

# Interim Employee Handbook Isla Vista Community Services District



*Approved on September 10, 2024*

# **WELCOME TO THE ISLA VISTA COMMUNITY SERVICES DISTRICT!**

## **Mission**

The Isla Vista Community Services District aims to improve the resources available to the community, ensure a high quality of life and level of public safety, and provide a local voice to the people of Isla Vista. The District will work to prioritize community engagement as it delivers localized public services and maximizes the resources available to the community.

## **Values**

- Community engagement and transparent decision making
- Efficient and innovative use of public tax dollars
- Pursuit of ambitious change for our community
- Social justice centered while putting people first
- Constituent service and education
- Safety, wellbeing, and enjoyment for all in Isla Vista
- Celebrating diverse perspectives and ideas

# EMPLOYMENT PRACTICES & POLICIES

## Equal Employment

IVCSD is an equal opportunity employer. It is the IVCSD's policy to provide equal employment opportunity for all applicants, employees, volunteers, interns, and persons performing services pursuant to a contract, in all areas of employment including recruitment, hiring, training, promotion, compensation, benefits, transfer, social/recreational programs and general treatment during employment. IVCSD does not unlawfully discriminate on the basis of race, religion, religious creed (including religious dress and religious grooming), color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex (including pregnancy, perceived pregnancy, childbirth, breastfeeding), gender, gender identity, gender expression, age, sexual orientation, military and veteran status, or any other basis protected by federal, state or local laws.

IVCSD shall make reasonable accommodations for the known physical or mental disabilities of an otherwise qualified applicant/employee who is otherwise able to safely perform all of the essential functions of their position unless undue hardship for the District would result in accordance with applicable federal, state or local law. It is the responsibility of each employee and supervisor along with the General Manager to follow this policy. Any applicant/employee who requires an accommodation in order to perform the essential functions of the job should contact the General Manager and request such accommodation.

## Anti-Discrimination Policy

Directors and staff, in the performance of their official duties and responsibilities, will not harass any person or discriminate on the basis of race, religion, color, creed, age, marital status, national origin, immigration status, ancestry, sex, gender identity or expression, sexual orientation, medical condition, or disability.

Directors and staff will not grant any special consideration, treatment, or advantage to any person or group beyond that which is available to every other person or group in similar circumstances.

## Anti-Harassment & Workplace Toxicity

### Statement of Intent

- The IVCSD is committed to providing a work environment where all feel welcome. In furtherance of this commitment, the IVCSD strictly prohibits all forms of harassment, including but not limited to harassment on the basis of any of the Protected Categories **listed under Equal Employment**. Every employee has a right to a work in an environment free from harassment, regardless of the intent of the parties involved.

### Persons Covered

- This policy is applicable to all Directors and employees of the IVCSD, including supervisors and managers. The District prohibits Directors and employees from engaging in any Unlawful Practice against co-workers, suppliers, independent contractors and others doing business with the IVCSD, including members of the public.

In addition, the IVCS D prohibits vendors, suppliers, independent contractors and other third parties doing business with the IVCS D from harassing IVCS D employees.

- IVCS D Directors and employees along with vendors, suppliers, independent contractors and others doing business with the IVCS D will henceforth be referred to as “affiliates of the IVCS D”.
- This policy applies to all phases of the employment relationship, including recruitment, testing, hiring, upgrading, assignments, promotion/demotion, discipline, transfer, layoff, termination, rates of pay, benefits, and selection for training.

## Prohibited Conduct

- Sexual harassment, including but not limited to harassment targeting pregnancy, perceived pregnancy, childbirth, breastfeeding, gender identity, gender expression, sex stereotype, sexual orientation, gender and transgender harassment, is defined as unwanted sexual advances, or visual, written, verbal or physical conduct of a sexual nature that creates an intimidating, offensive, or hostile working environment or that interferes with an employee’s work performance.
  - Examples of sexual harassment include, but are not limited to: unwelcome sexual propositions, hugging, kissing, or other offensive physical contact of a sexual nature; lewd gestures, remarks, or innuendoes; unwelcome discussions of sexual practices or anatomy, and sexually offensive posters, photographs, drawings, cartoons, jokes, stories, nicknames, or comments about appearance; joking about sex; degrading words or terms of a sexual nature; prolonged staring or leering; and continued invitations to social events outside the workplace after being told such are unwelcome.
  - Sexual harassment outside of the workplace is also prohibited. Action will be taken towards offenders as if the action took place at the workplace.
- All other forms of harassment are also strictly prohibited, especially when based on a Protected Category. Such harassment includes, but is not limited to:
  - Verbal conduct such as making or using derogatory comments, epithets, slurs, jokes, or verbal abuse;
  - Visual conduct such as prolonged staring or leering at a person, gestures, and displaying of offensive objects, posters, photographs, cartoons, or drawings;
  - Written conduct such as suggestive or obscene letters, emails, drawings, notes or invitations; and
  - Physical conduct such as assault, unwanted touching, or blocking normal movement, or violating someone’s “personal space.”
- The IVCS D believes all employees should be able to work in an environment free of harassment, bullying, and abusive conduct.
  - Abusive conduct is defined as conduct of an employer or employee in the workplace, with malice, that a reasonable person would find hostile, offensive, and unrelated to an employer’s legitimate business interests. Some examples of abusive conduct in the workplace include repeated acts such as, but not limited to:
    - Verbal abuse, including derogatory remarks, insults, and epithets
    - Verbal or physical conduct that a reasonable person would find threatening, intimidating, or humiliating
    - Sabotage
    - Unwarranted or invalid criticism delivered in bad faith
    - Blame without factual justification
    - Targeting others with cussing or disrespectful language

- Exclusion or social isolation
  - Excessive “prank” jokes or teasing of others
  - Consistently undermining the work or position of others
- The IVCS D strictly prohibits retaliation against any employee for making a good faith complaint of discrimination or harassment or for cooperating, assisting, testifying, “whistle-blowing,” or participating in any of the internal or external complaint procedures described below.

## Reporting Procedures

- Any employee who believes that they have been the target of Prohibited Conduct or any employee who observes or otherwise becomes aware of such conduct has a duty to immediately notify the General Manager, who is responsible for investigating such complaints.
  - Nothing in this policy may be interpreted as restricting the ability of any affiliate of the IVCS D from confiding in a trusted affiliate of the IVCS D regarding prohibited conduct. Complaints indirectly received by that have not been submitted directly to the General Manager will still be investigated to the fullest extent appropriate under this policy as if they had been directly reported to the General Manager.
  - An employee is not required to report the complaint to the General Manager if the General Manager is the individual who is engaging in the prohibited conduct, but may in the alternative report the conduct to the President of the Board of Directors.
- Any supervisor who is informed of a complaint alleging a prohibited practice by an employee, or any other individual, must report said complaint to the General Manager or the President of the Board of Directors immediately and must otherwise keep the matter confidential. The General Manager must also keep the matter confidential and not disclose the matter to any person who is not involved in the investigation or does not have legitimate work-related reasons for knowing of the complaint.
  - Any supervisor who fails to comply with this paragraph will be subject to disciplinary action, up to and including termination of employment.
- All complaints should be as detailed as possible, including the names of individuals involved, the names of any witnesses, direct quotations when language is relevant, and any documentary evidence (notes, pictures, cartoons, etc.).

## Investigation

- Upon the filing of a complaint with the IVCS D, the complainant will be provided with a copy of this policy. All incidents of prohibited discrimination, harassment and/or retaliation that are reported will be subject to an impartial, fair, timely and thorough investigation to be completed in no more than sixty (60) days. The investigation will reach conclusions based on the evidence collected. The IVCS D will document the timely, thorough, and objective investigation of the allegations to ensure reasonable progress is being made in the investigation. The IVCS D will inform the complainant of the progress of the investigation upon request.
- The General Manager is the impartial person designated by the IVCS D to investigate complaints of Unlawful Practices. The General Manager may, however, delegate the investigation at their discretion to a qualified, impartial investigator. In the event the Unlawful Practice complaint is against the General Manager, a qualified, impartial investigator shall be appointed by the Board of Directors.

