

Personnel Committee Meeting



YOUR BEST PROTECTION

ACWA JPIA
2100 Professional Drive
Roseville, CA 95661

Wednesday
January 21, 2026
3:00 PM

Chair: Melody McDonald, San Bernardino Valley Water Conservation District

Vice-Chair: J. Bruce Rupp, Humboldt Bay Municipal Water District

Brent Hasteley, Reclamation District 784

Szu Pei Lu-Yang, Rowland Water District



PERSONNEL COMMITTEE MEETING

AGENDA

ACWA JPIA
2100 Professional Drive
Roseville, CA 95661
(800) 231-JPIA

Wednesday, January 21, 2026, 3:00 PM

Zoom Link Meeting ID: 532 180 4035 Password: 5742 Telephone No.: 1 (669) 900-6833

WELCOME, CALL TO ORDER, ANNOUNCEMENT OF QUORUM, AND INTRODUCTIONS

ANNOUNCE RECORDING OF MEETING This meeting may be recorded to assist in preparation of minutes. Recordings will only be kept 30 days following the meeting, as mandated by the Ralph M. Brown Act.

PUBLIC COMMENT Members of the public will be allowed to address the Personnel Committee on any agenda item prior to the Committee's decision on the item. They will also be allowed to comment on any issues that they wish which may or may not be on the agenda. If anyone present wishes to be heard, please let the Chair know.

ADDITIONS TO OR DELETIONS FROM THE AGENDA

<u>Presenter</u>		<u>Page #</u>
McDonald	* I. Approve the Meeting Minutes of September 3, 2025	4
Beatty	* II. Review and Take Action on Employee Handbook Changes	9
Waterford	* III. Review Staff Activities	147
Waterford	* IV. Review Staffing Status	149
Waterford	* V. Review Recruitment Status	166
Beatty	* VI. Review and Take Action on New Position	168
Beatty	* VII. Update on Retirements, Future Positions, and Office Space	174

Presenter

Page #

McDonald/Beatty	VIII. Discuss Future CEO Performance Review Process	175
McDonald	* IX. Discuss Next Meeting Date: June 3, 2026	177

ADJOURN

*Related items enclosed.

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Written materials relating to an item on this Agenda that are distributed to the ACWA JPIA Personnel Committee within 72 hours before it is to consider the item at its regularly scheduled meeting will be made available for public inspection at ACWA JPIA, 2100 Professional Drive, Roseville, CA 95661-3700; telephone (916) 786-5742. ACWA JPIA's normal business hours are Monday – Friday, 7:30 a.m. to 4:30 p.m.



Unapproved Minutes

Personnel Committee Meeting

ACWA JPIA
2100 Professional Drive
Roseville, CA 95661
(916) 786-5742

September 3, 2025

This meeting consisted of a simultaneous Zoom teleconference call at the ACWA JPIA, 2100 Professional Drive, Roseville, CA 95661 and the following remote sites:

- Hastey - 3000 Plumas Arboga Road, Plumas Lake
- Rupp – 229 Boyle Drive, Eureka
- Lu Yang – 500 N. Brand Boulevard, Suite 1850, Glendale

MEMBERS PRESENT

Chair: Melody A. McDonald, San Bernardino Valley Water Conservation District (via Zoom; Chair McDonald abstained from voting on all motions, as the public did not have access to her location)

Vice Chair: J. Bruce Rupp, Humboldt Bay Municipal Water District (via Zoom)

Brent Hastey, Reclamation District 784 (via Zoom)

Szu Pei Lu-Yang, Rowland Water District (via Zoom)

MEMBERS ABSENT

None

STAFF PRESENT

Chief Executive Officer/Secretary: Adrienne Beatty

Chimene Camacho, Senior Executive Assistant (Recording Secretary)

Cassie Crittenden, HR Specialist (left meeting @ 10:56 AM)

David deBernardi, Director of Finance

Robert Greenfield, General Counsel

Jennifer Jobe, Director of Pooled Programs

Tony Waterford, Human Resources Manager

OTHERS

Ernie Avila, Contra Costa Water District (via Zoom)

Chris Kapheim, Kings River Conservation District (via Zoom)

Scott Ratterman, Calaveras County Water District (via Zoom)

Randall Reed, Cucamonga Valley Water District (via Zoom)

David Wheaton, Citrus Heights Water District (via Zoom)

Mary Egan, MRG Solutions (via Zoom @ 10:08 AM)

WELCOME, CALL TO ORDER AND ANNOUNCEMENT OF QUORUM

Chair McDonald called the meeting to order at 10:03 a.m. and announced there was a quorum.

PUBLIC COMMENT

As the agenda stated, members of the public would be allowed to address the Personnel Committee on any agenda item prior to the Committee's decision on that item. Comments on any issues on the agenda, or not on the agenda, were also welcomed. None were noted.

ADDITIONS TO AND DELETIONS FROM THE AGENDA

None

I. APPROVAL OF MINUTES

Chair McDonald called for approval of the minutes of the June 2, 2025, meeting.

M/S/C (Rupp/Hastey) (Hastey-Yes; Lu-Yang-Yes; Rupp-Yes): That the Personnel Committee approve the minutes of the June 2, 2025, meeting.

II. REVIEW STAFFING ACTIVITIES

Mr. Waterford provided an update on events and activities since the last Personnel Committee meeting. Highlights included staff social and wellness events, all staff training on navigating the new performance evaluation tool in Paylocity, management training on conducting performance reviews, and a mandatory Workplace Violence Prevention Plan training for staff.

III. REVIEW STAFFING STATUS

Mr. Waterford provided an update on staffing changes since the last Personnel Committee meeting. Among the changes, the following people joined the JPIA staff: Hunter Sargent, Cybersecurity Risk Specialist; Michele Dye, Employee Benefits Specialist; Lisa Waltman, Claims Adjuster III; and Jill Martin, Member Services Representative II. Judy Shiu was promoted to Liability and Property Claims Manager. Further details and an updated organizational chart were included in the meeting packet.

IV. REVIEW RECRUITMENT STATUS

Mr. Waterford reviewed the upcoming recruitments.

Replacement Positions	Department	Status
Training Specialist	Member Education	Interviews Completed
Training Coordinator	Member Education	Active
Admin. Assistant II	Workers' Compensation	Active
Communications Specialist II	Member Education	Not yet posted

Mr. Waterford shared that as for the recruitment efforts for new positions for which authority to hire has already been granted, the Risk Control Advisor II/Senior Risk Control Advisor recruitment was reopened following a candidate withdrawal, with interviews scheduled to take place in a Central Valley district location. He also shared that the second Claims Adjuster III recruitment is currently on hold to allow Judy Shiu, the new Property and Liability Claims Manager, time to acclimate to her role and to properly onboard Lisa Waltman, the newly hired Claims Adjuster III.

V. EMPLOYEE ENGAGEMENT SURVEY RESULTS UPDATE

Ms. Beatty reported that the Employee Engagement Survey, conducted in February 2025, achieved a 100% participation rate. The findings highlighted key trends in employee satisfaction, identifying both areas of progress and areas requiring attention that will help shape future organizational initiatives. With regard to employee engagement. The percentage of fully engaged employees declined from 56% to 35%, somewhat engaged increased to 45% from 20%, and the number of not engaged employees dropped from 24% to 20%. These shifts are likely linked to several factors. One factor is likely higher turnover (including 10% of staff retiring annually in 2023, 2024, and 2025) and the introduction of new performance expectations that may not align with past expectations and which may have contributed to uncertainty about roles and performance standards. However, these shifts can also likely be linked to newer employees often being less engaged as they navigate and learn about their new environment, culture, growth potential, and personal/supervisor expectations. It should be noted that 38% of employees completing the 2025 survey were hired after the 2021 survey so the population completing the 2021 and 2025 surveys are significantly different; therefore, the results are not “apples to apples.” On a positive note, the intent to stay reached a high of 54%, with 15% of those respondents indicating they plan to change positions (compared to 4% from the prior survey), suggesting that more employees today feel that there are growth opportunities for them versus in 2021.

The Committee held an in-depth discussion of the survey results, noting the overall fully engaged level of 35% as a key area that should be prioritized for long-term improvement. They stressed the need to refine future survey questions to make them more specific and actionable, and recommended conducting the next survey within two years rather than waiting for another three to capture more timely insights. Ultimately, the Committee agreed to delay the next survey until after the move to the new building, anticipated in early 2027, to ensure engagement levels related to the new workspace can also be captured.

VI. EMPLOYEE RECOGNITION PROGRAM UPDATE

Ms. Crittenden presented the new employee recognition initiatives developed collaboratively over six months in 2024 to strengthen engagement, inclusivity, and retention. In 2025, three programs were introduced: a spot recognition program encouraging peer-to-peer appreciation, an enhanced service anniversary program for milestone years, and the recent roll-out of the Annual Making the Difference award as a way to recognize an employee who consistently goes above and beyond, who embody JPIA’s core values, and who demonstrates excellence in key competencies. Yet to be rolled out, is an annual employee or Executive Committee appreciation event. These

events will alternate years. The employee appreciation event will be planned by the Leadership Team; the Executive Committee appreciation event will be planned by a volunteer staff committee.

VII. REVIEW AND MAKE RECOMMENDATION ON THE ADDITION OF JUNETEENTH AS A PAID JPIA HOLIDAY

Ms. Beatty noted that Chair McDonald had requested the Committee consider adding Juneteenth as an official paid holiday. She provided background on the current Federal, State, and JPIA holiday schedules for reference. Following discussion regarding the merits and potential costs of the addition, the Committee unanimously voted to recommend Juneteenth as a bankable paid holiday.

M/S/C (Rupp/Hastey) (Hastey-Yes; Lu-Yang-Yes; Rupp-Yes): That the Personnel Committee recommend to the Executive Committee approval of Juneteenth as a JPIA bankable paid holiday effective 2026.

VIII. UPDATE ON RETIREMENTS, FUTURE POSITIONS, AND OFFICE SPACES

Ms. Beatty reported on organizational updates, noting that major department moves were completed in July, including the relocation of the Finance and Property/Liability Claims departments, along with four managers, to strengthen team alignment and communication. These were the final major shifts ahead of the transition to the new building. She highlighted that 2–4 retirements are anticipated in 2026, with early conversations already underway to support succession planning. Ms. Beatty noted that – for the foreseeable future - the Director of Member Outreach position will not be refilled, with responsibilities re-distributed among existing directors and the CEO. Ms. Beatty also noted that although she had previously discussed potentially requesting approval for a building services coordinator role, this will no longer be necessary since a property management company has been contracted to service both the current and new buildings, resulting in lower overall cost for needed services.

IX. CEO PERFORMANCE EVALUATION AD HOC COMMITTEE UPDATE – CEO CONTRACT NEGOTIATIONS

Ad Hoc Committee Chair Rupp reported on the Committee’s progress with the CEO performance evaluation, noting that the group—comprised of himself, David Wheaton, Chris Kapheim, and Scott Ratterman, with Mary Egan facilitating—has met and may convene one or two additional times as needed. Their focus will be on reviewing and refining compensation recommendations and considering proposed changes to the CEO’s employment contract. Final recommendations, including any compensation adjustments and contract revisions, will be presented to the Executive Committee in Closed Session at their next meeting on September 30, 2025.

VIII. NEXT MEETING DATE

The Personnel Committee is scheduled to meet next on January 21, 2026, in person at the ACWA JPIA office in Roseville.

The Personnel Committee meeting adjourned at 11:19 a.m.

ACWA JPIA
Employee Handbook Changes
January 21, 2026

BACKGROUND

Annually, the Employee Handbook requires updating – in part – based on any new laws that become effective at the beginning of the calendar year.

In September 2024, President McDonald formed the Employee Handbook and Policy Review Ad Hoc Committee. Historically, Handbook changes are brought to the Personnel Committee and then the Executive Committee in January. However, the process has been inconsistent with regard to how changes have been presented, whether or not actual Handbook sections showing proposed changes were brought before the Committee for review, and on what frequency the Handbook was reviewed in its entirety. Clarity was also needed on what sections of the Handbook require Executive Committee approval, versus the sections staff has the discretion to change, as needed.

Starting in November 2024 through September 2025, the Ad Hoc Committee met seven (7) times – approximately every 6-8 weeks. Over the course of those seven (7) meetings, the entire Handbook was reviewed.

Subsequent to the September 2025 meeting, some additional changes were suggested by staff to policies not requiring Personnel Committee review or Executive Committee approval.

CURRENT SITUATION

Provided for the Committee's reference is the entire Handbook, inclusive of all changes proposed by staff and/or the Committee since November 2024. The following charts have also been provided:

- Summary of changes discussed with the Ad Hoc Committee
- Summary of changes added by staff since the last Ad Hoc Committee meeting
- Confirmation of which sections of the Handbook require Executive Committee approval

RECOMMENDATION

That the Personnel Committee recommend to the Executive Committee approval of the proposed Employee Handbook changes for sections requiring Executive Committee approval.

2025 Handbook Updates

Section	Major Updates:
Equal Employment Opportunity	- Added “reproductive health decision making” as a protected characteristic. This was added in 2023 as a protected characteristic under FEHA. - SB 1137 (Combined Characteristics Discrimination) – updated the EEO section to include it is unlawful to discriminate someone on any combination of protected characteristics; a perception someone has protected characteristics; or is associated with a person who has or is perceived to have protected characteristics.
Organizational Development and Engagement (Previously Diversity Equity and Inclusion)	Revised to reflect our intent to more clearly describe how we support employees, strengthen our workplace culture, and help our organization grow and adapt.
Employment	Added “conditionally qualified” as an acceptable standard to be hired. For example, an employee who is required to wear corrective lenses is hired as “conditionally qualified”.
Initial Appraisal Process	- Added a formal Initial 120-Day Performance Appraisal. - Removed that employees must get approval from their managers to take time off while they are still in their initial appraisal process. Requesting approval for time off is a standard practice.
Internal Applications	Removed that internal applicants must submit an application when applying for a position as JPIA only requires they submit a cover letter and resume.
Alternative Work Schedule	Participation Criteria: Added an Alternate Work Schedule (AWS) Agreement must be completed and approved prior to starting the AWS.

	- Revised that new employees can participate after their initial 120-day review. Previously stated 90-day review. Procedures: - Added that an AWS can only begin at the start of a pay period. - Removed that staff are required to be in the office on Mondays. - Removed the requirement that an absence of two or more days would require the employee to revert back to a normal schedule.
Remote Work	General Guidelines: - Revised to state that is now manager discretion if an employee can continue working remote when they are on a Performance Improvement Plan. Procedure: - Removed the requirement to have a telecommuting agreement signed to initiate remote work as that is not our current practice. - Removed that an evaluation of the employee's work performance during the trial period is required as evaluation of remote work is a standard practice.
Compensation Review and Merit Increase	Added if an employee successfully completes their performance improvement plan (PIP), they may be eligible for the merit pay increase.
Promotional Increase/Decrease	Revised that when a demotion occurs, you "are reassigned" to the new position, you do not have to "accept" it.
Employee Incentive Plan	Removed
Access to Personnel Records – The Employee	Added that JPIA will provide a copy to the employee for inspection no later than 30 calendar days after receiving the request.
Deferred Compensation	Revised for clarification on the process.
California Public Employee Retirement System (CalPERS) – CalPERS Options	Removed the amounts listed for the 1959 Survivor Benefit as those can be subject to change. Instead, referenced the CalPERS website for more information.

Educational Approval Process	Removed the two-year requirement to be eligible, since employees only need to pass their initial appraisal process.
Vacation	Updated three days advance notice to one week notice for vacation requests. Removed that any request over 15 consecutive days requires CEO approval.
Jury and Witness Duty	Added that employees provide reasonable advance notice and provide proof.
Sick Leave	Updated definition of designated person to be consistent with the California paid sick leave law. Clarified that all employees can make up time for a maximum of 4 hours in the work week.
Unpaid Leaves – FMLA/CFRA	Law Update – added Victim of a Qualifying Act of Violence as an approved reason to take leave under FMLA/CFRA.
Paid Leaves – Military Spouse Leave	Moved to the Unpaid Leaves section as it is unpaid.
Standards of Conduct	Added bullying and release of HIPAA information or liability or workers' compensation claims information to anyone not authorized as examples of unacceptable behavior.
Employee Grievances or Concerns	Removed this section upon the advice of Counsel and in light of relevant information from this section being duplicative of our Open Door Policy.
Injury & Illness Prevention Program	Removed mention of "Supervisors" as JPIA only has Managers and condensed this section.
Driving on The Job	Added that only employees who drive as an essential function of their position will be enrolled in the DMV Employer Pull Notice Program and removed redundant language. Moved language under the "Mileage" section to this section as it was more appropriate. Such as the requirement to complete three hours of defensive driving training every three years, practice good defensive driving, and out-of-pocket expenses due to traffic accidents on JPIA business may be reimbursed.

Compensable Time	Added a new section to provide clarity to staff on what type of work is considered compensable, such as when attending a training, meeting, conference, etc.
Credit Card Use	Added expenses reports must be submitted within two weeks of expense accrual.
Mileage	Removed language not consistent with discussing mileage and moved it to the “Driving on The Job” section.
Car Rentals	Rewrote this section to be clearer and more concise.
Electronic Communications Policy	Updated for clarity and modernization of systems and equipment currently used.
Retention of Email	Added the current record retention policy for the JPIA email system.
Use of JPIA Internal and External Websites	Changed the title of this section (previously titled “JPIA World Wide Web Site Policies”) Simplified structure to clearly distinguish internal and external site purposes and introduced the broader concept of employee and public engagement.
Internet Communications	Digital platforms included: References like email and collaboration platforms (e.g., Teams, SharePoint) are added to reflect current tools used at JPIA.
Internet Monitoring of Communications and Passwords	Modernized the list of monitored technologies to reflect JPIA’s current tools and practices. Expanded from email-only to include all JPIA communications systems and clarified that monitoring may occur for compliance, legal, or operational reasons. Clarified password sharing policy to reflect current JPIA practice of using Dashlane for secure password management.
Internet No Right of Privacy	Consolidated and condensed sentences that were repetitive while updating terminology to reflect modern usage.
Social Networking	Reworded to modernize the list of platforms.

Software	Updated language reflects broader security threats beyond viruses (e.g., malware, vulnerabilities) and clarifies that both downloading and installing are restricted without authorization.
Personal computing devices	Added a new section to clarify for security and integrity of JPIA systems and data, the use of personal computers to perform JPIA work is strictly prohibited.
JPIA-Provided Hotspots	Added a new section to clarify the process for staff to follow when issued a mobile hotspot for business use.
Mobile Device Policy: The JPIA expects mobile-device users to:	Removed the section regarding purchase of additional mobile device accessories as this is no longer applicable. Removed section on international roaming services as it is unnecessary
Mobile Device Policy: Additional Guidelines	Removed language regarding voice plan minute restrictions as most phone plans include unlimited voice and data.
Mobile Device Policy: Bring Your Own Device (BYOD) Policy and Rules of Behavior	Updated for more accuracy
Security	Added information on the installation of the new security cameras and paging system.
Acknowledgement of Receipt of Handbook and At-Will Agreement	Added additional language to clarify the at-will agreement. Added the employee agrees to comply with all applicable policies and procedures.
Oath of Employment	Added this new section to be compliant with the California Constitution and Government Code regulations that govern public service employees.
Rest and Break Time	Revised the language from requiring employees to take a 30-minute lunch, to encouraging them to do so. This is because under the FLSA rules for non-exempt employees, they are not required to take a lunch break.

Attendance Policy	Removed this section as it is duplicative. We have a section titled “Attendance” on page 14 which discusses our attendance policy and expectations.
COBRA	Removed UnitedHealthCare as an option for COBRA coverage (under Coverage Available) as retirees would not be given this option under COBRA if they disenrolled in retiree medical.
Unpaid Leaves	The language incorrectly stated how we calculate the 12 workweeks of leave. It is revised to state eligible employees receive up to 12 workweeks in a 12-month period, not each calendar year.

2025 Handbook Updates

Additional Updates Made After the last Ad Hoc Committee Meeting

Section	Major Updates:
Compensation Review and Merit Increase	Revised this section to include the new wage progression tool and process for merit increases.
Return-to-Work Program (RTW)	Moved this section under the Workers' Compensation Program section.
Fitness-For-Duty & Return-To-Work Evaluations	Moved this section under the Return-to-Work Program (RTW) section.
Professional Seminars/Conferences Attended During JPIA Time	Added the new requirement for staff to complete the Conference Attendance Request Form.
Holiday Observances	Added Juneteenth as a recognized holiday.
Unpaid Time Off Summary of Rules	Added access to organizational systems will be temporarily disabled during an approved leave of absence.
Compensable Time Authorized Study or Release Time	Added employees will be provided paid study time for coursework related to a required certification or degree program.
Dress and Grooming Standards	Added additional restrictions and guidelines.
Workers' Compensation Disclaimer Notice	Removed this section as this information is already listed in the Recreational Activities and Programs section.

Ad Hoc Committee

Policies to be considered for ExCo Approval or Internal Approval

Section	ExCo Approved Policy	Internal Policy
Handbook Interpretation and Introduction		X
JPIA Mission Statement		X
JPIA Core Values		X
Welcome to JPIA		X
Open Door Policy		X
Equal Employment Opportunity		X
Organizational Development and Engagement	X	
Employment		X
Employment of Relatives		X
New Employee Onboarding		X
Initial Appraisal Process		X
Employee Classifications		X
Rehired Employees		X
Internal Applications		X
Promotions		X
Temporary Upgrades		X
Work Hours		X
Alternative Work Schedule		X

Section	ExCo Approved Policy	Internal Policy
Remote Work		x
Overtime		x
Attendance		x
Rest and Break Time		x
Compensation Plan Opening Paragraph	x	
Compensation Plan Salaries		x
Compensation Plan Compensation Review and Merit Increase		x
Compensation Plan Promotional Increase/ Demotion		x
Compensation Plan Administrative Increase/ Decrease (Adjustment)		x
Compensation Plan Salary Ranges	x	
Compensation Plan Employee Incentive Plan		x
Compensation Plan Eligibility Requirements		x
Performance Appraisals		x
Access to Personnel Records Larry and Sally Dick – MWDOC (and MET Boards)		x
Payroll Administration		x

Section	ExCo Approved Policy	Internal Policy
Employee Benefits • Introduction		X
Employee Benefits • Group Insurance Plans	X	
Employee Benefits • Benefit Changes		X
Employee Benefits • Medical Plan, Dental Plan, Vision Plan, Life, Short Term Disability, Long Term Disability, Employee Assistance Program, Retiree Health Benefits	X	
COBRA (n/a – dictated by law)		
Workers' Compensation Program (n/a – dictated by law)		
CalPERS (n/a – dictated by law)		
Tax Deferred Compensation Program		X
Roth IRA		X
457 Contribution Plan	X	
Educational Approval Process	X	
Paid Leave Policy • Introduction		X
Paid Leave Policy • Vacation	X	
Paid Leave Policy • Holiday Observances	X	

Section	ExCo Approved Policy	Internal Policy
Paid Leave Policy Bereavement Leave (n/a – dictated by law)		
Paid Leave Policy Jury and Witness Duty (n/a – dictated by law)		
Paid Leave Policy Military Leave (n/a – dictated by law)		
Paid Leave Policy Time Off to Vote (n/a – dictated by law)		
Paid Leave Policy Inclement Weather		x
Paid Leave Policy - Sick Leave (some parts are dictated by law) - ExCo authority is limited to the financial impacts of sick leave on the organization	x	x
Paid Leave Policy Organ or Bone Marrow Leave (n/a – dictated by law)		
Unpaid Time Off Summary of Rules		x
Standards of Conduct		x
Attendance Policy		x
The Corrective Process		x

Section	ExCo Approved Policy	Internal Policy
Alcohol, Marijuana and Drug Free Workplace (depends – some parts are)		x For parts not prescribed by law
Fitness-For-Duty & Return-To-Work Evaluation		x
Outside Relations/Media Contact		x
Prohibition of Discrimination (n/a – dictated by law)		
Sexual Harassment (depends – some parts are)		x For parts not prescribed by law
Retaliation (n/a – dictated by law)		
Workplace Violence Prevention (n/a – dictated by law)		
Request for Reasonable Accommodation (n/a – dictated by law)		
Employment Duration		x
Employment Reference Checks		x
Off-Duty Conduct/Conflict of Interest		x
Anti-Fraud/Ethics Policy		x
Children At Work		x
California Public Records Act Request (CPRA is law but how we operationally address requests is not)		x
Lactation Accommodation (n/a – dictated by law)		

Section	ExCo Approved Policy	Internal Policy
Injury & Illness Prevention Program (n/a – dictated by law)		
Ergonomics		X
Bomb Threats And/Or Threatening Calls		X
Driving on The Job		X
Cellular Phone Safety		X
Staff Expense Reimbursement Guidelines		X
Compensable Time (n/a – mostly dictated by law)		
Credit Card Use		X
Employee Incurred Expense		X
Mileage		X
Air Travel		X
Car Rentals		X
Meals	X	
Lodging	X	
Cab/Shuttle from Office		X
Expense Reports		X
Dress & Grooming Standards		X
Telephone Calls		X
Electronic Communications Policy		X

Section	ExCo Approved Policy	Internal Policy
Personal Use of Electronic Communications Systems		X
Retention of Email		X
Access of Another Person's Electronic Communications		X
Use of JPIA Internal and External Websites		X
Artificial Intelligence Appropriate Use Policy		X
Internet		X
Social Networking		X
Software		X
Mobile Device Policy		X
Violations		X
Voice Mail		X
Smoking		X
Security		X
Solicitation and Distribution		X
Workers' Compensation Disclaimer Notice		X
Return-to-Work Program (RTW)		X
Break Room		X
Supplies		X

Section	ExCo Approved Policy	Internal Policy
Resignation		X
Termination		X
Employee Exit		X
Cooperation with Investigations		X
Property Return Agreement		X
Exit Interview		X
Benefits	X	
Final Paycheck (n/a dictated by law)		
CalPERS (n/a dictated by law)		
Deferred Compensation Plan		X
Acknowledgement of Receipt of Handbook and At-Will Agreement		X
Oath of Employment (n/a dictated by law)		

Employee Handbook



Revised January 202~~5~~⁴

Table of Contents

Handbook Interpretation and Introduction	1
JPIA Mission Statement	1
JPIA Core Values	1
Introduction to Employment	2
Welcome to the JPIA	2
Open Door Policy	2
Equal Employment Opportunity	3
Diversity Equity and Inclusion	3
Employment	4
Employment of Relatives	4
Marriage or Development of Involved Personal Relationships While Employed	55
Exceptions	5
New Employee Onboarding	65
Initial Appraisal Process	6
Employee Classifications	6
Full-Time Regular Employee	6
Part-Time Regular Employee	6
Temporary Employees	76
Extended Temporary Employees	77
Exempt/Non-Exempt Employee	7
Rehired Employees	7
Internal Applications	87
Promotions	88
Temporary Upgrades	8
Work Hours	8
Alternative Work Schedule	99
Purpose	99
Workweek Schedule	9
Participation Criteria	9
Non-Exempt Employees	1010
Exempt Employees	10
Procedures	1110
Remote Work	1211
General Guidelines	1212
Employee Responsibilities	12
Procedure	13
Overtime	1413
Time Worked	1414
Overtime	14
Attendance	1514

Rest and Break Time	15
Compensation Plan.....	<u>1745</u>
Salaries	<u>1746</u>
Compensation Review and Merit Increase.....	<u>1746</u>
Promotional Increase/Demotion	<u>1946</u>
Administrative Increase/Decrease (Adjustment)	<u>1946</u>
Salary Ranges.....	<u>1947</u>
Employee Incentive Plan.....	<u>1947</u>
Eligibility Requirements:	<u>2047</u>
Performance Appraisals.....	<u>2048</u>
Overview	<u>2048</u>
Access to Personnel Records.....	<u>2149</u>
Persons Other Than The Employee	<u>2149</u>
The Employee	<u>2249</u>
Payroll Administration	<u>2220</u>
Employee Self-Service.....	<u>2220</u>
Time Sheets.....	<u>2220</u>
Sign-In Sheets	<u>2220</u>
Paydays	<u>2220</u>
Garnishments.....	<u>2320</u>
Payroll Deductions	<u>2320</u>
Changing Your Employee Information	<u>2321</u>
Deferred Compensation	<u>2321</u>
Employee Benefits	<u>2421</u>
Introduction	<u>2421</u>
Group Insurance Plans	<u>2422</u>
Benefit Changes.....	<u>2522</u>
Medical Plan.....	<u>2523</u>
Dental Plan.....	<u>2725</u>
Vision Plan	<u>2725</u>
Life	<u>2825</u>
Short Term Disability	<u>2826</u>
Long Term Disability	<u>2926</u>
Employee Assistance Program (EAP).....	<u>2927</u>
Retiree Health Benefits	<u>3027</u>
COBRA	<u>3330</u>
Qualifications.....	<u>3331</u>
Qualifying Event	<u>3331</u>
Selection Period	<u>3331</u>
Cost.....	<u>3431</u>
Coverage Available	<u>3431</u>
Open Enrollment	<u>3431</u>
Special Note.....	<u>3432</u>

Employee Notification	3432
Non-Payment of Premiums	3432
Cal-COBRA.....	3432
Workers' Compensation Program	3532
Recreational Activities and Programs	3633
California Public Employee Retirement System (CalPERS)	3734
Tax Deferred Compensation Program	4137
Tax Benefit	4138
Contribution Limits	4138
Withdrawals.....	4238
Reports/Statements	4238
Investment Options	4238
Deferred Compensation Sources available through payroll deduction:	4238
Roth IRA	4239
457 Contribution Plan	4339
Educational Approval Process	4340
Degree/Certification/Professional Designation Programs	4340
Professional Courses and Specific Job-Related Courses	4440
Professional Seminars/Conferences Attended During JPIA Time	4440
Additional Requirements	4440
Paid Leave Policy	4541
Vacation	4541
Holiday Observances	4642
Bereavement Leave (Statutory)	4743
Jury and Witness Duty	4843
Military Leave	4844
Military Spouse Leave	4944
Time Off to Vote	4945
Inclement Weather	4945
Sick Leave.....	5045
Organ or Bone Marrow Leave	5146
Unpaid Time Off.....	5147
Summary of Rules.....	5147
Unpaid Leaves	5248
CFRA Carryover.....	Error! Bookmark not defined. 51
Intermittent Leave	Error! Bookmark not defined. 51
PDL Carryover	5752
Intermittent Leave	5752
Wage Replacement During Leave	5954
Reinstatement.....	6054
Fit-for-Duty Exam	6055
Employee Relations	6055
Standards of Conduct	6055
Attendance Policy	6257

The Corrective Process	<u>6257</u>
Employee Grievances or Concerns	<u>6357</u>
Alcohol, Marijuana and Drug Free Workplace.....	<u>6358</u>
Fitness-For-Duty & Return-To-Work Evaluations	<u>6459</u>
Outside Relations/Media Contact.....	<u>6559</u>
Prohibition of Discrimination.....	<u>6559</u>
Sexual Harassment.....	<u>6660</u>
Guidelines for the Employee	<u>6661</u>
Disciplinary and/or Corrective Action	<u>6862</u>
Retaliation	<u>6862</u>
Workplace Violence	<u>6862</u>
Request for Reasonable Accommodation.....	<u>6963</u>
Pregnant Workers Fairness Act	<u>7064</u>
Employment Duration	<u>7165</u>
Employment Reference Checks.....	<u>7165</u>
Off-Duty Conduct/Conflict of Interest	<u>7165</u>
Anti-Fraud/Ethics Policy	<u>7266</u>
Children At Work.....	<u>7367</u>
California Public Records Act Request (CPRA).....	<u>7367</u>
Lactation Accommodation.....	<u>7367</u>
Safety	<u>7467</u>
Injury & Illness Prevention Program.....	<u>7467</u>
Ergonomics.....	<u>7568</u>
Bomb Threats And/Or Threatening Calls	<u>7569</u>
Driving on The Job.....	<u>7569</u>
Procedures.....	<u>7569</u>
Cellular Phone Safety	<u>7669</u>
Staff Expense Reimbursement Guidelines	<u>7669</u>
Credit Card Use	<u>7770</u>
Employee Incurred Expenses	<u>7870</u>
Mileage	<u>7870</u>
Air Travel.....	<u>7870</u>
Car Rentals.....	<u>7971</u>
Meals	<u>8071</u>
Lodging	<u>8072</u>
Cab/Shuttle from Office.....	<u>8072</u>
Expense Reports	<u>8072</u>
Around The Office	<u>8072</u>
Dress & Grooming Standards	<u>8072</u>
Telephone Calls	<u>8273</u>
Electronic Communications Policy	<u>8273</u>
Personal Use of Electronic Communications Systems.....	<u>8374</u>

Retention of E-mail.....	<u>8375</u>
Access of Another Person's Electronic Communications.....	<u>8475</u>
JPIA World Wide Web Site Policies	<u>8475</u>
Internet.....	<u>8776</u>
Social Networking	<u>9079</u>
Software.....	<u>9180</u>
Mobile Device Policy	<u>9280</u>
Violations.....	<u>9783</u>
Voice Mail	<u>9783</u>
Smoking	<u>9783</u>
Security	<u>9884</u>
Solicitation and Distribution.....	<u>9884</u>
Workers' Compensation Disclaimer Notice	<u>9884</u>
Return-to-Work Program (RTW)	<u>9984</u>
Break Room	<u>9985</u>
Supplies	<u>10086</u>
Leaving The JPIA	<u>10086</u>
Resignation	<u>10086</u>
Termination	<u>10086</u>
Employee Exit.....	<u>10186</u>
Cooperation with Investigations	<u>10187</u>
Property Return Agreement	<u>10187</u>
Exit Interview.....	<u>10187</u>
Benefits	<u>10287</u>
Final Paycheck.....	<u>10287</u>
CalPERS.....	<u>10288</u>
Deferred Compensation Plan.....	<u>10288</u>
Acknowledgment of Receipt of Handbook and At-Will Agreement	<u>10389</u>
JPIA Employee Handbook Receipt (employee copy).....	<u>10389</u>
Acknowledgment of Receipt of Handbook and At-Will Agreement	<u>10490</u>
JPIA Employee Handbook Receipt (employer copy)	<u>10490</u>

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Handbook Interpretation and Introduction

This Handbook is intended to provide you with a general understanding of the Association of California Water Agencies Joint Powers Insurance Authority's (JPIA) human resource policies, benefits, and rules. It is intended to familiarize you with important information about the JPIA as well as information regarding your own privileges and responsibilities. Although it is not an employment contract or legal document, it is important that all employees read, understand, and follow the provisions of the Handbook. It [supersedes previous handbooks and](#) may be changed from time to time by the JPIA. You will be notified in writing of any amendments and additions to these policies and procedures. Keep this Handbook, additions, and revisions on file for your reference.

