible for enforcing safety rules and ensuring all employees comply.

19. All tools and equipment shall be maintained in good condition.
20. Damaged tools or equipment shall be removed from service and tagged "DEFECTIVE."
21. Pipe wrenches shall not be used as a substitute for other wrenches.
22. Only appropriate tools shall be used for the job.
23. Wheelbarrows shall not be used with handles in an upright position.
24. Portable electric tools shall not be lifted or lowered by means of the power cord. Ropes shall be used for this purpose.
25. In locations where the use of a portable power tool is difficult, the tool shall be supported by means of a rope or similar support of adequate strength.
26. Only authorized persons shall operate machinery or equipment.
27. Loose or frayed clothing, or long hair, dangling ties, finger rings, etc. shall not be worn around moving machinery or other sources of entanglement.
28. Machinery shall not be serviced, repaired or adjusted while in operation, nor shall oiling of moving parts be attempted, except on equipment that is designed or fitted with safeguards to protect the person performing the work.
29. Where appropriate, lock-out/block-out procedures shall be used.
30. Employees shall not work under vehicles supported by jacks or chain hoists, without protective blocking that will prevent injury if jacks or hoists should fail.
31. Air hoses shall not be disconnected at compressors until hose line has been bled.
32. All excavations shall be visually inspected before backfilling, to ensure that it is safe to backfill.

- xxiii. Wheelbarrows shall not be used with handles in an upright position.
- xxiv. Portable electric tools shall not be lifted or lowered by means of the power cord. Ropes shall be used for this purpose.
- xxv. In locations where the use of a portable power tool is difficult, the tool shall be supported by means of a rope or similar support of adequate strength.
- xxvi. Only authorized persons shall operate machinery or equipment.
- xxvii. Loose or frayed clothing, or long hair, dangling ties, finger rings, etc., shall not be worn around moving machinery or other sources of entanglement.
- xxviii. Machinery shall not be serviced, repaired or adjusted while in operation, nor shall oiling of moving parts be attempted, except on equipment that is designed or fitted with safeguards to protect the person performing the work.
- xxix. Where appropriate, lock-out procedures shall be used.
- xxx. Employees shall not work under vehicles supported by jacks or chain hoists, without protective blocking that will prevent injury if jacks or hoists should fail.
- xxxi. Air hoses shall not be disconnected at compressors until hose line has been bled.
- xxxii. All excavations shall be visually inspected before backfilling, to ensure that it is safe to backfill.
- xxxiii. Excavating equipment shall not be operated near tops of cuts, banks, and cliffs if employees are working below.
- xxxiv. Tractors, backhoes and other similar equipment shall not operate where there is possibility of overturning in dangerous areas like edges of deep fills, cut banks, and steep slopes.

An Injury and Illness Prevention Program, which will conform to the requirements of SB 198 and the Standards promulgated in response thereto by the California Occupational Safety and Health Standards Board, will require more than just the implementation of a policy similar to the foregoing sample. Full compliance will require an in-depth and individualized assessment of an agency's current workplace conditions, practices and problems. Said assessment must be documented and include a safety and health survey, workplace assessment, evaluation of assessment information, development of an action plan, implementation of said plan, and ongoing maintenance of the program. C.S.D.A. encourages its members to take full advantage of Cal/OSHA's Consultation Service. In addition to suggesting both governmental and private sources for information, Cal/OSHA has a publication entitled, "Guide to Developing Your Workplace Injury & Illness Prevention Program with Checklists for Self-Inspection." This document and other information can be obtained from the Cal/OSHA Consultation Service Offices listed below:

33. Excavating equipment shall not be operated near tops of cuts, banks, and cliffs if employees are working below.

34. Tractors, backhoes and other similar equipment shall not operate where there is a possibility of overturning in dangerous areas like edges of deep fills, cut banks, and steep slopes.

5025.9 Competent Person. For the purpose of defining the competent person on the jobsite, the order of hierarchy is listed as: Water Production II or Senior Water Utility Worker, Water Production, Cross-Connection Non-Potable Water or Water Utility Supervisor, Water Utility Superintendent and Director of Operations. Such designation must be listed on the essential functions of the job description of each position.

5025.10 Implementation. An Injury and Illness Prevention Program, which will conform to the requirements of SB 198 and the Standards promulgated in response thereto by the California Occupational Safety and Health Standards Board, will require more than just the implementation of a policy similar to the foregoing example. Full compliance will require an in-depth and individualized assessment of an agency's current workplace conditions, practices and problems. Said assessment must be documented and include a safety and health survey, workplace assessment, evaluation of assessment information, development of an action plan, implementation of said plan, and ongoing maintenance of the program. The District encourages its members to take full advantage of Cal/OSHA's Consultation Service. In addition to suggesting both governmental and private sources for information, Cal/OSHA has a publication entitled, "Guide to Developing Your Workplace Injury & Illness Prevention Program with Checklists for Self-Inspection." This document and other information can be obtained from the nearest Cal/OSHA Consultation Service Offices.

5025.11 Non-Retaliation. The District is committed to ensuring a safe work environment where employees can report injuries, illnesses, safety concerns, or policy violations without fear of retaliation. Retaliation in any form, including harassment or discrimination, is strictly prohibited. Employees who believe they have been retaliated against for reporting safety-related issues should immediately report the incident to Human Resources. The District will investigate all claims of retaliation and take appropriate action, including disciplinary measures if necessary.

POLICY TITLE: OCCUPATIONAL INJURY AND ILLNESS PREVENTION PROGRAM
POLICY NUMBER: 3120

3120.1 It is the policy of the District that accident prevention shall be considered of primary importance in all phases of operation and administration. The District desires to provide safe and healthful working conditions for all of its employees. Therefore, the District will maintain a safety and health program through the implementation of "best practices" to reduce the potential and frequency of injuries. The District's safety and health program will include:

1. Providing mechanical and physical safeguards to the maximum extent possible.
2. Conducting a program of safety and health inspections to find and eliminate unsafe working conditions or practices, to control health hazards, and to comply fully with the safety and health standards and law for every job.
3. Training all employees in good safety and health practices.
4. Providing necessary personal protective equipment (PPE), and instructions for use and care.
5. Developing and enforcing safety and health rules, and requiring that employees cooperate with these rules as a condition of employment.
6. Investigating promptly and thoroughly, every accident to determine its cause and correct the problem to prevent recurrence.
7. Developing a system of recognition and awards for outstanding safety service and/or performance.

3120.2 **Program Responsibility.** Although the District recognizes that the responsibility for safety and health is shared, the General Manager or his/her designee shall be responsible and have full authority for implementing this policy and the District's Injury and Illness Prevention Program (IIPP).

1. The District accepts responsibility for leadership of the safety and health program, for its effectiveness and improvements, and for providing the safeguards required to ensure safe conditions.
2. Supervisory and management personnel are responsible for developing proper attitudes toward safety and health for themselves and in their direct reports, and for ensuring that all operations are performed with the utmost regard for the safety and health of all personnel involved, including themselves.
3. It is equally the duty of each employee to accept and follow established safety regulations and procedures. Unsafe conditions must be reported to a supervisor immediately. Fellow employees that need help should be assisted. Everyone is responsible for the housekeeping duties that pertain to their jobs.
4. No employee will be required to work at a job the employee knows is not safe or healthful. Employees are responsible for wholehearted, genuine operation of all aspects of the safety and health program, including compliance with all rules and regulations, and for continuously practicing safety while performing their duties. Any employee found not practicing safety while performing their duties will be subject to appropriate discipline.
5. Any injury that occurs on the job, even a slight cut or strain, must be reported to management as soon as possible. In no circumstance, except an emergency, should an employee leave a shift without reporting an injury that occurred.

3120.3 **Injury and Illness Records.** The District's recordkeeping system for its Injury and Illness Prevention

Program shall conform to Cal/OSHA standards. Records shall be used to measure and evaluate the success of said program.

1. A report shall be obtained on every injury or illness occurring during the course of work which requires medical treatment.
2. Each injury or illness shall be recorded by Human Resources on the Cal/OSHA Form 300, according to its instructions.
3. A supplementary record of the occupational injury or illness shall be prepared on OSHA Form 5020, according to its instructions.
4. Annually, the summary Cal/OSHA Form 300A shall be prepared and posted in all employee break areas no later than February 1. Said form shall remain posted until March 1.
5. All records specified in this section shall be maintained by the District for a minimum of five years after their preparation.

3120.4 Documentation of Activities. Records shall be maintained of steps taken to establish and maintain the District's Injury and Illness Prevention Program. They shall include:

1. Records of scheduled and periodic inspections as required by Cal/OSHA (California Code of Regulations, Title 8, Chapter 4) to identify unsafe conditions and work practices. The documentation must include the name of the person(s) conducting the inspection, the unsafe conditions and work practices identified (if any), and the action taken to correct the unsafe conditions and work practices. The records of inspections will be maintained for a minimum of 3 years.
2. Documentation of safety and health training required by Cal/OSHA (California Code of Regulations, Title 8, Chapter 4) for each employee. The documentation must specifically include the employee name, training dates, type(s) of training and the name of the training provider. These records will be maintained for a minimum of 3 years.