- All employees are required to cooperate truthfully and in good faith with the IVCS D in any investigation under this policy. Knowingly making a false charge of an Unlawful Practice or a false statement in connection with an investigation, or deliberately interfering with any such investigation is also a violation of this policy and will subject an employee to discipline, up to and including termination.
  - Nothing in this policy shall be interpreted as allowing retaliation against an affiliate of the IVCS D for advancing a complaint in good faith, even when the complaint is found to be unsubstantiated by an investigation.

#### Corrective Action

- At the conclusion of the timely investigation, if it is determined that an unlawful practice has occurred, the IVCS D will take immediate and effective remedial action commensurate with the circumstances. Corrective action may include: training, referral to counseling, or disciplinary action, including but not limited to, verbal or written warning, suspension, transfer, demotion, and termination of employment, depending on the circumstances. With regard to acts of harassment by contractors and those conducting business with the IVCS D, corrective action will be taken after consultation with the General Manager.
- The complainant and alleged offender will be notified when the investigation has been completed and will be informed of the general outcome of the investigation.
- Corrective action will be taken to mitigate future similar offenses, including but not limited to redistribution of this policy, training, transfer, termination, etcetera, as prescribed in the disciplinary action section.

#### External Complaint Procedure

- The U.S. Equal Employment Opportunity Commission and the California Department of Fair Employment and Housing are authorized to accept and investigate complaints of employment discrimination, harassment and retaliation and to mediate settlements. State and federal laws also prohibit retaliation against employees because they have filed a complaint with the EEOC or DFEH, participated in an investigation, proceeding, or hearing with the IVCS D, or opposed any practice made unlawful by Title VII or the FEHA. Contact information for the DFEH can be obtained at [www.dfeh.ca.gov](http://www.dfeh.ca.gov). Contact information for the EEOC can be obtained at [www.eeoc.gov](http://www.eeoc.gov).
  - Nothing in this policy may be interpreted as limiting employees of the IVCS D from pursuing an internal complaint, as detailed under Reporting Procedures.

#### Resignation Procedures

- To leave District service in good standing, an employee must file a written notice of resignation with the General Manager at least two weeks before the effective date. The General Manager may, however, grant good standing with less notice if they determine the circumstances warrant. Resignations may not be withdrawn without the General Manager's approval.
  - In the event that the employee filing for resignation is the General Manager, a written notice of resignation shall be submitted to the President of the Board of Directors with a minimum of one month's notice. The Board of Directors may vote to grant good standing with less notice if it determines the circumstances warrant.

The resignation of a General Manager may not be withdrawn without the approval of the President of the Board of Directors.

- An exit interview should be conducted by the General Manager for full-time benefited employees.
  - In the event that the employee filing for resignation is the General Manager, an exit interview should be conducted by the President of the Board of Directors.
- To the extent permitted by law, District staff and Directors shall keep confidential the circumstances giving rise to an employee's resignation from the District.

## **Employee Missed Shifts and Scheduling Policy (*Approved on October 22, 2024*)**

### Punctuality and Attendance

- Employees are expected to report to work as scheduled, on time, and prepared to start work. Employees also are expected to remain at work for their entire work schedule, except for meal periods or when required to leave on authorized District business. Late arrival, early departure, or other unanticipated and unapproved absences from scheduled hours will not be tolerated. Failure to report to work as scheduled may result in discipline, up to and including termination.
- Because unexcused absences should be the last resort, all employee absences must be authorized in advance. Authorized absence is defined as written permission, no less than two hours in advance, from a Supervisor to be absent from duty for a specified purpose, with the right to return before or upon the expiration of the leave period. Employee leave periods authorized pursuant to any existing provisions of state or federal law and/or District regulations shall be considered an authorized absence.
- Employees who are ill, or for personal or other reasons, cannot report to their assigned shift, must utilize the District phone and email roster to try and find a replacement amongst program coworkers. Employees shall notify their program supervisor immediately, but no less than two hours before a scheduled shift, that they are unable to report to their assigned shift. Failure to notify a supervisor in advance of a missed shift shall constitute an unexcused absence. Continuous or excessive unexcused absences may result in discipline, up to and including termination.
- Employees who fail to report to work for three (3) consecutive shifts without notifying their supervisor of their absence will be considered as having voluntarily resigned from employment and having abandoned their jobs.

### Shift Schedules

- Shift schedules may vary, as assigned by the program supervisor. Employees who have the ability to voluntarily sign up for a shift will be considered to have committed to, be scheduled and held accountable for, the full shift upon sign-up. Once an employee signs up for a shift and the weekly schedule is finalized by the program supervisor, employees cannot make any changes to their scheduled shift unless otherwise authorized by the program supervisor.
- For larger District events, programs, or projects, the District will attempt to provide reasonable advance notice (i.e. 2 weeks) to employees to ensure the event is adequately staffed.

### Make-Up Shifts

*Approved on September 10, 2024*

- The District may, in its sole discretion, allow the use of makeup time when non-exempt employees need and voluntarily request time off. When approved by their program supervisor, employees may obtain an authorized absence and then make up the time in the same workweek in which the time was lost. Such makeup time will be paid at the employee's regular rate of pay. Makeup time may not exceed 8 hours in one workday or 40 hours in one workweek.
- Makeup time requests must be submitted in writing to the employee's supervisor, with the employee's signature, before the extra hours are worked. Requests will be considered for approval based on the business needs of the District at the time the request is submitted. A separate written request is required for each occasion that the employee requests makeup time. Missed work time may only be made up if a legitimate need for the extra hours exists, as determined in the sole discretion of the employee's supervisor. An employee's use of makeup time is completely voluntary.

#### Quarterly Evaluations

- The District relies on its employees to consistently provide high quality, cost effective services. Employees must routinely interact with other staff, Board members, vendors, and the general public to effectively meet these objectives. Good attendance is essential to these objectives and is an indicator of effective employee performance. The District will evaluate the effectiveness of this Policy upon a quarterly basis, to ensure the needs of the District and community are adequately served.
- The District intends to maintain a positive environment that supports its goals while recognizing individual needs and circumstances. If attendance issues arise, employees are encouraged to speak with their supervisor who can discuss the impact of their attendance on the District's goals and employee's individual performance.

## **COMPENSATION & BENEFITS**

### **District Employment Status & Overview of Benefits**

#### Full time employees

- These employees are hired on a permanent full time basis to assist the District in completing its regular operations.
- Full time employees shall be compensated at a level determined by the General Manager upon hiring.

#### Part time employees

- These employees are hired on a permanent part time basis to assist the District in completing its regular operations.
- Part time employees shall be compensated at an hourly rate of pay determined by the General Manager,
- Part-time employees shall be paid a minimum of \$15/hr, upon hiring and work a minimum of 20 hours per week.

#### Temporary employees

- These employees are hired on a limited term basis working part time to assist the District in completing extra tasks.
- Temporary employees shall be paid a minimum of \$15/hr and work for no more than 1080 hours during the term of their employment.



- Upon the completion of an employee's 1080 hours they may not be rehired as a temporary employee for a period of six months.

The employment Paid Leave & Holidays/Vacation benefits outlined below shall apply only to regular full time employees, and part time employees on a prorated basis.

Employee retirement benefits will be provided on the following basis:

- District regular (full & part time) employees will be required to participate in the 457(b) retirement plan. Temporary employees will not be eligible or participate in the plan.
- District will contribute 9% of the Employee's annual salary.
- Employees will contribute 3% of their annual salary.