This Handbook, however, cannot anticipate every situation or answer every question about employment, nor can it provide information that answers every possible question. Additionally, circumstances will undoubtedly require that guidelines, practices, and benefits described in this Handbook change. Accordingly, the JPIA must reserve the right to modify, supplement, or rescind any provision of this Handbook from time to time, as it deems necessary. You will, of course, be advised of changes that occur.

The JPIA is constantly striving to improve its operations, the services that it provides its members and its relations with its employees. You are encouraged to bring suggestions for improvements to the attention of your department manager, director, or the Chief Executive Officer. Additionally, if you have any questions or seek clarification, you should see your department manager.

By working together, the JPIA believes that it will share with its employees a sincere pride in the workplace and the services that they are here to provide.

JPIA Mission Statement

The ACWA Joint Powers Insurance Authority (JPIA) is dedicated to consistently and cost effectively providing the broadest possible affordable insurance coverages and related services to its member agencies.

JPIA Core Values

The core values of an organization are those values JPIA hold which form the foundation on which we perform work and conduct ourselves. There is an entire universe of values, but some of them are so important that throughout the changes in society, government, politics, and technology, they are STILL the core values JPIA will abide by. In an ever-changing world, core values are constant. Core values are not

descriptions of the work JPIA does or the strategies JPIA employ to accomplish the mission. These values underlie JPIA's work, how staff interact with each other, and which strategies JPIA employ to fulfill our mission.

- **People:** Members and JPIA are one team; employee success equates to organizational success
- **Integrity:** Operating with transparency, honesty and fairness to build trust
- **Innovation:** Continuous improvement and adaptation by asking "What if?" and finding the best solutions
- **Service:** Going beyond expectations for internal and external relationships; taking pride in all we do

Introduction to Employment

Welcome to the JPIA

I am thrilled to extend a warm welcome to you. As you embark on your journey with us, know that you are joining a dynamic and dedicated team committed to creating a culture that allows you to be innovative, creative, and have fun. Together, we work to meet the needs of our water agencies and your contributions will play a crucial role in our collective success.

Please take some time to read through our handbook and become familiar with our expectations and policies. I am here if you have any questions and will be happy to assist you in any way that I can. I hope your experience here will be rewarding, challenging, and enjoyable.

Again, welcome to the JPIA team! I look forward to witnessing the positive impact your talents and enthusiasm will have on our shared goals.

Sincerely,

Adrienne, CEO

Open Door Policy

The JPIA promotes an atmosphere in which you can talk freely with the management. You are encouraged to openly discuss with your department manager any problems so appropriate action may be taken. If they cannot be of assistance, the Human Resources Manager, Department Director -or Chief Executive Officer are available for consultation and guidance. The JPIA is interested in all of its employees' success and happiness.

Equal Employment Opportunity

It is the continuing policy of the JPIA to provide equal employment opportunities for all individuals who have the necessary qualifications with respect to recruitment, hiring, performance appraisal, promotion, training, termination, compensation, or other personnel-related activities regardless of ~~the actual or perceived~~ ancestry, race, color, religion, sex, gender, gender identification, gender expression, national origin, disability, medical condition, marital status, age, genetic information, sexual orientation preference, veteran/military status, reproductive health decision making, or any other characteristic protected by federal, state or local laws. This includes any combination of protected characteristics; a perception that the person has any of those characteristics; or is associated with a person who has, or is perceived to have, any of those characteristics. All employee decisions will be based upon policies and practices that further the principles of equal employment opportunity.

Every member of management is held responsible for assuring non-discrimination in employment opportunities. In addition, all staff members, regardless of position, share in the responsibility of maintaining a discrimination-free work environment.

~~Diversity Equity and Inclusion~~ Organizational Development and Engagement

ACWA JPIA is committed to cultivating a culture that promotes organizational excellence, while advancing an environment where every voice is valued, every perspective is respected, innovation is celebrated, and opportunities for engagement are accessible to all stakeholders. ~~fostering, cultivating and preserving a culture of diversity, equity and inclusion.~~

JPIA's human capital is the most valuable asset JPIA has. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities and talent that JPIA team members invest in their work represents a significant part of not only JPIA culture, but JPIA reputation and company's achievement as well.

JPIA value and encourage team members' differences ~~in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual identity, socio-economic status, veteran status,~~ and ~~other~~ characteristics that make JPIA team members unique.

JPIA's organizational development and engagement (ODE) ~~diversity~~ initiatives are applicable to all aspects of employment and the ongoing goal of developing of a work environment built on the premise ~~of gender and diversity equity~~ that encourages and enforces:

- Respectful communication and cooperation between all team members.
- Teamwork and employee participation, permitting the representation of all groups and employee perspectives.
- Work/life balance through flexible work schedules to accommodate team members' varying needs.
- Employer and employee contributions to the communities JPIA serve to promote a greater understanding and respect for the diversity.

All JPIA team members have a responsibility to treat others with dignity and respect at all times. All team members are expected to exhibit conduct that reflects inclusion during work, at work functions on or off the work site, and at all other company-sponsored and participative events.

Employment

All employees are hired on an "at will" basis, unless you are employed under a written contract stating otherwise. This means that you may resign at any time and that the JPIA may terminate you at any time, with or without cause. At the end of this Handbook, you will find a copy of an "at will" employment agreement. Please read this carefully, sign and return to the Human Resources Manager. An additional copy is provided for your records.

Any offer of employment will be conditioned upon a designation of "medically qualified" or "[conditionally qualified](#)" through a pre-employment physical exam and other conditions set forth in the offer letter.

Employment of Relatives

The JPIA's policy is to hire, promote, and transfer employees on the basis of individual merit and to avoid any hint of favoritism or discrimination in making such decisions. Even if favoritism or discrimination is not shown, the existence of the situation may precipitate questions difficult to answer or may cause some discomfort for the individuals involved.

The JPIA may refuse to hire relatives of present employees if doing so could result in actual or potential problems in supervision, security, safety, or morale or if doing so could create potential conflicts of interest. The JPIA defines "relatives" as spouses, registered domestic partners, children, siblings, parents, in-laws, and step-relatives.

The employment of relatives or spouses is regarded as a potential violation of this policy and will be discouraged in general for regular employees. It will be considered for temporary, short-term positions.

This policy also applies to persons who are not legally married, but in the JPIA's judgment, because of their involved personal relationship may be unduly likely to improperly alter their organizational decisions in favor of their partner.

Marriage or Development of Involved Personal Relationships While Employed

If two persons should marry while both are employed by the JPIA, they may continue their employment in the same job provided that such employment does not adversely affect safety, morale, security, internal financial control, or supervision; and such spouses or relatives neither initiate nor participate in making institutional recommendations or decisions which would directly affect employment status of their relatives.

If the criteria are not met, one of the spouses must change jobs, change JPIA locations, or leave the JPIA. The couple will make a decision within thirty (30) days of the marriage as to which of the two of them will change positions. If this decision is not made within 30 days, based upon its business needs the JPIA reserves the right to determine which employee will be transferred or whose employment will be terminated.

The provisions of this paragraph also apply to employees who establish a personal relationship, which in the JPIA's judgment, have become sufficiently involved to the point where it has become unduly likely that one or both of the partners will improperly make organizational decisions in favor of the other.

Exceptions

The CEO may make an exception to this policy if it is found that:

- The position to be filled requires a person with specialized training and experience not generally available in the employment market;
- There is a vital agency need to fill the position;
- Substantial bona fide efforts have been made to locate and employ such a person who is not a relative of any employee; and
- The relationship between the relative and the applicant or employee is unlikely to materially affect their employment by the JPIA.

New Employee Onboarding

As a new employee, you will be provided formal onboarding that will include: an initial meeting with your manager; a tour of the facility; a meeting with the Human Resources Manager to review the benefits, office procedures and employee Handbook; training as needed for your position (including basic training as outlined in the New Employee Onboarding Checklist); and a meeting with each department manager to learn about their specific departments.

Initial Appraisal Process

As part of the hiring process, your manager will conduct an initial appraisal within the first 30 days on the job. This appraisal will provide expectations, goals, and objectives to be completed within the first 120 days. Your manager will then conduct a formal [Initial 120-Day](#) Performance Appraisal. This appraisal process is considered part of the hiring process.

~~Newly hired employees, who are still in their initial appraisal process, must get approval off from their manager to take any paid time off.~~

Employee Classifications

Upon [hire](#) successfully completing this initial appraisal process, you will ~~then~~ be classified into one of the following categories:

Full-Time Regular Employee

Defined as at will employees who have successfully completed their initial appraisal process and are assigned a definite work schedule of at least 30 hours per week and their employment is expected to continue for an indefinite period of time. Full-time regular employees are eligible for employee benefits as described later in this Handbook. Full-time employees that work less than 40 hours per week, but 30 or more hours per week, will have benefits pro-rated according to the number of hours worked, in accordance with the following policies and requirements of vendors.

Part-Time Regular Employee

Defined as at will employees who have successfully completed their initial appraisal process and are assigned a work schedule of less than 30 hours per week, and it is expected to continue for an indefinite period of time. Part-time regular employees may be eligible for vacation, sick leave, and holiday benefits as described later in this Handbook.

Temporary Employees

Defined as at will employees who are hired to perform a specific task or to be employed for a temporary period of time. Regular temporary employees are limited to six months on the job for full time employment or 1,000 hours or 125 days in a fiscal year. They are not eligible for vacation and holiday benefits; however, are eligible for sick leave as described later in this Handbook.

Extended Temporary Employees

Extended Temporary Employees are those that exceed 1,000 hours of service. They are not eligible for vacation benefits; however, are eligible for sick leave as described later in this Handbook, plus:

- Enrollment in the CalPERS system, or payment into the system if already a member, with the JPIA paying the employer portion.
- Paid regular holidays as they fall within their service period

If the employee is rehired within one year of separation, the sick leave accrued at time of separation will be reinstated.

In addition, employees are also classified as Non-Exempt or Exempt.

Exempt/Non-Exempt Employee

Employees whose jobs are governed by the FLSA are either "exempt" or "non-exempt." Non-exempt employees are entitled to overtime pay. Exempt employees are not. Most employees covered by the FLSA are non-exempt. Some jobs are classified as exempt by definition. For most employees, however, whether they are exempt or non-exempt depends on (a) how much they are paid, (b) how they are paid, and (c) what kind of work they do.

The requirements to determine this status are outlined in the FLSA Regulations (promulgated by the U.S. Department of Labor). See the Human Resources Manager if you have questions.

Rehired Employees

Employees who are rehired following a break in service in excess of one (1) year, other than an approved leave of absence, must serve another initial appraisal process, whether or not such a period was previously completed. Such employees are considered new employees from the effective date of their re-employment for all purposes, including the purposes of measuring benefits.

Internal Applications

JPIA encourages staff to identify professional development opportunities within the organization. One such way is to apply for internal openings and grow within the JPIA. Any employee can apply for an internal opening, as long as they are not on a Performance Improvement Plan. When an opening is posted, the employee must submit a [JPIA application](#), resume and cover letter to the Human Resources Manager by the due date listed on the job advertisement. Like all external applicants, the internal candidate will be interviewed if they meet the qualifications of the job. An interview is not guaranteed.

Promotions

It is the JPIA's intent to promote from within whenever possible. However, it is in the JPIA's best interest to fill all positions with the best qualified individual. When opportunities occur within the organization, promotions and transfers will be based upon an employee's qualifications and performance.

Temporary Upgrades

Whenever temporary [positions-upgrades](#) are available within the JPIA or regular positions are filled on a temporary basis, it is the JPIA's intent to give employees an opportunity to apply for such positions.

If management feels that none of the applying employees are fully qualified for the temporary position, they may recruit outside candidates with the qualifications necessary to fill the position.

If you do not agree with the management's decision on who was selected for the temporary upgrade, you should discuss this with them. If a resolution is not reached, the manager should arrange to have you discuss the matter with the Chief Executive Officer.

When the temporary positions end, it is the JPIA's intent to give the employees who were temporarily advanced an opportunity to return to their former positions.

Work Hours

The standard work week begins at 12:01 a.m. Sunday and ends at 12 midnight the following Saturday. The core business hours are Monday through Friday, 7:30 a.m. to 4:30 p.m., depending upon operational requirements. Since the JPIA is a service organization, normal work may fluctuate with claims or member demand. As a general rule, departments are to be staffed from 7:30 a.m. to 4:30 p.m.

With management approval and depending on your department needs you may start work any time before 9:00 a.m. and you may end work between the hours of 3:30 p.m. and 6:00 p.m. Any work schedule outside of these hours would require manager approval. A consistent schedule is preferred. If changes in your work schedule are required or desired, your manager will notify you or respond to your request at the earliest opportunity. You may be required to work overtime or hours other than those normally scheduled. It is the JPIA's intent to allow you maximum flexibility in scheduling your time while still meeting the needs of the organization.

Alternative Work Schedule

Purpose

This policy is established in order to gain the maximum efficiency for the JPIA and allow the employee additional opportunities to enjoy their non-work hours.

Workweek Schedule

The JPIA's normal workweek consists of five/eight-hour days (40 hours per week), Monday through Friday. The JPIA has established a 9/80 work schedule for staff subject to the guidelines below. It is important to note that the Alternative Workweek Schedule is not appropriate for all positions, or in all settings, or for all employees.

Participation Criteria

- An Alternative Work Schedule requires approval from the employee's manager and completion of an Alternative Work Schedule Agreement.
- The Alternative Work Schedule will be initiated on a trial basis and may be discontinued at any time at the request of either the employee and/or management. The JPIA reserves the right to suspend the arrangement in the event of unanticipated circumstances regarding employee performance or operational needs.
- Eligibility to participate in the alternative program is subject at all times to the needs of the JPIA and may be modified as those needs dictate. Certain positions may be ineligible for participation due to necessary work schedules.
- New employees are eligible to participate following successful completion of initial ~~120~~90-day review.
- Service to the members must be maintained, including adequate phone coverage. It is essential that each department be staffed from 7:30 a.m. to 4:30 p.m. Monday through Friday (except during the noon hour).
- Timeliness, quality, and quantity of work must be maintained.
- Priority work must be accomplished in a timely manner.

- A satisfactory attendance record and continued satisfactory work performance must be maintained.
- All participants must agree to abide by the guidelines.
- In order for this program to be successful, it is important that employees communicate with their co-workers and managers regarding any critical issues that may arise on your day off.

Non-Exempt Employees

- Participants will work 80 hours over a two-week period; eight nine-hour workdays and one eight-hour workday. Fridays are the designated days off. The eight-hour workday and the day off are to be regularly scheduled.
- Employees will be paid overtime (time and a half) for hours worked in excess of 40 hours in any work week, or they can request comp time according to the JPIA's policy.
- It is required that employees have 40 hours in each workweek to equal 80 for the two week pay period.
- The normal workweek will begin on Friday, four hours into the work shift and ends on the following Friday four hours into the work shift.

Exempt Employees

- Exempt employee's schedules participating in this program are based on a 40-hour workweek utilizing the 9/80 schedule noted above. You are required to devise a work schedule with your manager in advance to coincide with your job responsibilities and the needs of the JPIA.
- There will be no alternative workweeks scheduled during any pay period with more than one holiday.
- If you are taking more than one day off in any two-week pay period, for any reason, you will be required to revert back to the original five-day work schedule. You will not be able to take a 9/80 day off during that pay period.
- If you work a 9/80 schedule and are unable to take your day off due to work ~~restrictions~~demands, you will not be entitled to carry that day over. It is recommended that you adjust your workweek accordingly and revert back to the normal schedule.
- If you work a 9/80 schedule, half days worked count as half a day only. Half days worked do not count as a full nine-hour day.

Procedures

- A 9/80 schedule can only begin at the start of a pay period.
- Pay periods will cover two weeks, or 26 pay periods per year. Any hours worked over 80 hours per pay period will not be carried forward to upcoming pay periods. The “slate” starts clean at the beginning of each new two-week pay period.
- Time sheets will be for a two-week/80-hour period and need to be completed on Paylocity by 9 a.m. on the Monday following the end of the pay period.
- Each department director/manager will manage their department schedule. ~~All staff is expected in the office on Mondays, unless granted approval by their manager in advance.~~
- Once participants are committed to an alternative schedule, it is expected to be followed for that pay period. Keep in mind that a scheduled day off will be treated just like any other Saturday or Sunday. If you get sick, the time will not be recognized as paid sick time.
- Holiday occurring on an employee’s regularly scheduled workday will require charging the number of hours/day, similar to employees working a regular schedule. For example, a holiday is eight (8) hours, the employee will need to charge one (1) hour of vacation for that day to total nine (9) hours when applicable.
- Holiday that falls on an employee’s regularly scheduled day off will require charging the number of hours/day and be given an alternate day off within the next 30 days.
- Vacations and Sick Leave absence of at least one full day but less than a full week will require charging the number of hours/days the employee was normally scheduled to work on the specified day(s). For example, an employee will need to charge a total of nine (9) hours of vacation or sick leave when applicable.
- ~~Vacations and Sick Leave absence of two or more days will require the employee to revert back to a traditional schedule to ensure no more than 40 hours/5 days in any given week is docked from leave accruals.~~
- If an employee is needed to assure adequate coverage during a period when a counterpart is on vacation or out of the office for one week or more, or any time the JPIA requires, they may be required to revert back to a five day/40-hour work week.
- Participants in the alternative program that take extended leaves for any reason, will be removed from the program for the duration of the leave.

- This program may be discontinued at any time.

Remote Work

JPIA considers working from home to be a viable alternative work arrangement in cases where the individual, job and manager characteristics are best suited to such an arrangement. Working remotely is a voluntary work alternative that may be appropriate for some employees and some jobs. It is not an entitlement, it is not a company-wide benefit, and it in no way changes the terms and conditions of employment with JPIA. The success of the program will be evaluated based on productivity, seamlessness to our members and staff, and no negative impact on our collaborative culture.

General Guidelines

Remote work is optional. Remote work is not permanent and may be discontinued at any time without prior notice and is not a privilege, or a right. A manager may determine that some positions and/or individuals are not well suited for the remote work option.

Remote work is limited to no more than 2 days per week and will be arranged by the manager due to the individual needs of each department.

Whether a position is eligible for remote work and how much is specified in the employee's job description and subject to manager approval. Manager and employee will have regular discussions as to the viability of continuing the benefit based on employee performance. At the discretion of the manager/supervisor, ~~the~~ the remote work option may be ~~is not~~ available to staff who are on a Performance Improvement Plan.

Employee Responsibilities

Keep the main JPIA Outlook calendar updated so that others can easily determine if employee has taken a day off, is out of the office, attending a virtual meeting, or working remotely.

Be available during the core hours of 8:00 a.m. to 4:00 p.m. to answer calls, respond to email, attend web meetings, etc., and attend all Connections Q & As.

Come into the office if requested by their manager/supervisor to do so.

Work will be performed from their primary residence.

Use of JPIA issued laptop computers, or a personal computer configured for JPIA remote work is required. Unless extenuating circumstances, no new equipment will be purchased by the JPIA nor will there be reimbursement for any office equipment for

remote work. Employee is responsible for the care and safety of any JPIA equipment issued. Needed supplies can be obtained when in the office.

Ensure remote work environment is one conducive to 8 hours of productive work time, preferably in a room separate from the rest of the household; and is safe, ergonomically correct and free of hazards and obstructions. (JPIA Risk Control staff are available for verbal consultation as requested.) Please notify your manager immediately if you are injured at home. Employee's home must have internet and cell service with sufficient speed/capacity to conduct work via computer and phone.

Follow all security and data privacy policies, procedures, and laws.

Answer phone calls and respond to emails and Team requests within two hours of receipt unless unavailable as noted in the Outlook calendar.

Respond via phone or internet, and access information using their own phone and internet service with no reimbursement from the JPIA.

Utilize the phone-forwarding feature on their [Zoom office](#) phone.

Determine, for themselves, any personal tax or legal implications resulting from use of a home office.

Focus on job performance and meeting business demands though working from home. Remote work is not designed to be a replacement for appropriate childcare. An individual employee's schedule may be modified to accommodate emergency childcare needs with manager's permission. Prospective remote workers are encouraged to discuss expectations of working from home with family members prior to entering into a trial period.

Remote workers who are not exempt from the overtime requirements of the Fair Labor Standards Act will be required to record all hours worked in a manner designated by JPIA. Such employees will be held to a higher standard of compliance than office-based employees due to the nature of the work arrangement. Hours worked more than those specified per day and per workweek, in accordance with state and federal requirements, will require the advance approval of the manager. Failure to comply with this requirement may result in the immediate cessation of the remote work agreement and/or disciplinary action.

If an employee incurs a work-related injury while working remotely, workers' compensation law and rules apply. An employee must notify their manager or Human Resources Manager immediately and complete all necessary documents regarding the injury.

Procedure

~~If the employee and manager agree, a telecommuting agreement will be prepared and signed by all parties.~~

~~Evaluation of remote worker's performance during the first 90 days will include interaction by phone and e-mail between the employee and the manager, and face-to-face meetings to discuss work progress and problems. At the conclusion of the 90-day trial period, the employee and manager will evaluate the arrangement and make recommendations for continuance or modifications. Evaluation of remote worker's performance beyond the trial period will be consistent with that received by employees working at the office.~~

Overtime

Due to varying workloads and cycles throughout the JPIA, your manager may ask you to work beyond your normal shift. The JPIA will pay all hourly employees overtime pay for hours worked over forty (40) hours in a work week. Although the JPIA will endeavor to provide advance notice of an overtime request, this is not always possible. Overtime work by non-exempt employees should be approved by their managers in advance of being worked when feasible. Overtime is paid at a rate of one-and-one-half (1-1/2) times the normal hourly rate.

Paid compensatory time-off may be given to non-exempt employees at a rate of one-and-one-half (1-1/2) hours for each hour of overtime if you and the JPIA agree to the time off from work in lieu of earned overtime pay. By law, you must request in writing your desire for compensatory time off in lieu of overtime monies. If you wish to take compensatory time, a written request for the time off must be submitted and approved by your manager in advance of the time requested. Compensatory time for non-exempt employees must be taken within thirty (30 days) following the date on which the overtime was worked.

Non-approved overtime will be paid but may subject the employee to disciplinary procedures.

Time Worked

You must record all time worked on your weekly time sheet, including time worked over your normal schedule.

Overtime

Overtime pay is calculated at one-and-one-half the regular rate of pay for all hours worked over forty (40) hours in one work week. Hours paid for hours not worked, e.g., holidays, sick days, and vacations, do not count toward hours worked for overtime computation purposes.

Attendance

The JPIA relies on you to consistently provide “high quality, cost effective risk control and risk financing services to its members.” You must routinely interact with other staff, members, vendors, and the general public to effectively meet these objectives. Good attendance is essential to providing these objectives and is an indicator of effective employee performance.

It is recognized that you will have periodic absences for illness or personal matters, but recurring and excessive absences and/or tardiness adversely affects productivity, morale, workflow, and service and directly impacts the JPIA’s ability to meet its ~~challenging~~ goals.

The professionalism that you bring to your position and the JPIA is valued and it is anticipated that you will manage your own good attendance. There are occasions, however, when attendance guidelines are beneficial and necessary to direct employees and managers.

The guidelines are intended to be straightforward and concise. They are subject to management discretion and allow for flexibility in addressing individual attendance situations. Your manager will consider State and Federal laws, family and medical leave issues, the demands of different work units, the JPIA’s policy, your performance, your attendance history, and individual circumstances when assessing appropriate steps to correct attendance problems.

The JPIA intends to maintain a positive environment that supports its goals while recognizing individual needs and circumstances. If attendance issues arise, please speak with your manager who can discuss the impact of your attendance on the JPIA’s goals and your individual performance. Please note that it is your responsibility, however, to understand the guidelines listed in the Attendance Policy of this Handbook.

If you fail to report to work for three consecutive workdays without notice or approval by your manager, the JPIA will make every effort to contact you. If no contact is made within five days, JPIA may consider that you have abandoned your job and your employment may be terminated.

Rest and Break Time

Full-time (40-hour/week) non-exempt employees are encouraged to take a 15-minute break in the morning and a similar break in the afternoon in order to “break” up the day and as a relief from office routine and tension. You are free to retire to the lunchroom, exit the building for a quick walk, or just sit outside on the benches provided. Less than 40-hour/week employees should clarify with their manager appropriate rest and break times.

Full-time non-exempt employees are ~~encouraged~~required to take at least a 30-minute lunch break. An exception could be made if you were working less than 8 hours/day (i.e., six hours) and requested that you not ~~be required to~~ take a lunch break. Under these circumstances, please meet with your manager for their decision of whether or not to require you to take a lunch break.

Compensation Plan

The foundation for the JPIA's compensation is based on the following key principles:

- Pay for Performance—You earn your compensation. Superior performance equals superior compensation. If you create results, you will be rewarded.
- Providing Opportunity—Career opportunities are available, further education is promoted, and compensation levels are competitive.
- Program Flexibility—The management has the ability to pay you according to performance levels rather than being limited to narrow ranges based on a job title. With this flexibility, pay can be used as a powerful communication and management tool. Responsibilities can broaden and pay opportunities can increase without having to change jobs.
- Employees Have a Significant Stake in the JPIA—You have the biggest stake in the JPIA. It is through collective performance that results are created. (i.e., Executive Committee is looking for image, leadership, behavior, morale, overall performance).

Salaries

For new hires, factors considered in establishing the base salary are education, previous work experience, position, grade level and other relevant factors.

For existing employees, adjustments to your base salary generally occur as a result of a performance appraisal, a promotion, or a significant increase or decrease in job responsibilities as well as business circumstances and other relevant factors.

Compensation Review and Merit Increase

Compensation reviews may occur annually and are subject to approval through the adopted budget process. Salary adjustments are not automatic and depend on individual performance, position within the salary range, and the JPIA's overall business and financial circumstances. Reviews may occur annually. Your manager and the Chief Executive Officer will evaluate the performances based on the outcome of the performance appraisal, and the position of the salary within the range and job responsibilities.

Employee performance is evaluated through the performance appraisal process. Performance ratings, along with job responsibilities and salary placement within the established range, are considered when determining eligibility for a merit increase.

Merit increases, if approved, are determined using a structured wage progression approach. Merit awards are calculated as a **percentage of the salary range midpoint** for the employee's classification, rather than as a percentage of the employee's current base salary. This approach allows employees within the same salary grade and with the same performance rating to receive the **same dollar amount**, regardless of their current position within the range.

Key elements of the merit process include:

- Merit award percentages vary based on where an employee's salary falls within the established range.
- Higher performance ratings result in higher merit awards.
- Employees rated "Unacceptable" are not eligible for a merit increase.

This merit structure is designed to promote equity, reduce wage disparities over time, and help prevent employees from reaching salary caps too quickly.

Any employee who is on a Performance Improvement Plan (PIP) at the time of the compensation review may be ineligible for a merit increase unless they successfully complete the PIP expectations.

Employees at or Near the Salary Range Maximum

If a merit increase would cause an employee's salary to exceed the salary range maximum, the employee's base salary will be increased up to the range maximum. Any remaining portion of the approved merit award will be paid as a non-PERSable bonus.

This provision applies to employees who receive an overall performance appraisal rating of 2 or higher.

New Hires

Eligibility for merit increases for new employees is based on length of service and participation in the annual performance appraisal process.

- New employees who have completed their 120-day introductory period but have been employed for less than one year, and who participate in the annual performance appraisal process, are eligible to receive the full merit increase.
- Employees who are within their 120-day introductory period at the time of the annual review are not eligible for a merit increase. This applies to employees with start dates between May 31 and September 30.

At manager discretion, if a new employee demonstrates significant quality of work within their first year (e.g., exceeding expectations or exceptional performance), a spot bonus may be requested. The intent is for this to be considered as part of the mid-year appraisal process in February.