3120.5 Communication. Readily understandable communication shall be maintained with all affected employees on matters relating to occupational health and safety, including provisions designed to encourage employees to inform the District of hazards at the worksite without fear of reprisal. Communications with employees shall include meetings, training programs, posted written information, and notification by employees about hazards.

1. New employees will receive an initial safety orientation. During the initial safety orientation, employees will be instructed to report any unsafe conditions, and to discuss occupational health concerns.
2. The District's Code of Safe Practices, below, shall be provided to each employee annually. It shall be posted in a conspicuous location such as the employee break room. Employees may request a copy of the Code of Safe Practices from Human Resources or the employee's supervisor.
3. Supervisory employees shall conduct "toolbox" or "tailgate" safety meetings, or equivalent, with their crew(s) at least every 10 working days to emphasize safety. During safety meetings, employees will be encouraged to report any unsafe conditions, and to discuss occupational health concerns. Documentation of these meetings shall be maintained for a minimum of 3 years.
4. Periodic meetings (at least 1 per quarter) of supervisory employees shall be held under the direction of the General Manager or their designee for the discussion of safety problems and accidents that have occurred. Documentation of these meetings shall be maintained for a minimum

of 3 years.

5. General employee meetings shall be conducted (at least 1 per quarter) at which safety is freely and openly discussed by those present. Such meetings shall be regular, scheduled, and announced to all employees. Documentation of these meetings shall be maintained for a minimum of 3 years. Discussions at these meetings should concentrate on:

- a. Feedback from employees.
 - b. Guest speakers from the District's workers' compensation insurance carrier or other agencies concerned with safety.
 - c. Brief audio-visual materials that relate to the District's operations.
6. All employee safety and health suggestions or concerns will be reviewed by the employee's supervisor, who will determine if an inspection, further training, or other action is necessary. The supervisor will communicate what actions, if any, are taken to the employee. If the employee is not satisfied with the actions taken by the supervisor, the employee may direct the matter to either Human Resources or the General Manager.

7. This policy shall be distributed to all employees upon its adoption, to all new employees at the time of hire, and annually thereafter.

3120.6 Occupational Health and Safety Training Program

1. All new employees will be provided a safety orientation during his/her first day on the job. The orientation will be conducted and documented by his/her supervisor and/or Human Resources. It will cover all company safety rules and the safe practices required for their job assignment.
2. Employees given a new job assignment will be provided a safety orientation regarding any new hazards prior to beginning the new job. Employees risking exposure to a new hazard will be given a safety orientation prior to working with the new hazard.
3. A safety orientation will be conducted periodically. Safety rules and safety practices will be emphasized at this training session, which will serve the same purpose as the safety orientation given to new employees.
4. Only individuals who are knowledgeable of the safety hazards and safe practices of the workers under their direction and control will be permitted to supervise.
5. Records will be kept of all training provided. Records will indicate the type of training given, date, the name of the training provider, and signatures of employees in attendance, and will be maintained for a minimum of 3 years.

3120.7 Inspections. Periodic safety inspections shall be conducted to identify existing hazards in the workplace, or conditions, equipment, and procedures that could be potentially hazardous. The inspections shall be conducted by personnel who, through experience or training, are able to identify actual and potential hazards and who understand safe work practices.

1. Inspections will be performed regularly to identify and evaluate workplace hazards with the use of an established checklist (see 3120.5.3).
2. Inspections will also be performed whenever a new process or substance is introduced, when the District receives information that a company process or substance is hazardous, as part of an accident investigation, and when a safety hazard is reported. These inspections may be limited to

the substance or process in question. The frequency of the inspections will depend on the operations involved, the magnitude of the hazards, the proficiency of employees, changes in equipment or work processes, and the history of workplace injuries and illnesses.

3. All inspections will be documented using the Hazard Checklist, which will be signed and dated by the inspector. The inspector will correct or arrange to correct all hazards identified.
4. Inspections may be conducted by outside consultants, the General Manager or their designee, the Director of Operations, the Water Utility Superintendent, or Human Resources. In the event of a safety complaint, the designated inspector should not be a member of the department under investigation, or a supervisor of any employees involved.

3120.8 Accident Investigation. All accidents shall be thoroughly and properly investigated by a responsible managing employee who shall be trained in accident investigation, with the primary focus on understanding why the accident or near-miss occurred and what actions can be taken to prevent a recurrence. A written report of said investigation shall be prepared which adequately identifies the cause(s) to the accident or near-miss occurrence.

1. All accidents, illnesses, and exposures to hazardous substances resulting from employment with the District will be investigated using the Incident Report Form, and submitted to Human Resources.
2. The investigation report will be reviewed by the General Manager, or his/her designee.
3. Particular attention will be given to ways of preventing future occurrences of similar accidents, illnesses, or exposures. Methods of prevention include, but are not limited to:
 - a. Additional training
 - b. Disciplinary action
 - c. Replacement of parts or equipment
 - d. Environmental controls
 - e. Additional staff assigned to tasks or worksites

3120.9 Unsafe Conditions and Work Practices.

1. When safety hazards are corrected, the action taken will be indicated on Hazard Checklist, which will then be signed and dated by the individual making the corrections.
2. Priorities for correction will be determined by the severity of the hazard(s) identified. Employees will be protected from imminent hazards using lockouts or other means of adequately preventing employees from exposure.
3. Hazard checklist forms will be kept as a record of the company's ongoing safety efforts for a minimum of 3 years.

3120.10 Recordkeeping. We are a local governmental entity and we are not required to keep written records of the steps taken to implement and maintain our IIP Program.

3120.11 Code of Safe Practices. All employees shall follow these safe practices rules, render every possible aid to safe operations, and report all unsafe conditions to a responsible managing employee.

1. Supervisory employees shall insist on employees observing and obeying every rule, regulation, and order as is necessary to the safe conduct of the work, and shall take action as necessary to obtain observance.
2. Anyone known to be under the influence of drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job, and will be subject to discipline specified in Policy 3205.
3. Employees shall obey all health and safety warning signs.
4. Horseplay, scuffling, and other acts which tend to have an adverse influence on the safety and well-being of the employees is prohibited.
5. Work shall be well-planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
6. No one shall knowingly be permitted or required to work while the employee's ability or alertness is so impaired by fatigue, illness, or other causes that it might unnecessarily expose the employee or others to injury.
7. Employees shall not enter manholes, underground vaults, chambers, or other similar places that receive little ventilation unless it has been determined that it is safe to enter.
8. Employees will ensure that all guards and other protective devices are in proper places and adjusted, and shall report deficiencies promptly to a responsible managing employee.
9. Employees shall not handle or tamper with any electrical equipment, machinery, or air or waterlines in a manner not within the scope of their regular duties, unless they have adequate instruction and supervision from a responsible managing employee.
10. All injuries shall be reported promptly to a responsible managing employee so that arrangements can be made for medical or first aid treatment.
11. When lifting heavy objects, the large muscles of the leg instead of the smaller muscles of the back shall be used.
12. Materials, tools, or other objects shall not be thrown from buildings or structures until proper precautions are taken to protect others from falling objects.
13. Employees shall cleanse thoroughly after handling hazardous or unhealthy substances, and follow special instructions from authorized sources.
14. Work shall be so arranged that employees are able to face a ladder and use both hands while climbing.
15. No burning, welding, or other source of ignition shall be applied to any enclosed tank or vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authorization for the work is obtained from a responsible managing employee.
16. Any damage to scaffolds, falsework, shoring, or other supporting structures shall be immediately reported to a responsible managing employee.
17. All tools and equipment shall be maintained in good condition. Damaged tools or equipment shall be removed from service and tagged "DEFECTIVE."
18. While working on or cleaning equipment, perform Lockout/Tagout/Blockout procedures if exposed to live wires, moving parts, or flying debris.
19. Only appropriate tools shall be used for the job. For example, Pipe or Stillson wrenches shall not be used as substitute for other wrenches.
20. Tools shall not be altered in a manner not intended by the manufacturer. For example, wrenches may not be altered by the addition of handle-extensions or "cheaters."
21. Portable electric tools shall not be lifted or lowered by means of the power cord. Ropes shall be used for this purpose.
22. Only authorized persons shall operate machinery or equipment.
23. Loose or frayed clothing, long hair, dangling ties, finger rings, etc., shall not be worn around moving

machinery or other sources of entanglement.