Employee health benefits shall be provided on the following basis:

Employee	Medical	Dependent Coverage	Dental	Vision
Full Time	100% - Platinum PPO (Valued at \$961/mo)	N/A	100% - DPO (Valued at \$53.66/mo)	100% - VSP (Valued at \$17.75/mo)
Part Time	100% - Silver PPO (Valued at \$629/mo)	N/A	N/A	N/A
Temporary	N/A	N/A	N/A	N/A

## Staff Compensation Policy

### Pay Periods

- The salaries and wages of all District employees shall be paid bi-weekly. Payday will be every other Friday.
- In the event a payday falls on a holiday recognized by the IVCSO, the immediately previous working day shall become the payday.

### Advance Pay

- No pay advances will be made

### Hiring & Introductory Period

- In hiring new employees, management shall select the most qualified person or persons from the job application list who meet the job specifications, meet the district's requirements and also satisfy the district's "Equal Opportunity Employment" policy .
- Employment with the district is not for a specified term and is at the mutual consent of the employee and the district. The employee has the right to terminate employment at any time without notice and without cause. The district maintains the same right. Employment with the district is at will and, accordingly, may be terminated by the employee or the district at any time without prior notice.
- The Board of Directors will select the General Manager and negotiate an employment contract or an employment agreement that sets forth the terms of employment between

the district and the General Manager. The contract will set the General Manager's salary and benefits and other terms of employment. Any increases in salary or changes to the contract will be made through an amendment to the contract unless otherwise specified. The General Manager will receive an annual performance evaluation and any amendments to the contract will be considered at that time. The General Manager salary is not part of the regular salary ranges for employees and all increases should be based on the decision of the Board of Directors unless otherwise included in the contract or agreement.

- Isla Vista Community Services District does not discriminate based upon race, religion, color, national origin, gender (including pregnancy, childbirth, or related medical conditions), sexual orientation, gender identity, gender expression, age, status as a protected veteran, status as an individual with a disability, or other applicable legally protected characteristics.
- Entry Level Salary
  - Newly hired persons, or existing personnel being promoted to a new job category without previous experience in this type of work, shall be compensated at the lowest bracket of the appropriate pay scale. At the end of a successful year of service he/she may be advanced 5% in the appropriate pay scale.
  - New employees will be kept informed of their progress by means of periodic performance evaluations and will be advised of any deficiencies in performance or conduct. If there are substantial deficiencies, they may result in immediate termination. Three (3) weeks prior to the end of the first year of employment, new employees will be evaluated. If it is determined that they are performing to district standards, and the district continues to need the position, they will receive a merit increase. If the determination is made that their performance is not to district standards, the merit increase may be delayed or employment may be terminated.
  - Persons being promoted whose current pay is higher than the minimum salary for the new job classification may also be advanced 5% after completion of one year of service but shall not exceed the highest merit step for their salary range.

#### Compensation Policy & Procedures

- As a public entity, the district is committed to rendering the highest level of service possible at a fair and reasonable cost. The district's ability to achieve this objective is affected by a number of factors, one of which is the quality and performance of district employees. To attract and retain highly competent employees, promote continuous superior performance, and give full recognition to district financial constraints, the following will be considered in establishing employee compensation:
  - The impact of compensation on the cost of services, financial position of the district, and overall operational costs.
  - Compensation paid for similar work in other public and private jurisdictions.
  - Review on an annual basis the March-to-March Consumer Price Index (CPI) for All Urban Consumers, Los Angeles-Riverside-Orange County, CA. Any adjustments would be effective July 1<sup>st</sup>.
  - The general and specific performance of employees.
  - Status of the labor force, economic condition, recruitment and retention experience, and other factors influencing the maintenance of a stable and efficient work force.
- The Board of Directors will set the range of pay for all positions based on the economic conditions and the ability of the district to pay. Range will mean the starting salary to the upper limits based on experience, length of service, etc. as determined by the Board. Merit increases and salary adjustments will not be automatic. Up to three step increases

of up to five percent (5%) within a range will be approved by the General Manager, based on merit.

- Attachment A is the salary range for current positions in the district, with the exception of the General Manager.

#### Performance Evaluations & Promotions

- All employees, on the anniversary of their date of hire will receive an annual performance evaluation.
- The performance of each employee will be periodically reviewed in order to evaluate the employee's competence in fulfilling the scope, duties, and requirements of the position. Performance evaluations enable the district to evaluate employees who should be considered for promotion, transfer, job changes and salary adjustments, and to appraise areas where training and other development programs may be necessary. Performance evaluations will be completed in writing.
- Performance Evaluation Process
  - The General Manager or designee will conduct or review performance evaluations.
  - The evaluation is then discussed with the employee. Sufficient time should be allotted to allow for employee recognition for good job performance, pointing out steps the employee can take to improve any weak areas, clarifying job requirements, and for questions the employee may ask. The employee will sign the written evaluation acknowledging that the evaluation discussion was held. No additional comments may be added to the form after the employee has signed it.
  - The Board of Directors will objectively evaluate the performance of the General Manager annually and will provide appropriate feedback.
- Merit Reviews
  - Review Schedule
    - Staff will receive an evaluation approximately 12 months after their hire or promotion date.
    - Thereafter employees will receive an annual review. Performance, as well as monetary compensation, will be considered on the anniversary date of when the employee was hired and annually thereafter.
    - If a promotion or a reclassification of a position occurs, the employee's review date will be re-established as of the effective date of the change.
    - Upon recommendation of and approval of the General Manager, all personnel are eligible at any time for pay advancement for meritorious service within their pay scale.
  - Merit Increases and Performance Bonus
    - Consideration for a merit increase in salary within the range for the position will be given to employees upon successful completion of their first year of employment and then annually thereafter until they have reached the final step in their salary range. Thereafter the employee will be eligible for a performance bonus.
    - Merit increases may advance the employee to the next level within the payroll schedule for the position. Managers will review the performance of the district's employees on each occasion, pointing out areas in which their performance is good and those in which improvement is needed.
    - Merit advancement shall be based upon the following:
      - Determination that the employee's performance is deserving and efficient. This relates to the totality of the job performance including these factors (not necessarily in the following order):

quality of work, level of work output, job attitude, cooperation, desire to learn, willingness and ability to accept responsibility, punctuality, regularity of attendance, and an obvious desire to excel.

- Up to three 5% salary increases may be granted by the General Manager in the affected salary range within each service year for meritorious and efficient service. No employee's salary shall exceed the salary range for the position.
- In exceptional cases of outstanding merit, the General Manager may recommend a merit increase of more than 5% increase. Any such exceptional cases shall be brought to the attention of the Board of Directors for approval and recognition of the exemplary employee.
- Merit increases shall not be automatic but shall depend upon excellent and efficient performance. The performance appraisal will be discussed with the employee during their review.
- The District's salary schedule shall provide a salary range for each employee job classification. In most cases, unless otherwise stated below, an employee who has proven to be fully satisfactory in a given (i.e., the same) classification for twelve (12) calendar months of continuous service from the granting of the previous salary step increase and a positive performance evaluation in which the employee exceeds the job requirements will be eligible to receive a 5% salary increase. Salaries will be provided as follows:
  - 1<sup>st</sup> Merit Increase: The first increase may be granted to an employee after satisfactory completion of the first year of employment. The adjustment shall be made only if granted by the district on the basis of a satisfactory performance evaluation.
  - 2<sup>nd</sup> Merit Increase: This increase is an incentive advancement and is the rate at which fully qualified, experienced and ordinarily conscientious employees may be expected to be paid.
  - 3<sup>rd</sup> Merit Increase: This increase is an incentive advancement and the employee is expect to be fully qualified and performing at a higher level.
  - Performance Bonus: After an employee has reached the final third merit step increase, they are eligible for annual performance bonuses. This bonus recognizes an employee's performance over a year long rating period. The employee will be eligible for up to a 7% bonus, depending on their overall performance. The employee will be considered for the bonus on the date of their annual performance evaluation.
- Economic Adjustments
  - The district will annually review the March to March Consumer Price Index (CPI) for All Urban Consumers, Los Angeles-Riverside-Orange County, CA for potential adjustment July 1<sup>st</sup>. The Board reserves the right to adjust or not adjust pay and benefits on an annual basis based on the factors outlined in this policy.