~~Merit increases, if any, are given based on performance and in accord with current business circumstances of the JPIA. All of these factors determine salary changes within the pay range. There are no automatic pay increases. It is the JPIA's objective to adjust a salary level that best represents performance level and responsibilities in accord with current business circumstances.~~

~~**Note:** Any employee on a performance improvement plan (PIP) may be ineligible for a merit pay increases, unless they successfully complete the PIP expectations, incentive/bonus program, promotion, and flex time.~~

Promotional Increase/Demotion

A promotion occurs when you accept a position that is in a higher-level grade. A salary increase is generally given to recognize increased job responsibilities.

A demotion occurs when you are reassigned to accept a job at a lower level.

Administrative Increase/Decrease (Adjustment)

An administrative increase is an increase in salary within a salary range. It is given to recognize employees who accept a significant increase in responsibilities or have demonstrated significant "growth" in a position.

Current salary level, increased responsibilities, and current business circumstances will be considered when determining a possible salary increase.

An administrative decrease is a decrease in salary within a salary range if the value of the job has decreased.

Salary Ranges

Minimum and maximum salary ranges have been established for each position. These ranges are reviewed and may be upgraded annually for inflation.

Employee Incentive Plan

~~The plan may be available each fiscal year, if approved by the Executive Committee. The program is designed to recognize those employees who have exhibited superior performance such as work done beyond their salary grade, completion of special assignments outside of their job description or additional contributions to the success of the organization, during the previous fiscal year.~~

~~Based on performance throughout the evaluation period which corresponds with the fiscal year (October through September), incentive dollars are awarded at the beginning of the following fiscal year (October). There is no guarantee of an incentive award. The objectives of the program are as follows:~~

- ~~• To reward individuals who go above and beyond in serving the membership and supporting JPIA values of service, people, innovation and integrity~~

- To recognize employees that performed beyond their position grade
- To encourage innovation and actions that sets JPIA apart

Eligibility Requirements:

- Full-time employee (temporary employees at Chief Executive Officer's discretion)
- A performance rating of outstanding or better (above 3.0)
- Employed by the JPIA at the time payouts are made
- Completion of the initial appraisal process by the end of the fiscal year for which payouts are made
- Not on progressive discipline

The amount of the award is at the complete discretion of senior management, can range from 1-10% of salary. Those rated above 3.0 but less than 4.0 can be awarded up to 5% of salary; those rated above 4.0 can be awarded up to 10% of salary. Incentive pay is paid in a lump sum in the month of October. The dollars paid out are considered Special Compensation under CalPERS rules.

Performance Appraisals

The JPIA maintains a policy of evaluating your job performance as a means of measuring the efficiency and effectiveness of operations and providing you with meaningful information about your work. Effective performance appraisals also aid in making personnel decisions related to such areas as training, merit pay increases, promotion, job assignments, retention, and long-range planning. The process is intended to be participatory in nature, involving you and your manager.

The process is designed to be as objective as possible, focusing on overall performance in relation to job responsibilities and also take into account conduct, demeanor, and record of attendance and tardiness. In addition, special written performance appraisals may be conducted by your manager at any time to advise you of the existence of performance or disciplinary problems. The use of such a system does not waive either the JPIA's or your right to terminate employment at any time with or without cause.

Overview

As a new employee, you will be evaluated at the end of your initial 120-day appraisal process to provide management with the opportunity to review your job performance. It will also provide you with an opportunity to become comfortable with your job position. Major objectives will be outlined by your manager at this appraisal.

Thereafter, you will be evaluated at mid-year, approximately in February and annually, approximately in August. This is done electronically through Paylocity. You will also

have the opportunity to journalize your work performance throughout the year in Paylocity and gauge employee performance based on the following performance competencies: customer service, quality of work, dependability, accountability, teamwork, job knowledge, initiative and motivation, adaptability, problem solving, and critical thinking. Please refer to [the JPIA internal intranet](#) ~~The Fountain~~ for a detailed description of the competencies.

The annual performance evaluation is the yearly appraisal that will provide a rating to be used in any approved compensation changes.

Additionally, job descriptions should be reviewed at the annual appraisal and updated accordingly.

A performance appraisal will be used to inform you of your performance during a review period and set new goals for the coming year. It will also be used to determine the appropriateness of a salary adjustment within the established guidelines for the current salary level and job classification.

Employees receiving a substandard rating may have their employment conditions modified in any of, but not limited to, the following:

- Ineligibility for promotional consideration until the deficiency is corrected;
- Withholding of a pay increase until the deficiency is corrected;
- Transfer to a comparable position or demotion for an indefinite period to a position in which competency can be reasonably expected; or
- Termination.

Access to Personnel Records

Employee files are confidential and are to be treated as such. Access to employee files is limited to the following:

Persons Other Than The Employee

Other employees of the JPIA may have access to personnel files only if they have a "need to know." This means access is limited to:

- Administrative Department staff as they need access in the course of their normal duties;
- Management considering an employee for promotion or transfer into their departments; and
- Others only as specifically authorized by the Chief Executive Officer.

Non-employees may not, except with specific authorization, have access to the files themselves. Generally, such access will be granted only upon the advice of counsel. Access of outsiders to information in a file is governed by the JPIA's policy on Employment Reference Checks found later in this Handbook.

The Employee

You may inspect your own personnel file in the presence of the Human Resources Manager or Chief Executive Officer. You may designate a representative to inspect/receive a copy of your personnel file. A request form is available on the network under Publications. JPIA will provide a copy for inspection no later than 30 calendar days after receiving the request.

Payroll Administration

Employee Self-Service

Employees can access their payroll, benefits, and similar information on the Employee Self-Service site located on the JPIA's network.

Time Sheets

You are required to keep an accurate record of your time on the time sheet located electronically in Paylocity. The use of time sheets assures proper cost accounting. You must submit your time sheets on a bi-weekly basis. The time sheet should be completed on the afternoon of the last working day of the pay period.

Vacation, sick, and holiday time must be entered on the time sheet.

Sign-In Sheets

You are asked to sign in and out every time you enter or leave the premises, primarily so the receptionist will know how to forward telephone calls and in the event of an emergency where the roster will be used to check attendance.

Paydays

You are paid every other Friday for the two weeks prior. All employees are required to receive paychecks electronically. Direct deposit funds will be available on that payday Friday.

Garnishments

A garnishment is a court order requiring the JPIA to remit part of an employee's wages to a third party in payment of a just debt.

Payroll Deductions

State and Federal laws require the JPIA to make proper deductions on its employees' behalf. Amounts withheld vary according to earnings, marital status, and number of exemptions claimed.

Required deductions include Federal Income Tax, FICA "Medicare Only" Contribution, State Income Tax, and PERS.

Changing Your Employee Information

Your current address and phone number are essential for many purposes. These changes should be noted in writing or via email as soon as possible. You are solely responsible to notify the Human Resources Manager of changes in your personal status including, but not limited to:

- Name and/or marital status
- Address and/or telephone number (employee makes changes to bsuiff)
- Number of eligible family members
- Tax payroll deductions
- Emergency contact information
- Changes to deferred compensation

Changes to Deferred Compensation

When you [want to](#) make any changes that affect the amount of money deducted from your paycheck, it is your responsibility to ~~give a copy of the paperwork to complete a change form and submit it to the Finance Department for review and approval. so that changes can be made to your paycheck.~~

Employee Benefits

Introduction

The JPIA has developed a broad, comprehensive set of employee benefit programs to supplement your regular wages. The JPIA is continually investigating opportunities to improve its benefits as budget limitations permit.

These employee benefit programs consist of two categories: insured and uninsured. Insured benefits are those that the JPIA pays for through an outside source. Examples of these benefits are Medical, Dental, Vision, Life, and Disability insurance.

Examples of uninsured benefits are vacation, sick, and holiday pay. These are benefits that are paid for directly by the JPIA and are available to you with conditions and specifications summarized in the following pages.

~~These benefits are "hidden costs" of approximately 40+% of salaries that go to supplement employees' incomes!~~

Group Insurance Plans

The JPIA provides group major medical, dental, vision, life, and Employee Assistance Program insurance at no cost to eligible employees and eligible dependents. You will receive information during the new employee onboarding from the Human Resources Manager.

Eligible employees are defined as full-time regular employees; see the Employee Classifications section of this handbook for details.

Eligible dependent is defined as the following:

- Spouse;
- Children to their 26th birthday including stepchildren and children placed in the home for adoption;
- Unmarried children who were enrolled before age 26 and are incapable of self-sustaining employment due to physical or mental condition. A physician must certify in writing within 60 days this condition and it is subject to carrier approval.
- Children eligible for coverage as a result of a valid qualified medical child support order.
- Grandchildren who meet the requirements listed on the Dependent Grandchild Affidavit. These include shared residence, parenting responsibilities, financial responsibility, and claiming the grandchild on taxes.

- Domestic partner as defined by the State of California for state registration requirements.
- Those designated according to the law.
- For an eligible dependent to be eligible for coverages, a copy of a marriage certificate, State of California Declaration of Domestic Partnership form (NP/SF DP-1), birth certificate, or other identifying paperwork is required.

NOTE: It is the employee's responsibility to notify the JPIA in writing upon divorce, termination of domestic partnership, over-age dependent, or any event that changes the status of dependency.

Benefit Changes

A benefits eligible employee may change their benefit elections during annual Open Enrollment in the Fall. Election changes will be effective January 1st of the upcoming calendar year. Otherwise, changes to benefit elections may not be made unless the employee experiences a qualifying life event.

Qualifying life events include marriage, divorce, birth or adoption of a child, loss or gain of other coverage, and loss of dependent eligibility among others. If you experience a qualifying life event and wish to make a change to your benefits, you must notify the JPIA within 31 days of the event to make the change. Changes take effect on the first of the month following the life event.

You then have 31 calendar days from the effective date of the coverage change to provide documentation of the qualifying event. Dependent verification documents, such as a marriage certificate for spouse or a birth certificate for child, must be provided for newly enrolled dependents. Coverage will not be effective until this documentation has been provided. If you do not complete your enrollment and provide documentation before this deadline, your next opportunity to make changes to your benefits will be during Open Enrollment with an effective date of January 1st of the next calendar year.

The following is a brief description of the plans available and is not meant to replace the actual wording of the policy, which makes the final determination of the benefits to be provided.

Medical Plan

Persons Eligible: Regular full-time employees and their eligible dependents.

Waiting Period: First day of the month following the date of hire.

Employee Contribution: None.

Employer Contribution: Total cost for employee and eligible dependents.

Provider: As provided by the JPIA.

Health Savings Account:

In early January, the JPIA will deposit monies into the Health Savings Account (HSA) for each eligible participant enrolled in a Consumer Driven Health Plan (CDHP) equal to an amount that will make the out-of-pocket deductible spend for participants equal to the Anthem PPO deductible, for Anthem CDHP plan participants, and equal to the Kaiser HMO deductible, for Kaiser CDHP plan participants. Please refer to the deductibles noted for each plan in the current year's plan documents for contribution amounts.

New enrollments during the calendar [year, year](#) for employees and/or dependents, will result in a prorated employer contribution.

Following Year Contributions

The amounts above will be contributed annually until the HSA balance (employer contribution minus deductions) reaches twice the annual out-of-pocket maximum. At that point, half of the annual deductible will be deposited into the HSA by the JPIA each year. Please refer to the deductibles and out-of-pocket maximums noted for each plan in the current year's plan documents for following year contribution amounts.

Calculating the "Balance"

To allow eligible participants to contribute to the HSA without reducing JPIA contributions, the "balance" used to determine the JPIA's contribution will not be the actual balance in the HSA, but will be calculated this way:

2022 "balance": 2021 Employer contribution minus 2021 withdrawals

2023 "balance": 2022 "balance" plus 2022 employer contribution minus 2022 withdrawals

and so on...

When "balance" nears twice the maximum-out-of-pocket, prorating will apply. JPIA's contribution will be *between* the full contribution and half of the deductible.

In the third year enrolled in the Kaiser CDHP or the fourth year enrolled in the Anthem CDHP, it is possible that the HSA "balance" could reach twice the maximum out of pocket. That is the point at which the employer HSA contribution is reduced. Therefore, from those years forward (and for every year since enrollment for calculation purposes) eligible participants will need to provide documentation showing total distributions

from the HSA. In early January, JPIA will deposit half of the annual deductible into the eligible participant's HSA.

IRS Form 1099-SA or the HSA Year End Statement must be submitted to the Finance department by the second week of February at the latest, to document annual distributions from the HSA. The balance of the employer contribution, if any, will be deposited in the eligible participant's HSA by the third week of February.

Recipients must be eligible to contribute to an HSA, in order to receive the employer contribution. Due to IRS restrictions, those enrolled in Medicare may not contribute to an HSA. See IRS Publication 969 for detailed information about Health Savings Accounts.

Participants have the option to switch medical plans each year during Open Enrollment.

JPIA contributions to HSAs shall not exceed the difference in annual cost between the traditional Kaiser HMO or Classic PPO plans and the corresponding CDHP. The Executive Committee reserves the right to review, revise and alter the JPIA's contribution to HSAs, depending on the cost of the program and the fiscal condition of the JPIA.

Providers: As provided by the JPIA.

Benefits Provided: See information provided for details.

Dental Plan

Persons Eligible: Regular full-time employees and their eligible dependents.

Waiting Period: First day of the month following the date of hire.

Employee Contribution: None.

Employer Contribution: Total cost for employee and eligible family members.

Provider: As provided by the JPIA.

Benefits Provided: Access to care from qualified dental providers from either an HMO or PPO plan, usually the lowest out-of-pocket costs to the employee. See the Delta Dental and Delta Care Benefits Summary for details.

Where To File Claims: As provided by the carrier or see the Human Resources Manager.

Vision Plan

Persons Eligible: Regular full-time employees and their eligible dependents.

Waiting Period: First day of the month following the date of hire.

Employee Contribution: None.

Employer Contribution: Total cost for employee and eligible dependents.

Provider: As provided by the JPIA.

Benefits Provided: VSP provides access to care from qualified eye doctors, offers quality eyewear, and affordability, usually at the lowest out-of-pocket costs to the employee. See the VSP Benefits Summary for details.

Where To File Claims: As provided by the carrier or see the Human Resources Manager.

Life Insurance

Persons Eligible: Regular full-time employees (must be actively employed) and their eligible dependents.

Waiting Period: First day of the month following the date of hire.

Employee Contribution: None. Supplemental coverage, including dependent, is optional and at your own expense.

Employer Contribution: Total cost for employee and eligible dependents.

Provider: As provided by the JPIA.

Benefits Provided: Up to two times annual regular gross earnings, dependent on age, to a maximum of \$300,000 payable to your designated beneficiary(s). Employees who have additional supplemental coverage are bound to the same maximum as the base coverage. For disability and dismemberment insurance limits, please see the policy.

Where to File Claims: As provided by carrier or see the Human Resources Manager.

Short Term Disability

Persons Eligible: Regular full-time employees.

Waiting Period: First day of the month following the date of hire.

Employee Contribution: None.

Employer Contribution: Total cost for employee.

Provider: As provided by the JPIA.

Benefits Provided: Short term disability insurance provides you with income protection if you become temporarily totally disabled from a covered sickness, accident, or pregnancy. The waiting period is 14 days from disability (accumulative sick time may be used during this time). The maximum benefit period is 11 weeks. Check policy for

detailed information. Note these benefits are taxable. Any overpayment of benefits will require reimbursement.

See long term disability for continued coverage.

Where to File Forms: As provided by the carrier or see the Human Resources Manager.

Note: The JPIA does not pay into SDI and provides employees with a superior disability plan

Long Term Disability

Persons Eligible: Regular full-time employees.

Waiting Period: First day of the month following the date of hire.

Provider: As provided by the JPIA.

Benefits Provided: Long term disability insurance provides you with income protection after the short term disability insurance ends and could continue beyond age 65 subject to an age reduction schedule. Check policy for detailed information. Note these benefits are taxable. Any overpayment of benefits will require reimbursement.

This long-term disability plan is restrictive to income from other sources. Check policy for further information.

Employee Contribution: None.

Employer Contribution: Total cost for employee.

Where to File Claims: As provided by carrier or see the Human Resources Manager.

Employee Assistance Program (EAP)

Persons Eligible: Regular full-time employees, their eligible dependents, and members of their household.

Waiting period: First day of the month following the date of hire.

Provider: As provided by the JPIA.

Benefits provided: The Employee Assistance Program (EAP) provides confidential, professional assistance when personal problems affect an employee's life and work. The program provides information, consultation and counseling for employees and their family members, as well as offering training and consultation to management.

The EAP encourages employees to use services early in the progression of a problem before situations significantly impact work. This is accomplished by promoting service for "normal problems in living" such as relationships, stress, legal and financial problems, career concerns, anxiety, and depression. The EAP also services more serious

concerns such as alcohol, marijuana and drug problems, family violence, and threats of suicide. Numerous additional resources are available.

Employee Contribution: None.

Employer Contribution: Total cost for employee and eligible family members.

Who to contact: Human Resources Manager.

Retiree Health Benefits

Eligibility for Participation

All regular full-time employees are eligible for participation in the JPIA's Retiree Health Benefit Plan (RHBP) if a minimum age of 55 years and a minimum ten years of employment upon retirement of active employment with the JPIA. Regular full-time employees working less than 40 hours per week and more than 30 hours per week will be eligible when they have reached a minimum age of 55 years and a minimum of 20,800 hours of service (2,080 hours = 1 year of service). Changes in employment status will be pro-rated accordingly. The following schedule should be followed:

Age + Years of Service	=	JPIA's Percentage of Premium Payment
65	=	50%
66	=	55%
67	=	60%
68	=	65%
69	=	70%
70	=	75%
71	=	80%
72	=	85%
73	=	90%
74	=	95%
75+	=	100%

For example, the combination of age (minimum 55) plus years of service with the JPIA (minimum 10) equals 65 points, which would make the employee eligible for 50% of his/her benefits to be paid for by the JPIA upon retirement from the JPIA. Points will be added in increments of five percent for each additional year of service with the JPIA until the combination of age and of JPIA service reaches 75 points (maximum number), at which time the employee would be eligible for 100 percent of his/her benefits being paid for by the JPIA upon normal retirement from the JPIA. For employees hired after January 31, 2018, a pro-rated allowance of up to the JPIA's current premium cost or the above scheduled percentage of \$500 (up to \$1000 with spouse or domestic partner coverage), whichever is less, will be provided for use towards medical premium, using the matrix above.

Participation in the Retiree Health Benefit Plan (RHBP)

Eligible retirees may participate in the RHBP, as well as eligible dependents, in accordance with current law. It is the retiree's responsibility to notify the JPIA in writing of any changes.

Spouse/Domestic Partner

An eligible and enrolled spouse/domestic partner of an eligible employee may enroll in the RHBP, with premiums being paid according to the eligible employee's status on the matrix provided, regardless of the dependent's age. For employees hired after January 31, 2018, spouse or domestic partner receives up to \$500 towards medical premium, based on matrix above.

Surviving Spouse/Domestic Partner

A surviving spouse/domestic partner of an active employee (not yet a RHBP participant) who has met at least the minimum age and service requirement, may participate in the RHBP, if the surviving spouse has not remarried or entered into a new domestic partner relationship.

A surviving spouse/domestic partner of a RHBP participant may participate in the RHBP. Coverage may continue for the enrolled family members at the same level provided for the deceased enrollee. Participation in the RHBP may continue if the surviving spouse/ domestic partner remarries or enters into a new domestic partnership. Coverage will be discontinued if the premiums are not paid (if applicable), the child overages, or the surviving spouse/domestic partner obtains coverage elsewhere.

Change in Marital/Domestic Partner Status

An eligible spouse is no longer eligible for benefits once they are divorced from an RHBP participant. An eligible domestic partner is no longer eligible for benefits once they have filed for termination of their domestic partnership from an RHBP participant. It is the retiree's responsibility to notify the JPIA in writing if this situation arises. In accordance with the law, they may continue to participate in the plan only for the period mandated by COBRA and only if the premiums are paid.

Children

A child of an RHBP participant must be eligible and enrolled in the RHBP at the time of the retirement of the employee to receive the RHBP's benefit. It is the retiree's responsibility to notify the JPIA in writing if this situation changes. The child age limit of the policy in force applies. For those hired after January 31, 2018, children are not eligible but may continue to participate only for the period mandated by COBRA and only if the premiums are paid.

Terminated Employees

Employees that have attained eligibility status for the RHBP and have been terminated before enrollment in the RHBP are ineligible to participate.

Premium Payments

Premium payments are due and payable to the JPIA by the first of the month, according to the matrix.

Non-payment of Premiums

Participants in the RHBP that have defaulted more than 30 days on their portion of the premium payments will be eliminated from the plan and will not be permitted to reenroll.

Plan Benefits

The RHBP is designed to offer the same level of health benefits coverage to JPIA retirees as currently offered to active employees. The medical plan option in force, at the time of retirement, will be the option-in-force until the following Open Enrollment. Retirees will be offered the right to change plans during annual Open Enrollment. However, dependents not enrolled at the time of retirement may not be added. Retirees who waived coverage previously may not elect to enroll. Elections made during the Open Enrollment period, typically in November, remain in force for the duration of the following calendar year with this exception. If the retirement occurs after the close of Open Enrollment but before January 1, a new plan election may be made to take effect January 1.

Change in Geographic Location

Retirees who do not live within service areas of the JPIA's health plan providers may receive reimbursement for health insurance premiums paid. Upon receipt of proof of address outside of the JPIA plans' service area and proof of insurance coverage, and a billing itemizing premium payment, the JPIA will reimburse the retiree quarterly in a dollar amount equal to actual premium cost, but not to exceed the JPIA's expenditure for that retiree's currently enrolled option. The reimbursement shall occur at the end of each three-month premium period and it is the responsibility of the retiree to submit the required paperwork.

NOTE: Once a RHBP participant leaves the JPIA plan, they are ineligible to return.

Medicare Coverage

If eligible for Medicare, all RHBP participants must be enrolled in Parts A and B. Part B premiums are paid by the retiree, directly to Medicare. The JPIA UnitedHealthcare and Kaiser plans have Medicare Part D built in. Part D premiums are included in monthly premiums. However, if the RHBP participant's income exceeds the thresholds published by Medicare annually, the RHBP participant will be responsible for the

Income-Related Monthly Adjusted Amount (IRMAA). Do not enroll in another Part D plan. Medicare allows you to have only one Part D plan at a time.

Plan Components and Duration

The Executive Committee reserves the right to review, revise, and alter the JPIA's RHBP including carriers and coverage, depending on the cost of the program and the fiscal condition of the JPIA. The Executive Committee reserves the right to eliminate the coverage or benefit contributions for employees and retirees not currently enrolled in the RHBP.

COBRA

The Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) was enacted to protect employees and their eligible family members by allowing them to continue their group health insurance under the employer's plan at affordable group rates. Employees are notified at hiring of their rights under this law and it is the employee's responsibility to notify the JPIA (Human Resources Manager or HR Specialist) of any qualifying event (defined below) within 60 days of the event. Specifics of COBRA include:

Qualifications

Any employee/eligible family member who loses regular group eligibility because of a qualifying event is eligible for enrollment under COBRA.

Qualifying Event

Qualifying event is defined by COBRA regulations and includes loss of coverage due to: termination of employment; reduction of hours; death of employee; employee's Medicare entitlement; divorce or legal separation; child ceasing to be eligible; bankruptcy of employer; and expiration of leave criteria. It is the employee's or eligible family member's responsibility to inform the JPIA (Human Resources Manager or HR Specialist) within 60 days when a qualifying event takes place or your eligibility for COBRA may be jeopardized.

Selection Period

The JPIA's COBRA benefits provider~~isolved Benefit Services~~ will send written notification, upon notification to the JPIA, to the employee/eligible family member of their right to elect continued coverage, the election period, and premium payments.

Cost

The employee/eligible family member must pay a full monthly premium for each coverage selected plus a 2% administrative charge to [the JPIA's COBRA benefits provider](#) ~~isolved Benefit Services~~ by the first day of each month that the premium(s) is due.

Coverage Available

At the time of the qualifying event, whichever health insurance the employee/dependent is enrolled in (Kaiser, Anthem Blue Cross ~~or California Care, UnitedHealthCare,~~ Delta Dental, ~~JPIA~~-Vision Plan, and Employee Assistance Program) will be considered the coverages available.

Open Enrollment

Purpose: COBRA continuees have the same rights under the plan as active employees. This includes rights during open enrollment periods. When an open enrollment period occurs, COBRA continuees must be informed of their rights.

The Open Enrollment Notification should inform COBRA continuees of the open enrollment period, the options available during the open enrollment period and the monthly premium rates for those options.

It defines COBRA continuees as possible electees, electees and continuees. Possible electees are individuals in their 60-day election period; electees are individuals who have elected but have not yet paid; continuees are individuals who have elected and paid.

Special Note

There can be no interruption of coverage under COBRA.

Employee Notification

Because of the complexity of COBRA regulations, ~~isolved~~ Benefit Services has been contracted to carry out the notification and explanation to employees.

Non-Payment of Premiums

Participants in COBRA that have defaulted more than 30 days on their portion of the premium payments will be eliminated from the plan and will not be permitted to reenroll.

Cal-COBRA

If the employee has exhausted their COBRA coverage and was entitled to less than 36 months of coverage, then the employee may choose additional continuation coverage under Cal-COBRA up to 18 months. The JPIA will send notification to the COBRA

enrollee upon COBRA expiration. Cal-COBRA participants have the same rights and responsibilities as COBRA participants identified above.

Workers' Compensation Program

The JPIA extends workers' compensation coverage to safeguard employees in the event of job-related injuries or disabilities. This comprehensive coverage ensures that you are protected in case of on-the-job incidents. You may be eligible to receive workers' compensation insurance benefits, which encompass medical costs, temporary disability, permanent disability, supplemental job displacement benefits, or death benefits—all provided to you at no expense.

Compensation payments commence either from the initial day of hospitalization or, if hospitalization is not required, after the third day following the injury.

~~The cost of this coverage is completely paid for by the JPIA.~~ Accumulated sick or vacation leave may be used for the three-day waiting period, follow-up medical appointments, or to supplement partial wage replacement as long as the employee does not receive more than they normally would. Any overpayment of benefits will require reimbursement to the JPIA.

If you are injured while working, you must immediately report such injuries to your manager, or another manager, regardless of how minor the injury might be. If you have any questions regarding this workers' compensation coverage, you should contact the Human Resources Manager. Workers' Compensation leave may run concurrently with other appropriate leaves such as the Family Medical Leave Act (FMLA)/California Family Rights Act (CFRA).

Predesignation of Personal Physician

In the event you sustain an injury or illness related to your employment, you may be treated for such injury or illness by your personal medical doctor (M.D.), doctor of osteopathic medicine (D.O.) or medical group if:

- On the date of your work injury you have health care coverage for injuries or illnesses that are not work related;
- The doctor is your regular physician, who shall be either physician who has limited his or her practice of medicine to general practice or who is board-certified or board-eligible internist, pediatrician, obstetrician-gynecologist, or family practitioner, and has previously directed your medical treatment, and retains your medical records;

- Your “personal physician” may be a medical group if it is a single corporation or partnership composed of licensed doctors of medicine or osteopathy, which operates an integrated multispecialty medical group providing comprehensive medical services predominantly for nonoccupational illnesses and injuries;
- Prior to the injury your doctor agrees to treat you for work injuries or illnesses;
- Prior to the injury you provided JPIA with the following in writing: 1) notice that you want your personal doctor to treat you for a work-related injury or illness, and (2) your personal doctor’s name and business address.

You may use the Predesignation of Personal Physician form to notify the JPIA if you wish to have your personal medical doctor or a doctor of osteopathic medicine treat you for a work-related injury or illness and the above requirements are met. Please contact the Human Resources Manager if you have any questions.

Recreational Activities and Programs

JPIA or its insurer will not be liable for payment of workers’ compensation benefits for any injury that arises out of an employee’s voluntary participation in any off-duty recreational, social, or athletic activity that is not part of the employee’s ~~work~~ related work-related duties.

Return-to-Work Program (RTW)

In an effort to minimize serious disability due to on-the-job and off-the-job injuries and illnesses and to reduce workers’ compensation costs (if applicable), the JPIA has developed a Return-to-Work program.

This policy is consistent with the JPIA’s responsibilities under the Americans with Disabilities Act to provide reasonable accommodations to persons with disabilities.

Managers will assist by directing the employee to appropriate care and assisting in proper reporting of the injury or illness while maintaining a positive and constant flow of communication with the injured worker. They will also assist in arranging work which meets “light duty” restrictions, as needed, to reduce lost time. The JPIA management staff will work with the workers’ compensation carrier (if applicable) and the physician to assist with the assessment of the employee’s ability to return to work. Together they will actively encourage the treating physician to release the injured worker to work as soon as possible.

By this joint effort, the JPIA will help the injured/ill worker recover at a more rapid rate, gain production for wages paid, minimize the employees’ wage loss, and reduce workers’ compensation costs.

Fitness-For-Duty & Return-To-Work Evaluations

The purpose of this policy is to determine an employee's ability to safely perform the essential job tasks of their job with or without reasonable accommodation. This policy is not designed or intended to supersede employer requirements under any state or federal law or regulation and will be utilized in accordance with the law.

General guidelines:

- Each employee is responsible for maintaining their health in such a way that the employee can perform the essential functions of their job with or without reasonable accommodation. If a manager has reason to question the ability of an employee to perform the essential job functions, a Fitness-for-Duty or Return-to-Work Evaluation may be requested.
- To determine the appropriateness of a Fitness-for-Duty or Return-to-Work Evaluation request, management must consult and receive approval from the Human Resources Manager and Chief Executive Officer.
- Time required by the employee to complete the Fitness-for-Duty / Return-to-Work Evaluation is considered work time and may require an administrative leave. Time off for prescribed treatment (after the evaluation), mandatory or otherwise, will be charged to accrued sick leave.
- Results of the evaluation will be maintained confidentially and separate from the employee's personnel record.
- If a Fitness-for-Duty / Return-to-Work evaluation is necessary, the employee will be required to be examined by a treating, personal physician or specialist selected by the JPIA.
- Failure to attend a Fitness-for-Duty or Return-to-Work Evaluation may lead to disciplinary action, up to and including, termination.

California Public Employee Retirement System (CalPERS)

Rather than Social Security, the JPIA offers a retirement plan under CalPERS. **Due to changes in the law, effective January 1, 2013, (PEPRA), the JPIA will have two tiers of employees:** Tier 1) Those employed before January 1, 2013, and those new employees eligible due to carryover within six months (as provided by PEPRA); Tier 2) Those employed on January 1, 2013, and after.

Persons Eligible: Regular full-time employees, part-time employees reaching minimum hour requirement, and employees already CalPERS member.

Waiting Period: Eligible from the first day of employment.

Employee Contribution: Tier 1: During the first five years of service 7% of regular bi-weekly earnings (overtime earnings are not included). After five years of full-time service, the JPIA will pay the employee's contribution. This is a tax-deferred contribution. Tier 2: Employee contribution of 8.25% of regular bi-weekly earnings. Employee contributions are subject to change each year based on CalPERS calculations.

Employer Contribution: Varies according to experience rating.