24. Machinery shall not be serviced, repaired, or adjusted while in operation. Oiling of moving parts shall not be attempted except on equipment that is designed and fitted with safeguards to protect the person performing the work.
25. Where appropriate, lock-out procedures shall be used.
26. Employees shall not work under vehicles supported by jacks or chain hoists, without protective blocking that will prevent injury if jacks or hoists should fail.
27. Air hoses shall not be disconnected at compressors until the hose line has been bled.
28. All excavations shall be visually inspected before backfilling, to ensure that it is safe to backfill.
29. Excavating equipment shall not be operated near tops of cuts, banks, and cliffs if employees are working below.
30. Tractors, backhoes, and other similar equipment shall not be operated where there is a possibility of overturning in dangerous areas such as steep slopes, edges of fills, or cut banks.
31. Use sound ergonomic principles appropriate for the location and nature of work.
32. Keep walkways, hallways, and doorways free of items or debris to prevent injury.
33. Keep desk drawers, filing cabinets, and overhead cabinets closed when not in use to prevent injury.

TITLE: ILLNESS AND INJURY PREVENTION PROGRAM
POLICY NUMBER: 5025

5025.1 **Program Goal and Outline.** The goal of the District is to provide safe and healthy working conditions for all employees. Therefore, the District will maintain a safety and health program conforming to the best practices of agencies of this type. The District's safety and health program will include:

1. **Safeguards.** Providing mechanical and physical safeguards to the maximum extent possible.
2. **Inspections.** Conducting a program of safety and health inspections to find and eliminate unsafe working conditions or practices, to control health hazards, and to comply fully with the safety and health standards and law for every job.
3. **Training.** Training all employees in good safety and health practices.
4. **Equipment.** Providing necessary personal protective equipment, and instructions for use and care.
5. **Rule Enforcement.** Developing and enforcing safety and health rules, and requiring that employees cooperate with these rules as a condition of employment.
6. **Investigations.** Investigating promptly and thoroughly, every accident to determine its cause and correct the problem as indicated so it will not happen again.
7. **Recognition.** Developing a system of recognition and awards for outstanding safety service and/or performance.

5025.2 **Program Responsibility.** Although the District recognizes that the responsibility for safety and health is shared, the District through its Human Resources and Department of Operations will be responsible and have full authority for implementing this policy and the District's Injury and Illness Prevention Program.

1. **Responsibility.** The District through its Human Resources and Department of Operations accepts responsibility for leadership of the safety and health program, for its effectiveness and improvements, and for providing the safeguards required to ensure safe conditions.
2. **Supervisors.** Supervisory personnel are responsible for developing proper attitudes toward safety and health for themselves and in those they supervise, and for ensuring that all operations are performed with the utmost regard for the safety and health of all personnel involved, including themselves and in accordance with the District's Injury and Illness Prevention Program (IIPP).
3. **Compliance.** No employee will be required to work at a job he/she knows is not safe or healthy. Employees are responsible for wholehearted, genuine operation of all aspects of the safety and health program-including compliance with all rules and regulations-and for continuously practicing safety while performing their duties. Any employee found not practicing safety while performing their duties will be subject to appropriate discipline.

5025.3 **Injury and Illness Records.** The Human Resources Department shall manage the reporting and serve as the custodian for all Injury and Illness records. The District's record keeping system for its Injury and Illness Prevention Program shall conform to Cal/OSHA standards. Records shall be used to measure and evaluate the success of said program.

1. **Reporting.** A report shall be obtained on every injury or illness requiring medical treatment.

Adopted by Resolution XXX

BEAUMONT-CHERRY VALLEY WATER DISTRICT

2. **Recording.** Each injury or illness shall be recorded on the “Cal/OSHA Log and Summary of Occupational Injuries and Illnesses,” Cal/OSHA Form 300A, according to its instructions.
3. **Supplemental Record.** A supplementary record of the occupational injuries and illnesses shall be prepared on OSHA Form 5020, “Employer’s Report of Injury or Illness,” with the same information as in subsection 5025.2, above.
4. **Annual Preparation.** Annually, the summary Cal/OSHA Form 300 shall be prepared and posted no later than February 1 in a place easily observable by employees. Said form shall remain posted until April 30 of the same year.

5025.4 **Documentation of Activities.** Records shall be maintained by the Human Resources Department of steps taken to establish and maintain the District’s Injury and Illness Prevention Program. They shall include:

1. **Inspection Records.** Records of scheduled and periodic inspections as required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] to identify unsafe conditions and work practices. The documentation must include the name of the person(s) conducting the inspection, the unsafe conditions and work practices identified, and the action taken to correct the unsafe conditions and work practices. The records are to be maintained for at least one(1) year.
2. **Training Documentation.** Documentation of safety and health training required by Cal/OSHA [California Code of Regulations, Title 8, Chapter 4] for each employee. The documentation must specifically include employee name or other identifier, training dates, type(s) of training and the name of the training provider. These records must also be kept for at least one (1) year.

5025.5 **Program Communication System.** Readily understandable communication shall be maintained with all affected employees on matters relating to occupational safety and health, including provisions designed to encourage employees to inform the District of hazards at the worksite without fear of reprisal. Communications with employees shall include meetings, training programs, posted written information, and a system of anonymous notification by employees about hazards.

1. **Communication.** Written communications to employees shall be in a language they can understand. If an employee cannot read in any language, said communication shall be made orally in a language he/she can readily understand.
2. **Conspicuous Posting.** The District’s Code of Safe Practices, below, shall be posted at a conspicuous location in the District’s maintenance office, and shall be provided to each supervisory employee who shall keep it readily available.
3. **Meetings.** Periodic meetings (at least one per quarter) of supervisory employees shall be held under the direction of the General Manager or his/her designee for the discussion of safety problems and accidents that have occurred. Documentation of these meetings shall be maintained for three (3) years.
4. **Supervisor Meetings.** Supervisory employees shall conduct “toolbox” or “tailgate” safety meetings, or equivalent, with their crew(s) at least every ten (10) working days to emphasize safety. Documentation of these meetings shall be maintained for three (3) years.
5. **General Meetings.** General employee meetings shall be conducted monthly at which safety is freely and openly discussed by those present. Such meetings should be regular, scheduled, and announced to all employees so that maximum employee attendance can be achieved. Documentation of these meeting shall be maintained for three (3) years. Discussions at these meetings should concentrate on:

Adopted by Resolution XXX

- a. **Accident History.** Occupational accident and injury history within the District, including possible comparisons to other agencies.
 - b. **Feedback.** Feedback from employees.
 - c. **Guest Speakers.** Guest speakers from the District's workers compensation insurance carrier or other agencies concerned with safety.
 - d. **Materials.** Brief audio-visual materials that relate to the District's operations.
6. **Training Programs.** Training programs shall be conducted every six (6) months or when new equipment, machinery or tools are purchased. Employees shall be instructed in the safe operation of said equipment, machinery or tools. Documentation of training programs shall be maintained for three (3) years.
 - a. **New Employees.** New employees shall be trained by their supervisor in the safe operation of the equipment, machinery and tools with which they will be working prior to being allowed to work independently. Documentation of new employee training shall be maintained for three (3) years.
7. **Posters/Bulletins.** Posters and bulletins relating to and encouraging safe and healthy practices shall be posted on a rotational basis at a conspicuous location in the District's maintenance office.

5025.6 **Hazard Assessment and Control.** Periodic safety inspections shall be conducted to identify existing hazards in the workplace, or conditions, equipment and procedures that could be potentially hazardous. The inspections shall be conducted jointly by Human Resources and Director of Operations or his/her designee who, through experience or training, are able to identify actual and potential hazards and who understand safe work practices.

1. **Observe.** Safety inspectors will observe if safe work practices are being followed and will ensure that unsafe conditions or procedures are identified and corrected properly.
2. **Quarterly.** Safety inspections will be conducted at least quarterly. The frequency of the inspections will depend on the operations involved, the magnitude of the hazards, the proficiency of employees, changes in equipment or work processes, and the history or workplace injuries and illnesses.
3. **Written Assessment.** A written assessment shall be prepared after said inspections which will document identified hazards and prescribe procedures for the elimination of same, and measures that can be taken to prevent their recurrence.
4. **Assessment Review.** The General Manager or his/her designee will review written inspection reports and/or assessments prepared by Human Resources and will assist in prioritizing actions and verify completion of previous corrective actions. He/she shall also review the overall inspection program to determine trends.

5025.7 **Accident Investigation.** All accidents shall be thoroughly and properly investigated jointly by the Human Resources and Director of Operations or his/her designee, with the primary focus of understanding why the accident or near-miss occurred and what actions can be taken to preclude recurrence. A written report of said investigation shall be prepared which adequately identifies the cause(s) of the accident or near-miss occurrence.