## **District Holidays**

- IVCSO offices shall be closed and permanent employees given paid time off on the following Federally Observed Holidays. Part-time permanent employees shall receive paid time off on holidays on a pro-rata basis:
  - New Years Day (included in Winter Recess unless it falls on a Sunday)
  - MLK's Birthday
  - President's Day
  - Cesar Chavez Day
  - Memorial Day
  - Juneteenth
  - Independence Day
  - Labor Day
  - Indigenous People's Day (known as Columbus Day Federally)
  - Veterans' Day
  - Thanksgiving Day
  - Christmas Day (included in Winter Recess)
- The District shall observe a Winter Recess (December 24-January 1). Employees wishing to work during the recess may clear their request with the General Manager and reallocate the days to another approved period of the year.
  - Part-time permanent employees shall receive Winter Recess pay on a pro-rata basis
- When a Federally Observed Holiday falls on a Saturday, it is observed on the preceding Friday. A holiday that falls on a Sunday will be observed on the following Monday.
- The IVCSO further recognizes that official US holidays may not accurately reflect occasions of cultural or personal importance for all employees. Accordingly, all full-time employees are granted two paid cultural holidays every year.
  - Cultural holidays may be taken for any culturally valued occasion and should be scheduled as far in advance as possible with the General Manager. Should the General Manager wish to schedule a cultural holiday it should be scheduled as far in advance as possible with the President of the Board of Directors.
  - Cultural holidays are allocated on an annual basis and do not carry over from one year to the next.

## **Vacation**

- Vacation time off with pay is available to permanent employees to provide opportunities for rest, relaxation, and personal pursuits. Employees planning to take more than three consecutive full days (24 hours) of vacation time should seek approval from the General Manager as soon as possible.
  - The General Manager shall schedule vacation time as far in advance as possible with the President of the Board of Directors. Vacation time scheduled by the General Manager shall be subject to a vote of the Board of Directors for approval.
- One day of paid time off is equivalent to eight hours of work at the employee's current rate of salary.
  - Regular full-time employees shall annually accrue 120 hours of paid time off on January 1st. Employees shall receive an allocation on a pro-rated basis based on their hire date during their first calendar year of employment.
  - IVCSO-observed holidays falling within an employee's authorized leave period shall not be charged as vacation time.
  - All employees who are not full-time will accrue vacation time on a pro-rata basis.

- To ensure that employees take regular time off to recharge, a maximum of 240 hours of vacation time may be accrued. When employees use paid vacation time and bring the available amount below the cap, vacation accrual will begin again.
- Paid vacation is intended as an aid in maintaining the long-term and consistent health and contentment of IVCSD employees. As such, pay in lieu of vacation time away from work shall not be permitted.
- The IVCSD recognizes that vacation time spent fighting serious illness or debilitation fails to provide the degree of rest and relaxation that vacation is designed to provide. As such, an employee who becomes ill while on vacation and desires to claim sick leave rather than vacation may make such a request as soon as possible after they desire sick leave compensation to begin. Such requests are subject to approval by the General Manager or, if the General Manager is the employee submitting the request, by the President of the Board of Directors.
  - Upon resignation or termination of employment for any reason, employees will be paid for unused vacation time that has been earned through the last day of work at their current rate of pay.
  - Employees must be employed for one year before being eligible to be paid for unused vacation time. Vacation time must be a year old before it is eligible to be paid out to the employee.

## **Sick Leave**

- All employees will begin employment with twenty four (24) hours of paid sick leave already accrued.
- A permanent regular employee (both full time and part time) accrues paid sick leave at the rate of four (4) hours per pay period.
- Temporary employees will accrue one (1) hour for every thirty (30) hours worked, up to forty-eight (48) hours.
- Permanent employees can only accrue paid sick leave up to a cap of 168 hours of sick leave. Sick leave does not accrue once the cap is reached, but accrual begins again when accrued sick leave drops below this cap. Any unused accrued paid sick leave carries over year to year while continuously employed.
- An employee may use accrued paid sick leave for one of the following reasons:
  - The diagnosis, care, or treatment of an existing health condition of, or preventative care for, an employee or an employee's family member, to attend legal proceedings, or to obtain medical treatment, counseling or other survivor's services for domestic violence, sexual assault, or stalking.
  - A "family member" for these purposes is defined as a child (a biological, adopted, or foster child, stepchild, legal ward, or a child to whom the employee stands in loco parentis), a parent (a biological, adoptive or foster parent, stepparent, or legal guardian of an employee or the employee's spouse or registered domestic partner, or a person who stood in loco parentis when the employee was a minor child), a spouse or domestic partner, a grandparent, grandchild and sibling.
- After 5 scheduled work days of consecutive use of paid sick leave, the employee and General Manager shall meet to discuss additional needs to utilize paid sick leave, and/or implement a flexible work schedule. If the employee needs to utilize an additional 5 days of consecutive paid sick leave the employee shall produce a medical provider's letter that describes their needs in the workplace and meet with the General Manager again at the end of the second 5 day period.
- An employee shall provide reasonable advance notification of their need to use accrued paid sick leave to their supervisor if the need for paid sick leave is foreseeable (e.g.

doctor's appointment scheduled in advance). If the need for paid sick leave is unforeseeable, the employee shall provide notice of the need for the leave to their supervisor as soon as is practicable.

- Upon resignation or termination of employment for any reason, employees will not be paid for unused sick leave.

### **California Family Rights Act Leave (Approved on December 3, 2024)**

The California Family Rights Act ("CFRA") provides eligible employees the opportunity to take unpaid, job-protected leave for specified reasons. The maximum amount of leave employees may use under this policy is twelve weeks within a twelve-month period, except as otherwise required by law.

To be eligible for CFRA leave under this policy, employees must:

1. Have worked at least twelve months for the District in the preceding year; and
2. Have worked at least one thousand two hundred fifty (1,250) hours for the District over the twelve months preceding the date the leave would commence.

CFRA leave may be taken for any of the following reasons:

1. To care for or bond with a newborn child, with a newly-adopted child, or with a newly-placed foster child.
2. To care for an immediate family member (i.e., employee's spouse, registered domestic partner, child, parent, grandparent, grandchild, sibling, or registered domestic partner's child or parent, or "designated person") with a serious health condition. For purposes of this policy, a "designated person" is any individual related by blood or whose association with the employee is the equivalent of a family relationship. Employees are limited to one "designated person" per twelve-month period.
3. Because of the employee's serious health condition that makes the employee unable to perform their job functions.
4. A "qualifying exigency" arising out of the fact that the employee's immediate family member is on, or has been notified of an impending call to, "covered active duty."

Once the District determines an absence is for a CFRA-qualifying reason, it will designate the absence as CFRA.

Generally, a "serious health condition" is an illness, injury, impairment or physical or mental condition that involves either in-patient care in a medical care facility or continuing treatment by a health care provider, and either prevents the employee from performing the functions of their job or prevents the qualified family member from participating in school or other daily activities.

The District measures the period of twelve months in which leave is taken by a rolling calendar period. This means that when an employee requests leave for a qualifying reason,

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the District will look back over the past twelve months to determine whether the employee has any remaining CFRA time.