Vesting Provisions: You become vested after completion of five years of public service, be it with the JPIA or another public employer who participated in CalPERS. Vesting means funds may be left on deposit for future retirement. Should you leave the JPIA and wish to withdraw your contributions, you may request a refund from CalPERS. The employer contributions are only paid upon retirement.

Benefits Provided: You will be eligible to retire when you have five years of service credit and have attained age 50 (Tier 1) or age 52 (Tier 2). Your retirement date can be any date you choose; however, the amount of the monthly allowance can be affected. Your age determines your benefit factor used in the retirement formula. So, you may decide to retire on your birthday or at a completed quarter year of age to increase the benefit factor. CalPERS will calculate the retirement benefits based on three factors: (1) years of service, (2) a percentage factor determined by your age at retirement, and (3) Tier 1: the final average monthly pay rate for the highest 12 consecutive months of work; Tier 2 the final average monthly pay rate for the highest 36 consecutive months. There is no mandatory retirement age.

CalPERS Options

The JPIA contract includes several options and benefits for its employees, briefly described below. For more detailed information, refer to the "CalPERS" website or see the Finance Manager.

- 2% @ 60 (Tier 1)
This formula provides to local miscellaneous members 2% of pay at age 60 for each year of service credited with that employer. For members who retire earlier, the percentage is reduced. See the CalPERS Local Miscellaneous Benefits booklet.
- 2% @ 62 (Tier 2)
This formula provides local miscellaneous members 2% of pay at age 62 for each year of service credited with that employer. For members that retire earlier, the percentage is reduced. See the CalPERS Local Miscellaneous Benefits booklet.
- Salary Cap
- The Public Employee Pension Reform Act (PEPRA) of 2013 included compensation limits for CalPERS retirement salary calculations (GC 7522.10). For

any employee hired after January 1, 2013, the salary cap provided for the current year will be utilized as determined by CalPERS. For any Classic employee hired after 1996 and before 2013, there is also a cap for the current year as determined by CalPERS. For anyone hired before that, there is no cap.

- **One-Year Final Compensation (Tier 1)**
The period for determining the average monthly pay rate when calculating retirement benefits would be for the 12 highest paid consecutive months.
- **Three-Year Final Compensation (Tier 2)**
The period for determining the average monthly pay rate when calculating retirement benefits would be for the 36 highest paid consecutive months (3 years).
- **1959 Survivor Benefit, 4th Level (if enrolled)**
The 1959 survivor benefit is paid along with the other death benefits, with the exception of the special death benefit, whether or not you were eligible to retire at the time of death. The fourth level provides a higher-level of 1959 survivor benefits to survivors of a member who dies prior to retirement. The benefit is in addition to the Basic Death Benefit and the 1957 Survivor Benefit. The benefit consists of a monthly allowance, which may be paid to your eligible surviving spouse and children. A spouse is eligible until remarriage, if ~~he~~they ~~or she~~ (1) has care of eligible children, or (2) is age 60 or older. **Monthly payments would be paid out based on one of the following tiers:**
 - Spouse with two or more eligible children or three or more eligible children only — ~~\$2,280~~
 - Spouse with one eligible child or two eligible children only — ~~\$1,900~~
 - One eligible child only or surviving spouse at age 60 or older until remarriage or dependent parents — ~~\$950~~

[For details on the survivor benefits and payment amounts refer to the CalPERS website at https://www.calpers.ca.gov.](https://www.calpers.ca.gov)

- **Improved Non-Industrial Disability Allowance**
The disability retirement allowance would be 30% of final compensation for the first five years of service credit plus 1% for each additional year of service to a maximum of 50% of final compensation.
- **Post Retirement Survivor Allowance**
Upon the death of a member after retirement, an allowance shall be continued to the surviving spouse. A surviving spouse must have been married to the member at least one year prior to the member's retirement and continuously to the date of the retired member's death. For disability retirement, a spouse who was married to the member on the date of their retirement and continuously to the date of their death. If there is no surviving spouse, or the spouse later dies or remarries, the

allowance shall be continued to the eligible unmarried children collectively until all reach age 18. Eligible children include disabled children over age 18 if the disability begins prior to age 18. If there is no surviving spouse or eligible children, the benefit would be paid to the surviving parent or parents of the deceased member who were dependent upon the member for support. If, at the effective date of retirement, the member has no eligible spouse, eligible children, or eligible dependent children, no survivor allowance shall be paid under this benefit.

- **Military Service Credit**

Military Service Credit As Public Service: A member may elect to purchase up to four years of service credit for any continuous active military or merchant marine service prior to employment. The member must contribute an amount equal to the contribution for current and prior service that the employee and the employer would have made with respect to that period of service.

Military Service Credit for Retired Persons: The retired person must contribute an amount to the contributions for current and prior service that the employee and the employer would have made with respect to that period of service. The retiree must not receive credit for the same military service with another publicly funded retirement system. The retired person's allowance would be increased only with respect to the allowance on or after the effective date of the election to purchase the service credit.

- **Credit for Unused Sick Leave**

To the extent as allowed by CalPERS, any unused sick leave accumulated at the time of retirement will be converted to credited services. Eight hours of sick leave equals one day; it takes 250 sick days (2000 hours) to receive one year of service credit.

- **Pre-Retirement Optional Settlement 2 Death Benefit**

This benefit is a monthly allowance equal to the Service Retirement benefit that the member would have received had the member retired on the date of their death and elected Optional Settlement 2. (A retiree who elected Optional Settlement 2 receives an allowance that has been reduced so that it will continue to be paid after their death to a surviving beneficiary.) The allowance is payable as long as the surviving spouse lives. There is a guarantee that the total amount paid will be at least equal to the basic Death Benefit.

- **Cancellation of Remaining Payments**

Payments owed by the member for the purchase of optional service credit upon the employment related disability of member (i.e., upon industrial disability retirement) can be cancelled, the final amount will be adjusted accordingly.

- Local System Service Credit

Local system service credit will be used in the computation of benefits payable under the basic death benefit for all local members (miscellaneous and safety) who were members of a local retirement system at the time the local system was discontinued.

Employees nearing retirement are urged to avail themselves of the retirement pre-counseling and planning available to them by CalPERS. CalPERS requires at least 90 days' notice in advance of planned retirement (as does Social Security for any previous services). However, the JPIA strongly urges employees anticipating retirement to make their inquiries at least six months to one year in advance to avoid any unnecessary delays.

The Human Resources Manager or Human Resources Specialist can provide you with names and phone numbers of personnel at CalPERS who can assist you in your retirement planning.

~~Please note that employees may be subject to the "Windfall Elimination" due to exemption from Social Security. Information will be provided during the New Employee Onboarding on this topic.~~

Tax Deferred Compensation Program

The JPIA provides the opportunity for all employees to enroll in a payroll tax deferral plan called, "Deferred Compensation 457". All contributions to this plan are made by the employee on a voluntary basis. Contributions are made by payroll deduction. Such amounts deducted are not included currently in your taxable income. Thus, if you elect to participate in this plan and have amounts deducted from your pay, you will see a reduction in salary, but not to the extent of the total amount deducted.

Tax Benefit

Compensation deferred under the plan, together with all earnings (interest) on such contributions, are subject to Federal and State income taxes only in the year in which such amounts are paid or made available to you or your beneficiary. [The JPIA is not a tax specialist. Employees should consult with a licensed tax professional for a complete explanation of the tax implications of a deferred compensation program.](#)

Contribution Limits

You may contribute into the plan the maximum allowed by law. These amounts may be lower if you participate in more than one deferred compensation program (employees who do should consult their tax advisor). During the last three years before you reach normal retirement age under the plan (60), you may be eligible to contribute more. If you think you may be eligible for this catch-up contribution provision, you should contact the Finance Manager and your tax advisor.

Withdrawals

You may withdraw all or part of your contributions, together with the interest earned thereupon, subject to appropriate tax withholdings, upon the occurrence of one of the following: termination of employment on account of death, retirement or other cause; permanent disability; the attainment of age seventy and one-half; or the facing of an unforeseeable emergency. An unforeseeable emergency includes any severe financial hardship to the participant caused by sudden or unexpected illness or accident of the participant or their dependent, a casualty loss, or some other similar extraordinary circumstance caused by events beyond the participant's control. Home purchases and payments of college tuition do not qualify as unforeseeable emergencies under this definition. Eligible employees may withdraw all or part of their contributions plus earnings. Several withdrawal options are available.

Reports/Statements

Sent to your home address at least quarterly by the vendor. It is your responsibility to verify the information for accuracy.

Investment Options

You can choose among several different investment options, including high interest, money market, stock, bond, balanced, or a combination of these.

Deferred Compensation Sources available through payroll deduction:

CalPERS

P. O. Box 9255, Boston, MA 02209-9255

(800) 260-0659

Note of Caution: The JPIA is the administrator of this plan on behalf of the employee participants. No investment advice should be given to you by your manager or any other employee. Employees seeking investment or tax advice should consult with their independent investment and/or tax advisor.

Any questions with regard to enrollment into this plan should be referred to the Finance Manager.

Roth IRA

You can choose to contribute money from the after-tax portion of your salary. ~~This helps you build a nest egg of tax-free income in retirement. Your qualified withdrawals of Roth contributions and any earnings come out tax-free, which means you could potentially end up with more in net distributions in retirement.~~

The Roth option doesn't change the total of what you can contribute to the CalPERS 457 Plan, but it does give you more control over when your contributions – and retirement income – will be subject to federal income tax.

457 Contribution Plan

JPIA employees impacted by the mandatory compensation limits mandated by PEPR for amounts included in the CalPERS qualified retirement plan for JPIA employees will be eligible to participate in the JPIA 457 Contribution Plan.

At the discretion of the Executive Committee, the JPIA 457 Contribution Plan will contribute to an employee's CalPERS 457 Plan an amount equal to the employee's elected contribution. The JPIA's contribution will be limited to an amount equal to the current year's employer rate, applied to the portion of the employee's annual salary that exceeds the CalPERS limit set for that calendar year. It will be the employee's responsibility to monitor and ensure that the total combined contributions of JPIA and the employee do not exceed the maximum allowed by law.

JPIA 457 Contribution Plan Policy Examples

	<u>Employee A</u>	<u>Employee B</u>
1 CalPERS Employer Contribution Rate	7%	7%
2 Salary	\$150,000	\$175,000
3 CalPERS Compensation Limit	140,424	140,424
4 Compensation Over Limit	9,576	34,576
5 JPIA contribution limit (line 1 x line 4)	670	2,420
6 Employee's contribution to 457 Plan	1,200	3,000
7 JPIA contribution (lessor of line 5 & 6)	670	2,420

Educational Approval Process

Recognizing the mutual benefits derived from personal growth and increased work competence, it is the policy of the JPIA to provide financial assistance to regular full-time employees interested in furthering their formal education. To be eligible, an employee must have completed their initial appraisal process, unless a job requirement, and submit an Application for Educational Approval. All requests must be approved in advance by the employee's manager, their director, ~~Human Resources Manager,~~ and the Chief Executive Officer (if applicable). Criteria for approval are listed below:

Degree/Certification/Professional Designation Programs

For employees in good standing and with the organization, ~~for at least two years,~~ the JPIA will reimburse ~~pre-pay~~ the expense of tuition, ~~and~~ required text, and exam fees for all courses leading to a JOB-RELATED degree, ~~or~~ certificate, or professional designation not to exceed \$3000 ~~the cost~~ per calendar year. ~~semester of tuition for six~~

~~semester units/hours at the California State University at Sacramento. Reimbursement will be made upon providing proof that you have passed the course or after earning degree, certification, or professional designation. Expenses for tuition and required text to obtain professional designations will be pre-paid/reimbursed at actual cost.~~ The application must be complete with a description of the entire program, listing of classes required, explanation of job-relatedness to the JPIA, targeted career path with the JPIA, and defined timelines for completion of courses. A copy of the course description and necessary classes from the school catalog should be included.

If the employee is suffering a financial hardship, they may request from the CEO an exception to the policy to allow for prepayment of the cost of tuition and required texts.
If you do receive prepayment and ~~If you~~ do not complete or fail a course, you will be expected to repeat the course at your own expense or reimburse the JPIA within one year if you decide not to continue pursuit of the program. In general, no future approvals will be given until this is cleared from the files.

~~Professional Courses and Specific Job-Related Courses~~

~~Professional and job-related course tuition, required text, and exam fee expenses will be pre-paid upon approval.~~

~~Professional Seminars/Conferences Attended During JPIA Time~~

~~The JPIA policy generally provides for one professional job-related seminar/conference per fiscal year with fees, text, transportation, lodging and meals will be pre-paid upon approval. On occasion there may be additional conferences pertinent to the JPIA and consideration will be given upon submission of a request.~~

~~Upon return, a verbal report will be presented recapping the significant highlights and benefits to the JPIA as a result of attendance.~~

Additional Requirements

- You are responsible for registration and ordering of any necessary text.
- It is your responsibility to provide your manager and the Human Resources Manager with transcripts after completion of the course.
- If you do not complete or fail a course, you will be expected to repeat the course at your own expense or reimburse the JPIA within one year if you decide not to continue pursuit of the program. In general, no future approvals will be given until this is cleared from the files.
- If you fail to meet the timelines outlined, the JPIA will have the discretion to discontinue the financing of the program.

Professional Seminars/Conferences Attended During JPIA Time

The JPIA policy generally provides for one professional job-related seminar/conference per fiscal year with fees, text, transportation, lodging and meals will be pre-paid upon approval. On occasion there may be additional conferences pertinent to the JPIA and consideration will be given upon submission of a request.

Employees seeking approval to attend a conference must complete the required Conference Attendance Request Form. The form should identify the sessions, workshops, or networking activities the employee plans to attend and explain how participation will support the employee's professional development and provide value to their department and/or the JPIA.

Following the conference, the employee is expected to share key takeaways from their experience. This will include a written summary outlining what was learned, insights gained, or best practices identified. This summary will be added as an attachment to the following Connection agenda.

Paid Leave Policy

The JPIA's policy allows eligible employees to earn time off in accordance with their employment status and length of service and to use such earned time to take time off with pay under the guidelines stated in this policy. Regular part-time employees' paid time off will be pro-rated according to their scheduled work hours. Please note, the JPIA's fiscal year is utilized for tracking paid leave. Categories of paid leave are provided, as outlined below:

Vacation

The JPIA recognizes the value of rest and relaxation and encourages you to use all accrued vacation benefits. Regular full-time and part-time scheduled employees are eligible for paid vacation according to months of service. Vacation must be approved in advance and except for unusual circumstances emergency situations, requests for vacation should be made at least three days ten business days in advance. any request for vacation in excess of 15 consecutive days of vacation to be taken in advance of accrual needs the approval of the Chief Executive Officer. Vacation requests require managersupervisor approval, which is subject to business needs and staffing requirements.

Vacation is earned and accrued from the first day of employment with maximum accrual at 320 hours (non-exempt)/40 days (exempt) as follows.

Months of Service	Non-Management	Managers	Directors	Stop Accruing at
	Hours*/Days	Hours*/Days	Hours*/Days	Hours/Days
0 – 12	96 hours / 12 days	120 hours / 15 days	160 hours / 20 days	320 hours / 40 days
13 -24	104 / 13	128 / 16	168 / 21	"
25 -36	112 / 14	136 / 17	176 / 22	"
37 - 48	120 / 15	144 / 18	184 /23	"
49 - 60	128 / 16	152 /19	192 / 24	"
61 - 72	136 / 17	160 / 20	200 / 25	"
73 - 84	144 / 18	168 / 21		"
85 - 96	152 /19	176 / 22		"
97 - 108	160 / 20	184 /23		"
109 - 120	168 / 21	192 / 24		"
121 - 132	176 / 22	200 / 25		"
133 - 144	184 /23			"
145 - 156	192 / 24			"
157+	200 / 25			"

*Regular full-time working less than 40 hours and more than 30 hours are pro-rated according to scheduled hours. For non-exempt employees, the minimum increment of vacation is 15 minutes. Exempt employees may utilize half-day vacation requests.

Holiday Observances

All regularly scheduled full and part-time employees will receive a normal day's pay at their normal hourly rate for the following holidays, subject to the conditions below:

- New Year's Day — January 1
- Martin Luther King Day* — Third Monday in January
- Presidents' Day* — Third Monday in February
- Memorial Day* — Last Monday in May
- Juneteenth* — June 19
- Independence Day — July 4
- Labor Day* — First Monday in September
- Veteran's Day* — November 11
- Thanksgiving — Fourth Thursday and Friday in November
- Christmas Eve — December 24

- Christmas Day — December 25
- Floating Holiday — Your choice to be approved in advance. For new employees, full day if hired before July 1; half day if hired after July 1. Must be taken during calendar year.

If the holiday has an asterisk, you may work this holiday and trade it for future use. The following rules apply:

- Subject to Manager approval
- Must be used in full day increments
- Must be used within the calendar year (i.e. use it or lose it)
- Cannot be banked/used until after the actual date ~~of~~ the holiday has passed
- Can't be cashed out

Holiday Conditions:

- If the holiday falls on a Saturday, it may be observed on the preceding Friday. If it falls on a Sunday, it may be observed on the next Monday, staff will be advised of all dates the office will be closed for holiday observances at the start of each calendar year.
- Employees on unpaid leave of absence for any reason at the time of the holiday observance will be ineligible for holiday pay.
- If a holiday falls during your approved vacation period, you will be paid for the holiday and will not be charged with a vacation day for the day the holiday is observed.
- When computing overtime pay, you do not receive credit for hours worked on holidays that are not actually worked.

Bereavement Leave (Statutory)

In the event of a death in your immediate family, the JPIA **will** ~~pay you grant~~ up to 40 hours for non-exempt employees (pro-rated for less than 40 hours per week) or five (5) days for exempt employees of paid time away from work if you are a regular full-time employee. **The intent of this benefit is to allow you to make arrangements for and/or to attend the funeral.** Additional unpaid time off in the form of a personal leave of absence may be granted for special circumstances with the CEO's approval.

Bereavement leave does not run concurrent with FMLA or CFRA. Immediate family for the purpose of bereavement leave ~~is the same as under CFRA~~ are:

- Spouse

- Child
- Parent
- Grandparent
- Grandchild
- Sibling
- Parent-in-Law
- Domestic Partner
- Designated person (defined as any individual related by blood or ~~who's~~whose association is equivalent of a family relationship).

Jury and Witness Duty

You should immediately notify your manager if you receive a notice for jury duty. If you are summoned for jury duty, JPIA will pay you up to ten (10) days for jury duty, provided that you provide the JPIA with reasonable advance notice and proof of such court order. As a public employee, a waiver should be signed to avoid payment (as it must be returned) when appearing for Jury Duty. If the waiver is not completed and you are paid for jury duty then you will need to provide a check to the JPIA for the amount you were paid. This is to avoid being overpaid.

Non-exempt employees – If reporting time combined with any work time is greater than normal workday, you will need to balance your days to equal your normal weekly hours. If dismissed from jury duty after reporting time, you must return to work to complete a full day's time, or supplement with vacation time.

If required by law to appear in court as a witness, ~~you may be given paid time off~~ JPIA will pay you up to a maximum of 32 hours for non-exempt (pro-rated for regular part-time) employees or four (4) days per year for exempt employees for such purpose, provided that you provide the JPIA with reasonable advance notice and proof of such court order.

Military Leave

A military leave, in accordance with Federal law, will be granted to those employees of a reserve component of the Armed Forces of the United States or National Guard.

If regular, full-time employees are called to active military duty training as members of the Armed Forces, Reserves, or National Guard, they will be assured full pay for military leaves for up to ten (10) working days per calendar year provided that they are regular, full-time employees. If ordered for purposes of military training, encampment, naval cruises, special exercises or like activity, they shall be entitled to receive the

difference between their regular rate of pay and the military rate of pay for the first 30 calendar days of any such absence.

If regular, full-time employees are called to active duty during national or state emergencies, as members of the Armed Forces, Reserves, or National Guard, they shall be entitled to receive the difference between their regular rate of pay and their military rate of pay for the duration of their active-duty call.

Military orders must be presented to your immediate manager and arrangements for leave made as early as possible before departure.

Should you either voluntarily or involuntarily leave your employment to serve in the armed services, you shall be entitled to reinstatement according to State and Federal law in effect at the time of your release from active service.

~~Military Spouse Leave~~

~~Employees that work more than 20 hours per week and have a spouse in the Armed Forces, National Guard, or Reserves that have been deployed during a period of military conflict are eligible for up to 10 unpaid days off when their spouse is on leave from military deployment. Employees must request this leave in writing to the Chief Executive Officer within two business days of receiving official notice that their spouse will be on leave. Employees requesting this leave are required to attach to the leave request written documentation certifying the spouse will be on leave from deployment.~~

Time Off to Vote

In accordance with California State law, if your work hours do not allow sufficient time off to vote in California general, direct or presidential elections, the JPIA will ~~pay~~offer two (2) hours paid time off for you to vote. To receive time off for voting, you must notify your manager and present a valid voters' registration card. When you return from voting, it will be necessary to present the voters' receipt to your manager. Time taken for the purposes of voting must be either at the beginning or end of the normal workday.

Inclement Weather

In the event the Chief Executive Officer deems it necessary to close the office due to inclement weather, managers will be phoned, and they will contact employees. You should make the effort to come into the office unless you are notified otherwise. If you are unable to do so, you need to touch base with a manager.

If the office is officially closed through a management decision, you will be paid for the day with no effect on your paid time off. If, however, the office is not closed and you do not come to work, you should take vacation, use one of your "personal days off", request time off without pay, or make other arrangements with your manager.

Sick Leave

Sick leave is a form of insurance that employees accumulate in order to minimize the economic hardships that may result from out of the ordinary, unexpected, or emergency need to take time off, such as physical or mental illness or injury to employees or their immediate family members. Immediate family for sick leave purposes is defined as a spouse or registered domestic partner, child, parent (or parent-in-law), grandparent, grandchild, sibling, or designated person (defined as someone identified by the employee at the time the employee requests paid sick days, as any individual related by blood or who's association is equivalent of a family relationship, limited to one per 12-month period). Time off for medical, dental, and optical appointments will be treated as sick leave. - Sick leave is not intended to be used in lieu of vacation.

The JPIA offers paid sick leave to regular full-time employees at a rate of eight hours per month (full-time non-exempt, pro-rated if less than 40 hours per week) or one day per month (full-time exempt). This time off can be carried over indefinitely.

Part-Time Regular Employees, Temporary Employees, and Extended Temporary Employees will accrue sick leave of .75 days of sick leave per month after 30 days on the job for full time (40-hour week), prorated if less.

For all employees~~non-exempt employees~~, the minimum increment of leave is 15 minutes. On select occasions ~~scheduled paid~~ time off may~~will~~ be allowed to be made up at a maximum of 4 hours ~~(if taking less than one day)~~ by working additional hours only during the week the time was taken, ~~if deemed necessary due to work necessities~~, with the approval of your manager. ~~For exempt employees, the minimum increment is 4 hours (half day).~~

For all staff, it is expected that appointments be arranged around your workload and your department's needs.

Employees are permitted to use up to two days (16 hours) of accrued sick leave for personal time off each calendar year. This time will be deducted from sick leave accrual. If the time is not used, it just stays on the books.

To the extent as allowed by CalPERS, unused accumulated sick leave at the time of retirement will be converted to additional service credit. Eight hours of sick leave equals one day; it takes 250 sick days (2000 hours) to receive one year of service credit. Retirement age for the JPIA's purposes is age 50. Unused sick leave will not be paid if an employee is terminated or voluntarily resigns prior to retirement from the JPIA.

Abusive or excessive use of sick leave may result in disciplinary action, up to and including termination.

If you are unable to report to work due to unscheduled paid time off, you must contact your manager as soon as practicable, preferably before your start time. A phone call,

email, or text message is acceptable providing you receive a response back from your manager acknowledging your absence. If your manager is unavailable, you should contact any other available manager. If you become sick during the day, you must notify your manager, or if unavailable, any other manager before leaving the office.

A notification from a doctor that you are able to return to work may be required for any absences due to illness or injury of longer than five (5) days. A doctor's note may be required if you are on written warning or exhibiting a pattern of excessive use of sick leave.

If you have exhausted all paid time off credits and cannot report to work, you may be terminated at the discretion of the JPIA.

There is no limit on the amount of sick leave that may be accrued.

Sick leave is not paid out upon termination.

Organ or Bone Marrow Leave

Employees may take up to 60 days (workdays) of leave in any one-year period for the purpose of donating an organ to another person. The JPIA requires that employees taking leave for organ donation use two weeks of accrued but unused sick leave and/or vacation. JPIA will pay the remaining two weeks up to 30 days. The remaining 30 days are not paid, though employees can use wage replacement. The JPIA will continue to provide and pay for current group health plan benefits.

Employees are required to provide written verification of the need for leave, including confirmation that the employee is an organ or bone marrow donor and that there is a medical necessity for the donation.

Employees may take up to five paid days (workdays) of leave in any one-year period for the purpose of donating bone marrow to another person. You may use five days of accrued but unused sick leave and/or vacation.

Organ and Bone Marrow leave do not run concurrent with CFRA.

Unpaid Time Off

Several types of unpaid leaves of absence are available to eligible employees under the JPIA's policies.

Summary of Rules

A summary of the rules and restrictions applicable to all unpaid leaves of absence is provided below:

- Unpaid status: All leaves of absence are provided on an unpaid basis. Use of wage replacement (i.e. sick or vacation pay) does not turn unpaid leave into paid leave.

- Vacation and sick leave accrual: Employees on a leave of absence stop accruing vacation and sick hours until they actively return to work. However, the employee's accrual rate based on their seniority is not impacted. For example, if an employee is on a leave of absence and their accrual rate changes from earning 12 days/year of vacation to 13 days, the employee is still eligible for the accrual rate increase.
- Unless mandated by law, all leave of absences may be reported to CalPERS and result in a loss of service credit for the period of time you are on a leave of absence.
- The JPIA will attempt to reasonably accommodate employees who are released for partial or modified duty by their treating physician.
- Holiday Benefits: If a paid holiday falls during the period you are on leave of absence, you will not be eligible for the holiday pay.
- Health and Benefit Plans: The JPIA will maintain coverage under any group health plan for the duration of the leave and under the condition's coverage would have been provided had you been employed continuously during the leave. You will be required to pay for the entire cost of group health insurance for (1) the period of any family medical leave or other mandated leave of absence beyond the end of the month in which the leave terminates, and (2) for the entire period of any personal leave beyond the end of the calendar month in which the leave begins. This will be offered through COBRA and you are requested to notify the Human Resources Manager that you have arranged for all necessary payments with the Finance Manager before your leave commences. If you fail to return to work at the end of your leave period, the JPIA has the right to collect from you the cost of the health benefit premiums. An employee who returns to work for at least 30 days is considered to have "returned to work".
- Misrepresentations: Misrepresenting reasons for applying for a leave of absence may result in disciplinary action, including possible termination.
- Access to organizational systems will be temporarily disabled during an approved leave of absence, including any portion of the leave extended using accrued paid time off (such as sick leave, vacation, or PTO).

Unpaid Leaves

1. Federal Mandated Family Medical Leave Act (FMLA) / California Family Rights Act (CFRA) (Statutory)

FMLA and CFRA entitles eligible employees up to 12 workweeks/60 days/480 hours of unpaid, job-protected leave each calendar year in a 12-month period for specified family and medical leave reasons. An employee is eligible for FMLA/CFRA if they have at least 12 months of employment (does not need to be consecutive) and have worked a

minimum of 1250 hours preceding the leave. The purpose of the FMLA and CFRA is to provide you with the right to take time off from work to bond with a child, to care for a family member or to recover from a serious illness without jeopardizing your job.

Requested leaves must be submitted before the leave begins. See the Human Resources Manager for appropriate forms and specific information. When leaves are foreseeable, the employee must provide at least 30 days advance notice. If the leave is not foreseeable, the employee must provide notice as soon as practicable. The employee must consult with their supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to the operation of the JPIA. Any such scheduling is subject to the approval of the health care provider.

An employee can take family and medical leave under both the CFRA and FMLA for several different reasons. In many instances, the reasons under CFRA and FMLA overlap, but there are some key differences between the two. FMLA and/or CFRA leave may be taken for one or more of the following reasons:

- For a serious health condition that makes the employee unable to perform their job (FMLA/CFRA);
- To care for a family member with a serious health condition. Eligible family members are:
 - Spouse (FMLA/CFRA)
 - Child (CFRA - no age limit) (FMLA – under 18 years of age unless the adult child is incapable of self-care due to a disability)
 - Parent (FMLA/CFRA)
 - Grandparent (CFRA only)
 - Grandchild (CFRA only)
 - Sibling (CFRA only)
 - Parent-in-law (CFRA only)
 - Domestic partner (CFRA only)
- Designated person (defined as any individual related by blood or whose association is equivalent of a family relationship, limited to one per 12-month period) (CFRA only) ;
- Pregnancy related disability (FMLA only);
- The birth of the employee's child, or placement of a child with the employee for adoption or foster care. (FMLA/CFRA);

- For any “qualifying exigency” (defined by Section 3302.2 of the Unemployment Insurance Code) because the employee’s spouse, child, parent, or for CFRA only, domestic partner, is on active military duty (or has been notified of an impending call or order to active duty) in the Armed Forces of the United States. (FMLA/CFRA)
- Military Caregiver Leave - An employee who is the spouse, son, daughter, parent, or next of kin of a covered service member shall be entitled to a total of 26 weeks of unpaid leave in a 12-month period to care for a covered service member with a serious injury or illness. (FMLA only)
- Victim of a Qualifying Act of Violence (FMLA/CFRA)

a. Calculating the 12-month Period

The 12-month period is measured forward from the date the leave begins. Successive 12-month periods commence on the date of an employee’s first use of such leave after the preceding 12-month period has ended. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

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

For a qualifying exigency or leave to care for a covered service member, the 12-month period begins on the first day of the leave. Leave to care for a covered service member is for a maximum of 26 workweeks during a 12-month period.

b. Leave for Employee’s Own Health Condition

Employee’s own “serious health condition” is an injury, illness, impairment, or physical or mental condition that involves either inpatient care or continuing treatment:

- “Inpatient care” - admission to a health care facility with the intention of an overnight stay
- Period of incapacity of more than three days, followed by treatment by a healthcare provider)
- Chronic condition that continues over an extended period of time and requires periodic visits for treatment with a healthcare provider
- Permanent or long-term conditions
- Treatment for substance abuse

- A period of incapacity due to pregnancy, or for prenatal care. NOTE: An employee's own incapacity due to pregnancy is covered as a serious health condition under FMLA but not under CFRA.

If the FMLA/CFRA request is made because of the employee's own serious health condition, the JPIA may require, at its expense, a second opinion from a health care provider that the JPIA chooses. The health care provider designated to give a second opinion will not be one who is employed on a regular basis by the JPIA.

If the second opinion differs from the first opinion, the JPIA may require, at its expense, the employee to obtain the opinion of a third health care provider designated or approved jointly by the employer and the employee. The opinion of the third health care provider shall be considered final and binding on the JPIA and the employee.

The JPIA requires the employee to provide certification within 15 days of any request for FMLA/CFRA, unless it is not practicable to do so. The JPIA may require recertification from the health care provider if additional leave is required. (For example, if an employee needs two weeks of FMLA/CFRA, but following the two weeks needs intermittent leave, a new medical certification may be requested and required.) If the employee does not provide medical certification in a timely manner to substantiate the need for FMLA/CFRA, the JPIA may delay approval of the leave, or continuation thereof, until certification is received. If certification is never received, the leave may not be considered FMLA/CFRA.