1. **Obtain Facts.** The investigation must obtain all the facts surrounding the occurrence: what caused the situation to occur; who was involved; was/were the employee(s) qualified to perform the functions involved in the accident or near-miss; were they properly trained; were proper operating procedures established for the task involved; were procedures followed, and if not, why not; where else this or a similar situation might exist, and how it can be corrected.
2. **Locate Problems.** The accident investigator must determine which aspects of the

operation or process require additional attention (what type of constructive action can eliminate the cause(s) of the accident or near-miss).

3. **Note Previous Actions.** Actions already taken to reduce or eliminate the exposures being investigated should be noted, along with those remaining to be addressed.
4. **Note Interim Procedures.** Any interim or temporary precautions should also be noted. Any pending corrective action and reason for delaying its implementation should be identified.
5. **Identify Corrective Action.** Corrective action should be identified in terms of not only how it will prevent a recurrence of the accident or near-miss, but also how it will improve the overall operation. The solution should be a means of achieving not only accident control, but also total operation control.

5025.8 **Code of Safe Practices.**

1. All employees shall follow the safe practices rules identified in the District's Injury and Illness Prevention Program (IIPP), render every possible aid to safe operations, and report all unsafe conditions or practices to the immediate supervisor, Department Head, Human Resources or General Manager.
2. Supervising employees shall insist on employees observing and obeying every rule, regulation, and order as is necessary to the safe conduct of the work, and shall take such action as necessary to obtain observance. Each employee should be safety minded and encourage co-workers to do the same.
3. Anyone known to be under the influence of drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job while in that condition, and will be subject to the discipline specified in Policy 3205 Substance Abuse addressing Drug and Alcohol Abuse.
4. Horseplay, scuffling, and other acts which tend to have an adverse influence on the safety or well-being of the employees shall be prohibited.
5. Work shall be well planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
6. No one shall knowingly be permitted or required to work while the employee's ability or alertness is so impaired by fatigue, illness, or other causes that it might unnecessarily expose the employee or others to injury.
7. Employees shall not enter manholes, underground vaults, chambers or other similar places that receive little ventilation, unless it has been determined that it is safe to enter.
8. Employees shall be instructed to ensure that all guards and other protective devices are in proper places and adjusted, and shall report deficiencies promptly to the Competent Person on the jobsite
9. Crowding or pushing when boarding or leaving any vehicle or other conveyance shall be prohibited.
10. Workers shall not handle or tamper with any electrical equipment, machinery, or air or water lines in a manner not within the scope of their duties, unless they have received instructions from the Competent Person on the jobsite, or other responsible managing employee.
11. All injuries shall be reported promptly to the Competent Person on the jobsite, or other responsible managing employee, so that arrangements can be made for medical or first aid treatment.
12. When lifting heavy objects, the large muscles of the leg instead of the smaller muscles of the back shall be used.
13. Materials, tools, or other objects shall not be thrown from buildings or structures until

Adopted by Resolution XXX

BEAUMONT-CHERRY VALLEY WATER DISTRICT

- proper precautions are taken to protect others from falling objects.
14. Employees shall cleanse thoroughly after handling hazardous or unhealthy substances and follow special instructions from authorized sources and in accordance with the Safety Data Sheet (SDS).
 15. Work shall be so arranged that employees are able to face a ladder and use both hands while climbing.
 16. Gasoline shall not be used for cleaning purposes.
 17. No burning, welding, or other source of ignition shall be applied to any enclosed tank or vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authority for the work is obtained from the Water Utility Superintendent, Director of Operations or his/her designee, or other responsible managing employee.
 18. Any damage to scaffolds, false work, shoring or other supporting structures shall be immediately reported to the Competent Person on the jobsite, or other responsible managing employee.
 19. All tools and equipment shall be maintained in good condition.
 20. Damaged tools or equipment shall be removed from service and tagged "DEFECTIVE."
 21. Pipe wrenches shall not be used as a substitute for other wrenches.
 22. Only appropriate tools shall be used for the job.
 23. Wheelbarrows shall not be used with handles in an upright position.
 24. Portable electric tools shall not be lifted or lowered by means of the power cord. Ropes shall be used for this purpose.
 25. In locations where the use of a portable power tool is difficult, the tool shall be supported by means of a rope or similar support of adequate strength.
 26. Only authorized persons shall operate machinery or equipment.
 27. Loose or frayed clothing, or long hair, dangling ties, finger rings, etc. shall not be worn around moving machinery or other sources of entanglement.
 28. Machinery shall not be serviced, repaired or adjusted while in operation, nor shall oiling of moving parts be attempted, except on equipment that is designed or fitted with safeguards to protect the person performing the work.
 29. Where appropriate, lock-out/block-out procedures shall be used.
 30. Employees shall not work under vehicles supported by jacks or chain hoists, without protective blocking that will prevent injury if jacks or hoists should fail.
 31. Air hoses shall not be disconnected at compressors until hose line has been bled.
 32. All excavations shall be visually inspected before backfilling, to ensure that it is safe to backfill.
 33. Excavating equipment shall not be operated near tops of cuts, banks, and cliffs if employees are working below.
 34. Tractors, backhoes and other similar equipment shall not operate where there is a possibility of overturning in dangerous areas like edges of deep fills, cut banks, and steep slopes.

5025.9 Competent Person. For the purpose of defining the competent person on the jobsite, the order of hierarchy is listed as: Water Production II or Senior Water Utility Worker, Water Production, Cross-Connection Non-Potable Water or Water Utility Supervisor, Water Utility Superintendent and Director of Operations. Such designation must be listed on the essential functions of the job description of each position.

5025.10 Implementation. An Injury and Illness Prevention Program, which will conform to the

Adopted by Resolution XXX

BEAUMONT-CHERRY VALLEY WATER DISTRICT

requirements of SB 198 and the Standards promulgated in response thereto by the California Occupational Safety and Health Standards Board, will require more than just the implementation of a policy similar to the foregoing example. Full compliance will require an in-depth and individualized assessment of an agency's current workplace conditions, practices and problems. Said assessment must be documented and include a safety and health survey, workplace assessment, evaluation of assessment information, development of an action plan, implementation of said plan, and ongoing maintenance of the program. The District encourages its members to take full advantage of Cal/OSHA's Consultation Service. In addition to suggesting both governmental and private sources for information, Cal/OSHA has a publication entitled, "Guide to Developing Your Workplace Injury & Illness Prevention Program with Checklists for Self-Inspection." This document and other information can be obtained from the nearest Cal/OSHA Consultation Service Offices.

5025.11 **Non-Retaliation.** The District is committed to ensuring a safe work environment where employees can report injuries, illnesses, safety concerns, or policy violations without fear of retaliation. Retaliation in any form, including harassment or discrimination, is strictly prohibited. Employees who believe they have been retaliated against for reporting safety-related issues should immediately report the incident to Human Resources. The District will investigate all claims of retaliation and take appropriate action, including disciplinary measures if necessary.

Adopted by Resolution XXX

POLICY TITLE: OCCUPATIONAL INJURY AND ILLNESS PREVENTION PROGRAM
POLICY NUMBER: 3120

3120.1 It is the policy of the District that accident prevention shall be considered of primary importance in all phases of operation and administration. The District desires to provide safe and healthful working conditions for all of its employees. Therefore, the District will maintain a safety and health program through the implementation of "best practices" to reduce the potential and frequency of injuries. The District's safety and health program will include:

1. Providing mechanical and physical safeguards to the maximum extent possible.
2. Conducting a program of safety and health inspections to find and eliminate unsafe working conditions or practices, to control health hazards, and to comply fully with the safety and health standards and law for every job.
3. Training all employees in good safety and health practices.
4. Providing necessary personal protective equipment (PPE), and instructions for use and care.
5. Developing and enforcing safety and health rules, and requiring that employees cooperate with these rules as a condition of employment.
6. Investigating promptly and thoroughly, every accident to determine its cause and correct the problem to prevent recurrence.
7. Developing a system of recognition and awards for outstanding safety service and/or performance.

3120.2 **Program Responsibility.** Although the District recognizes that the responsibility for safety and health is shared, the General Manager or his/her designee shall be responsible and have full authority for implementing this policy and the District's Injury and Illness Prevention Program (IIPP).

1. The District accepts responsibility for leadership of the safety and health program, for its effectiveness and improvements, and for providing the safeguards required to ensure safe conditions.
2. Supervisory and management personnel are responsible for developing proper attitudes toward safety and health for themselves and in their direct reports, and for ensuring that all operations are performed with the utmost regard for the safety and health of all personnel involved, including themselves.
3. It is equally the duty of each employee to accept and follow established safety regulations and procedures. Unsafe conditions must be reported to a supervisor immediately. Fellow employees that need help should be assisted. Everyone is responsible for the housekeeping duties that pertain to their jobs.
4. No employee will be required to work at a job the employee knows is not safe or healthful. Employees are responsible for wholehearted, genuine operation of all aspects of the safety and health program, including compliance with all rules and regulations, and for continuously practicing safety while performing their duties. Any employee found not practicing safety while performing their duties will be subject to appropriate discipline.
5. Any injury that occurs on the job, even a slight cut or strain, must be reported to management as soon as possible. In no circumstance, except an emergency, should an employee leave a shift without reporting an injury that occurred.