CFRA leave for the birth of a child, or placement of a child for adoption or foster care, must be concluded within twelve months of the child's birth or placement.

Eligible employees may take CFRA leave in a single block of time, intermittently (in separate blocks of time), or by reducing the normal work schedule when medically necessary for the serious health condition of the employee or immediate family member. Intermittent leave for the birth of a child, to care for a newborn child or for the placement of a child for adoption or foster care generally must be taken in at least two-week increments, with shorter increments allowed on two occasions. Employees who require intermittent or reduced-schedule leave must try to schedule their leave so that it will not unduly disrupt the District's operations.

Employees are required to use applicable accrued paid time off (such as paid sick time, vacation, compensatory time, etc.) concurrently with the CFRA leave, to the extent permitted by law and in accordance with District policies. The only exception to this requirement is during any period in which the employee is receiving temporary disability benefits (e.g., for workers' compensation or short-term disability), the employer cannot require the employee to use their accrued paid leave to coordinate pay with those disability benefits. However, the employer and employee may agree to do so.

Once the employee's accrued paid leave time is exhausted, the remainder of the CFRA leave is unpaid time off.

The District maintains health care coverage during CFRA leave on the same terms as if the employee had continued actively to work. Employees must make arrangements to pay their normal share of health plan premiums while on unpaid leave. Use of CFRA leave does not result in the loss of any employment benefit that accrued prior to the start of leave under this policy.

When seeking leave under this policy, employees must provide to the Assistant General Manager the following:

1. Thirty days' advance notice of the need to take CFRA leave if the need for leave is foreseeable or, in the case of unforeseeable leave: notice as soon as practicable and in compliance with the District's normal call-in procedures.
2. Medical certification supporting the need for leave due to a serious health condition affecting the requesting employee or an immediate family member.
3. Medical certification of release to return to work, with or without any restrictions on the ability to work, if the leave was due to the employee's serious health condition.

If the employee requesting leave is eligible for CFRA leave, the District will provide them with a notice that designates the leave as CFRA. The notice will specify any additional information required, and include a statement of the employee's rights and responsibilities, and include a guarantee of reinstatement to the same position or a comparable position. If the employee is not eligible for CFRA leave, the District will provide a reason for the ineligibility.



Upon returning from CFRA leave, employees will be restored to their original position or to an equivalent position with equivalent pay, benefits, and other employment terms and conditions, to the extent required by law.

For more information regarding leave under this policy, contact the Assistant General Manager.

## **Maternity/Parental Leave**

Maternity or parental leave is available to employees of the District, either before, during or after the birth of an employee's child or the placement of a child with an employee in connection with adoption or foster care. The purpose of maternity/parental leave is to enable the employee to care for and bond with a newborn or a newly adopted or newly placed child. Additionally, pregnancy disability leave is available for employees who meet the applicable criteria. This policy will run concurrently with Family and Medical Leave Act (FMLA) leave and/or California Family Rights Act (CFRA) leave, as applicable. If a State or Federal law is in conflict with this policy, the terms of the law will be applicable.

### Parental Leave

Eligible employees must meet the following criteria:

- Have been employed with the District for at least 12 months (the 12 months do not need to be consecutive);
- Have worked at least 1,250 hours during the 12 consecutive months immediately preceding the date the leave would begin;
- Be a full- or part-time, regular employee (temporary employees and interns are not eligible for this benefit).

In addition, employees must meet one of the following criteria:

- Have given birth to a child;
- Be a spouse or committed partner of a person who has given birth to a child; or
- Has used a surrogate for the birth of their child
- Have adopted a child or been placed with a foster child (in either case, the child must be age 17 or younger). The adoption of a new spouse's child is excluded from this policy.

### Amount, Time Frame, and Duration of Parental Leave

- Eligible employees will receive a minimum of sixteen (16) weeks of *paid* parental leave per birth, adoption or placement of a child/children. The fact that a multiple birth, adoption or placement occurs (e.g the birth of twins or adoption of siblings) does increase the 16-week total amount of paid parental leave granted for that event by the following: 2 weeks additional for twins, an additional 2 weeks additional for triplets, and an additional 2 weeks for a child born with a disability.
- Approved parental leave may be taken at any time during the 12-month period immediately following the birth, adoption or placement of a child with the employee. Parental leave may not be used or extended beyond this 12-month time frame.
- Employees do not need to take parental leave in one continuous period of leave, but the minimum increment should be in 2-week blocks, or in smaller increments under two separate occasions. In no event shall the intermittent leave be more than a cumulative total of 16 weeks within a 12-month period. This is contingent upon the availability of

CFRA and FMLA leave available to each employee within that 12-month period, as provided below.

#### Coordination with FMLA/CFRA Policies

- Parental leave taken under this policy will run concurrently with leave under the FMLA/CFRA; thus, any leave taken under this policy that falls under the definition of circumstances qualifying for leave due to the birth or placement of a child due to adoption or foster care, the leave will be counted toward the 12 weeks of available FMLA/CFRA leave per a 12-month period. All other requirements and provisions under the FMLA/CFRA will apply. In no case will the total amount of leave—whether paid or unpaid—granted to the employee under the FMLA/CFRA exceed 12 weeks during the 12-month FMLA/CFRA period. Please refer to the FMLA/CFRA Policy for further guidance.
- The District will maintain all benefits for employees during the parental leave period just as if they were taking any other paid leave such as paid vacation leave or paid sick leave.
- If a holiday occurs while the employee is on parental leave it will extend the total parental leave entitlement.

#### Requests for Parental Leave

- The employee will be required to provide his or her supervisor with notice of the request for leave at least 30 days prior to the proposed date of the leave (or if the leave was not foreseeable, as soon as possible). The employee must complete the necessary forms and provide all documentation as required to substantiate the request.
- As is the case with all District policies, the organization has the exclusive right to interpret this policy.

### **Pregnancy Disability Leave**

#### Pregnancy Disability Leave

- An employee who needs a reasonable accommodation for pregnancy disability should consult with her supervisor or manager to request a reasonable accommodation interactive meeting. Pregnancy disability leave (PDL) is available in the event of childbirth, loss of pregnancy, pregnancy and related physical and mental conditions when the employee is disabled from these conditions. “Disabled” is defined as having a physical or mental condition related to pregnancy, loss of pregnancy, or childbirth that prevents an employee from performing essential duties of her job, or if her job would cause undue risk to her or her pregnancy’s successful completion. The employee shall begin pregnancy disability leave when the employee’s physician, in consultation with the employee, certifies that they should discontinue working because of a disability related to pregnancy, loss of pregnancy, childbirth, or a related condition. PDL is unpaid leave.

#### Length of Pregnancy Disability Leave

- An employee is entitled to up to four (4) months of unpaid PDL. An employee may elect to use accumulated sick and/or vacation leave during the period of her physical inability to perform work on account of pregnancy. Such sick and/or vacation leave shall only be allowed during the period in which an attending physician certifies that the employee is not able to perform the job.
- An employee who is on pregnancy disability leave shall be entitled to accrue the same general, administrative, and sick leave and vacation benefits normally accruing, and the District shall continue its contribution to the employee’s health plan premium. The

maximum term for these benefits is four (4) months per pregnancy. Health benefit premiums will continued to be paid in the same manner as if the employee were working. Failure to make such premium payments, when required, may result in the cancellation of coverage.

- Employees returning from pregnancy leave will be returned to the same or similar position they occupied prior to taking leave.

#### Coordination With FMLA/CFRA Leave Policies

- PDL shall run concurrently with FMLA leave, but will not run concurrently with CFRA leave. That is, if an employee is on leave under PDL, the time will also run under FMLA leave. Once PDL is exhausted, then the employee will still be eligible for leave under CFRA based on qualifying reasons, such as additional baby-bonding time under parental leave, as discussed above.