If an employee cites their own serious health condition as a reason for leave, the employee must submit a certification from the health care provider stating;

- Date of commencement of the serious health condition;
- Probable duration of the condition, and
- Inability of the employee to work at all or perform any one or more of the essential functions of their position because of the serious health condition.

The JPIA will require an additional certification by the employee's health care provider that the employee is fit to return to their job. The physician must stipulate whether the employee can perform essential functions with or without accommodation.

Failure to provide certification by the health care provider of the employee's fitness to return to work will result in denial of reinstatement for the employee until the certificate is obtained.

Employees may take leave intermittently (in blocks of time/minimum 15-minute increments, or by reducing their normal weekly or daily work schedule). The reduced leave schedule must be medically necessary as determined by the employee's health care provider.

c. Leave to Care for a Family Member

If the leave is needed to care for an eligible family member, the employee must provide a certification from the health care provider stating:

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

Employees may take leave intermittently (in blocks of time/minimum 15-minute increments, or by reducing their normal weekly or daily work schedule). The reduced leave schedule must be medically necessary as determined by the health care provider of the family member with the serious health condition.

d. Leave for Birth, Adoption, or Foster Care

A leave taken due to the birth of the employee's child, or placement of a child with the employee for adoption or foster care, may need to be supported by a certification, such as a birth certificate or adoption and foster care paperwork.

A female employee's request for leave for the birth of her child will begin once her pregnancy disability leave has ended.

When both parents are employed by the JPIA, and request leave for the birth or placement for adoption or foster care for a child, the JPIA will grant the time off and ask that the parents work to minimize disruption to the workplace.

All leave for baby bonding must conclude within one year of the birth of the child or one year from the date the child was placed with the employee for adoption or foster care. Employees may request intermittent leave for child bonding. The minimum duration of leave is two weeks. However, JPIA will grant a request for leave of less than two weeks' duration on any two occasions and may grant requests for additional occasions of leave lasting less than two weeks.

e. Leave Related to Military Service

A leave taken due to a "qualifying exigency" related to military service may need to be supported by a certification of its necessity. A leave taken due to the need to care for a service member shall be supported by a certification by the service member's health care provider.

2. Pregnancy Disability Leave (PDL) (Statutory)

Any full or part-time employee who is disabled by pregnancy, childbirth, or a related medical condition will, upon request and approval, be granted PDL without pay not to exceed four months.

If you require PDL, you must notify your manager and the Human Resources Manager as soon as possible, at least 30 days in advance if foreseeable. The written notice should specify the commencement date of the leave, the expected duration of the leave and be accompanied by a signed physician's statement. JPIA has ten calendar days to respond to the request.

For employees on PDL, the JPIA guarantees reinstatement to the same or similar job with the same or similar duties, pay, and location unless granting such a leave would substantially undermine the JPIA's ability to operate the business safely and efficiently.

PDL Carryover

Leave granted under any of the reasons provided by PDL will be considered as part of the 12-workweek entitlement in a 12-month period; PDL provides a 17 workweek (693 hours) entitlement in a 12-month period. The 12-month period is measured forward from the date any employee's first PDL leave begins. Successive 12-month periods commence on the date of an employee's first use of such leave after the preceding 12-month period has ended. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

Intermittent Leave

Employees may take PDL intermittently (in blocks of time/minimum 15-minute increments, or by reducing their normal weekly or daily work schedule) if the leave is for the serious health condition of the employee or the employee's immediate family (as noted above), and the reduced leave schedule is medically necessary as determined by the health care provider of the person with the serious health condition. This is deemed unpaid leave. Employee may exercise wage replacement as set forth above.

3. School Activity Leave (Statutory)

Any employee who is the parent of a child through grade 12 may request up to 40 hours off per year for the purpose of participating in school activities, such as teacher conferences, award ceremonies or school plays. The leave can also be used for locating and/or enrolling in school or childcare, or for school or childcare emergency. This time will be unpaid unless you choose to use wage replacement through accrued sick or vacation time or compensatory time off for this purpose. You will be limited to no more than eight hours off for this purpose in any one calendar month unless it is due to a childcare provider or school emergency. Upon request, the JPIA reserves the right to require documentation for this leave.

"Parents" are specifically defined to include parents, guardians, grandparents, stepparents, foster parents, and persons standing in loco parentis to a child.

4. School Appearance Leave (Statutory)

Any employee who is the parent or guardian of a child through grade 12 may request leave to appear at his/her child's school in connection with disciplinary action by the school. The Education Code allows school districts to adopt policies requiring that parents or guardians attend class with their student after the student returns school from a suspension. The time will be unpaid unless you choose to use wage replacement through accrued sick or vacation time or compensatory time off for this purpose. Upon request, the JPIA reserves the right to require documentation for this leave.

5. Personal Leaves of Absence

General: Employees who have been continuously employed with the JPIA for at least one (1) year, may, due to special circumstances, request a personal leave of absence without pay, for a reasonable period of time up to one hundred and eighty (180) days. Requests for leaves of absence will be considered on the basis of length of service, performance, responsibility level, the reason for the request, whether other individuals are already out on leave, and the expected impact on the JPIA.

Requests: A request must be submitted in writing and be approved in writing by the Chief Executive Officer before a leave begins. A request for an extension of a leave of absence must be submitted in writing and approved in writing by the Chief Executive Officer before the extended period begins. It is your responsibility to report to work at the end of the approved leave. If you fail to report to work on the day after your leave expires, you will be considered to have voluntarily resigned.

Status of Employee Benefits During a Personal Leave: The JPIA does not pay for group insurance premiums during any portion of a non-mandated, unpaid leave of absence beyond the end of the month in which the leave begins. Accordingly, the premiums beyond that point for such coverage are your complete responsibility and offered through COBRA. In order to keep the insurance in force, premiums for the period of the leave must be paid according to the schedule outlined in the COBRA notification form.

When you are on a personal leave of absence, an effort will be made to hold your position open for the period of the approved leave. However, the JPIA will not guarantee reinstatement after a personal leave of absence.

6. Volunteer Civil Service Training Leave (Statutory)

As a volunteer firefighter, reserve police officer, or emergency rescue person, any employee has the right to take an unpaid leave of absence up to 14 days per year for responding to an emergency or related training.

7. Crime or Abuse Victims' Leave (Statutory)

Any employee who is the victim or who has an immediate family member or designated person, that is a victim of a qualifying act of violence, including domestic violence, sexual assault, stalking, or an act, conduct, or pattern of conduct that includes (1) bodily injury to another, (2) the brandishing or drawing of a weapon, or (3) the

perceived or actual threat to use force against another to cause physical injury has a right to reasonable accommodation and unpaid leave to attend legal proceedings or to obtain or attempt to obtain any relief necessary, including a restraining order or for medical treatment, to ensure the employee's own health or welfare, or that of the employee's child or children. Leave shall be supported by appropriate documentation. This leave runs concurrently with FMLA and CFRA. The employee may choose to use sick time or vacation time during the leave period.

8. Reproductive Loss Leave (Statutory)

Any employee who suffers a reproductive loss event, which is the day, or final day of a multiple event day has the right to take an unpaid leave of absence up to 5 days per event, not to exceed 20 days in a 12 month period. The 5 days do not need to be consecutive but must be taken within 3 months of the event. Reasons for leave include failed adoption, failed surrogacy, miscarriage, stillbirth, and unsuccessful assisted reproduction. The employee may choose to use sick time or vacation time during the leave period. No documentation is required.

9. Military Spouse Leave

Employees that work more than 20 hours per week and have a spouse in the Armed Forces, National Guard, or Reserves that have been deployed during a period of military conflict are eligible for up to 10 unpaid days off when their spouse is on leave from military deployment. Employees must request this leave in writing to the Chief Executive Officer within two business days of receiving official notice that their spouse will be on leave. Employees requesting this leave are required to attach to the leave request written documentation certifying the spouse will be on leave from deployment.

Wage Replacement During Leave

Employees on leave of absence stop accruing vacation and sick hours until they actively return to work.

Use of wage replacement (i.e. sick, vacation) during a leave does not change the status of the leave from Unpaid to Paid.

If the employee is on unpaid leave for PDL, CFRA, or FMLA, the employee may use sick or vacation pay to supplement wage replacement benefits.

If the employee is receiving benefits from a paid disability plan such as Worker's Compensation or provided supplemental disability insurance, the employee may use sick or vacation pay to supplement partial wage replacement benefits as long as the employee does not receive more than they would normally earn at work.

All requests for wage replacement must be made in writing (email is acceptable) to the Human Resources Manager prior to the start of leave.

Reinstatement

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

Fit-for-Duty Exam

Before an employee returns to work from FMLA, CFRA and/or PDL for the employee's own serious health condition, the employee may be required to submit a fitness-for-duty certification from the health care provider stating the employee is able to resume work.

Employee Relations

Standards of Conduct

The following examples are given in order to provide you some guidance concerning unacceptable behavior. If the JPIA chooses to correct an employee who engages in unacceptable behavior, the employee may be subject to corrective action up to and including termination. Please note that it is impossible to provide an exhaustive list of behaviors that are not acceptable. The following is therefore intended to simply provide some examples:

- Poor performance.
- Using abusive or vulgar language, or causing disruption to the workplace or to fellow employees or visitors.
- Spreading malicious gossip; engaging in behavior which creates discord.
- Unavailability for work, i.e., absenteeism or tardiness.
- Misuse of the JPIA's monies.
- Conducting non-business activities during working hours.

- Any action indicating a disrespect or disregard for the JPIA, its vendors, suppliers or clients.
- Release of confidential information about the JPIA or its members.
- Falsification of forms, records, or reports including, but not limited to, time sheets, employment applications and member records.
- Possessing or bringing firearms, weapons, open containers of alcohol, marijuana or illegal drugs or chemicals on or to the JPIA's property.
- Insubordination, refusing to follow a manager's directions, or other disrespectful conduct toward a manager.
- Unauthorized possession or removal of property, records, or other materials that do not belong to you.
- Smoking in restricted areas.
- Destroying or willfully damaging the JPIA's or another employee's property, records, or other materials.
- Non-compliance with safety or health rules or practices or engaging in conduct that creates a safety or health hazard.
- Leaving the JPIA's property without approval prior to the end of a scheduled workday.
- Sexual harassment or other unlawful harassment of another employee.
- Giving false or misleading information during the application and/or selection process.
- Failure to report involvement in an accident occurring on the JPIA's premises, or involving the JPIA's equipment, or giving false information in accident or insurance reports.
- Willful failure to report to ~~managersupervisor~~ any significant omissions, errors or mistakes or accidental damage affecting work assignment, property or equipment.
- Unauthorized opening of, or tampering with, locks in desks, doors, cabinets, etc., or unauthorized use of or duplication of keys.
- Reporting to work under the influence of drugs and/or alcohol and/or marijuana.
- Threatening, bullying, or intimidating other employees or supervisors.
- Behavior unbecoming a JPIA employee; that behavior or action which would adversely prejudice public opinion of the JPIA.

- Failure to immediately report the loss of a California driver's license due to suspension, withdrawal, forfeiture or confiscation by any court of law or by the California Division of Motor Vehicles. This rule applies only to those employees who must maintain such a license as a condition of their employment.
- Installing unauthorized software on the JPIA's computer system.
- Misuse of electronic systems (email, internet, fax) per policy.
- Inability to get along with co-workers, members' staff, vendors, and/or Board Members.
- Release of HIPAA information or liability or workers' compensation claims information about an active employee, former employee, dependents, or members by anyone and to anyone not specifically authorized to access said HIPAA information or authorized to adjust the claim.

Since all employees are "at will" employees, the employment relationship may be terminated at any time by either the JPIA or the employee with or without cause.

Attendance Policy

~~The JPIA may utilize a system of corrective action, at its sole discretion, in cases of misconduct or unacceptable performance, including absenteeism. The use of such a system does not waive either the JPIA's or your right to terminate employment at any time with or without cause. If the number of absences within the most recent 12-month period, regardless of the reason, is excessive, you may be subject to corrective action, at the discretion of the JPIA, to make you aware of problems and to create an action plan to resolve issues. The attendance policy of the JPIA will be followed only to the extent allowed by law and is not meant to circumvent or abrogate any existing provisions of the FEHA, ADA, ADEA, or other state or federal law and/or regulation.~~

The Corrective Process

The corrective process is an optional process that may be used to address performance-based concerns. It is not mandatory and is at the sole discretion of the JPIA. The corrective process may take the form of an informal discussion. If the problem persists, a written corrective action may then be issued confirming you have been made aware of any problem, that a meeting an interview has taken place, and that you understand what must take place for satisfactory resolution. A second written corrective action may also be issued, with termination a possible final consequence.consequence.

As indicated in the Standards of Conduct section of this Handbook, certain instances of gross misconduct could lead to immediate termination.

Employee Grievances or Concerns

The JPIA encourages employees that may be experiencing work performance problems, employee supervisory concerns, peer disturbances or other concerns to bring them to the attention of your respective managers or to the Human Resources Manager or the Chief Executive Officer if your manager is involved in the situation or does not respond to the complaint in a reasonable length of time.

The JPIA defines a grievance as an expressed dissatisfaction by employees pertaining to conditions of their employment.

In matters relating to a management employee's job demotion, reduction in salary, or employment termination, employees may present their grievances to the Personnel Committee at its next regularly scheduled meeting. All other employees may present their grievances to the Chief Executive Officer.

Alcohol, Marijuana and Drug Free Workplace

The JPIA recognizes that behavior resulting from the use of alcohol and/or marijuana and/or drugs may detrimentally affect the safety and work performance of its work force and can present a risk to the health and welfare of its employees and members.

In recognition of the JPIA's responsibility to maintain a safe work environment and your responsibility to perform safely, the JPIA will act to eliminate any substance abuse, which increases the risk of injuries, accidents, or substandard performance at the workplace. For the purpose of this policy, substance abuse includes the use or possession of illegal drugs, alcohol, marijuana, sharing of prescription drugs, or abuse of prescription drugs, which could impair your work performance and/or ability to perform your job safely. It is expected that:

- You shall not be at work, drive a vehicle on JPIA business, or operate the JPIA's equipment with alcohol, marijuana or illegal drugs in your system which would result in a confirmed positive test indicating impairment; shall not use alcohol or marijuana, possess open containers of alcohol, possess marijuana, or use or possess illegal drugs while on duty; and shall not manufacture, distribute, dispense, sell, or provide alcohol, marijuana, or illegal drugs to any person while on duty.
- If ~~your~~the use of a prescription drug combined with the duties of the required job creates an unsafe working condition, you shall report this ~~fact shall be reported~~ to your ~~managers~~supervisor or Human Resources Manager prior to reporting to work. ~~If an e~~Employee's ~~ss whose~~ job performance is so restricted you may be subject to reassignment, medical examination, or other actions specified by this handbook or applicable statutes and regulations.

Reasonable Suspicion Testing

Employees may be subject to drug and alcohol testing when there is reasonable suspicion that the employee has violated the rules expressed above. Regarding testing for marijuana, JPIA will ensure drug testing detects only employees' current impairment or active THC levels. JPIA will not test for the presence of non-psychoactive cannabis metabolites. An employee who is under the influence of marijuana, alcohol, or drugs while at work will be subject to termination.

In addition, when any employee has previously been found in violation of these rules, or by the employee's own admission, the employee may be required to submit to periodic substance testing as a condition of remaining in or returning to JPIA employment.

~~Fitness For Duty & Return To Work Evaluations~~

~~The purpose of this policy is to determine an employee's ability to safely perform the essential job tasks of his/her job with or without reasonable accommodation. This policy is not designed or intended to supersede employer requirements under any state or federal law or regulation and will be utilized in accordance with the law.~~

~~General guidelines:~~

- ~~• Each employee is responsible for maintaining his/her health in such a way that the employee can perform the essential functions of his/her job with or without reasonable accommodations. If a manager has reason to question the ability of an employee to perform the essential job functions, a Fitness for Duty or Return to Work Evaluation may be requested.~~
- ~~• To determine the appropriateness of a Fitness for Duty or Return to Work Evaluation request, management must consult and receive approval from the Human Resources Manager and Chief Executive Officer.~~
- ~~• Time required by the employee to complete the Fitness for Duty / Return to Work Evaluation is considered work time and may require an administrative leave. Time off for prescribed treatment (after the evaluation), mandatory or otherwise, will be charged to accrued sick leave.~~
- ~~• Results of the evaluation will be maintained confidentially and separate from the employee's personnel record.~~
- ~~• If a Fitness for Duty / Return to Work evaluation is necessary, the employee will be required to be examined by a treating, personal physician or specialist selected by the JPIA.~~

- ~~Failure to attend a Fitness for Duty or Return to Work Evaluation may lead to disciplinary action, up to and including, termination.~~

Outside Relations/Media Contact

If you are contacted by the media or external and independent organization, ~~y~~You are not permitted to give or report any information about the members of the JPIA, another employee, outside vendor, client, or consultant to anyone outside of the JPIA. You should forward any such request, whether verbal or written, to the Chief Executive Officer for handling.

Prohibition of Discrimination

The JPIA is committed to providing a work environment that is free of unlawful discrimination. In keeping with the commitment, the JPIA strictly prohibits unlawful harassment on the basis of an employee's race (inclusive of traits associated with race, including but not limited to hair texture and protective hairstyles), sex (including breastfeeding), gender identity, religious creed, color, national origin, ancestry, age (over 40), marital status, sexual orientation, or physical or mental disability, or any other class protected by state or federal law. Discrimination of anyone in or from the JPIA, on any of these bases, is strictly prohibited.

This policy prohibits discrimination in any form, including:

- Verbal harassment such as epithets, jokes, derogatory comments or slurs based on the person's race, sex, religious creed, color, national origin, ancestry, age (over 40), marital status, sexual orientation, or physical or mental disability;
- Physical harassment such as assault, impeding or blocking movement, or any physical interference with normal work or movement when directed at an individual based on one of the categories above; and
- Visual harassment such as derogatory posters, cartoons, or drawings based on one of the categories above. Also included are emails that may be inappropriate, offensive, harassing, and/or creating a hostile work environment.

If you believe you have been or are being subjected to this kind of discrimination and are unable to resolve (or uncomfortable attempting to address) the problem with the individual, you should promptly report it to your manager, any other manager, the Human Resources Manager or the Chief Executive Officer. All such claims will be investigated in a manner designed to protect the privacy and confidentiality of all involved and appropriate action will be taken. When appropriate, the JPIA may seek to resolve the matter informally. Any employee found to have discriminated against anyone in or from the JPIA's work environment, based on one of the categories above will be disciplined, from verbal reprimand to dismissal, based on the circumstances.

If you have any questions about this policy, or want more information about it, please contact the Human Resources Manager or Chief Executive Officer.

Sexual Harassment

JPIA values each and every employee and expects all staff to behave in a respectful manner at all times. When harassment occurs, the entire organization suffers and our mission to serve our members becomes at risk.

Sexual harassment of the JPIA's employees, by any person in or from the work environment, is strictly prohibited. Sexual harassment includes, but is not limited to, unwelcome sexual advances, requests for sexual favors, or other verbal, visual, or physical conduct of a sexual nature when:

- Submission to such conduct is made either expressly or by implication a term or condition of an individual's employment;
- Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting the individual; or
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance; creating an intimidating, hostile, threatening or offensive working environment; or adversely affecting the employee's performance, appraisal, assigned duties, or any other condition of employment or career development.

Other examples of sexual harassment include unwelcome sexual flirtations or propositions; verbal abuse of a sexual nature; graphic verbal comments about an individual's body; sexually degrading words used to describe an individual; emails that may be inappropriate, offensive, harassing, and/or creating a hostile work environment; and the display in the work environment of sexually suggestive objects or pictures, posters, jokes, cartoons, or calendar illustrations. Sexual harassment conduct need not be motivated by sexual desire.

Guidelines for the Employee

All employees of JPIA have a right to work in an environment free of harassment of any kind, including bullying. JPIA prides itself on a culture of respect and to that end, expects every employee, vendor or visitor to behave in the highest of standards.

If you think you have been subjected to inappropriate or disrespectful behavior or seen a co-worker subjected to such behavior:

- Say NO! Make it clear to the offender that the behavior is unacceptable to you. The harasser may not realize the advances or behavior are offensive. Sometimes a simple confrontation will end the situation.

- Don't let confusion and self-doubt stop you from speaking out.
- JPIA wants to know about any disrespectful activity so that it can be addressed appropriately.
- Keep a record of dates, times, places, witnesses and nature of harassment. Such records will be very helpful if you find it necessary to pursue a formal grievance.
- If you are not a manager and feel that you have been or are being sexually harassed or are aware of or suspect the occurrence of sexual harassment, or you desire counseling on coping with sexual harassment, you should immediately contact your manager, any other manager, the Human Resources Manager, or the Chief Executive Officer. If you are a manager, you should immediately contact your Director, any other Director, the Human Resources Manager, or the Chief Executive Officer. If you are a Director, you should immediately contact the Human Resources Manager or the Chief Executive Officer.~~If you feel that you have been or are being sexually harassed or are aware of or suspect the occurrence of sexual harassment, or you desire counseling on coping with sexual harassment, you should immediately contact your manager, any other manager, the Human Resources Manager, or the Chief Executive Officer.~~ This procedure is your exclusive remedy for prevention and resolution of any issues of harassment at the JPIA.
- Any and all complaints will be treated with confidentiality to the extent possible. The complaint will be responded to in a timely fashion; investigated promptly and thoroughly by impartial and competent personnel; documented and tracked to ensure reasonable progress; met with appropriate remedial action when misconduct is found; and afforded a timely closure. Be advised that making a complaint will not result in any retaliation against the complainant or any participant in the investigation.
- In addition to notifying the JPIA about harassment or retaliation complaints, affected employees may also direct their complaints to the California Civil Rights Department ("CRD"), which has the authority to conduct investigations of the facts. The deadline for filing complaints with the CRD is three years from the date of the alleged unlawful conduct. If the CRD believes that a complaint is valid and attempts to resolve the dispute fail, the CRD may seek an administrative hearing before the California Civil Rights Department Commission ("CRDC") or file a lawsuit in court. Both the FEHC and the courts have the authority to award monetary and nonmonetary relief in meritorious cases. Employees can contact the nearest CRD office or the FEHC at the locations listed in the District CRD poster or by checking the State Government listings in the local telephone directory.
- Maintain strict confidentiality ensuring the privacy of all parties concerned.

Disciplinary and/or Corrective Action

Any employee found to have sexually harassed anyone in or from the JPIA's work environment will be disciplined, from verbal reprimand to dismissal, based on the circumstances.

Retaliation

Harassment also includes any act of retaliation against an employee for reports of violation of this policy or for participating in the investigation of a sexual harassment complaint. Retaliation is a serious matter. Any employee found to have retaliated against someone for filing a complaint or being involved in an investigation will be disciplined up to and including termination. Retaliation can be very subtle – from simply ignoring someone to spreading malicious rumors to making disrespectful comments – but nonetheless, is prohibited. Retaliatory actions put a damper on encouraging all staff to speak up when harassed or disrespected. Even if a complaint seems to lack legal merit, it is not permissible to engage in retaliation in any form.

Workplace Violence Prevention

The safety and security of employees and customers are very important to the JPIA. Threats, threatening behavior, acts of violence, or any related conduct which disrupts another's work performance or the JPIA's ability to execute its daily business will not be tolerated.

As part of its commitment of ensuring a safe and secure workplace the JPIA has established a Workplace Violence Prevention Plan ("WVPP").

Responsibility

The WVPP Administrator, Human Resources Manager, has the authority and responsibility for implementing the provisions of this Plan for the JPIA. All managers and supervisors are responsible for implementing and maintaining the WVPP in their work areas and for answering questions about the WVPP.

Employee Participation

All JPIA employees are expected to assist in maintaining a safe, healthy, and secure work environment. Everyone is responsible for using safe work practices, following the WVPP, following the applicable Injury and Illness Prevention Plan and Workplace Violence policy, as well as complying with all related directives, policies, and procedures.

All employees, their designated representatives, and Cal/OSHA representatives have the right to examine and receive a copy of the JPIA Workplace Violence Prevention Plan. The complete WVPP is located on the JPIA internal intranet ~~(The Fountain)~~.

To ensure that the JPIA maintains a workplace safe and free of violence for all employees, the JPIA prohibits the possession or use of dangerous weapons on JPIA property. A license to carry the weapon does not supersede this policy. JPIA property is defined as all JPIA owned or leased buildings and surrounding areas such as sidewalks, walkways, driveways, and parking lots under the JPIA ownership or control. This policy applies to all vehicles that come onto JPIA property.

Any person who makes threats, exhibits threatening behavior, or engages in violent acts on JPIA property may be removed from the premises pending the outcome of an investigation. Threats, threatening behavior, or other acts of violence off JPIA property, but directed at JPIA employees, JPIA members or the public while conducting business for the JPIA, is a violation of this policy.

Off-site threats include but are not limited to threats made via telephone, fax, electronic or conventional mail, or any other communication medium. Violations of this policy will lead to disciplinary action that may include dismissal, arrest, or prosecution. In addition, if the source of such inappropriate behavior is a member of the public, the response may also include barring the person(s) from JPIA property, termination of business relationships with that individual, and/or prosecution of the person(s).

Employees are responsible for notifying the Human Resources Manager, Chief Executive Officer, or any other manager of any threats, which they have witnessed, received, or have been told that another person has witnessed or received. Employees should also report any behavior they have witnessed which they regard as threatening or violent when that behavior is job related or might be carried out on JPIA property or in connection with employment.

Any employee that receives a protective or restraining order that lists JPIA premises as a protected area is required to provide the Human Resources Manager with a copy of such order.

Request for Reasonable Accommodation

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the JPIA will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact the Human Resources Manager and your manager to discuss the need for an accommodation. The JPIA will engage in an interactive process with the employee to identify possible accommodations, if any that will help the applicant or employee perform the job.

Interactive Process

An interactive good faith communication process between the JPIA and a disabled employee is required in selecting an appropriate reasonable accommodation, if one exists. This is a timely individual process where management and the individual discuss the request and effective reasonable accommodation(s). In general, the JPIA will initiate an interactive process when: (1) an applicant or employee with a known disability requests a reasonable accommodation, (2) the JPIA otherwise becomes aware of the need for an accommodation through a third party or by observation, or (3) the JPIA becomes aware of the possible need for an accommodation because the employee has a disability and has exhausted leave under the Workers' Compensation Act, [FMLA](#), CFRA, or other federal, state or employer leave provisions, if applicable.

The following is a non-exclusive list of the considerations when reviewing a request for accommodation:

- The essential functions of the job.
- Conduct an independent assessment.
- How the disability limits performance of the essential functions.
- Identify accommodation options that overcome limitations and determine the reasonableness of the proposed accommodations.
- Select the most appropriate reasonable accommodation, if one exists.

If an accommodation request is made, the JPIA will initiate the interactive process and confer with the individual applicant or employee, as necessary, until the interactive process is complete and/or a reasonable accommodation, if any, is determined.

Pregnant Workers Fairness Act

A reasonable accommodation may be requested for the physical or mental condition related to, affected by, or arising out of pregnancy, childbirth, or related medical conditions and the employee or job applicant needs a change in the work environment or job duties. However, one distinction is that, while the ADA requires an employee to be able to perform the “essential functions” of their position, with or without accommodation, the PWFA includes a provision allowing for the temporary inability of an employee to perform an essential function. The request for reasonable accommodation must be based on the advice from the employee’s or job applicant’s

health care provider.

Employment Duration

The relationship between you and the JPIA is based on the mutual consent of both parties. Accordingly, either you or the JPIA can terminate the employment relationship at any time, unless an employment contract containing terms to the contrary exists.

Employment Reference Checks

All inquiries regarding a current or former JPIA employee must be referred to the Human Resources Manager or the Chief Executive Officer.

Should you receive a written request for a reference, you must refer the request to the Human Resources Manager for handling. You may not issue a reference letter to any current or former employee without the permission of the Chief Executive Officer.

Under no circumstances should you release any information about any current or former JPIA employee over the telephone. All telephone inquiries regarding any current or former employee of the JPIA must be referred to the Human Resources Manager.

In response to an outside request for information regarding a current or former JPIA employee, the Human Resources Manager, or designated staff member, will verify only an employee's name, dates of employment, and job title. No other data regarding any current or former JPIA employee will be released unless the employee authorizes the JPIA to release such information in writing or the JPIA is required by law to furnish any information.

If, however, you are contacted to give a personal reference regarding a current or former JPIA employee, you are permitted to do so and should emphasize to the inquirer that the reference is personal only and not on behalf of the JPIA.

Failure to follow these directions may be cause for corrective action up to and including termination.

Off-Duty Conduct/Conflict of Interest

While the JPIA does not seek to interfere with the off-duty and personal conduct of its employees, certain types of off-duty conduct may interfere with the JPIA's legitimate business interests. For this reason, employees should be aware of the following policies:

Employees are expected to conduct their personal affairs in a manner that does not adversely affect the JPIA's or their own integrity, reputation or credibility. Conduct on

the part of an employee that adversely affects the JPIA's legitimate business interests or the employee's ability to perform their job will not be tolerated.

While employed by the JPIA, employees are expected to devote their energies to their jobs with the JPIA. The following types of outside employment are strictly prohibited:

- Employment that conflicts with an employee's work schedule, duties and responsibilities;
- Employment that creates a conflict of interest or is incompatible with the employee's employment with the JPIA;
- Employment that impairs or has a detrimental effect on the employee's work performance with the JPIA;
- Employment that requires the employee to conduct work or related activities on the JPIA's property during the JPIA's working hours or using the JPIA's facilities and/or equipment;
- Employment that directly or indirectly competes with the business or the interests of the JPIA.

Employees who wish to engage in outside employment that may create a conflict of interest must submit a written request to the Chief Executive Officer explaining the details of the outside employment. If the outside employment is authorized, the JPIA assumes no responsibility for the outside employment. The JPIA shall not provide workers' compensation coverage for injuries occurring from or arising out of outside employment. Authorization to engage in outside employment can be revoked at any time. If an employee has any doubts, it is recommended that a written request be submitted to insure there are no future problems.

Anti-Fraud/Ethics Policy

The JPIA and its employees must, at all times, comply with all applicable laws and regulations. Employees uncertain about the application or interpretation of any legal requirements should refer the matter to their manager.

The JPIA expects its employees to conduct themselves in a businesslike manner and perform duties conscientiously, honestly, and in accordance with the best interests of the organization. Employees are expected to take great care when working with JPIA suppliers or contractual contacts and members. Employees should respect the confidentiality of information acquired in the course of their work. Regardless of circumstances, if an employee senses that a course of action may involve a conflict of interest, fraud, and/or dishonesty, they should immediately communicate all facts to their manager, any Director, or the Chief Executive Officer.

Children At Work

The JPIA prefers that children not be brought to the office in lieu of childcare. However, if necessary, and in limited circumstances, the JPIA will deem this acceptable under the following circumstances:

- You must get prior approval from your manager.
- Your child must not be disruptive. If this occurs, you and your child will be asked to leave immediately.
- Your child should be situated in a quiet, out-of-the way place, such as an unused conference room.
- Your child must not interfere with your job or your co-workers.