3120.3 **Injury and Illness Records.** The District's recordkeeping system for its Injury and Illness Prevention

Program shall conform to Cal/OSHA standards. Records shall be used to measure and evaluate the success of said program.

1. A report shall be obtained on every injury or illness occurring during the course of work which requires medical treatment.
2. Each injury or illness shall be recorded by Human Resources on the Cal/OSHA Form 300, according to its instructions.
3. A supplementary record of the occupational injury or illness shall be prepared on OSHA Form 5020, according to its instructions.
4. Annually, the summary Cal/OSHA Form 300A shall be prepared and posted in all employee break areas no later than February 1. Said form shall remain posted until March 1.
5. All records specified in this section shall be maintained by the District for a minimum of five years after their preparation.

3120.4 Documentation of Activities. Records shall be maintained of steps taken to establish and maintain the District's Injury and Illness Prevention Program. They shall include:

1. Records of scheduled and periodic inspections as required by Cal/OSHA (California Code of Regulations, Title 8, Chapter 4) to identify unsafe conditions and work practices. The documentation must include the name of the person(s) conducting the inspection, the unsafe conditions and work practices identified (if any), and the action taken to correct the unsafe conditions and work practices. The records of inspections will be maintained for a minimum of 3 years.
2. Documentation of safety and health training required by Cal/OSHA (California Code of Regulations, Title 8, Chapter 4) for each employee. The documentation must specifically include the employee name, training dates, type(s) of training and the name of the training provider. These records will be maintained for a minimum of 3 years.

3120.5 Communication. Readily understandable communication shall be maintained with all affected employees on matters relating to occupational health and safety, including provisions designed to encourage employees to inform the District of hazards at the worksite without fear of reprisal. Communications with employees shall include meetings, training programs, posted written information, and notification by employees about hazards.

1. New employees will receive an initial safety orientation. During the initial safety orientation, employees will be instructed to report any unsafe conditions, and to discuss occupational health concerns.
2. The District's Code of Safe Practices, below, shall be provided to each employee annually. It shall be posted in a conspicuous location such as the employee break room. Employees may request a copy of the Code of Safe Practices from Human Resources or the employee's supervisor.
3. Supervisory employees shall conduct "toolbox" or "tailgate" safety meetings, or equivalent, with their crew(s) at least every 10 working days to emphasize safety. During safety meetings, employees will be encouraged to report any unsafe conditions, and to discuss occupational health concerns. Documentation of these meetings shall be maintained for a minimum of 3 years.
4. Periodic meetings (at least 1 per quarter) of supervisory employees shall be held under the direction of the General Manager or their designee for the discussion of safety problems and accidents that have occurred. Documentation of these meetings shall be maintained for a minimum

of 3 years.

5. General employee meetings shall be conducted (at least 1 per quarter) at which safety is freely and openly discussed by those present. Such meetings shall be regular, scheduled, and announced to all employees. Documentation of these meetings shall be maintained for a minimum of 3 years. Discussions at these meetings should concentrate on:
 - a. Feedback from employees.
 - b. Guest speakers from the District's workers' compensation insurance carrier or other agencies concerned with safety.
 - c. Brief audio-visual materials that relate to the District's operations.
6. All employee safety and health suggestions or concerns will be reviewed by the employee's supervisor, who will determine if an inspection, further training, or other action is necessary. The supervisor will communicate what actions, if any, are taken to the employee. If the employee is not satisfied with the actions taken by the supervisor, the employee may direct the matter to either Human Resources or the General Manager.
7. This policy shall be distributed to all employees upon its adoption, to all new employees at the time of hire, and annually thereafter.

3120.6 Occupational Health and Safety Training Program

1. All new employees will be provided a safety orientation during his/her first day on the job. The orientation will be conducted and documented by his/her supervisor and/or Human Resources. It will cover all company safety rules and the safe practices required for their job assignment.
2. Employees given a new job assignment will be provided a safety orientation regarding any new hazards prior to beginning the new job. Employees risking exposure to a new hazard will be given a safety orientation prior to working with the new hazard.
3. A safety orientation will be conducted periodically. Safety rules and safety practices will be emphasized at this training session, which will serve the same purpose as the safety orientation given to new employees.
4. Only individuals who are knowledgeable of the safety hazards and safe practices of the workers under their direction and control will be permitted to supervise.
5. Records will be kept of all training provided. Records will indicate the type of training given, date, the name of the training provider, and signatures of employees in attendance, and will be maintained for a minimum of 3 years.

3120.7 **Inspections.** Periodic safety inspections shall be conducted to identify existing hazards in the workplace, or conditions, equipment, and procedures that could be potentially hazardous. The inspections shall be conducted by personnel who, through experience or training, are able to identify actual and potential hazards and who understand safe work practices.

1. Inspections will be performed regularly to identify and evaluate workplace hazards with the use of an established checklist (see 3120.5.3).
2. Inspections will also be performed whenever a new process or substance is introduced, when the District receives information that a company process or substance is hazardous, as part of an accident investigation, and when a safety hazard is reported. These inspections may be limited to

the substance or process in question. The frequency of the inspections will depend on the operations involved, the magnitude of the hazards, the proficiency of employees, changes in equipment or work processes, and the history of workplace injuries and illnesses.

3. All inspections will be documented using the Hazard Checklist, which will be signed and dated by the inspector. The inspector will correct or arrange to correct all hazards identified.
4. Inspections may be conducted by outside consultants, the General Manager or their designee, the Director of Operations, the Water Utility Superintendent, or Human Resources. In the event of a safety complaint, the designated Inspector should not be a member of the department under investigation, or a supervisor of any employees involved.

3120.8 **Accident Investigation.** All accidents shall be thoroughly and properly investigated by a responsible managing employee who shall be trained in accident investigation, with the primary focus on understanding why the accident or near-miss occurred and what actions can be taken to prevent a recurrence. A written report of said investigation shall be prepared which adequately identifies the cause(s) fo the accident or near-miss occurrence.

1. All accidents, illnesses, and exposures to hazardous substances resulting from employment with the District will be investigated using the Incident Report Form, and submitted to Human Resources.
2. The investigation report will be reviewed by the General Manager, or his/her designee.
3. Particular attention will be given to ways of preventing future occurrences of similar accidents, illnesses, or exposures. Methods of prevention include, but are not limited to:
 - a. Additional training
 - b. Disciplinary action
 - c. Replacement of parts or equipment
 - d. Environmental controls
 - e. Additional staff assigned to tasks or worksites

3120.9 **Unsafe Conditions and Work Practices.**

1. When safety hazards are corrected, the action taken will be indicated on Hazard Checklist, which will then be signed and dated by the individual making the corrections.
2. Priorities for correction will be determined by the severity of the hazard(s) identified. Employees will be protected from imminent hazards using lockouts or other means of adequately preventing employees from exposure.
3. Hazard checklist forms will be kept as a record of the company's ongoing safety efforts for a minimum of 3 years.

3120.10 **Recordkeeping.** We are a local governmental entity and we are not required to keep written records of the steps taken to implement and maintain our IIP Program.

3120.11 **Code of Safe Practices.** All employees shall follow these safe practices rules, render every possible aid to safe operations, and report all unsafe conditions to a responsible managing employee.