## **Paid Family Leave**

### Paid Family Leave

- In addition to the foregoing, the State of California administers a Paid Family Leave (PFL) program. PFL can run concurrently with the unpaid leaves discussed above. Employees must take leave for one of the following covered reasons:
  - to bond with a new child who arrives by birth, adoption, or placement through the foster care system, or
  - to take care of a spouse, registered domestic partner, parent, child, grandparent, grandchild, sibling, or parent-in-law with a serious illness.
- PFL provides paid leave up to 60-70% of the employee's compensation for up to eight (8) weeks. To be eligible for PFL benefits, employees must have earned \$300 or more in compensation during a 12-month base period preceding the claim. These wages must have been subject to withholdings for the State's disability insurance program. The District will cover the remaining 30-40% of the employee's compensation for the 8 weeks of paid family leave, and will pay 100% of the employee's compensation for the remaining 8 weeks of parental leave.
- PFL gives employees the right to collect benefits but does not, in and of itself, provide job protection.
- Employees wishing to use PFL must apply on the State's website at:  
<https://edd.ca.gov/en/disability/paid-family-leave/>

### **Bereavement Leave (*Updated and approved on September 24, 2024*)**

- All employees who suffer a death in their immediate family may have a paid leave of forty hours for each death of an immediate family member. For purposes of this policy an employee's immediate family is defined to include the employee's current spouse, domestic partner, child, parent, sibling, grandparent, grandchild of employee, or child, sibling, parent or grandchild of employee's spouse or domestic partner.
- Employees are required to provide reasonable documentation of the need for bereavement leave. This may include a death certificate, a published obituary, or written verification of death, burial, or memorial services from a mortuary, funeral home, burial society, crematorium, religious institution, or government agency. This documentation

must be provided within 30 days of the employee's first day of leave. All information received by the District will be treated as confidential.

- If an employee requires more than forty hours off for bereavement leave, the employee may request additional unpaid leave or may request the opportunity to use any accrued vacation or sick time at the discretion of the General Manager.

#### **Reproductive Loss Leave (Added and approved on December 3, 2024)**

- A District employee who has sustained a reproductive loss may request a paid leave of up to five days. Reproductive loss is defined as: a failed adoption; a failed surrogacy; a miscarriage; a still birth; or an unsuccessful assisted reproduction.
- Reproductive Loss leave does not need to be taken consecutively, but the leave must generally be completed within three months of the loss.

#### **Jury Duty (*Updated and approved on October 22, 2024*)**

- The District will provide exempt full-time employees a maximum of 20 working days or 160 hours of paid time off per valid summons, subpoena, or other court order to serve, as required by law, on a jury, grand jury, appear in court, or otherwise participate in court-related proceedings. Temporary and Part time employees will receive paid time off on a prorated basis, based on their weekly hourly schedule. Upon receipt of a summons, subpoena, or other court order, employee shall immediately present a copy of the notice to his or her supervisor.
- For each week of jury duty, the District requires its employees to provide the District with a certificate of jury service,
- Employees may request unpaid leave for the length of absence needed to complete the service beyond the 20-day or 480 hour period, or may opt to utilize other available PTO during the otherwise unpaid portion of their time off.
- An amount equal to the total compensation, except expenses and mileage, received by employee from the courts will be deducted from the employee's salary; or, if preferred, the employee may turn in to the District all such compensation received and draw full pay during jury duty.

#### **Employee Flex Time Policy**

- The District will work with employees to achieve flexibility in work schedules to accommodate special needs in areas such as childcare, eldercare, or education. These accommodations can be made whenever they can be done without causing hardship on the work unit or level of service.
- The allowable work schedule flexibility not needing prior approval shall be limited to those that can be made within the workday, such as modifying starting or ending time by thirty (30) minutes, and/or reducing the meal period to thirty (30) minutes.
- At the discretion and authority of the General Manager, the District may implement flexible work schedules for employees. The District shall stagger employee shifts to provide coverage on all days of the week as necessary and appropriate for District operations, with the standard range of District working hours being from 8:00 a.m. to 8:00 p.m. Monday through Friday. The District may change employee work schedules to include the weekends upon reasonable notice, when it is feasible in meeting the needs of District operations and/or when the change is in the employee's long term assignment schedule.

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- Employees working flexible work schedules shall have holidays off to the same proportion as to their regular scheduled work hours. If a holiday falls on a regularly scheduled day off, the employee shall take an alternate day off within the current or following pay period. If an employee has approval from the General Manager to work on a scheduled District holiday, the employee shall take an alternate day off within the current or following pay period.
- Flexibility may also include other modifications which would require the use of leave hours or reductions in pay.
- In no event shall an employee be scheduled to work less than their scheduled number of hours of work per workweek. For example, full-time employees shall be scheduled to work a 40-hour workweek. Exempt employees may at times be required to work more than 40-hour workweeks to meet the needs of District operations. In the event this is occurring regularly or over an extended period of time, in the interest of preventing exhaustion or “burn-out” of employees, the General Manager is authorized to allow employees to schedule additional paid time off to recuperate, up to a limit of 10 days per year.

### **Personal Vehicle Usage and Reimbursement Policy**

- When an employee is authorized to use their personal vehicle in the performance of District work, they shall be reimbursed for the cost of said use on the basis of total miles driven and at the rate specified in the Internal Revenue Service Guidelines in effect at the time of said usage.
- Use of personal vehicles shall not be authorized for the performance of District work if a suitable District vehicle is available and safely operational. Every attempt shall be made to coordinate work so that District vehicles are available and operational for the performance of said work.
- Proof of adequate insurance coverage for collision, personal injury, and property damage shall be required by the District of any employee using a personal vehicle in the performance of District work.
- Mileage forms with number of miles traveled, destination, purpose of the trip and date are required.

### **Leave of Absence Policy**

- General Leave
  - A regular Full-Time or regular Part-Time employee who has completed their probationary period may be allowed up to thirty (30) days leave of absence per calendar year without pay for acceptable reasons upon the prior written approval of the General Manager or by vote of the Board of Directors if the employee seeking leave is the General Manager.
  - A leave of absence over thirty (30) days requires the prior approval of the Board.
  - The District will continue to pay health and other benefits for an employee while the employee is on an authorized, unpaid leave of absence for up to ninety (90) days during any twelve (12) month period. The District will cease to pay health and other benefits for an employee who is on an authorized, unpaid leave of absence for more than ninety (90) days for the remaining duration of the leave of absence.
- Military Leave

- Military Leave shall be granted in accordance with Section 395 of the California Military and Veterans Code and Federal Military Leave regulations. An employee entitled to military leave shall give the General Manager an opportunity within the limits of military regulations to determine when such leave shall be taken.
- Military Spousal Leave
  - The IVCSD will grant employees up to three days leave during that time in which the employee's spouse or domestic partner is on leave from deployment in a combat zone with the active duty or reserve military or national guard during a period of military conflict.
  - Employees may use accrued vacation time to cover this absence. If the employee has no accrued vacation, the employee must request time off without pay.
- Unauthorized Leave
  - Any employee, who is absent for three (3) calendar days without being on authorized sick leave, authorized vacation leave, authorized bereavement leave or authorized leave of absence may be terminated at the discretion of the General Manager.
  - Nothing in this section shall limit the General Manager's authority to discipline or dismiss an employee due to an unauthorized absence.
  - An employee terminating employment in the manner described in this section will be considered to have voluntarily resigned their District employment.

## **EMPLOYEE CONDUCT & EXPECTATIONS**

### **General Conduct & Expectations**

All employees of the IVCSD are public servants of Isla Vista and represent a community investment in good governance. As such, employees shall strive to be efficient in their service and conduct themselves professionally and courteously in all dealings with the public and fellow employees.