California Public Records Act Request (CPRA)

The JPIA strives to comply with all applicable laws and provide the public with information as requested. Therefore, our goal is to respond promptly to any Public Records Request. Any employee receiving a request from the public for documents is to forward that request to the General Counsel immediately. The General Counsel will work with those necessary to fulfill the request. Employees are NOT to respond to CPRA requests independently.

Lactation Accommodation

JPIA recognizes lactating employees' rights to request lactation accommodation, and accommodates lactating employees by providing a reasonable amount of break time and a suitable lactation location to any employee who desires to express breast milk for their infant child, subject to any exemption allowed under applicable law. If possible, the break time should run concurrently with your normally scheduled break time. Any break time to express breast milk that does not run concurrently with your normally scheduled break time is unpaid.

JPIA provides two options for use by mothers needing to express breast milk. Employee can reserve the Quiet Room which can be locked or utilize the private sitting room in the women's restroom which can also be locked. Employee and manager will work together to schedule the break time needed to accommodate needs. An employee's request may be provided orally, by email, or in writing, and need not be submitted on a specific form. If JPIA cannot accommodate the request, we will provide a written response to your request.

If you believe you have been denied your rights related to lactation accommodation, you have the right to file a complaint with the Labor Commissioner.

Injury & Illness Prevention Program

The JPIA greatly values the safety and health of all of its employees and is committed to providing a safe and healthful workplace. This will be accomplished through the establishment, implementation, and maintenance of an effective Injury & Illness Prevention Program (IIPP). The complete IIPP is located on the JPIA internal intranet. ~~(The Fountain)~~. Here are the key responsibilities to understand:

The CEO is assigned responsibility for implementing the IIPP.

An Injury/Illness Prevention Program (IIPP) administrator, (Safety Program Administrator) is delegated the authority and responsibility for administering the provisions of this program for JPIA. The JPIA's Safety Program Administrator is responsible for reporting to management any safety issues or concerns and for suggesting corrective actions. The Safety Program Administrator will be appointed by the CEO.

The Safety Program Administrator will be the Risk Control Manager.

Management:

- Responsible for implementing and maintaining the IIPP in their work areas and for answering worker questions about the IIPP;
- Make a copy of the IIPP available to their employees; and
- Provide the necessary leadership and resources to administer an effective program.

Supervisors:

- ~~Responsible for implementing and maintaining the IIPP in their work areas and for answering worker questions about the IIPP;~~
- Know the program and provide the necessary leadership to insure its success;
- Provide employees with necessary training; and
- Be a good example.

Employees:

- Know the program and give it your total support;
- Learn the hazards of your trade, and practice safe behavior; and
- Help fellow employees to prevent accidents.

Ergonomics

The JPIA encourages safe and proper work procedures and requires all employees to follow safety instructions and guidelines. It is our intention to reduce exposure to ergonomic hazards through modifications to equipment and process and employee training. Any necessary, reasonable adjustments to minimize workplace repetitive motion injuries will be considered and made. If you require any adjustments or have any concerns or questions about ergonomics, be sure to discuss the matter with your manager or the Human Resources Manager. Employees are encouraged to complete the General Office Ergonomics on-line class for information on preventing injuries.

Bomb Threats And/Or Threatening Calls

Should you receive a threatening phone call, remain calm and try to write down the exact wording of the emergency/threat. Be sure to notify a manager and Human Resources immediately, and if appropriate, phone 9-1-1.

Driving on The Job

The JPIA has established and maintains a Driving Record Review Program. As part of this program, it has enrolled in the Department of Motor Vehicles (DMV) Employer Pull Notice Program. This is a free service for public agencies that provides driver record reports on employees. Employees who may have their records reviewed include all who drive as an essential function of their job on JPIA business, including temporary, seasonal, and part-time employees and volunteers.

These employees are required to:

~~Procedures~~

~~The JPIA may obtain from the DMV a copy of the driving record of all of its employees that are authorized to operate vehicles (JPIA or personal) on the JPIA's business.~~

- ~~• The JPIA is responsible for ordering and interpreting all driving records.~~
- ~~If your duties require driving a vehicle, you must M~~maintain a driving record that will not cause the JPIA's insurance rate to be increased or for you to become uninsurable. Any such actions could lead to disciplinary action.
- ~~• If your duties require driving a vehicle, you must P~~provide proof of insurance at least annually.
- Complete three hours of defensive driving training every three years. This may be completed by attending a formal defensive driving class or by completing three Vector Solutions on-line classes.

You are expected to practice good defensive driving techniques and operate the vehicle in a safe and responsible manner.

Any employee incurring out-of-pocket expenses due to traffic accidents while on JPIA business (i.e., deductibles), may be reimbursed by the JPIA.

Cellular Phone Safety

The use of cellular phones while driving on JPIA business is considered a dangerous distraction and is prohibited. If your job requires you to keep your cell phone turned on while driving, you must safely pull off the road and stop before conducting business. Under no circumstances may a driver initiate or answer a cellular phone call or text message while driving a vehicle on company time unless you can use your cellular phone in a hands-free manner, such as a speaker phone or voice commands.

Staff Expense Reimbursement Guidelines

The JPIA will fully compensate employees for all reasonable and prudent expenses incurred in the course of business as described below:

Compensable Time

When employees participate in work-related travel or training, compensable time (i.e., time that counts as hours worked) is determined as follows:

Training, Meetings, and Conferences

Attendance is considered work time if any of the following are true:

- It occurs during normal working hours,
- It is mandatory,
- It is directly related to the employee's job, and
- Work is performed during the session.

If none of these criteria are met, it is non compensable time.

Travel Time

Compensability of travel time depends on the type of travel:

- Ordinary Commute: Daily home-to-work and work-to-home travel is not paid time.

- One-Day Travel to Another City: Travel for a special one-day assignment in another city is compensable.
- Travel During the Workday: Travel between job sites or for job duties during the day is compensable.
- Travel Outside the Normal Workday: Travel on weekends or outside normal working hours for a work related activity is compensable. For example, if traveling to a conference on a Sunday, then compensable time begins when you leave your house and ends when you arrive at your destination.

Please consult with your manager if you're unsure whether travel or training time is compensable for a specific situation.

Authorized Study or Release Time

The JPIA may, at its discretion, authorize paid release time for study or coursework related to a required certification or degree program.

- Supervisors may approve a reasonable amount of paid time – not to exceed 8 hours per week for such activities, based on operational needs and the estimated time required to complete the training.
- Employees are expected to request and obtain advance approval for any study or training time they wish to count as paid work time.
- If an employee is unable to complete required study or training within the approved hours, the employee must notify their supervisor for guidance. All additional time reasonably required to complete mandatory training shall remain compensable.
- Employees must record all approved training or study hours on their timesheet in accordance with the JPIA's timekeeping procedures. Managers are responsible for verifying attendance and approving compensable training time.

Study time or coursework is not compensable and should occur outside of regular working hours if the participation is voluntary and not required by the JPIA or by law. Examples include optional professional development, college degree coursework, or self-study for future promotional opportunities.

Credit Card Use

Credit cards will be issued to specific employees who either travel on a regular basis on JPIA business or have the need to frequently purchase supplies or services. Credit cards should be used only for legitimate, approved business of the JPIA, subject to the

following regulations. These cards should be used for all approved expenses as authorized in this section.

- No personal items may be charged on the business credit card;
- All charges must be in line with travel guidelines or as approved by management; and
- Expense reports must be submitted to your manager within thirty (30) days of expense accrual. Receipts must be signed by a manager and submitted to Finance within one week of making the charge.

Employee Incurred Expenses

All expenses which are incurred by employees for JPIA purposes will be reimbursed as soon as the accounting department can process payment. All expenses must be approved in advance by management before submitting to Finance for reimbursement.

Mileage

The mileage reimbursement rate to operate privately-owned vehicles will be the allowable IRS rate in effect at the time the expense is incurred. The mileage distance should be calculated from destination to destination. ~~Any employee incurring out-of-pocket expenses due to traffic accidents while on JPIA business (i.e., deductibles), may be reimbursed by the JPIA.~~

~~Those of you driving vehicles on JPIA business will be required to complete three hours of defensive driving training every three years. This may be completed by attending a formal defensive driving class or by completing three Vector Solutions on-line classes. You will also be enrolled in the state of California PULL program that monitors driving records for public employees. In addition, you are required to provide the JPIA with proof of insurance coverage for your personal vehicle.~~

~~You are expected to practice good defensive driving techniques and operate the vehicle in a safe and responsible manner.~~

Air Travel

When flying on JPIA business, employees are requested to look for the most cost efficient flight with the most convenient schedule. It is preferred that employees use Southwest Airlines when traveling on JPIA business, unless another airline can better accommodate your schedule, or you are able to secure a less expensive ticket through another airline, or Southwest does not fly to your destination. It is a requirement to book flights in a timely manner in order to avoid last minute charges, unless approved in advance by management.

If flying Southwest, it is permissible to purchase “Wanna Get Away Plus fares and permissible to purchase “Early Check-in” option when booking Wanna Get Away fares.

Employees are normally expected to use the least expensive fare, but. ~~They’re not required to take inconvenient flights, or weekend stays just to save money. However, if a cost-saving option like a Saturday stay or odd schedule works for the employee and helps JPIA save money, the related costs (like extra hotel nights or meals) will be reimbursed. when choosing flights. Although you are not asked to take flights with “crazy schedules” or stay over a Saturday to save money, if it is cost beneficial to the JPIA and you choose, the additional expenses will be reimbursed.~~

Car Rentals

~~The JPIA’s policy is to allow you to rent a mid-size automobile where you get the best rate and most convenient rental.~~

~~When renting a car on JPIA business, use your JPIA issued corporate credit card and do not purchase additional car rental loss and damage coverage. Do not accept direct billing if offered because it negates this coverage. The coverage is primary and no deductible applies. Exclusions are for pickups, trucks, RVs, exotic and antique autos.~~

~~The JPIA has a contract with Enterprise with very good prices. Please utilize those rates when booking with Enterprise. You are not required to use Enterprise if you can find a better price/convenience elsewhere.~~

~~Below is the link for Enterprise Rental Car.~~

~~https://www.enterprise.com/car_rental/deeplinkmap.do?bid=029~~

Rental location	Log-in:	Pin:
Northern CA	L30C524	joi
Southern CA	CF2719	acw

~~The link for Budget Car Rental is www.budget.com. The Budget BCD number (Offer Code) is S398064. Use ACWA/JPIA for the Customer ID. We also get money back for each reservation. The JPIA’s policy is to allow you to rent a mid-size automobile where you get the best rate and most convenient rental.~~

When renting a car on JPIA business, JPIA strongly encourages you to use your JPIA issued corporate credit card. The JPIA has corporate discount codes with Enterprise Rental Car and Budget. You are free to use other car rental agencies if the prices are equivalent or better.

- Enterprise Corporate Code #L30C524
- Budget BCD (Offer Code) #S398064. Use ACWA/JPIA for the Customer ID.

Damage Waiver – Car rental:

If using your JPIA issued corporate credit card, DO NOT purchase additional car rental loss and damage coverage. The coverage is provided by the credit card and is primary and no deductible applies.

If you are using a personal credit card and submitting reimbursement, you MUST accept the additional insurance coverage provided by the rental company.

Meals

The JPIA will provide up to \$125 per day for full-day travel expenses and up to \$75 per day for half-day travel expenses. Special circumstances will be required to justify reimbursement for amounts above these limits. Tipping can generally be up to 20%.

Lodging

The reimbursement rate should not exceed \$295 per night, exclusive of tax, or whatever is a reasonable rate in the area. Staff members should always try to get a government rate whenever possible. Management approval is required for lodging fees that are far beyond the rate listed. ~~At ACWA Conferences, the reimbursement rate shall be the rate set for single rooms for the Conference.~~

Cab/Shuttle from Office

At times it may be more cost effective and/or convenient to utilize a cab, shuttle, or other services such as Uber and Lyft from the office/your home to the airport (consider mileage, parking fees, etc.). ~~The Administration Department has information on local providers, and the Director of Finance has information on the Uber Business contract. Please check these options if appropriate while travelling.~~

Expense Reports

Expense Reports should be submitted within ~~one~~ two weeks of return.

Around The Office

Dress & Grooming Standards

JPIA employees contribute to the organization culture and reputation by the way they present themselves. Good grooming and appropriate dress reflect employee pride and inspire confidence on the part of members and vendors.

Procedures

JPIA department managers may exercise reasonable discretion to determine appropriateness in employee dress and appearance. Employees who do not meet a professional standard may be sent home to change, and nonexempt employees will not be paid for that time off. Reasonable accommodations will be made where required.

General guidelines for appropriate workplace attire

Basic elements for appropriate and professional business attire include clothing that is in neat and clean condition, not torn, ripped or frayed. Clothing should project a professional appearance.-

Although it is impossible and undesirable to establish an absolute dress and appearance code, the JPIA will apply a reasonable and professional workplace standard to individuals on a case-by-case basis. Management may make exceptions for special occasions. An employee unsure of what is appropriate should check with their manager or the Human Resources Manager before wearing the item.

If a ~~supervisor or~~ manager decides that an employee's dress or appearance is not appropriate as outlined in this policy, ~~he or she~~they may take corrective action and require the employee to leave the work area and make the necessary changes to comply with the policy.

Professional Dress:

Employees who attend Committee Meetings that take place in the building should wear professional dress which includes: ties, dress shirts, blouses, skirts, dress slacks; no jeans of any color.

Never allowed: shirts with inappropriate slogans or pictures, crop top type shirts, ~~or~~ clothing that may be overly revealing, hats, shorts, leggings, sweatpants, hoodies, jeans or any type of pants with rips or holes in them (even if that is the way the pants were designed/produced), camo patterns, and t-shirts, sweatshirts, or other casual tops displaying text or slogans of any kind, bold or large graphics or images, or oversized logos.

Subtle, discreet and professional brand logos (i.e. Nike, Polo, etc.) are acceptable. Acceptable t-shirts must have a collared shirt, blazer, or sweater over.-

Footwear must be professional, appropriate, in clean and good condition, and safe for the workplace providing adequate support and stability. Flip flops, beach-style sandals, house slippers, and similar casual or overly informal footwear is not permitted.

JPIA logo wear clothing will always be acceptable.

The expectation is that all employees will dress appropriately for the occasion.

JPIA management reserves the right to change dress code requirements and parameters at any time.

Telephone Calls

The JPIA understands that you may need to speak with your family or tend to non-business activities at times, but requests cooperation in keeping personal calls to reasonable levels. Please note, all phone calls should be considered public information and subject to surveillance. Any confidential calls should be conducted elsewhere. All communication can be disclosed to law enforcement or other third parties without prior consent of the sender and/or receiver.

~~If you travel on a regular basis, you may request a JPIA issued cellular phone.~~

Electronic Communications Policy

The JPIA uses various forms of electronic communications including, but not limited to, communications via computers, email, telephones, mobile ~~phones~~devices (including mobile and smart phones), ~~smart phones, collaboration platforms and~~ text messaging, ~~internet, PDAs, etc.~~ All electronic communications are official JPIA records and are the property of the JPIA. The JPIA reserves the right to access and disclose all messages sent through its system for any purpose.

Messages transmitted ~~over the electronic communications system should be limited to JPIA business activities, for the accomplishment of business related tasks, or communications directly related to JPIA business, administration, or practices. using JPIA systems must relate to JPIA business functions, administrative operations, or authorized work activities.~~

The following general policies apply:

- Computers and all data transmitted through JPIA ~~servers~~systems are JPIA property owned by the JPIA for the purpose of conducting JPIA business. These items must be maintained according to JPIA rules and regulations. Computers must be kept clean and employees must exercise care to prevent loss and damage. Prior authorization must be obtained before any JPIA property may be removed from the premises.
- All electronic communications also remain the sole property of JPIA and are to be used for JPIA business. For example, email messages are considered JPIA records.
- Electronic information created by an employee using ~~any computer or any means of electronic communication is also the property of JPIA~~JPIA systems or devices ~~and~~ remains the property of JPIA.

- Information stored in JPIA computers, ~~and file servers~~, or cloud platforms is the property of the JPIA and may not be distributed outside the JPIA in any form whatsoever without the written permission of the JPIA Chief Executive Officer.
- Violation of any of the provisions of this policy, whether intentional or not, will subject JPIA employees to disciplinary action up to, and including, termination.

Personal Use of Electronic Communications Systems

The JPIA provides computers, electronic communications, ~~electronic information~~, and information technology resources, including the Internet, to its employees to ~~help them do their jobs~~ support employees in fulfilling their job responsibilities. Generally, these resources ~~and property~~ should be used only for business related purposes; however, there are a few exceptions. Limited, occasional, or incidental use of electronic communications for personal use may be permitted under the following circumstances:

- Personal use may not interfere with the productivity of the employee or his/her co-workers;
- Personal use may not involve any prohibited activity described in this Policy;
- Personal use may not disrupt or delay the performance of JPIA business;
- Personal use may not consume JPIA resources or otherwise deplete system resources available for JPIA business purposes;
- Personal use may not be used for personal employee gain or commercial ventures;
- Personal use may not support or advocate non-JPIA-related business purposes; and
- ~~The JPIA's record retention program is regulated by various record retention laws.~~

Retention of E-mail

• The JPIA's record retention program is regulated by various record retention laws.
No e-mail messages shall be considered by the JPIA to be retained in the ordinary course of business. However, the content of some e-mail messages could be classified as a record pursuant to the guidelines established by management and to the following criteria:

- Content required by law to be retained;
- Content which is documentation of notice to a member of the public of an action or position taken on behalf of the JPIA;
- Content which is documentation of a JPIA policy, JPIA regulation, or official decision made on behalf of the JPIA;

- Content which is documentation of a transaction of business between the JPIA and another party; and
- Employees should make themselves familiar with the provisions of the JPIA's Records Retention Policy to determine if an email is required to be maintained as a printed and/or electronic document.

JPIA's email system applies automated retention policies based on message type and folder. Most emails are archived or permanently deleted in accordance with system rules, including a default permanent deletion after 8 years. Employees are responsible for ensuring that emails classified as official records are preserved before automated deletion occurs.

Access of Another Person's Electronic Communications

Employees may not intercept, eavesdrop on, record, read, alter, retrieve, receive, send, or use another person's Electronic Communications and/or storage without proper authorization from the HR Manager and CEO. Employees, including system administrators and Supervisors, may not, without authorization, peruse Electronic Communications and/or Electronic Storage of other employees.

~~JPIA World Wide Web Site Policies~~ Use of JPIA Internal and External Websites

~~The external (or public) JPIA World Wide web site and all domains owned and maintained by the JPIA represent a fundamental communication tool for providing critical JPIA information. The JPIA maintains both internal and external websites to support employee communications and public engagement.~~ The goal of the collective web sites is to encourage increased participation in JPIA activities. The JPIA internal intranet ~~(The Fountain)~~ which is currently transitioning to a Sharepoint-based site ~~web site~~ provides fundamental and critical information to all employees to assist in accomplishing the JPIA's mission. Towards this end, the development and use of the JPIA's websites are guided-governed by the web-siteorganization's website policy:

The JPIA's IT Department is responsible for advising departments regarding the creation and implementation of their respective ~~web-sites~~ websites, helping departments to comply with the web policies, and maintaining and securing the web servers and web-siteplatforms.

- The JPIA's ~~web site is for "official use" only. All information disseminated through the web site must be related to the official duties and responsibilities of employees and department.~~ websites are for official use only. All content published must relate to the duties, responsibilities, and functions of the JPIA and its departments.

- The California Public Records Act applies to information processed, sent, and stored on the Internet. Confidential information should not be posted on the JPIA's external ~~web-site~~[website](#). Management must approve all information that is posted on the ~~web-site~~[website](#).
- No JPIA employee or official may use any JPIA ~~web-site~~[website](#) for campaign-related purposes. Such campaign-related purposes include, but are not limited to, the following: statements in support or opposition to any candidate or ballot measure; requests for campaign funds or references to any solicitations of campaign funds; and references to the campaign schedule or activities of any candidate. The JPIA official ~~web-site~~[website](#) may not be linked to any private ~~web-site~~[website](#) related to a candidate's campaign for elective office, but it may link directly to the home page of the election-related pages where general election and candidate information can be found.

Artificial Intelligence Appropriate Use Policy

Generative Artificial Intelligence (AI) is a set of relatively new technologies that leverage large amounts of data, along with some machine learning techniques to create content such as images, videos, or text, without being explicitly programmed to do so. While it is a tool that can assist with everyday tasks, responsibility for the final product is still on the employee not the tool.

There are a variety of benefits that result from using AI systems, but there must be guidelines in place for them to be used responsibly. Employees are encouraged to explore and experiment with AI as agreed upon with their manager. JPIA is committed to utilizing AI technologies responsibly and ethically to improve processes, enhance JPIA services, and support employees to do their best work.

This policy outlines the acceptable and unacceptable uses of AI. It is intended to promote safe and responsible use within JPIA, while also protecting privacy and security.

Acceptable Use

Employees are permitted to use AI for work-related purposes, including but not limited to:

- Providing support to members by answering their questions and providing information.
- For research purposes, such as generating new ideas or for general knowledge, meant to enhance your understanding of a work-related topic.
- For artistic or creative purposes, such as drafting original content for marketing campaigns or advertising.
- Creating and reviewing content such as articles, reports, and documents.

- Improving internal processes and workflows.
- Other legitimate business purposes as approved by your manager.

Unacceptable Use

- Enabling direct integration of any AI program into work applications (such as Microsoft Word) without prior approval of your Manager and the IT Manager.
- Using any copyrighted information, images, or data for a final work product of any kind. It can be used for generating drafts or ideas, which will be transformed and edited by the user prior to consumption.
- Inputting confidential business information – including member data - or personally identifiable information on individuals (i.e. personal email, telephone number, home address, medical information etc.) into a public AI platform.
- AI tools must not be used for any illegal, harmful, or malicious activities. This includes activities that perpetuate unlawful bias, automate unlawful discrimination, and produce other harmful outcomes.
- AI must not be used for decision-making processes, such as determining eligibility for employment, personnel decisions, or financial services.
- AI must not be used to generate content that violates the JPIA's standards of conduct, ethics policies, or laws.

Employee Responsibility

You are expected to use AI tools responsibly and in accordance with this policy to ensure that AI is used to enhance, not replace, human decision-making. You are to maintain accountability for your work. You must safeguard confidential information when using AI, adhere to data security protocols as referenced in the JPIA Electronic Communications Policy and report any misuse or issues with AI systems. Additionally, you should seek training to stay informed on the ethical and effective use of AI in your role.

Manager Responsibility

Managers are responsible for ensuring that their teams use AI tools ethically, effectively, and in alignment with JPIA policies. They should provide guidance on appropriate AI usage and ensure that AI tools are not used to replace critical human judgment. It is also the manager's duty to ensure that staff are properly using AI technologies and to address any misuse promptly.

Security Vetting

IT must review and approve the use of AI tools prior to employees using them. This includes reviewing the tool's security features, terms of service, and privacy policy. The

IT team will verify the reputation of the tool developer and any third-party services used by the tool.

Internet

Access to the Internet has been provided to staff members for the benefit of the JPIA and its members. It allows employees to connect to information resources around the world. Every staff member has the responsibility to maintain and enhance the organization's public image and to use the Internet in a productive manner. Employees accessing the Internet are representing the JPIA. Employees are responsible for seeing that the Internet is used in an effective, ethical, and lawful manner. To ensure that all employees are responsible, productive Internet users and are protecting JPIA's public image, the following guidelines have been established:

Unacceptable Use of the Internet

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

While it is not possible to provide an exhaustive list of every type of inappropriate use of the Internet, all users should be aware that inappropriate use of the Internet includes, but is not limited to, the following rules:

- Never use an account assigned to another user;
- Never make an unauthorized attempt to ~~enter any computer~~access to any computer, server, network, or system;
- Never post, send, or provide access to any confidential Employer materials or information;
- Never post or send publications of discriminatory, offensive, harassing, defamatory, or confidential remarks about other employees;
- Never access or send sexually-suggestive material;
- No gambling;
- No trademark, copyright, and licensing stipulation infringements;
- No proprietary and confidential information;

- No solicitation, according to the JPIA's policy;
- No personal sites; and Do not create, host, or manage personal websites using JPIA resources or systems.
- No threatening or inappropriate blogs.

Communications

Each employee is responsible for the content ~~of all text, audio, or images that they place or send over the Internet they create, transmit, or publish over the Internet, including text, images, audio, and other digital media, whether through email, collaboration platforms, or other internet-based systems.~~ Fraudulent, harassing, or obscene messages are prohibited. All ~~messages communicated over the Internet should have your name attached. communications transmitted over the Internet or other electronic systems must clearly identify the sender.~~ No messages should be transmitted under an assumed name. Employees may not attempt to obscure the origin of any message. Information published on the Internet should not violate or infringe upon the rights of others. No abusive, profane, or offensive language is transmitted through the system.

Monitoring of Communications and Passwords

The JPIA reserves the right to inspect all JPIA property, systems, and resources -to ensure compliance with its rules and regulations, without notice to the employee and at any time, not necessarily in the employee's presence. JPIA computers and all electronic communications and electronic information are subject to monitoring and no one should expect privacy regarding such use. ~~The JPIA reserves the right to access, review, and monitor electronic files, information, messages, text messages, e-mail, Internet history, browser-based webmail systems, and other digital archives and to access, review, and monitor the use of computers, software, and electronic communications to ensure that no misuse or violation of JPIA policy or any law occurs~~ The JPIA may, without prior notice, monitor, access, review, or audit any electronic communications or information transmitted, received, stored, or accessed using JPIA systems. This includes, but is not limited to, email, instant messaging (e.g., Microsoft Teams), text messages, video conferencing (e.g., Zoom), internet browsing history, files stored on shared drives, browser-based apps (such as SharePoint and webmail), and other digital services. E-mail may be monitored by the JPIA and there is no expectation of privacy. Assume that e-mail may be accessed, forwarded, read, or heard by someone other than the intended recipient, even if marked as private." Employees should assume that all communications on JPIA systems may be accessed, viewed, or forwarded by authorized individuals. Even communications marked as 'private' or 'confidential' may be subject to monitoring for compliance, legal, or operational purposes

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

All passwords created by the user or issued to the user are for ~~the purpose of communication and are not to be shared, given, or otherwise disclosed to any other person authorized JPIA use only and must not be shared, given, or otherwise disclosed to any other person unless securely managed through the JPIA-approved password management system.~~ Passwords must not be shared ~~and will be changed periodically by the JPIA staff to ensure security unless managed through the JPIA-approved password management system.~~ JPIA staff may periodically update or reset passwords ~~to maintain security.~~ All security features contained within the JPIA's Electronic Communications Systems such as passwords, codes, or delete functions will not prevent the JPIA from accessing employees' business or personal Electronic Communications, stored or otherwise, on the Electronic Communications Systems.

No Right of Privacy

The JPIA respects the individual privacy of its employees. However, ~~employee privacy employees should understand that this privacy~~ does not extend to the employee's work-related conduct or to the use of JPIA-provided ~~systems,~~ equipment or ~~supplies communications tools.~~ Employees should be aware that the terms of this Policy limit their privacy in the workplace.

~~The JPIA's Electronic Communications Systems, Electronic Communications, and Electronic Storage are the JPIA's property and are intended for JPIA business. All Electronic Communications and Electronic Storage within these systems are the property of the JPIA, regardless of the content, including any personal communications. All systems, communications, and data stored or transmitted using JPIA resources are the property of the JPIA, regardless of content, and are intended for business purposes~~

~~The JPIA reserves the right to monitor the Electronic Communications Systems for any reason, including the right to review, audit, and disclose all matters sent over and/or stored in the Electronic Communications Systems. The JPIA reserves the right to monitor, audit, and disclose any activity, messages, or content transmitted or stored within its communication systems, without prior notice.~~

~~As a result, employees should be aware that no Electronic Communications transmitted on the Electronic Communications Systems, or Electronic Storage contained within the systems, is private or confidential. Employees should have no expectation of privacy with respect to any use, including storage, business, or personal, of the JPIA's Electronic Communications Systems. Accordingly, employees should have no expectation of privacy when using JPIA's communication or storage systems – whether for business or personal use.~~

Employees should be aware that Electronic Communications and/or Electronic Storage can be copied, modified, and/or forwarded to others without the express permission of the original author. Therefore, employees must use caution in the storage, transmission, and dissemination of Electronic Communications outside of the JPIA and must comply with all state and federal laws. ~~Electronic Communications and/or Electronic Storage of~~

~~the JPIA may be recognized as official records in need of protection/retention in accordance with the laws of California~~ JPIA Electronic Communications and Electronic Storage may be considered official records and must be retained and protected in accordance with applicable California laws and the JPIA's Records Retention Policy. All e-mail and Internet messages are subject to state and federal laws, including but not limited to the California Public Records Act, open meeting laws, and the federal Electronic Communications Privacy Act.

The California Public Records Act (CPRA), Government Code Section ~~65206~~250, *et seq.* requires the JPIA to make all public records available for inspection and to provide copies upon request. A public record is any writing (which includes electronic documents) related to the conduct of the public's business prepared, owned, used, or retained by the JPIA. The CPRA includes a number of exceptions from the disclosure requirement. Any information on the JPIA's information system may be subject to disclosure under the CPRA. If there is some doubt, the employee should contact the General Counsel for advice as to whether the information is public record. All public records must be retained in accordance with the JPIA's Record Retention Policy.

Social Networking

~~The JPIA views social networks such as web-based discussion or conversation pages and other forms of social networking such as Facebook, Twitter, You Tube, etc., as significant new forms of public communication.~~ The JPIA recognizes social media platforms—including, but not limited to X (formerly Twitter), YouTube, and LinkedIn—as important public communication tools. As such, we hold all of our employees who engage in social networking to the same standards we hold for any public communications. Therefore, all employees have an obligation to the JPIA to ensure that any public communication they make, including social networking communications, must not negatively impact the reputation of the JPIA or bring disrepute in any way to the JPIA, its partners, customers, suppliers, etc. Further, only a select group of employees are authorized to publicly speak on behalf of the JPIA, per our Media Contact policy. Violations of this policy will result in discipline, which may include termination, depending on the severity of the situation and its impact on the JPIA.

Additionally, engaging in social networking during your workday can negatively impact your productivity and work performance. Therefore, it is your responsibility to regulate your social networking so that it does not impact your productivity or cause performance issues.

Identified below are general guidelines and examples of prohibited communications. Please note that this list contains examples only and is not intended to be, nor is it, an exhaustive list of prohibited communications. **The absence of, or lack of explicit reference to, a specific site does not limit the extent of the application of this policy.**

Where no policy or guideline exists, employees should use their professional judgment and take the most prudent action possible. Consult with your manager ~~or supervisor~~ if you are uncertain.

General Guidelines and Examples of Prohibited Communications:

- You may not use the JPIA's logo on your posts unless given written consent by the CEO.
- Do not link to the JPIA's website or post JPIA material on a social media site without written permission.
- All JPIA policies that regulate off-duty conduct apply to social media activity including, but not limited to, policies related to illegal harassment, code of conduct, non-competition, protecting confidential and/or proprietary information. Violation of this policy may lead to discipline up to and including termination.