1. Supervisory employees shall insist on employees observing and obeying every rule, regulation, and order as is necessary to the safe conduct of the work, and shall take action as necessary to obtain observance.
2. Anyone known to be under the influence of drugs or intoxicating substances which impair the employee's ability to safely perform the assigned duties shall not be allowed on the job, and will be subject to discipline specified in Policy 3205.
3. Employees shall obey all health and safety warning signs.
4. Horseplay, scuffling, and other acts which tend to have an adverse influence on the safety and well-being of the employees is prohibited.
5. Work shall be well-planned and supervised to prevent injuries in the handling of materials and in working together with equipment.
6. No one shall knowingly be permitted or required to work while the employee's ability or alertness is so impaired by fatigue, illness, or other causes that it might unnecessarily expose the employee or others to injury.
7. Employees shall not enter manholes, underground vaults, chambers, or other similar places that receive little ventilation unless it has been determined that it is safe to enter.
8. Employees will ensure that all guards and other protective devices are in proper places and adjusted, and shall report deficiencies promptly to a responsible managing employee.
9. Employees shall not handle or tamper with any electrical equipment, machinery, or air or waterlines in a manner not within the scope of their regular duties, unless they have adequate instruction and supervision from a responsible managing employee.
10. All injuries shall be reported promptly to a responsible managing employee so that arrangements can be made for medical or first aid treatment.
11. When lifting heavy objects, the large muscles of the leg instead of the smaller muscles of the back shall be used.
12. Materials, tools, or other objects shall not be thrown from buildings or structures until proper precautions are taken to protect others from falling objects.
13. Employees shall cleanse thoroughly after handling hazardous or unhealthy substances, and follow special instructions from authorized sources.
14. Work shall be so arranged that employees are able to face a ladder and use both hands while climbing.
15. No burning, welding, or other source of ignition shall be applied to any enclosed tank or vessel, even if there are some openings, until it has first been determined that no possibility of explosion exists, and authorization for the work is obtained from a responsible managing employee.
16. Any damage to scaffolds, falsework, shoring, or other supporting structures shall be immediately reported to a responsible managing employee.
17. All tools and equipment shall be maintained in good condition. Damaged tools or equipment shall be removed from service and tagged "DEFECTIVE."
18. While working on or cleaning equipment, perform Lockout/Tagout/Blockout procedures if exposed to live wires, moving parts, or flying debris.
19. Only appropriate tools shall be used for the job. For example, Pipe or Stillson wrenches shall not be used as substitute for other wrenches.
20. Tools shall not be altered in a manner not intended by the manufacturer. For example, wrenches may not be altered by the addition of handle-extensions or "cheaters."
21. Portable electric tools shall not be lifted or lowered by means of the power cord. Ropes shall be used for this purpose.
22. Only authorized persons shall operate machinery or equipment.
23. Loose or frayed clothing, long hair, dangling ties, finger rings, etc., shall not be worn around moving

- machinery or other sources of entanglement.
24. Machinery shall not be serviced, repaired, or adjusted while in operation. Oiling of moving parts shall not be attempted except on equipment that is designed and fitted with safeguards to protect the person performing the work.
 25. Where appropriate, lock-out procedures shall be used.
 26. Employees shall not work under vehicles supported by jacks or chain hoists, without protective blocking that will prevent injury if jacks or hoists should fail.
 27. Air hoses shall not be disconnected at compressors until the hose line has been bled.
 28. All excavations shall be visually inspected before backfilling, to ensure that it is safe to backfill.
 29. Excavating equipment shall not be operated near tops of cuts, banks, and cliffs if employees are working below.
 30. Tractors, backhoes, and other similar equipment shall not be operated where there is a possibility of overturning in dangerous areas such as steep slopes, edges of fills, or cut banks.
 31. Use sound ergonomic principles appropriate for the location and nature of work.
 32. Keep walkways, hallways, and doorways free of items or debris to prevent injury.
 33. Keep desk drawers, filing cabinets, and overhead cabinets closed when not in use to prevent injury.



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
September 17, 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 / Board Reviewed Drafts	Board Approved	% Complete
Board Administration ¹	25	25	22	22	88.00%
Engineering ²	8	8	0	1	12.50%
Finance	15	15	5	5	33.33%
Human Resources	68	68	64	60	88.23%
Information Technology ³	52	52	0	0	0.00%
Operations⁴	40	40	0	0	0.00%
TOTALS	168	168	94	88	52.38%

¹ Previously titled “Administration” but added clarifier that is specific to the Board of Directors.
² Added four (4) policies identified previously as “Operations”
³ Increased 33 more policies related to Cybersecurity which will go directly to the Board.
⁴ Moved the four (4) policies to Engineering Department as these are aligned more with Engineering.



Table 2 – Recommended Policies to be added to the Policy Matrix

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	3176	Transfers and Voluntary Demotion	2 pages	August	September
2	3136	Succession and Workforce Planning	1 page	August	September
3	3255	Other Mandated Leaves of Absence	2 pages	August	September
4	5025	Illness and Injury Prevention Program (IIPP)	5 pages	August	September
5	3090	Family and Medical Leave	3 pages	September	October
6	3145	Driver Training and Record Review	2 pages	September	October
7	3111	Leave for Crime Victims and Family Members	1 page	September	October

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

Staff Report prepared by Ren Berioso, Human Resources Manager

**Policy Approval Tracking
BCVWD Policy Manual Project**

Policy Number	New Policy Number	Section	Policy Name	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Committee	Provisionally Approved by Committee	Presented to Board of Directors	Approved by Board of Directors	Adoption Date	Resolution Number
2	1000	General	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
	1005		Contractual Provisions	Human Resources	Additional Edits	2/26/2021	2/22/2021	2/20/2021	4/14/2021	4/14/2021	4/14/2021	21-006
3	2000	Administration	Policy Manual	Human Resources	Additional Edits	3/15/2021	N/A	N/A-directed to Board	3/9/2022	3/9/2022	3/9/2022	22-006
5	2010	Administration	Equal Opportunity	Human Resources	Additional Edits	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
6	2015	Administration	Access to Personnel Records	Human Resources	Additional Edits	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
7	2020	Administration	Harassment	Human Resources	Additional Edits	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
8	2025	Administration	Sexual Harassment	Human Resources	Additional Edits	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-006
N/A	3000	Personnel	Whistleblower Protection	Human Resources	Additional Edits	3/15/2021	3/22/2021	3/22/2021	4/14/2021	4/14/2021	4/14/2021	21-018
N/A	3001	Personnel	Employee Status	Human Resources	Additional Edits	4/12/2021	7/19/2021	7/19/2021	10/13/2021	10/13/2021	10/13/2021	21-018
N/A	3002	Personnel	Employee Information and Emergency	Human Resources	Additional Edits	4/12/2021	6/17/2021	6/17/2021	10/13/2021	10/13/2021	10/13/2021	21-018
N/A	3003	Personnel	Employee Groups	Human Resources	Additional Edits	7/13/2021	7/19/2021	7/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
N/A	3006	Personnel	Compensation	Human Resources	Additional Edits	7/13/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
10 & 49	3010	Personnel	Resolving Wage-Public Works Contractor	Human Resources	Additional Edits	7/13/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
11	3015	Personnel	Employee Performance Evaluation	Human Resources	Additional Edits	8/3/2021	9/20/2021	9/20/2021	10/13/2021	10/13/2021	10/13/2021	21-018
12	3020	Personnel	Performance Evaluation-General	Human Resources	Additional Edits	10/12/2021	5/17/2022	5/17/2022	6/8/2022	6/8/2022	6/8/2022	22-019
13	3025	Personnel	Health and Welfare Benefits	Human Resources	Additional Edits	10/12/2021	11/15/2021	11/15/2021	5/11/2022	5/11/2022	5/11/2022	22-016
14	3030	Personnel	Pay Periods	Human Resources	Additional Edits	12/10/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016
15	3035	Personnel	Gift Acceptance Guidelines	Human Resources	Additional Edits	10/12/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016
16	3040	Personnel	Outside Employment	Human Resources	Additional Edits	6/28/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	24-012
18	3050	Personnel	Volunteer Personnel Workers'	Human Resources	Additional Edits	5/2/2024	6/18/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	24-012
19	3055	Personnel	Work Hours, Overtime, and Standby	Human Resources	Additional Edits	6/14/2022	7/19/2022	7/19/2022 with revisions	9/14/2022	9/14/2022	9/14/2022	22-028
20 (incorrect)	3060	Personnel	Continuity of Service	Human Resources	Additional Edits	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	24-007
21	3070	Personnel	Reduction in Force	Human Resources	Additional Edits	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	24-010
22	3075	Personnel	Holidays	Human Resources	Additional Edits	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	24-002
24	3085	Personnel	Vacation	Human Resources	Additional Edits	1/18/2022	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	23-005
25	3090	Personnel	Sick Leave	Human Resources	Additional Edits	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	24-007
26	3095	Personnel	Family and Medical Leave	Human Resources	Additional Edits	8/31/2022	10/18/2022	10/18/2022	12/14/2022	12/14/2022	12/14/2022	22-043
N/A	3096	Personnel	Pregnancy Disability Leave	Human Resources	Additional Edits	9/1/2022	9/20/2022	9/20/2022	12/14/2022	12/14/2022	12/14/2022	22-043
27	3100	Personnel	Lactation Accommodation	Human Resources	Additional Edits	8/25/2022	9/20/2022	9/20/2022	12/14/2022	12/14/2022	12/14/2022	22-043
28	3105	Personnel	Bereavement Leave	Human Resources	Additional Edits	5/10/2022	5/17/2022	5/17/2022	6/8/2022	6/8/2022	6/8/2022	22-019
29	3110	Personnel	Personal Leave of Absence	Human Resources	Additional Edits	6/28/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	24-012
N/A	3111	Personnel	Jury and Witness Duty	Human Resources	Additional Edits	10/5/2023	10/17/2023	11/21/2023	12/13/2023	12/13/2023	1/10/2024	23-031
30	3115	Personnel	Leave for Crime Victims and Family	Human Resources	Additional Edits	9/29/2022	10/18/2022	10/18/2022	12/14/2022	12/14/2022	12/14/2022	22-043
31	3120	Personnel	Return to Work Policy	Human Resources	Additional Edits	1/11/2023	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	23-005
N/A	3121	Personnel	Occupational Injury and Illness	Human Resources	Additional Edits	1/11/2023	1/17/2023	1/17/2023	2/8/2023	2/8/2023	2/8/2023	23-005
N/A	3122	Personnel	Infectious Disease Control	Human Resources	Additional Edits	2/2/2023	2/21/2023	2/21/2023	3/15/2023	3/15/2023	3/15/2023	23-009
32	3125	Personnel	Workplace Violence	Human Resources	Additional Edits	1/2/2024	1/16/2024	1/16/2024	2/14/2024	2/14/2024	2/14/2024	24-002
33	3130	Personnel	Uniforms and Protective Clothing	Human Resources	Additional Edits	3/14/2023	3/21/2023	3/21/2023	5/10/2023	5/10/2023	5/10/2023	23-013
34	3135	Personnel	Employee Training, Education and Occupational Certification and Succession and Workforce Planning	Human Resources	Additional Edits	6/29/2024	7/16/2024	8/20/2024	9/17/2022	9/17/2022	9/17/2022	22-028
N/A	3136	Personnel	Respiratory Protection Program	Human Resources	Additional Edits	6/14/2022	8/16/2022	8/16/2022	9/17/2022	9/17/2022	9/17/2022	22-028
35	3140	Personnel	Driver Training and Record Review	Human Resources	Additional Edits	6/29/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	24-012
36	3145	Personnel	District Vehicle Usage	Human Resources	Additional Edits	3/14/2023	3/21/2023	3/21/2023	4/12/2023	4/12/2023	4/12/2023	23-010
37	3150	Personnel	Personal Vehicle Usage	Human Resources	Additional Edits	2/5/2024	3/19/2024	3/19/2024	4/16/2024	4/16/2024	4/16/2024	24-007
38	3151	Personnel	HIPAA Compliance and Security Officer	Human Resources	Additional Edits	2/5/2024	3/19/2024	3/19/2024	4/16/2024	4/16/2024	4/16/2024	24-006
39	3160	Personnel	Smoke Free Workplace and Tobacco	Human Resources	Additional Edits	2/5/2024	3/19/2024	3/19/2024	4/16/2024	4/16/2024	4/16/2024	24-010
41	3170	Personnel	Disciplinary Action or Terminations	Human Resources	Additional Edits	6/29/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	24-006
42	3175	Personnel	Transfers and Voluntary Demotion	Human Resources	Additional Edits	6/29/2024	7/16/2024	7/16/2024	8/14/2024	8/14/2024	8/14/2024	24-006
Proposed	3176	Personnel	Neptolom-employment of Relatives	Human Resources	Additional Edits	4/8/2024	4/16/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	24-010
43	3180	Personnel	Employee Separation	Human Resources	Additional Edits	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	24-010
44	3200	Personnel	Grievance Procedures	Human Resources	Additional Edits	5/2/2024	6/18/2024	6/18/2024	7/10/2024	7/10/2024	7/10/2024	24-010
47	3205	Personnel	Substance Abuse	Human Resources	Additional Edits	12/6/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016
48	3206	Personnel	FMCSA Clearinghouse Registration	Human Resources	Additional Edits	12/6/2021	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	22-016