IVCSD staff should not take an active part in any political campaign during working hours or use their title or position in connection with any political activity at any time including the election of IVCSD officials. This provision does not in any way deny employees the right and privilege to express their private opinions, seek a public office, or otherwise engage in activism as private citizens during non-working hours.

The General Manager, President of the Board of Directors, or the designee thereof shall handle all contacts with the media. Unless otherwise instructed, employees shall channel any media requests through the General Manager for approval before granting interviews or disseminating information.

Employees are not to be at the workplace if they are experiencing illness that could be contagious to other employees.

### **External Representation of the District**

Any member of the Board (or staff person) as designated by the Board of Directors, may represent the Board where it is appropriate or desirable for the District to appear, at meetings, events, or hearings of other public agencies, private entities, non-profit corporations, public

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groups, or private groups. Such representatives must report back to the Board of Directors at an appropriate Board meeting, following the meeting, event, or hearing.

When external representation is so desired by the Board of Directors, for an incidental or regular meeting, event, or hearing, the General Manager shall be the de facto representative for matters pertaining to District Operations, and the Board President (or their designee) shall be the de facto representative related to governance and policy. The Board of Directors may take action to waive these responsibilities, and designate another Director (or staff person) to serve as the District's representative to a specific public or private entity, or non-profit corporation.

When a Director (or staff member) attends a meeting, event, or hearing of another public agency, private entity, non-profit corporation, public or private group, or other public or private gathering on their own behalf, they should make a good faith effort to clarify so.

## **Reimbursement Policy**

Whenever District employees or Directors desire to be reimbursed for out-of-pocket expenses for item(s) or service(s) purchased to carry out the official business of the District, or "Training Education and Conferences Policy" related expenses, a request for reimbursement may be submitted to the General Manager.

- Cash advances or use of District credit cards for these purposes is not permitted.

Those seeking reimbursement shall submit their requests on a reimbursement form approved by the General Manager. Stipulations of the reimbursement form will be:

- Submission within thirty days of the expense.
- An explanation of the District-related purpose for the expenditure(s); and,
- Receipts evidencing each expense shall be attached.

The General Manager will review and approve reimbursement requests. Reimbursement requests by the General Manager will be reviewed and approved by a designee of the Board.

## **Credit Card Policy**

### Overview

The Isla Vista Community Services District (IVCSD or District) has established a purchasing card program whereby authorized employees may use a district-issued credit card for small dollar purchases of certain goods or services. The procurement card is a flexible purchasing tool that offers an alternative method of paying for low-cost items. Procurement cards are issued with purchase category limitations (e.g., cannot purchase from a liquor store or obtain cash) as well as single and monthly dollar transaction limits.

This user's guide is designed to provide you with instructions on the proper use of a district-issued credit card. In accepting a district-issued credit card, cardholders agree to abide by these guidelines and all applicable purchasing policies. Intentional and unintentional misuse of a city credit card can result in suspension or revocation of the credit card privilege and/or disciplinary action.

### Approval of Purchasing Cards

The issuance of a purchasing card is based on operational need as determined by the General Manager. District employees assigned a purchasing card by the General Manager must sign a cardholder agreement before the card can be activated. By signing the agreement, cardholders

indicate their understanding of program requirements and agree to use the card in compliance with all requirements.

#### Card Set-up, Issuance, and Activation

The program administrator (General Manager or designee) is responsible for submitting requests for purchasing cards and establishing card controls such as transaction/monthly dollar limits and blocking/allowing different merchant category codes to be used.

Individual cardholders are responsible for activating the purchasing card by calling U.S. Bank Customer Service at 800-344-5696.

#### Cardholder Responsibilities

The purchasing card can only be used for legitimate business purposes. Misuse of the card will subject the cardholder to disciplinary action in accordance with IVCSA's personnel policies and procedures. In using a procurement card, cardholders must:

- Never use the card for personal purchases.
- Maintain the card in a secure location at all times.
- Not allow other individuals to use their card for any reason, unless pre-approval is provided by the General Manager in accordance with [Section 1.13, Pre-approval Form](#).
- Adhere to the transaction limits established for use.
- Obtain and reconcile all sales slips and register receipts to the monthly statement and provide this documentation to the program administrator by the established due dates (see [Section 1.8, Monthly Statement Review and Approval](#)).
- Provide correct expense coding information so that charges are accurately categorized for tracking purposes.
- Attempt to resolve billing errors directly with a vendor and notify the bank if such disputes are not satisfactorily resolved (see [Section 1.10, Disputed Purchases](#)).
- Ensure that appropriate credit amounts appear on subsequent statements.
- Never accept cash in lieu of a credit to the cardholder account for returned items.
- Immediately report lost or stolen cards to the bank and program administrator (see [Section 1.11, Lost or Stolen Cards](#)).
- Inform the program administrator or designee when a card is no longer needed (see [Section 1.12, Purchasing Card Cancellation](#)).

#### Authorized Uses of Purchasing Cards

The purchasing card may be used for the following legitimate business purposes, subject to all purchasing policy provisions, and requirements that may be specified by the General Manager or designee:

- One-time payment for goods or off-site services within cardholder transaction limit
- Gift cards and prizes for members of the public in conjunction with District events
- Training, classes, seminars, and conventions
- Subscriptions, books, publications, and training videos
- Professional memberships
- Authorized (pre-approved) travel arrangements for official District business including airfare, hotel, car rental and food
- Advertising costs
- Emergency/disaster-related purchases
- Food and/or non-alcoholic beverage purchases authorized by the General Manager



A district-issued credit card must not be used to pay for operational services provided on IVCS D property, or professional consulting services or any other services where insurance coverage would otherwise be required. This requirement may be waived if it is determined by the General Manager that insurance coverage is unnecessary, in accordance with [Section 1.13, Pre-approval Form](#).

#### Allowable Services

Purchasing cards may be used to pay for delivery services such as Federal Express or United Parcel Service where insurance coverage is not required. Purchasing cards may also be used for off-site equipment repair services where such repairs are performed at the service provider's place of business and do not otherwise require an onsite presence that could trigger insurance requirements.

#### Prohibited Purchases

The following items cannot be purchased with district-issued purchasing cards:

- Items for personal use
- On-site services where insurance coverage is required, unless such coverage requirements are waived by the General Manager in accordance with [Section 1.13, Pre-approval Form](#).
- Alcoholic beverages for any reason
- Gifts for District employees other than those approved for special events such as retirements
- Purchases from companies for which a District contract is already in place, unless use of a purchasing card is required for payment efficiency
- Cash advances
- Split purchases to avoid purchasing limits

Cardholders who make unauthorized purchases will be subject to disciplinary actions in accordance with established personnel policies and procedures.

#### Mistaken Personal Use

Every effort must be made to use the purchasing card for official District business. However, if a district-issued purchasing card is accidentally used for a personal purchase, the following steps must be followed:

- Immediately notify the program administrator and cardholder supervisor of the unauthorized purchase.
- Following the notifications in step 1, return the purchased item and obtain a credit for the full purchase amount. If the item cannot be returned for full refund, immediately reimburse IVCS D for the purchase.
- Notify the program administrator and cardholder supervisor of completion of step 2.
- Attach proof of refund or repayment to the monthly statement and provide an explanation of the unauthorized charge and how the District was reimbursed.
- Submit the statement for approval in accordance with the instructions in Section 1.8 below.

Note: Intentional misuse of the purchasing card for personal expenses is prohibited and is grounds for disciplinary action and/or civil/criminal penalties depending on the nature of the purchase.

#### Monthly Statement Review and Approval

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The program administrator or designee will provide cardholders with monthly statements. All charges must be verified, with a copy of each original, itemized receipt properly approved and coded. Transactions requiring prior approval must include an appropriate level of detail that demonstrates pre-approval was obtained (including documentation required by [Section 1.13, Pre-approval Form](#)); authorized food purchases shall identify the names of all persons involved.