Software

To prevent computer viruses from being transmitted through the system, there will be no unauthorized downloading of any software or applications. To reduce the risk of malware or system vulnerabilities, employees are prohibited from downloading or installing unauthorized software or applications. All software downloads will be done through the Technology Services staff. All software and application installations must be coordinated through the IT Department to ensure proper licensing, compatibility, and security

Personal computing devices

To ensure the security and integrity of JPIA systems and data, the use of personal computers to perform JPIA work is strictly prohibited. All employees are issued JPIA-managed laptops, which are configured, tested, and secured with organization-approved software and controls.

Employees must use only JPIA-issued computers to access JPIA systems, whether on-site or remotely. Computers not configured by IT pose a significant security risk, including potential exposure to malware, unauthorized access, and non-compliance with regulatory requirements.

In the event an employee forgets their JPIA-issued laptop, they must return to the office to retrieve it or request a pre-configured loaner device from IT. Personal devices, even temporarily, are not permitted as substitutes.

Mobile Device Policy

JPIA grants its employees the privilege of ~~purchasing and using smartphones and tablets of their choosing~~ using personally owned smartphones and tablets at work for their convenience. JPIA reserves the right to revoke this privilege if users do not abide by the policies and procedures outlined below. This policy is intended to protect the security and integrity of JPIA's data and technology infrastructure. Limited exceptions to the policy may occur due to variations in devices and platforms. JPIA employees must agree to the terms and conditions set forth in this policy in order to be able to connect their devices to the company network.

Policy and Guidelines for JPIA-Provided Mobile Device

The ~~JPIA no longer provides mobile devices~~ phones to its employees; however, there are a handful of longer-tenured JPIA employees still in possession of and using JPIA-provided mobile devices. -The following policy and guidelines inform JPIA-provided mobile device users of their allowable usage and features available for business and limited personal use. This document also serves to make clear the responsibility of mobile device users to take proper care of the JPIA furnished equipment entrusted to them. Mobile device care is the responsibility of each mobile device user. Failure to adhere to the guidelines listed below may result in personal liability and/or retraction of device privileges.

Use of JPIA-Provided Hotspots

As some JPIA employees defined job duties frequently require them to provide in-person training at member facilities at which there may be weak or unreliable internet, those employees may be issued mobile hotspots for business use to provide them with a more reliable, secure internet connection.

Usage Requirements:

- **Mandatory Use on Untrusted Networks:**

Employees issued a JPIA hotspot must use it whenever accessing the internet from public, unsecured, or untrusted Wi-Fi networks (e.g., airports, hotels, coffee shops) while using JPIA-issued equipment.

- **Business Use Only:**

JPIA hotspots are intended for business purposes only. Personal use is not permitted. Non-JPIA devices (such as personal laptops, tablets, or phones) may not connect to JPIA hotspots unless pre-approved by the IT Department.

- **Data Protection and Bandwidth Management:**

Employees must avoid data-heavy, non-business activities (such as streaming personal videos or large file downloads) to prevent overage charges and maintain available bandwidth for business needs. The JPIA reserves the right to monitor data usage to ensure appropriate use and adherence to service plan limits.

VPN Requirement:

- While JPIA systems that require internal network access (such as iVOS, the Fountain, and IDMS) can only be accessed via the JPIA-approved Cisco VPN, employees are encouraged to use a reputable VPN service whenever working on **public Wi-Fi networks**, even when not accessing internal systems. This includes use of personal or public hotspots, airports, hotels, coffee shops, or any other untrusted network. Using a VPN on public Wi-Fi helps protect your device and your JPIA credentials from interception or unauthorized access. If you have questions about recommended VPN solutions for personal use, please contact the IT Department.

- **Device Security:**

Employees are responsible for safeguarding their hotspot device. The hotspot should not be left unattended in public places and must be stored securely when not in use. Lost, stolen, or malfunctioning hotspots must be reported to IT immediately, in accordance with the JPIA's IT Asset Management policy.

—**Return of Equipment:**

Hotspots remain JPIA property and must be returned upon request or at the end of employment

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The JPIA expects mobile-device users to:

- Protect their JPIA-issued device from theft, damage, abuse, and unauthorized use;
- If the device is lost or stolen, the user will notify the JPIA Help Desk within one hour, or as soon as practical after you notice the device is missing. Upon notification, JPIA IT will lock and disable the device ~~upon notification~~. A lost or stolen device will be replaced a maximum of three times, pending availability of devices and funding;
- Maintain usage within the plan parameters. If your business use requirements are dramatically different than the standard plan, you must contact the Director of Finance to discuss other available options; Comply with JPIA's appropriate use policies when using the device found, as outlined in Section VIII –Around The Office, C. Electronic Communications Policy;
- Abide by the law governing the use of mobile cell phones and/or smartphones while driving (e.g., hands-off use and/or texting); and
- ~~Purchase any additional mobile device accessories (e.g., holsters, cases, car chargers, screen protectors, Bluetooth headsets, etc.) that the user may desire in addition to the items provided by the JPIA.~~

Privacy Expectations:

JPIA employees do not have a right, nor should they have an expectation, of privacy while conducting JPIA business or utilizing a JPIA provided or subsidized device, including accessing the Internet and using e-mail and voice communications. To the extent that employees wish that their private activities remain private, they should avoid using the JPIA provided device for personal use. By acceptance of the JPIA provided or subsidized devices, employees imply their consent to disclosing and/or monitoring of device usage, including the contents of any files or information maintained or passed-transmitted- through that device. Regardless of the device used, any JPIA business conducted may be subject to being turned over to the JPIA in order to comply with a request under the California Public Records Act.

Additional Guidelines:

- JPIA Director of Finance has complete oversight and management of device usage and expenses.

- The JPIA-provided devices are being provided as a productivity tool for business use. JPIA reserves the right to terminate services for non-use, limited business use, or excessive personal use. The policy for terminating voice and data services for non-usage is 30 days.
- ~~Due to voice plan minute restrictions, employees should opt to use their work landline phone, when at their workstation, to make and receive calls.~~
- Assistance or support is handled by the JPIA Helpdesk.
- ~~International roaming services may be available on a temporary basis for business travel only. Data rate plans for e-mail and broadband cards are an additional cost to JPIA for mobile device users traveling outside the continental United States. Contact the Director of Finance 30 days prior to travel to request temporary international roaming feature, if you have official JPIA travel plans abroad. Failure to add the international roaming feature could result in cost overages for which the JPIA will not be responsible.~~
- JPIA reserves the right to recall/disconnect JPIA-provided mobile devices due to budget restrictions or changes to deployment priorities.

Questions related to the above Policy and Guidelines should be directed to your supervisor.

Bring Your Own Device (BYOD) – Policy and Rules of Behavior

This document provides policies, standards, and rules of behavior (ROB) for the use of personally-owned smart phones and/or tablets by JPIA employees (herein referred to as users) to access JPIA network resources. Access to and continued use of network services is granted on condition that each user reads, signs, respects, and follows the JPIA's policies concerning the use of these devices and services.

Expectation of Privacy: JPIA will respect the privacy of your personal device and will only request access to the device by technicians to implement security controls, as outlined below, or to respond to legitimate discovery requests arising out of administrative, civil, or criminal proceedings (applicable only if user downloads JPIA email/attachments/documents to their personal device), or legitimate requests under the California Public Records Act.

This differs from policy for JPIA-provided equipment/services, where JPIA employees do not have the right, nor should they have the expectation, of privacy while using JPIA equipment or services. While access to the personal device itself is restricted, JPIA Policy and Rules of Behavior regarding the use/access of JPIA e-mail and other JPIA system/service remains in effect. If there are questions related to compliance with the below security requirements, the user may opt to drop out of the BYOD program versus providing the device to technicians for compliance verification.

~~Virtual Private Network (VPN) BYOD access is available for senior executives or management and requires approval of the Chief Executive Officer (CEO). Currently this access is only available for Apple iOS iPad devices. Access is not approved for Android devices.~~

Overall Requirements for all BYODs Accessing JPIA Network Services:

- User will not download or transfer sensitive business data to their personal devices. Sensitive business data is defined as documents or data whose loss, misuse, or unauthorized access can adversely affect the privacy or welfare of an individual (personally identifiable information), the outcome of a charge/complaint/case, proprietary information, or agency financial operations. This excludes JPIA e-mail that is protected through the various security controls listed below;
- User will password protect the device;
- User agrees to maintain the original device operating system and keep the device current with security patches and updates, as released by the manufacturer. The user will not “Jail Break” the device (installing software that allows the user to bypass standard built-in security features and controls);
- User agrees that the device will not be shared with other individuals or family members, due to the business use of the device (potential access to JPIA e-mail, etc.);
- User agrees to delete any sensitive business files that may be inadvertently downloaded and stored on the device through the process of viewing e-mail attachments. JPIA IT will provide instructions for identifying and removing these unintended file downloads. Follow the premise, “When in Doubt, Delete it Out.”
- Employees must only access JPIA systems and services (such as email, SharePoint, and Teams) through JPIA-approved applications and platforms.
- When working in public spaces, employees must avoid connecting to unprotected, public WiFi networks. Instead, they should use their phone’s personal hotspot for internet access when necessary.
- Employees must also ensure their personal hotspot is secured with a sufficiently complex and unique password to reduce the risk of unauthorized access.
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Accessing JPIA (e-Mail/Calendar) Services on BYOD

- If the device is lost or stolen, the user will notify the JPIA Help Desk within one hour, or as soon as practical after you notice the device is missing. JPIA IT will

~~erase JPIA data, lock the device, and e-mail on the device will be deleted~~, if possible.

- Users must comply with all JPIA password policies, including use of strong passwords, password expiration, and password history.

Backing-Up / Storing documents on Non- JPIA Servers

- User will not download/transfer sensitive JPIA business data/documents to any non- JPIA device.

Use of Virtual Private Network (VPN) to access Network Services

- Users must have a need to access internal JPIA resources, such as ~~the iVesClaims~~ Enterprise, Document Management System, NavRisk, Network drives, etc., as required by her/his position and duties.
- Users may only use JPIA approved and configured VPN client software to access JPIA's VPN.
- Users must comply with all JPIA Password Policies on their device, including use of strong passwords, password expiration (6 months), and password history (3).
- Users will immediately notify IT if the device is lost or stolen, at which point JPIA will lock the device and disable the user's VPN access.

Violations

Violations of any guidelines listed above may result in disciplinary action up to, and including, termination. If necessary, the JPIA will advise appropriate legal officials of any illegal violations.

Voice Mail

The Zoom Workplace phone system is equipped with a very efficient and easy to use voice mail system. You should change your voice mail message greeting -if you are going to be out of the office.

Smoking

In accordance with California State law, the entire building is considered a non-smoking area, including use of e-cigarettes. Employees are prohibited from smoking within 20 feet of the building.

Security

Security is important to everyone. You are asked to not discuss the security of the JPIA premises or services with any individual not employed by the JPIA. Additionally, neither the JPIA nor its insurance carriers take any liability for your personal belongings. You are encouraged to secure personal belongings to the best of your ability.

The building is secured with electronic keypads for access before and after hours. You will be given a confidential code, not to be shared with anyone. Security cameras have been installed (indoor video cameras in public areas only) and outdoor video cameras for additional security. Cameras are installed at every entrance and exit, one in the main hallway, and one on the patio that has motion sensor and floodlight capabilities. These cameras are app based and only record during off hours for additional building security.

~~Additionally~~ Additionally, the building is secured with a paging system to alert staff regarding evacuations due to emergency situations, including earthquake, fire, combative intruder, etc.

Since the JPIA retains the right to search its property or facilities at any time (including employee-assigned desks, files and computer systems), if you have anything of a private nature that you wish not to be subjected to discovery during such searches, these items should be kept in your briefcase, purse or lunch bag.

Solicitation and Distribution

Soliciting your co-workers when either of you is on work time being paid for by the JPIA is prohibited, including the use of e-mail. Distribution or posting of pamphlets, leaflets, or any other literature in the JPIA's departments is prohibited except in the employee break room.

~~Workers' Compensation Disclaimer Notice~~

~~The JPIA or its insurance carrier may not be liable for the payment of workers' compensation benefits for any injury which arises out of your voluntary participation in any off-duty recreational, social, or athletic activity for which your attendance is not required and which is not a part of your work-related duties.~~

Return-to-Work Program (RTW)

~~In an effort to minimize serious disability due to on-the-job and off-the-job injuries and illnesses and to reduce workers' compensation costs (if applicable), the JPIA has developed a Return-to-Work program.~~

~~This policy is consistent with the JPIA's responsibilities under the Americans with Disabilities Act to provide reasonable accommodations to persons with disabilities.~~

~~Managers will assist by directing the employee to appropriate care and assisting in proper reporting of the injury or illness while maintaining a positive and constant flow of communication with the injured worker. They will also assist in arranging work which meets "light duty" restrictions, as needed, to reduce lost time. The JPIA management staff will work with the workers' compensation carrier (if applicable) and the physician to assist with the assessment of the employee's ability to return to work. Together they will actively encourage the treating physician to release the injured worker to work as soon as possible.~~

~~By this joint effort, the JPIA will help the injured/ill worker recover at a more rapid rate, gain production for wages paid, minimize the employees' wage loss, and reduce workers' compensation costs.~~

Break Room

The JPIA has a great "kitchen" and "service areas" for your use throughout the workday. It is important that you clean up after yourself. Do not leave any dirty dishes, wipe off the counters, and clean the inside of the microwave if there is any splattering of food during cooking.

- Coffee/Tea/Hot Chocolate: These items are available for your use and convenience, so help yourself.
- Making Coffee: If you find that the coffee pot is running low, please make the next pot of coffee. If you're not sure how to make the coffee, ask someone to help you. When the coffee has been made, throw the grounds in the garbage (not in the sink), rinse the basket, and place it in the drainer for the next person to use.
- Employee Fund Committee: The Committee provides a supply of various food/drink items for purchase. All profits go back to the Committee for staff events.
- Sacramento Bee: The daily paper is delivered to the office and is for everyone's use and convenience. Please leave the papers in the break room and wait until the end of ~~day~~the day if you need to cut out an article or coupon.

- Coffee Cup Washing: The dishwasher ~~is run~~runs every Friday afternoon. If you would like to have your cup washed, place it in the dishwasher before the end of the day on Fridays.
- Refrigerators: The refrigerators are available for your convenience. However, there are over 40 employees using the refrigerators, so please limit the ~~amount~~number of items you put in them. Also, they will be cleaned out every Friday, so please throw away any old items and take home any dishes, Tupperware, etc. If you have items that you want to keep, please put your name on them.

Supplies

It is the JPIA's intent to provide you with everything you need to do your job. Basic supplies are kept in the workroom. Any special orders costing over \$50 should be placed on special forms provided to each department and approved by your manager ~~and the Human Resources Manager~~ before submitting it to the receptionist for ordering.

Leaving The JPIA

Resignation

When you decide to leave for any reason, your manager, the Chief Executive Officer and/or the Human Resources Manager would like an opportunity to discuss the resignation with you before final action is taken.

Termination

As a JPIA employee, you have the status of "employee-at-will," meaning that you have no contractual right, expressed or implied, to remain in the JPIA's employ. The JPIA may terminate your employment, or you may terminate your employment, with or without cause, and with or without notice, at any time. No manager or other representative of the JPIA has the authority to enter into any agreement for employment for any specified period of time, or to make any agreement contrary to the above, with the exception of the Chief Executive Officer.

If you fail to report to work for three consecutive workdays without notice or approval by your manager, the JPIA may consider that you have abandoned your job and your employment may be terminated.

Employee Exit

~~Employee agrees~~Employees agree that during the time between notification of separation and last day of employment, they will cooperate fully with the JPIA in all matters relating to the winding up of any pending work and the orderly transfer to the other JPIA employees of the accounts for which they have ~~he has~~ been most recently responsible. Employee further agrees that prior to the expiration of the “Notice Period,” they will return to the JPIA all originals and hard copies of literature, correspondence, memoranda, reports, summaries, manuals, proposals, contracts and other documents of any kind which relate in any way to the business of the JPIA including specifically all materials which comprise or refer to the JPIA’s Confidential Information.

Cooperation with Investigations

During employment and after the termination of same, the employee agrees to remain available to the JPIA and its legal counsel, voluntarily upon the JPIA’s request and without the necessity of a subpoena or court order, in connection with the JPIA’s investigation, preparation, prosecution and/or defense of any actual or potential legal proceeding, regulatory action or internal matter. The employee agrees to cooperate with the JPIA to provide any information reasonably within their recollection and to provide truthful testimony as required. If employee is called upon to provide cooperation after employment has been terminated, the JPIA will reimburse employee for reasonable out of pocket expenses actually incurred under this section or at the JPIA’s option and will advance employee’s reasonable expenses or incur them directly.

Property Return Agreement

Upon employment with the JPIA, each employee may complete a Property Return Agreement if they receive any JPIA property. Property includes, but is not limited to, laptops, cell phones, ~~PDA~~s, equipment, keys, reports, proprietary information, and any other job-related materials. All JPIA property must be returned prior to departure.

Exit Interview

The Human Resources Manager is responsible for scheduling an exit interview with you on your last date of employment and for arranging the return of the JPIA’s property.

Benefits

Medical, Dental, and Vision benefits end on the last day of the month of your employment. Life and Disability coverages require “active” employment; therefore, coverage for these two ends on your last day worked.

COBRA notification will be sent directly to your home.

Final Paycheck

You will receive your final paycheck on the next regularly scheduled pay day or earlier if it is required by law. Unused vacation will be paid and calculated in accordance with the JPIA’s vacation policy.

CalPERS

You will be notified directly by CalPERS regarding your options.

Deferred Compensation Plan

If you are enrolled in a deferred compensation program, you should contact the plan carrier to ensure you completely understand your options.

Acknowledgment of Receipt of Handbook and At-Will Agreement

After you have read this Handbook and have clarified any issues with your manager, please complete and sign both copies of the following statement. Two copies are provided, one for your records and one for the JPIA's records. Detach one copy and return it to the Human Resources Manager within five days.

JPIA Employee Handbook Receipt (employee copy)

I have voluntarily started working for the JPIA and I acknowledge that the term of employment is not fixed. Accordingly, I or JPIA may terminate the relationship at any time, with or without cause, unless there is a violation of applicable federal or state law.

I have received my copy of the JPIA's employee Handbook in electronic and/or paper form. I understand and agree that it is my responsibility to read and familiarize myself with and follow the policies and procedures contained in the Handbook. I agree to comply with all of the policies and procedures applicable to my position.

I understand that, except for employment at-will status, any and all policies or practices can be changed at any time by the JPIA. I understand and agree that, other than the Chief Executive Officer of the JPIA, no manager, ~~supervisor~~ or representative of the JPIA has authority to enter into any agreement, expressed or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will; only the Chief Executive Officer has the authority to make any such agreement and then only in writing, signed by the Chief Executive Officer.

My signature below certifies that I understand that the foregoing agreement on at-will status is the sole and entire agreement between the JPIA and me concerning the duration of my employment. It supersedes all prior agreements, understandings, and representations concerning the duration of my employment.

Employee's Signature: _____ Date: _____

Sign, date, and keep this copy for your records.

Acknowledgment of Receipt of Handbook and At-Will Agreement

After you have read this Handbook and have clarified any issues with your manager, please complete and sign both copies of the following statement. Two copies are provided, one for your records and one for the JPIA's records. Detach one copy and return it to the Human Resources Manager within five days.

JPIA Employee Handbook Receipt (employer copy)

I have voluntarily started working for the JPIA and I acknowledge that the term of employment is not fixed. Accordingly, I or JPIA may terminate the relationship at any time, with or without cause, unless there is a violation of applicable federal or state law.

I have received my copy of the JPIA's employee Handbook in electronic and/or paper form. I understand and agree that it is my responsibility to read and familiarize myself with and follow the policies and procedures contained in the Handbook. I agree to comply with all of the policies and procedures applicable to my position.

I understand that, except for employment at-will status, any and all policies or practices can be changed at any time by the JPIA. I understand and agree that, other than the Chief Executive Officer of the JPIA, no manager, ~~supervisor~~ or representative of the JPIA has authority to enter into any agreement, expressed or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will; only the Chief Executive Officer has the authority to make any such agreement and then only in writing, signed by the Chief Executive Officer.

My signature below certifies that I understand that the foregoing agreement on at-will status is the sole and entire agreement between the JPIA and me concerning the duration of my employment. It supersedes all prior agreements, understandings, and representations concerning the duration of my employment.

Employee's Signature: _____ Date: _____

Sign, date, and return this copy to the Human Resources Manager.

|

Oath of Employment

Purpose:

As a California special district and public entity, our organization is subject to the laws and regulations governing public service. In accordance with Article XX, Section 3 of the California Constitution and Government Code Section 3100 et seq., all public employees are required to take and subscribe to the Oath of Affirmation of Allegiance prior to the commencement of their duties.

This Oath affirms an employee's commitment to support and defend the Constitution of the United States and the Constitution of the State of California against all enemies, foreign and domestic, and to faithfully discharge the duties of their employment. The purpose of this requirement is to ensure that all individuals serving in the public sector acknowledge their responsibility to uphold the principles and values foundational to California's system of government and public trust.

All employees, regardless of position or classification, are required to take this Oath as a condition of employment. Failure to do so may result in ineligibility for employment or separation from service.

Religious or Personal Beliefs

The Oath of Employment is a non-sectarian, civil declaration and is not intended to conflict with any individual's religious beliefs. Employees who object to the religious connotation of the word "swear" may choose to "affirm" the Oath, which carries the same legal effect. The option to affirm rather than swear is available to ensure that all individuals may comply with this legal requirement in a manner consistent with their personal or religious convictions.

Employees who have questions or concerns about the Oath process are encouraged to contact Human Resources for additional information or accommodations.

OATH OF EMPLOYMENT

FOR PUBLIC OFFICERS AND EMPLOYEES

(State Constitution Art. XX, Sec. 3 as amended)

STATE OF CALIFORNIA

ACWA JPIA

I, _____, do solemnly swear (or affirm) that
I will (Print Name)

support and defend the Constitution of the United States and the Constitution of the
State of California against all enemies, foreign and domestic; that I will bear true faith
and allegiance to the Constitution of the United States and the State of California;
that I take this obligation freely, without any mental reservation or purpose of evasion;
and that I will well and faithfully discharge the duties upon which I am about to enter.

Signature:

Subscribed and sworn to before me

this _____ day of _____,
(day) (month) (year)

(ACWA JPIA Representative Signature)

Employee Handbook Addendum: Handbook Governance and Approval Authority

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Handbook Interpretation and Introduction</u>		<u>X</u>
<u>JPIA Mission Statement</u>		<u>X</u>
<u>JPIA Core Values</u>		<u>X</u>
<u>Welcome to JPIA</u>		<u>X</u>
<u>Open Door Policy</u>		<u>X</u>
<u>Equal Employment Opportunity</u>		<u>X</u>
<u>Organizational Development and Engagement</u>	<u>X</u>	
<u>Employment</u>		<u>X</u>
<u>Employment of Relatives</u>		<u>X</u>
<u>New Employee Onboarding</u>		<u>X</u>
<u>Initial Appraisal Process</u>		<u>X</u>
<u>Employee Classifications</u>		<u>X</u>
<u>Rehired Employees</u>		<u>X</u>
<u>Internal Applications</u>		<u>X</u>
<u>Promotions</u>		<u>X</u>
<u>Temporary Upgrades</u>		<u>X</u>
<u>Work Hours</u>		<u>X</u>
<u>Alternative Work Schedule</u>		<u>X</u>
<u>Remote Work</u>		<u>X</u>

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Overtime</u>		<u>X</u>
<u>Attendance</u>		<u>X</u>
<u>Rest and Break Time</u>		<u>X</u>
<u>Compensation Plan</u> • <u>Opening Paragraph</u>	<u>X</u>	
<u>Compensation Plan</u> • <u>Salaries</u>		<u>X</u>
<u>Compensation Plan</u> • <u>Compensation Review and Merit Increase</u>		<u>X</u>
<u>Compensation Plan</u> • <u>Promotional Increase/ Demotion</u>		<u>X</u>
<u>Compensation Plan</u> • <u>Administrative Increase/ Decrease (Adjustment)</u>		<u>X</u>
<u>Compensation Plan</u> • <u>Salary Ranges</u>	<u>X</u>	
<u>Compensation Plan</u> • <u>Employee Incentive Plan</u>		<u>X</u>
<u>Compensation Plan</u> • <u>Eligibility Requirements</u>		<u>X</u>
<u>Performance Appraisals</u>		<u>X</u>
<u>Access to Personnel Records</u>		<u>X</u>
<u>Payroll Administration</u>		<u>X</u>
<u>Employee Benefits</u> • <u>Introduction</u>		<u>X</u>
<u>Employee Benefits</u> • <u>Group Insurance Plans</u>	<u>X</u>	

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Employee Benefits</u> • <u>Benefit Changes</u>		<u>X</u>
<u>Employee Benefits</u> • <u>Medical Plan, Dental Plan, Vision Plan, Life, Short Term Disability, Long Term Disability, Employee Assistance Program, Retiree Health Benefits</u>	<u>X</u>	
<u>COBRA (n/a – dictated by law)</u>		
<u>Workers' Compensation Program (n/a – dictated by law)</u>		
<u>Return-to-Work Program (RTW)</u>		<u>X</u>
<u>Fitness-For-Duty & Return-To-Work Evaluation</u>		<u>X</u>
<u>CalPERS (n/a – dictated by law)</u>		
<u>Tax Deferred Compensation Program</u>		<u>X</u>
<u>Roth IRA</u>		<u>X</u>
<u>457 Contribution Plan</u>	<u>X</u>	
<u>Educational Approval Process</u>	<u>X</u>	
<u>Paid Leave Policy</u> • <u>Introduction</u>		<u>X</u>
<u>Paid Leave Policy</u> • <u>Vacation</u>	<u>X</u>	
<u>Paid Leave Policy</u> • <u>Holiday Observances</u>	<u>X</u>	
<u>Paid Leave Policy</u> • <u>Bereavement Leave (n/a – dictated by law)</u>		
<u>Paid Leave Policy</u>		

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Jury and Witness Duty (n/a – dictated by law)</u>		
<u>Paid Leave Policy</u> <u>Military Leave (n/a – dictated by law)</u>		
<u>Paid Leave Policy</u> <u>Time Off to Vote (n/a – dictated by law)</u>		
<u>Paid Leave Policy</u> <u>Inclement Weather</u>		<u>X</u>
<u>Paid Leave Policy</u> <u>Sick Leave (some parts are dictated by law)</u> <u>ExCo authority is limited to the financial impacts of sick leave on the organization</u>	<u>X</u>	<u>X</u>
<u>Paid Leave Policy</u> <u>Organ or Bone Marrow Leave (n/a – dictated by law)</u>		
<u>Unpaid Time Off</u> <u>Summary of Rules</u>		<u>X</u>
<u>Standards of Conduct</u>		<u>X</u>
<u>Attendance Policy</u>		<u>X</u>
<u>The Corrective Process</u>		<u>X</u>
<u>Alcohol, Marijuana and Drug Free Workplace (depends – some parts are)</u>		<u>X</u> <u>For parts not prescribed by law</u>
<u>Outside Relations/Media Contact</u>		<u>X</u>
<u>Prohibition of Discrimination (n/a – dictated by law)</u>		

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Sexual Harassment (depends – some parts are)</u>		X <u>For parts not prescribed by law</u>
<u>Retaliation (n/a – dictated by law)</u>		
<u>Workplace Violence Prevention (n/a – dictated by law)</u>		
<u>Request for Reasonable Accommodation (n/a – dictated by law)</u>		
<u>Employment Duration</u>		X
<u>Employment Reference Checks</u>		X
<u>Off-Duty Conduct/Conflict of Interest</u>		X
<u>Anti-Fraud/Ethics Policy</u>		X
<u>Children At Work</u>		X
<u>California Public Records Act Request (CPRA is law but how we operationally address requests is not)</u>		X
<u>Lactation Accommodation (n/a – dictated by law)</u>		
<u>Injury & Illness Prevention Program (n/a – dictated by law)</u>		
<u>Ergonomics</u>		X
<u>Bomb Threats And/Or Threatening Calls</u>		X
<u>Driving on The Job</u>		X
<u>Cellular Phone Safety</u>		X

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Staff Expense Reimbursement Guidelines</u>		<u>X</u>
<u>Compensable Time (n/a – mostly dictated by law)</u>		
<u>Credit Card Use</u>		<u>X</u>
<u>Employee Incurred Expense</u>		<u>X</u>
<u>Mileage</u>		<u>X</u>
<u>Air Travel</u>		<u>X</u>
<u>Car Rentals</u>		<u>X</u>
<u>Meals</u>	<u>X</u>	
<u>Lodging</u>	<u>X</u>	
<u>Cab/Shuttle from Office</u>		<u>X</u>
<u>Expense Reports</u>		<u>X</u>
<u>Dress & Grooming Standards</u>		<u>X</u>
<u>Telephone Calls</u>		<u>X</u>
<u>Electronic Communications Policy</u>		<u>X</u>
<u>Personal Use of Electronic Communications Systems</u>		<u>X</u>
<u>Retention of Email</u>		<u>X</u>
<u>Access of Another Person's Electronic Communications</u>		<u>X</u>
<u>Use of JPIA Internal and External Websites</u>		<u>X</u>
<u>Artificial Intelligence Appropriate Use Policy</u>		<u>X</u>
<u>Internet</u>		<u>X</u>

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Social Networking</u>		<u>X</u>
<u>Software</u>		<u>X</u>
<u>Mobile Device Policy</u>		<u>X</u>
<u>Violations</u>		<u>X</u>
<u>Voice Mail</u>		<u>X</u>
<u>Smoking</u>		<u>X</u>
<u>Security</u>		<u>X</u>
<u>Solicitation and Distribution</u>		<u>X</u>
<u>Break Room</u>		<u>X</u>
<u>Supplies</u>		<u>X</u>
<u>Resignation</u>		<u>X</u>
<u>Termination</u>		<u>X</u>
<u>Employee Exit</u>		<u>X</u>
<u>Cooperation with Investigations</u>		<u>X</u>
<u>Property Return Agreement</u>		<u>X</u>
<u>Exit Interview</u>		<u>X</u>
<u>Benefits</u>	<u>X</u>	
<u>Final Paycheck (n/a dictated by law)</u>		
<u>CalPERS (n/a dictated by law)</u>		
<u>Deferred Compensation Plan</u>		<u>X</u>
<u>Acknowledgement of Receipt of Handbook and At-Will Agreement</u>		<u>X</u>

<u>Section</u>	<u>ExCo Approved Policy</u>	<u>Internal Policy</u>
<u>Oath of Employment (n/a dictated by law)</u>		

ACWA JPIA
Staff Activities
January 21, 2026

BACKGROUND

The Personnel Committee has asked to be kept up to date on staff activities.