Priority Legend:
 Yellow Highlight = Highest Priority
 Light Blue Highlight = Lowest Priority

**Policy Approval Tracking
BCVWD Policy Manual Project**

Policy Number	New Policy Number	Section	Policy Name	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Committee	Provisionally Approved by Committee	Presented to Board of Directors	Approved by Board of Directors	Adoption Date	Resolution Number
50	3215	Personnel	Personnel Action Form (PAF)	Human Resources	Yes	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	24-007
N/A	3220	Personnel	Recruitment, Selection and Onboarding	Human Resources	Yes	2/5/2024	3/19/2024	3/19/2024	4/10/2024	4/10/2024	4/10/2024	24-006
N/A	3225	Personnel	Employee Leave Donation Program and Workers' Compensation	Human Resources	Yes	2019	5/16/2023	2019	10/9/2019	10/9/2019	10/9/2019	19-011
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
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	4/8/2024	4/16/2024	4/16/2024	5/16/2024	5/16/2024	5/16/2024	24-007
1	4005	Board of Directors	Miscellaneous Leave of Absences	Administration	No							
2	4010	Board of Directors	Basic of Authority	Administration	Yes							
3	4015	Board of Directors	Members of the Board of Directors	Administration	Yes							
4	4020	Board of Directors	Committees of the Board of Directors	Administration	Yes							
5	4025	Board of Directors	Board President	Administration	Yes	Verbal Review during			12/8/2021	12/8/2021	1/11/2023	2023-02
6	4030	Board of Directors	Board Meetings	Administration	Yes							
7	4035	Board of Directors	Board Meeting Agendas	Administration	Yes							
8	4040	Board of Directors	Board Meeting Conduct	Administration	Yes							
9	4045	Board of Directors	Board Actions and Decisions	Administration	Yes							
10	4050	Board of Directors	Attendance at Meetings	Administration	Yes							
11	4055	Board of Directors	Minutes of Board Meetings	Administration	Yes							
12	4060	Board of Directors	Rules of Order for Board and Training, Education and Conferences	Administration	Yes							
13 & 16	4065	Board of Directors	Remuneration, Director Per Diem Fees	Administration	Yes	6/30/2021			7/14/2021	7/14/2021	7/14/2021	2021-12
14	4070	Board of Directors	Payment of Expenses Incurred on	Administration	Yes	6/30/2021			7/14/2021	7/14/2021	7/14/2021	2021-12
15	4075	Board of Directors	Expenditure Reimbursement	Administration	Yes							
17	4080	Board of Directors	Membership in Associations	Administration	Yes							
18	4085	Board of Directors	Partnership in Associations	Administration	Yes							
N/A	4086	Board of Directors	Ethics Training	Administration	No							
19	4090	Board of Directors	Anti-Harassment Training	Administration	No							
20	4095	Board of Directors	Code of Ethics	Administration	Yes							
1	5005	Operations	Ethics Policy	Administration	Yes	7/29/2024	8/20/2024	8/20/2024				
2	5010	Operations	Emergency Preparedness	Human Resources	Yes							
4	5020	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
5	5025	Operations	Environmental Health and Safety	Human Resources	Yes	7/29/2024	8/20/2024	8/20/2024				
6	5030	Operations	Illness and Injury Prevention Program	Human Resources	Yes							
N/A	5031	Operations	Budget Preparation	Finance	Yes	11/8/2022	11/15/2022	11/15/2022	12/14/2022	12/14/2022	12/14/2022	22-043
7	5035	Operations	User Fee Cost Recovery	Finance	Yes	11/15/2022	N/A	N/A	12/14/2022	12/14/2022	12/14/2022	22-089
8	5040	Operations	Fixed-Asset Accounting Control	Finance	Yes							
9	5045	Operations	Fixed-Asset Capitalization	Finance	Yes							
N/A	5046	Operations	Investment of District Funds	Finance	Yes	11/15/2023	N/A	N/A	12/13/2023	12/13/2023	12/13/2023	23-030
N/A	5047	Finance	Other Post-Employment Benefits	Finance	Yes	5/10/2022	N/A	N/A	8/14/2024	8/14/2024	8/14/2024	24-012
10	5050	Operations	Pension Funding	Finance	Yes	8/10/2023	8/1/2024	8/1/2024	8/14/2024	8/14/2024	8/14/2024	24-012
11	5055	Operations	Customer Payment Arrangements	Finance	Yes							
12	5060	Operations	Employment of Consultants and	Finance	Yes							
13	5065	Operations	Employment of Outside Contractors	Finance	Yes							
14	5066	Engineering	Employment of Outside Contractors	Engineering	Yes							
15	5070	Engineering	Escurement Abandonment	Engineering	No							
16	5075	Operations	Escurement Permits	Engineering	Yes							
17	5080	Operations	Encroachment Permits	Finance	Yes		8/1/2024					
18	5085	Operations	Credit Card Usage	Finance	Yes							
19	5090	Operations	Purchasing	Finance	Yes							
N/A	5095	Operations	Disposal of Surplus Property or Records Retention	Finance	Yes	4/28/2023	4/18/2023	5/16/2023	6/14/2023	6/14/2023	6/14/2023	2023-17
N/A	5100	Operations	District Residences and Facility	Human Resources	Yes	7/21/2020	6/21/2021	Requested Edits	10/28/2021	10/28/2021	10/28/2021	21-019
3	5105	Miscellaneous	Press Relations and Social Media	Information Technology	Yes	1/11/2022	4/19/2022	4/19/2022	5/11/2022	5/11/2022	5/11/2022	2022-016
4	5110	Miscellaneous	Public Complaints	Finance	Yes							
6	5115	Engineering	Claims Against the District	Finance	Yes							
			District Standards for the Furnishing of	Engineering	Yes							