Monthly statements must be reviewed and approved by the General Manager.

Transactions made by the General Manager shall be approved by the Board Chair.

#### No Receipt Available

Every effort must be made to obtain an itemized receipt. On occasion, no receipt may be available. In these instances, a written explanation must be provided explaining the purchase and circumstances that must be approved by the General Manager or designee.

#### Disputed Purchases

If a purchased item is found to be defective, or if a charge is in dispute, the cardholder is responsible for returning the item for full credit and/or resolving the disputed charge. If the vendor refuses to correct the defect or satisfactorily resolve the disputed charge, then the purchase of the item is in dispute.

Disputed items must be reported to U.S. Bank Corporate Payment Systems within 60 days from the date of the first statement on which the item was billed. Notification can be done by calling the 24-hour customer service number at 800-344-5696.

#### Lost or Stolen Cards

If the purchasing card is lost or stolen, immediately notify the program administrator, cardholder supervisor, and U.S. Bank at 800-344-5696. The following information will be needed when notifying the bank:

- Complete name
- Credit card number
- Date reported to law enforcement, if stolen
- Any purchases made on the day and since the card was lost or stolen

#### Purchasing Card Cancellation

The program administrator is responsible for setting up, maintaining, and closing cardholder accounts. However, cardholders are responsible for notifying the program administrator if:

- Transferring to a different department,
- Moving to a different position within a department where a purchasing card is not required, or
- Terminating employment.

#### Pre-approval Form

Where pre-approvals are required by this User's Guide, the Purchasing Card Pre-approval Form must be completed and approved by the General Manager or designee before a purchase can be made. Pre-approval is required for the following items:

- Instances where a cardholder would like to allow another employer employee to use the cardholder's purchasing card to make an authorized District purchase, and
- Requests to use a purchasing card for onsite services or other services that would typically require a vendor or consultant to insure the District from liability.

## **Corrective Action (Updated and approved on December 3, 2024)**

- Corrective measures, including but not limited to counseling, warnings, mandatory training, suspension, or dismissal, may be used to correct violations of District standards or policies, or performance or conduct issues, and/or to ensure safety and accountability in the workplace. Any one or more of these types of disciplinary measures may be used as appropriate, in the discretion of the General Manager.
- “Progressive discipline” is a system of increasingly more serious disciplinary steps imposed for repeated or more serious offenses. While the District may choose to use progressive discipline, it is not required to do so. Rather, the General Manager may impose any disciplinary action(s) they deem appropriate under the circumstances.

## **Conflict Resolution and Grievance Procedures**

The IVCSO provides a path for employees to seek redress in disputes over a corrective action or the interpretation or application of IVCSO policy. This policy may be applied in cases of personal interest (such as when an employee believes they have been subjected to unjust corrective action) and in cases where employees perceive a violation in policy that undermines the accountability and spirit of IVCSO operations.

The grievance process comprises two steps, the first is an appeal to the General Manager and the second is an appeal to the Board of Directors. It is proper procedure for employees to begin any grievance at the first step, but in cases where the General Manager is a party to the grievance (including in cases of corrective action) the employee may move directly to the second step.

- Within 10 days of becoming aware of the circumstances which form the basis for the alleged grievance, an employee may present a written grievance to the General Manager. Written grievances shall detail the alleged violations of District policies, facts or allegations upon which the grievance is based, and a statement of the remedy or correction requested of the IVCSO. The General Manager shall issue a decision in writing to the grievant(s) within five days after the grievance is filed.
- In cases where the General Manager is a party to the grievance or an employee wishes to appeal within ten days of a decision rendered in Step 1, employees may submit their grievance in writing to the Board of Directors. Written grievances, in addition to the content described in Step 1, shall include a concise explanation as to why Step 1 is being bypassed or on what grounds a decision rendered in Step 1 is being appealed. A hearing before the Board of Directors shall be set within 30 calendar days from receipt of the employee’s written appeal. Any rulings made by the end of the hearing shall be considered final.

## **DISTRICT OPERATIONS**

### **General Manager Responsibilities and Functions**

The General Manager shall be responsible for all executive and administrative functions of the District as agreed to in the District’s MOU with the General Manager and as consistent with the following provisions of Government Code 61051:

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- The implementation of the policies established by the board of directors for the operation of the district.
- The appointment, supervision, discipline, and dismissal of the district's employees, consistent with the employee relations system established by the board of directors.
- The supervision of the district's facilities and services.
- The supervision of the district's finances.

## **District Internship Programs**

District internship programs shall be managed and operated by the General Manager. The General Manager shall be responsible for maintaining partnerships with other organizations offering internships with the Isla Vista Community Services District.

## **Constituent Response Policy**

The Isla Vista Community Services District will make a reasonable effort to respond to inquiries from the public in a timely manner. Responses will be made by staff, under the direction of the General Manager. Unless there is a legitimate need for confidentiality, staff must identify themselves by their name and their department or division when answering inquiries. The District will be prepared to receive inquiries from the public by telephone, e-mail, written mail, or via social media channels.

## **Social Media Usage (for the District)**

As pursuant to the IVCSA's Public Information Dissemination policy, staff may use social media to engage with District constituents. The General Manager shall oversee the usage of the District's social media accounts, including approving all posts and comments by the District and maintaining all records as required by law.

## **Media Relations**

- The Board President, General Manager, or their designees, are the only persons authorized to provide comment to members of the media on behalf of the Isla Vista Community Services District.
- Board members may make their own personal position known about any matter, which is pertinent to the business of the District, including Board decisions, provided that they are not speaking on behalf of the District.
- Board members, the General Manager, and District employees will refrain from making personal statements to the media without clearly prefacing such remarks that they are their personal views and not those of the District.
- Official press statements of the District shall not include any adverse reflection on the Board of Directors, General Manager, Employees, or Board decisions.
- All Board members shall be able to inspect and/or obtain a copy of any press release so filed.
- Media statements and press releases must not include information for the purpose of personal promotion.
- Press releases will be made available to the general public by publishing on the District's website and social media accounts on the day of release.
- A media release should not quote Board members, the General Manager, or District employees without their prior knowledge.

## **Training, Education, and Conferences Policy**

- District staff and members of the Board of Directors are encouraged to attend educational conferences and professional meetings when the purposes of such activities are to improve District operation.
  - Given Board approval, there is no limit as to the number of Directors attending a particular conference or seminar when it is determined that their attendance is beneficial to the District.
- Attendance at training, education, and conference events that has been pre-approved for reimbursement is eligible for receipt of reimbursement for travel, meals, lodging, and event fees, as detailed in the Reimbursement Policy. Pre-approval for Board Directors or the General Manager is performed by the Board of Directors. Pre-approval for District staff, other than the General Manager, is performed by the General Manager.
- Reimbursements for attendance for which pre-approval was not obtained can be approved only at the discretion of the Board of Directors and should only happen under extenuating circumstances.
- The Board of Directors will consider payment for the cost of certification renewal for the certifications deemed pertinent and beneficial to the activities of the board and/or its employees, less any late fees or penalties due to individual negligence.
- Education or training required by the District as a condition of continued employment in the employee's present position shall be reimbursable at one-hundred percent (100%) or paid directly by the District and shall take place on District time.

## **EMPLOYEE RECEIPT AND ACCEPTANCE**

I hereby acknowledge receipt of the Isla Vista Community Services District Employee Handbook. I understand that it is my continuing responsibility to read and know its contents. I also understand and agree that the Employee Handbook is not an employment contract for any specific period of employment or for continuing or long-term employment.

*Approved on September 10, 2024*

I have read and understand the Isla Vista Community Services District Employee Handbook.

Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Date \_\_\_\_\_

*Approved on September 10, 2024*