Priority Legend:
Yellow Highlight = Highest Priority
Light Blue Highlight = Lowest Priority

**Policy Approval Tracking
BCVWD Policy Manual Project**

Policy Number	New Policy Number	Section	Policy Name	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Committee	Provisionally Approved by Committee	Presented to Board of Directors	Adoption Date	Resolution Number
7	5120	Miscellaneous	Environmental Review Guidelines	Engineering	Yes		N/A	Direct to Full Board			
8	5125	Miscellaneous	Annexation	Engineering	Yes		N/A	Direct to Full Board			
9	5130	Miscellaneous	Construction Requirements	Engineering	Yes		N/A	Direct to Full Board			
1	6005	Miscellaneous	Purpose of Board Requirements	Administration	Yes		N/A	Direct to Board (Ad Hoc?)			
2	6010	Miscellaneous	Adoption, Amendment of Policies	Administration	Yes	4/28/2023	N/A	Direct to Full Board	6/14/2023	6/14/2023	2023-17
5	6015	Miscellaneous	Public Records	Administration	Yes		4/18/2023	5/16/2023			
N/A	6020	Miscellaneous	Copying Public Documents	Administration	Yes		N/A	Direct to Full Board			
N/A	7001	Information Technology	Acceptable Use Policy	Information Technology	Yes			Board Closed Session			
N/A	7002	Information Technology	Access Control Policy	Information Technology	Yes			Board Closed Session			
N/A	7003	Information Technology	IT Hardware and Software Procurement	Information Technology	Yes			Board Closed Session			
N/A	7004	Information Technology	Workstations, Servers, and Network	Information Technology	Yes			Board Closed Session			
N/A	7005	Information Technology	Asset Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7006	Information Technology	Backup and Disaster Recovery Policy	Information Technology	Yes			Board Closed Session			
N/A	7007	Information Technology	Bring Your Own Device (BYOD) Policy	Information Technology	Yes			Board Closed Session			
N/A	7008	Information Technology	Change Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7009	Information Technology	Cloud Computing Policy	Information Technology	Yes			Board Closed Session			
N/A	7010	Information Technology	Third-Party Risk Assessment Policy	Information Technology	Yes			Board Closed Session			
N/A	7011	Information Technology	Configuration Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7012	Information Technology	Cybersecurity Policy	Information Technology	Yes			Board Closed Session			
N/A	7013	Information Technology	Data Breach Notification Policy	Information Technology	Yes			Board Closed Session			
N/A	7014	Information Technology	Data Classification Policy	Information Technology	Yes			Board Closed Session			
N/A	7015	Information Technology	Email and Communication Policy	Information Technology	Yes			Board Closed Session			
N/A	7016	Information Technology	Encryption Policy	Information Technology	Yes			Board Closed Session			
N/A	7017	Information Technology	Incident Response Policy	Information Technology	Yes			Board Closed Session			
N/A	7018	Information Technology	Information Security Policy	Information Technology	Yes			Board Closed Session			
N/A	7019	Information Technology	Internet and Social Media Policy	Information Technology	Yes			Board Closed Session			
N/A	7020	Information Technology	Mobile Device Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7021	Information Technology	Network Security Policy	Information Technology	Yes			Board Closed Session			
N/A	7022	Information Technology	Password Policy	Information Technology	Yes			Board Closed Session			
N/A	7023	Information Technology	Patch Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7024	Information Technology	Physical Security Policy	Information Technology	Yes			Board Closed Session			
N/A	7025	Information Technology	Privacy Policy	Information Technology	Yes			Board Closed Session			
N/A	7026	Information Technology	Remote Access Policy	Information Technology	Yes			Board Closed Session			
N/A	7027	Information Technology	Risk Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7028	Information Technology	Security Awareness and Training Policy	Information Technology	Yes			Board Closed Session			
N/A	7029	Information Technology	Server Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7030	Information Technology	Social Engineering Policy	Information Technology	Yes			Board Closed Session			
N/A	7031	Information Technology	Software Development Policy	Information Technology	Yes			Board Closed Session			
N/A	7032	Information Technology	Third-Party Vendor Management Policy	Information Technology	Yes			Board Closed Session			
N/A	7033	Information Technology	Wireless Network Security Policy	Information Technology	Yes			Board Closed Session			
N/A	7034	Information Technology	IT Asset Disposal (ITAD) or Electronic	Information Technology	Yes			Board Closed Session			
N/A	7035	Information Technology	Drone Policy	Information Technology	Yes			Board Closed Session			
N/A	7036	Information Technology	Asset Protection and Fraud Policy	Information Technology	Yes			Board Closed Session			
N/A	7037	Information Technology	Electronic Signature Policy	Information Technology	Yes			Board Closed Session			
N/A	7038	Information Technology	Cellular Telephone Usage Policy	Information Technology	Yes			Board Closed Session			
N/A	7039	Information Technology	Electronic Communications and Data	Information Technology	Yes			Board Closed Session			
N/A	7040	Information Technology	Computer and Business Continuity	Information Technology	Yes			Board Closed Session			
N/A	7041	Information Technology	Accessibility Policy	Information Technology	Yes			Board Closed Session			
N/A	7042	Information Technology	Personally Identifiable Information (PII)	Information Technology	Yes			Board Closed Session			
N/A	7043	Information Technology	Security and Technology Access for	Information Technology	Yes			Board Closed Session			
N/A	7044	Information Technology	Artificial Intelligence (AI) Policy	Information Technology	Yes			Board Closed Session			
N/A	7045	Information Technology	Data Ethics Policy	Information Technology	Yes			Board Closed Session			
N/A	7046	Information Technology	IoT (Internet of Things) Security Policy	Information Technology	Yes			Board Closed Session			
N/A	7047	Information Technology	Date Loss Prevention (DLP) Policy	Information Technology	Yes			Board Closed Session			
N/A	7048	Information Technology	Endpoint Security Policy	Information Technology	Yes			Board Closed Session			
10	5135	Miscellaneous	District Responsibility for Soil	Engineering	No		N/A	Direct to Full Board			

Priority Legend:
Yellow Highlight = Highest Priority
Light Blue Highlight = Lowest Priority

**Policy Approval Tracking
BCVWD Policy Manual Project**

Policy Number	New Policy Number	Section	Policy Name	HR's Recommendation Responsible Department	Drafted by BCVWD Staff	Approved by Legal Counsel	Presented to Committee	Provisionally Approved by Committee	Presented to Board of Directors	Approved by Board of Directors	Adoption Date	Resolution Number
			Color Code									
			Not Yet Reviewed									
			Present to Committee									
			Present to Board									
			Referred									
			Stated for Committee									
			Tabled or Lost									
			Added to Matrix									
			Adopted									

Priority Legend:
 Yellow Highlight = Highest Priority
 Light Blue Highlight = Lowest Priority



**Beaumont-Cherry Valley Water District
Personnel Committee Meeting
September 17, 2024**

Item 8

HUMAN RESOURCES REPORT

TO: Personnel Committee

FROM: Ren Berioso, Human Resources Manager

SUBJECT: Human Resources Department Report for the Month of August 2024

Table 1: Personnel

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

Total Current Employees (Excluding Board Members)	47
Full-Time Employees	45
Part-Time	1
Temporary	1
Interns	0
Separations	0
Retired Employee(s)	0

Table 2: New Hires

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

Employee Name	Job Title	Department
Melissa Rodriguez-Elizondo	Management Analyst II	Finance and Administration

Table 3: Anniversaries*

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

Employee Name	Department	Years of Service
Joshua Rogers	Operations	2 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 August 31, 2024

Employee Name	Former Title	Changed to
Luis Lomeli	Water Utility Worker I	Water Utility Worker II

Table 5: Recruitment

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

As of August 31, 2024

Position	Department	Update
Management Analyst II	Finance and Administration	Posting Closed 6/13/2024 Position Filled 8/5/2024.
Water Utility Worker II	Operations	Posting Closed 7/2/2024 Position Filled 8/26/2024

Table 6: Separation/Retirement

The below table represents employees separating from BCVWD.

As of August 31, 2024

Employee Name	Position Held	Department	Last Day
None			

Table 7: Communications

The below table represents HR communications to BCVWD employees.

As of August 31, 2024

Communication	Topic
HR Memo 24-015 - Upcoming Anthem Employee Assistant Program (EAP) Session	EAP
HR Memo 24-016 - Expanded CalPERS Health Plans Available in Region 3 – Riverside County	Director’s Benefits
HR Memo 24-017 - Main Office Temperature Settings and Workspace Comfort	Ergonomics

Staff Report Prepared by Ren Berioso, Human Resources Manager