CURRENT SITUATION

Below is a detailing of staff activities experienced since the last Committee meeting on September 3, 2025:

- On September 12, 2025, the JPIA Social Committee hosted JPIA's Annual Adult Social – "JPIA Great Gatsby Social Night" – an elegant evening of 1920s glamour and mystery. The event was held at the Canto Ao Vinho Winery in Rocklin, CA. Activities included a murder mystery game where JPIA staff and guests participated in solving a thrilling mystery while enjoying delicious appetizers and beverages.
- On September 23, 2025, the JPIA Wellness Committee hosted "Wake Up with Wellness: Eating to stay energized and maintain a healthy weight". Deb Dutcher, Health Coach and Corporate Wellness Consultant, presented practical tips on fueling your body with the right foods, boosting your energy, and making nutrition work for your lifestyle.
- On September 30, 2025, in alignment with JPIA's goal of ongoing community service, JPIA staff volunteered at Feeding the Foothills (formerly known as the Placer Food Bank).
- On October 14, 2025, Cassie Crittenden, in collaboration with the JPIA Employee Benefits team, presented the 2026 Open Enrollment information to JPIA staff. The presentation covered JPIA benefits and plan changes for 2026. It was recorded, held in the Executive Committee Conference Room, and made available virtually for remote staff.
- On October 30, 2025, the JPIA Social Committee hosted the JPIA's Annual Halloween "fun lunch." This event included pizza, refreshments, and dessert. The Team did an amazing job with the creation of a haunted house, and other highlights included spooky appetizers, Halloween trivia, and awards to the top voted costume, spooky appetizer, and participation prizes.
- On November 12, 2025, the JPIA Wellness Committee hosted the JPIA's Annual Fall Feast. JPIA staff enjoyed a delicious lunch, including appetizers, turkey, stuffing, candied sweet potato, mac and cheese, and desserts, and participated in exciting activities to help balance the food intake.

- On November 26, 2025, in recognition of the JPIA Thanksgiving holiday and day after Thanksgiving holiday – November 27, 2025, and November 28, 2025 – all staff were allowed to finish their workday 2 hours early.
- On December 11, 2025, the JPIA hosted a JPIA Holiday and Retirement Celebration for five honorees including Cece Wuchter, Debbie Cruz, Tandra Vaughn, Linda Craun, and Jackie Rech. The event was held at the Union Brick Event Center located in Roseville, CA, and included a lovely holiday dinner, including appetizers, refreshments, and dessert. Highlights included an evening of special tributes (singing performances, department videos and live presentations) celebrating each new retiree.
- On December 17, 2025, the JPIA Wellness Committee hosted “Wake Up with Wellness: Be Positive.” This was a virtual webinar through Zoom and included the benefits of the power of positivity. The keynote speaker and coach, Holly O’Hern, owner of Regime Change, explored how shifting one’s thought processes and perspectives can help harness the benefits of positive thinking. Participants discovered practical strategies for transforming their mindset and improving their overall quality of life.
- On December 23, 2025 and on December 31, 2025, in recognition of the JPIA Christmas Eve, Christmas Day, and New Years Day holidays – December 24, 2025, December 25, 2025, and January 1, 2026 – all staff were allowed to finish their workdays 4 hours early.
- On January 20, 2026, the JPIA Wellness Committee hosted “Dream Big. Vision Bigger. Make it Stick.” Participating JPIA staff joined the hands-on vision board event to turn their dreams into a visual roadmap for 2026: Career goals, personal growth, wellness, or adventure – a chance to envision it, believe it, and bring it to life. The event included supplies and hors d’oeuvres.
- On January 21, 2026, Tony Waterford conducted training for JPIA staff which included a preview of the new C4E Mid-Year Employee Performance Evaluation tool and a demonstration on how to navigate and use the tool in Paylocity, utilize Performance Competency Journals in Paylocity, and create/include goals in Paylocity. The training was recorded, held in the Executive Committee Conference Room, and made available virtually for remote staff.

RECOMMENDATIONS

None, information only.

ACWA JPIA
Staffing Status
January 21, 2026

BACKGROUND

The Personnel Committee is to be kept apprised of staffing changes.

CURRENT SITUATION

Below is a detailing of staffing changes which have occurred since the last Personnel Committee meeting on September 3, 2025:

- On September 8, 2025, Monica Sisco, Senior Workers' Compensation Claims Examiner, separated employment with JPIA.
- The following staff were promoted effective September 28, 2025:
 - Jeremy Sadler was promoted from Risk Control Advisor I to Risk Control Advisor II
 - Kristin Smith was promoted from Workers' Compensation Claims Examiner I to Workers' Compensation Examiner II
 - Laura Davis was promoted from Event Planner to Communications and Event Specialist
- On October 9, 2025, Aileen Dizon joined the JPIA to serve as a Training Specialist for the Member Education department. Resume attached. This is a replacement position.
- On October 20, 2025, Jennifer Duchene joined the JPIA to serve as Administrative Assistant II for the Workers' Compensation Claims department. Resume attached. This is a replacement position.
- Also on October 20, 2025, staff were informed that Erik Kowalewski, IT Manager, would be transitioning to the role of Interim IT Manager and eventually, Lead IT Analyst, once a new IT Manager is hired. This decision was made in collaboration with leadership and at Erik's request to allow for him to continue to best support the IT Team and the organization.
- At the October 22, 2025, All Staff Connection, Erin Bowles, Workers' Compensation Claims Manager, was recognized for completing the Supervisor Basics track of the JPIA's Professional Development Program. Robin Flint, Risk Control Manager, was recognized for receiving the California Association of Joint Powers Authorities (CAJPA) Volunteer of the Year Award.

- On November 5, 2025, Jill Martin, Member Services Representative II, separated employment with the JPIA.
- On November 6, 2025, Diego Casillas Iniguez joined the JPIA to serve as Senior Risk Control Advisor for the Risk Control department. Resume attached. This is a new position that supports our members in the northern Central Valley.
- On November 10, 2025, Shelby Toth joined the JPIA to serve as Training Coordinator in the Member Education department. Resume attached. This is a replacement position.
- On November 12, 2025, Syreeta McGaskey, Risk and Safety Technician, separated employment with the JPIA.
- On December 4, 2025, Sara Clonce joined the JPIA to serve as Workers' Compensation Examiner I for the Workers' Compensation Claims department. Resume attached. This is a replacement position.
- On December 15, 2025, Julia Griffin joined the JPIA to serve as Communications Specialist II for the Member Education department. Resume attached. This is a replacement position.
- On December 30, 2025, Linda Craun, Administrative Assistant III in the Member Education department served her last day in the office, and on January 1, 2026, Jackie Rech, Employee Benefits Specialist, served her last day in the office, in preparation for their retirements. Linda's official retirement date was December 31, 2025; and Jackie's official retirement date was January 2, 2026.
- On January 12, 2026, la Her joined the JPIA to serve as Member Services Representative II for the Member Services department. Resume attached. This is a replacement position.
- Since September 2025, several employees also celebrated Service Anniversaries:
 - Chimene Camacho, Senior Executive Assistant – 13 years
 - Sonya Pierce (Baker), Benefits Systems Analyst II – 11 years
 - Kyle Hutchings, Senior Accountant – 4 years
 - Adrienne Beatty, Chief Executive Officer – 4 years
 - Shelley Tippet, Claims Adjuster I – 6 years
 - Sarah Crawford, Member Education Manager – 9 years
 - Laura Davis (Baryak), Communications & Event Specialist – 4 years

- Terry Lofing, Administrative Assistant III – 30 years
- Andrew Corral, Senior Risk Control Advisor – 3 years
- Patti Rider, Senior Workers' Compensation Examiner – 9 years
- Heather Spain, Senior Workers' Compensation Examiner – 1 year
- Jeremy Sadler, Risk Control Advisor II – 4 years
- Cassie Crittenden, Human Resources Specialist – 5 years
- Robert Greenfield, General Counsel – 12 years

- An updated organizational chart reflective of the above changes follows.

RECOMMENDATIONS

None, information only.

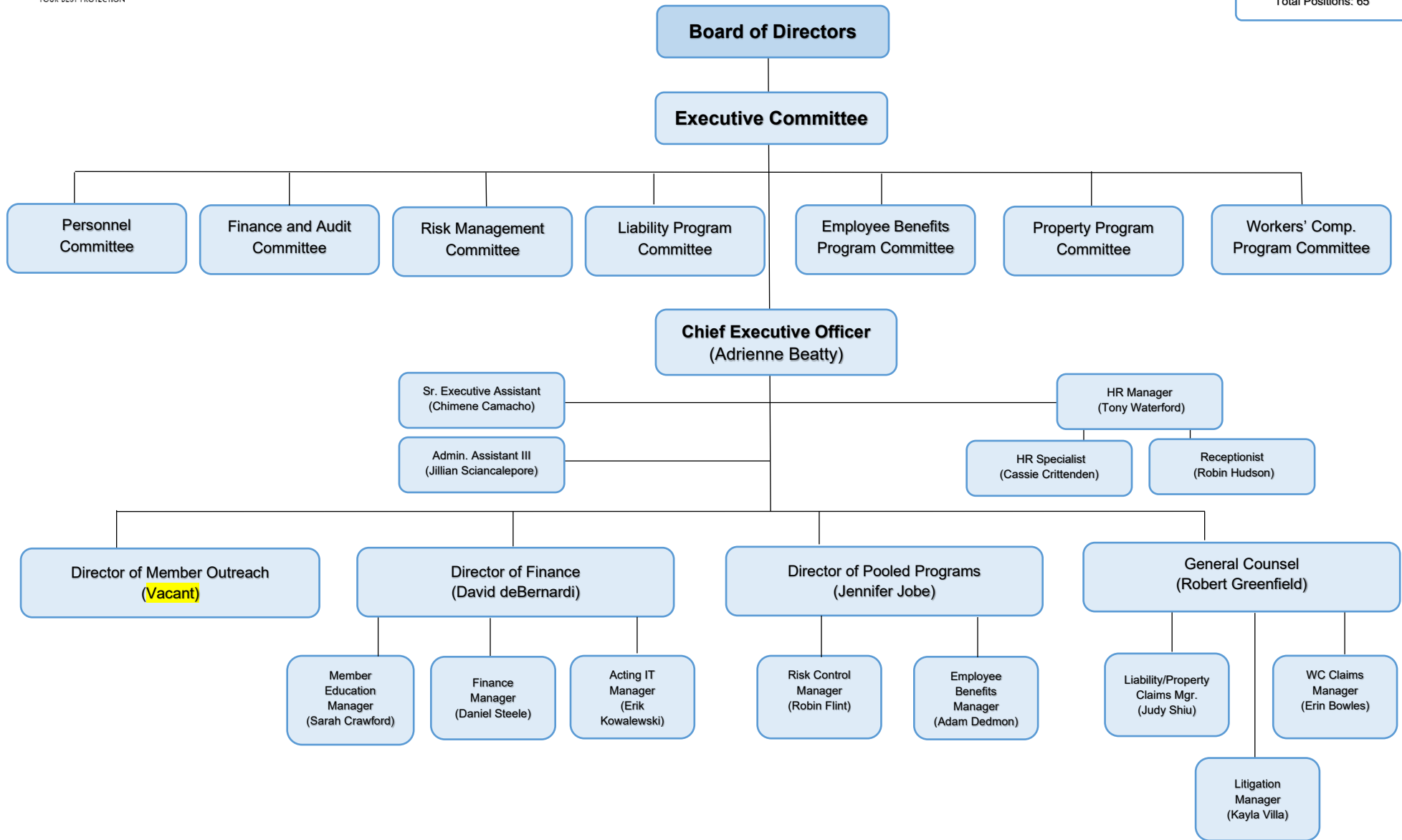


Organizational Chart

Effective January 21, 2026

Full time employees: 61

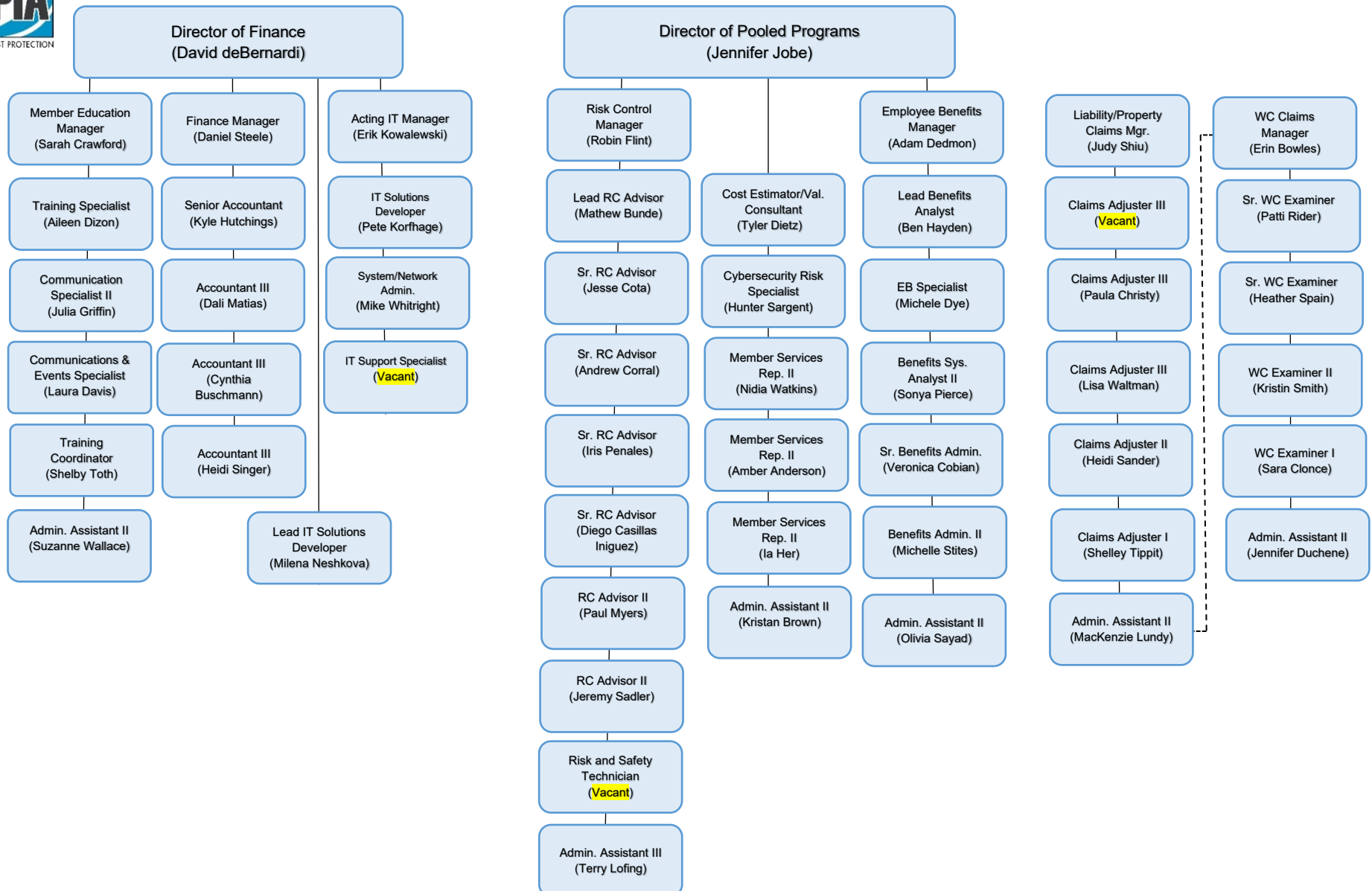
Total Positions: 65





Organizational Chart

Effective January 21, 2026



AILEEN G. DIZON

CERTIFIED PROFESSIONAL IN LEARNING AND PERFORMANCE

STRATEGY | LEADERSHIP | PERFORMANCE

I am an experienced and top performing training & instructional design professional with an emphasis on coaching/mentoring, project management and execution, and instructional design in the healthcare industry and public sector. Throughout my professional career I have refined a set of skills that will afford me the opportunity to become an effective member of any training organization. These skills include internal business consulting/partnering, interpersonal communication, coaching/mentoring peers in varying dimensions of adult learning, and project management/oversight.

AREAS OF EXPERTISE

- | | | |
|----------------------------|----------------------------|-----------------------|
| ▪ Project Management | ▪ Instructional Design | ▪ Content Development |
| ▪ Coaching/Mentoring | ▪ Learning & Development | ▪ Leadership Training |
| ▪ Healthcare Revenue Cycle | ▪ Supervision & Management | ▪ Consulting |
-

PROFESSIONAL EXPERIENCE

CALIFORNIA MENTAL HEALTH SERVICES AUTHORITY, SACRAMENTO, CA July 2019 – Current

SR. PROGRAM COORDINATOR, WORKFORCE EDUCATION & TRAINING REGIONAL PARTNERSHIP PROGRAM

- Manage a statewide budget of more than \$42 million.
- Provide monthly consultation to California Behavioral/Mental Health County Offices for spending their state grant dollars on workforce recruitment and retention, as part of a 5-year plan.
- Support California Behavioral/Mental Health County Offices in creating, developing and deploying programs that financially incentivize and retain critical workforce staff, specifically clinicians and staff that provide direct mental health services to non-served, underserved, and underrepresented communities and demographics, while adhering to program regulations and requirements.
- Ensure fiscal stewardship by managing each county's grant funds and managing over 5,000 contracts statewide.
- Provide fiscal year activities reports to the Department of Healthcare Access and Information which provides data related to program deployment, strategies, expenditures, and impact.

TRAINING SPECIALIST, HELP@HAND PROGRAM

- Designed and developed Digital Mental Health Literacy curriculum that is currently offered by 12 California County Behavioral Health Centers. The curriculum is comprised of video tutorials, instructor-lead classroom courses, and one-on-one coaching courses.
- Provide instructional design, materials development, and training/facilitation support for 12 California counties' behavioral health centers and CalMHSA internal staff including: Zoom Features, Marketing, System Development Life Cycle, Smartsheet, Software Testing and Validation; HIPAA.

DELTA DENTAL (CONSULTANT), RANCHO CORDOVA, CA August 2017 – July 2019

LEARNING & DEVELOPMENT CONSULTANT, ENTERPRISE OPERATIONS TRAINING

- Performed analysis, design, and development of a corporate dashboard project aimed at implementing a Leadership Coaching program with the goal of increasing Delta Dental's Customer Experience Net Promoter Score
- Provided instructional design and training for the implementation of a new Interactive Voice Response (IVR) and Voice Over Internet Protocol (VOIP) system in the Customer Contact Center
- Functioned as lead resource in providing operational elbow-to-elbow support during system implementations.

OPTUM360, RANCHO CORDOVA, CA July 2014 – May 2017

SENIOR TRAINER, OPERATIONAL DISCIPLINE DIVISION

- Performed training and instructional design duties in support of healthcare revenue cycle management operations including revenue cycle acumen, healthcare concepts and business acumen, systems training.
- Key resource in standing up several training and instructional design teams across Optum360 sites. Provided train-the-trainer and coaching to Associate Trainers, both domestically and globally, in the areas of facilitation and training techniques, instructional design, materials development, and internal consulting
- First point of contact for internal business partnering opportunities; responsible for intake, project scoping, and resource planning including ad-hoc training projects and system go-live projects.
- Performed project management and oversight duties for training program projects to include design, development, implementation, and delivery.
- Introduced and infused training programs and materials that promote cross-accountability of the learning process between leadership, trainers, and trainee.

KAISER PERMANENTE (CONSULTANT), PLEASANTON, CA January 2013-August 2013**BUSINESS SYSTEMS ANALYST/APPLICATION COORDINATOR (AC), TAPESTRY UTILIZATION MANAGEMENT**

- Provided build support for Tapestry Utilization Management Phase One activities and Epic 2012 configuration changes. Phase One activities included multiple testing cycles.
- Studied and applied business requirement to ensure successful application configurations.
- Maintained business documents to accurately reflect system configurations.
- Functioned as Lead AC for User Acceptance Testing including project management, creating workflows/call scripts, creating test scenarios, system seeding, and point person for business partner communications.
- Functioned as primary liaison to the Training and Development team.

SUTTER PHYSICIAN SERVICES, MATHER, CA March 2009- January 2012**TRAINER II, MANAGED CARE DIVISION**

- Performed Managed Care process, workflow, and gap analyses; this included documenting processes and workflows to support instructional design and development, as well as presenting results and recommendations from gap analyses to key stakeholders for the purposes of training and employee development.
- Successfully supported three Epic Tapestry implementations (Palo Alto Medical Foundation; Sutter Gould Medical Foundation; Central Valley Medical Group; also supported post-implementation activities for Sutter East Bay Medical Foundation)
- Wrote 90% of both GE Centricity and Epic Tapestry learning materials for the Managed Care Division of Sutter Physician Services (Eligibility; Claims, Utilization and Case Management and Recovery departments); receiving numerous accolades both internally and client-facing.
- Supported employee growth by providing new employees with remedial and optimization training to Managed Care staff.

WACHOVIA - EDUCATION FINANCE DIVISION, RANCHO CORDOVA, CA, March 2008 - December 2008**CUSTOMER SERVICE SUPERVISOR, HIGHER EDUCATION LOAN DIVISION**

- Provided coaching and quality assurance in technical and soft skills to ensure data, product, and process integrity, as well as customer focus in student lending.
- Wrote and conducted performance evaluations and provided verbal and written feedback utilizing Wachovia's online performance management tool, CISCO agent statistic reports, Gallup scores and monthly scorecards.
- Proposed and launched a cross-selling rewards program for our call center to increase the number of sales leads transfers to our corporate sales team resulting in a cross-selling increase of 376%.
- Monitored and managed four call queues utilizing CISCO Supervisor – Customer Service, Customer Service Escalations, Customer Support and Spanish queues to ensure service level were met.
- Ensured borrower needs were met by utilizing knowledge of FFELP and private loan products and lending processes.
- Used various financial aid systems including NSLDS, ELM, and FDR

EDFUND, RANCHO CORDOVA, CA, April 2002 - August 2007**SENIOR TRAINER, HUMAN RESOURCES DIVISION**

- Facilitated learning and employee development utilizing instructed-lead classrooms, participant-centered/experiential learning, self-directed learning, e-learning, and blended solutions.
- Nurtured employee readiness by providing soft skills training (i.e. customer service, high performance teams, time management, values) and technical training (i.e. business model, industry regulations and updates, systems)

- Redesigned, delivered, and administered corporate onboarding program for approximately 150 new employees per year. This onboarding program played a significant role in EDFUND's nomination and final placement in the 2006 and 2007 Sacramento Workplace Excellence Leader Awards
- Successfully managed internal partnerships by working collaboratively with or offering consultation to leaders from various departments for the purpose of identifying employee training needs.
- Conducted needs assessments utilizing online surveys, focus groups, and one-on-one interviews.
- Planned and organized annual employee conferences and seasonal events. Managed all aspects including facility, hotel, catering, audio-visual and speaker contracts; budgeting; theme and agenda; and marketing/communications.
- Managed vendor relationships ensuring quality and cost expectations were met.
- Held lead position in the Core Values Committee aimed at promoting corporate values and advocating corporate social responsibility/citizenship.
- Implemented Sexual Harassment & Discrimination Prevention training in compliance with California law.

EDFUND, RANCHO CORDOVA, CA, March 2001 - April 2002

DEPARTMENT TRAINER, DEFAULT MANAGEMENT DIVISION

- Improved and delivered department onboarding program, reducing department turnover by 3%.
- Conducted group and one-on-one training for supervisors and collection staff in the areas of financial aid, collections, customer service, systems, and department procedures.
- Utilized needs assessments to target department or individual training needs.
- Coached employees in areas needing improvement by utilizing call simulations, exercises, performance feedback forms, call monitoring.
- Provided feedback and consultations to department and division leaders to ensure staffing efficiency.

EDFUND, RANCHO CORDOVA, CA, May 1998 - March 2001

COLLECTIONS SUPERVISOR, DEFAULT MANAGEMENT DIVISION

- Supervised staff of 12-15 collectors in a call center environment
- Diverted escalated calls to ensure staff, borrower, and department success.
- Provided feedback and consultation to department manager to ensure staffing and dialer strategy efficiencies.

PHOENIX RESOURCE GROUP / THE MONEY STORE, SACRAMENTO, CA, January 1997 - February 1998

COLLECTIONS SUPERVISOR, DEFAULT MANAGEMENT DIVISION

- Supervised staff of 12-15 collectors
- Ensured quality and compliance in collection efforts through call monitoring, account audits, one-on-one training, and reviews.
- Conducted performance evaluations.
- Developed and assisted in implementation of various collection strategies.

NATIONWIDE CREDIT INC., UNION CITY, CA, March 1994 - December 1996

UNIT TRAINING MANAGER, TRAINING AND DEVELOPMENT UNIT

- Delivered onboarding program including collection techniques and best practices, Fair Debt Collection Practices Act regulations and United States Department of Education Loan programs and regulations.
- Provided quality assurance through call monitoring, account documentation examinations and one-on-one training.
- Conducted 90-day performance reviews and assisted Collection Training Managers in determining full-time employment of new hires based on my appraisals.

EDUCATION & TRAINING

CERTIFICATIONS

- Epic Certified (lapsed)- Tapestry Application including Core, AP Claims, Utilization & Case Management
- Certified Professional in Learning and Performance- American Society for Training and Development
- Situational Self Leadership - Ken Blanchard Companies (individual leadership model)
- Civil Treatment Series - Employment Learning Innovations, Inc. (sexual harassment and discrimination prevention)
- Values Matter - BlessingWhite (corporate and individual values identification and alignment)
- Techniques for a High-Performance Workforce - Development Dimensions International, Inc. (29 courses related to personal and group effectiveness and getting business results)
- Creative Training Techniques Part I & II - The Bob Pike Group (high impact learning through instructor-lead, participant-centered training and facilitation techniques)

JENNIFER DUCHENE

Summary:

Organized and dependable administrative professional with over 10 years of experience in administrative support, compliance, and customer service. Strong background in records management, accuracy, being detail orientated, interpersonal skills, communication, reliability, and interactions with all levels of organizations. Able to collaborate and support staff and clients to achieve organizational goals.

Skills:

Customer service • payroll support • union reporting • records and file management • data entry • documentation audits • phones • email • scanning/copying/mailing • accounts payable • insurance and compliance tracking • onboarding and training support • Microsoft Outlook/Word/Excel/Teams • ADP • Encompass • Contractor Foreman

Professional Experience:

Office Coordinator

PHE, Inc.

May 2024 to Current

- Administer payroll functions, verify timecards, ensure compliance with prevailing wage requirements, and coordinate with the Public Works Consultant for DIR certified payroll reporting.
- Maintain current business insurance policies, audits and renewals, coordinating with agent and manager to maintain appropriate coverage.
- Responsible for accounts payable, monitor credit card expenditures, and coordinate with the team to collect and maintain accurate financial and expense records.
- Develop, implement, and track annual safety and wellness trainings.
- Draft, revise, and maintain employee policies, procedures, health and safety manuals, and required regulatory postings.
- Maintain accurate employee, licensing, and business records.
- Conduct payroll audits, collaborate with attorneys, and coordinate corrective actions to resolve compliance issues.
- Support managers and employees with problem-solving, day-to-day business needs, and research solutions.
- Administer new hire onboarding, termination processing, and employee record maintenance across Microsoft 365, APD, Guideline 401(k), and Contractor Foreman.
- Provide onboarding support and end-user training for staff to ensure efficient system and software usage.
- Coordinate with unions on prevailing wages, dues, dispatches, and payroll removal notices.
- Input payroll data into union reporting systems to process monthly fringe benefit payments and compiling required information to secure LMCC grant funding on each project.
- Provide comprehensive administrative support, including mail distribution, supply ordering, cellular phone procurement and setup, coordination with business service providers, lease renewals, and management of utilities such as internet, phone systems, and water delivery.

Office Clerk (Contracted through Randstad USA)

US Bank

November 2022 to May 2024

- Reviewed, processed and validated mortgage trailing documents for completeness, accuracy, and compliance.
- Certified receipt of documents, coordinated with clients to resolve missing or incomplete information, and ensured timely resolution.
- Entered data and generated reports using Excel and emBTRUST; supported documentation management and retention compliance.
- Met daily production deadlines and quality requirements consistently.
- Identified and eliminated redundancies in electronic filing, reducing production time by 50%.

- Organized and maintained accurate and detailed databases, files, and records. Verified accuracy of information, researched discrepancies, and records information. Coordinated and ensured compliance with established records retention schedules.
- Received telephone calls, and emails, providing a high level of customer service to both external and internal customers; provided information to staff, other organizations, and customers.
- Cross-trained and assisted team members.

Mortgage Underwriter

Goodleap, LLC July 2016 to July 2022

- Reviewed income records, financial statements, and supporting documentation to evaluate borrower stability, consistency, and eligibility per conventional underwriting guidelines.
- Validated data from Encompass against automated underwriting systems (Fannie Mae DU/Freddie Mac LPA); and resolved any data discrepancies to ensure accurate feedback.
- Issued approval, suspense, and denial notices; ensured compliance with internal policies and investor requirements.
- Communicated rationale for decision with loan officers, processors and management to clarify decisions and identify solutions for conditional approvals.

Jr. Underwriter

Goodleap, LLC July 2015 to July 2016

- Supported the Pre-fund Quality Control department, by auditing underwritten loans for completeness, compliance, and adherence to guidelines.
- Created checklists and wrote policy and procedure manual to improve departmental consistency.
- Provided feedback to underwriters and management to enhance quality assurance.

Senior Mortgage Loan Processor

Goodleap, LLC December 2009 to July 2015

- Processed Conventional, FHA, VA and USDA loans from application through funding.
- Collected and maintained borrower documentation, communicated with clients and ensured confidentiality.
- Collaborated with underwriters, loan officers, and vendors to meet all loan conditions and title requirements.
- Reviewed, organized and submitted loan application documentation from underwriting through funding.
- Met and exceeded productivity requirements, promoted to Jr. Underwriter in 2015.

Education

- Bachelor of Science, Criminal Justice Administration
University of Phoenix
- Computerized Office and Accounting Certificate
Health Staff Institute

DIEGO CASILLAS INIGUEZ, MS, CSP

PROFESSIONAL EXPERIENCE:

The Zenith

7/2021 - Present

Safety and Health Consultant

- Provide routine evidence-based services to 80+ policyholders.
- Assist with industrial hygiene sampling and reporting.
- Evaluate current effectiveness of safety programs and exposures within workplaces.
- Provide recommendations to policyholders and assist in influencing decision makers.

Management Consultant to CalMutuals - JPRIMA Program

- Oversee and maintain relationships with 120+ water districts.
- Developed training materials and industry specific webinars for training.
- Provided evidence-based on-site support to assist in loss reduction.
- Presented in board meetings to showcase Zenith's resources and online offerings.

Pacific Southwest Container

7/2020 - 7/2021

EOHS Manager

- Managed 4 plants with approximately 1,000 employees.
- Responsible for maintaining safety programs, JSAs, SOPs, and other regulatory programs.
- Conducted daily walkthroughs, tailgates, and inspections.
- Performed incident investigations and ensured corrective actions were enacted.
- Held monthly safety meetings at each location and provided updated trends and injury information.

California State University - Fresno

1/2020 - 5/2020

EOHS Intern

- Assisted with industrial hygiene sampling and reporting.
- Responsible for application of federal and California-specific regulations.

EDUCATION:

Columbia Southern University, Orange Beach, AL
M.S., Occupational Health and Safety

California State University, Fresno, CA
B.P.H., Environmental/Occupational Health and Safety

DESIGNATIONS:

Certified Safety Professional (CSP)

SKILLS:

Technical: Proficient in Microsoft Office and Google Workspace

Language: Fluent in English and Spanish

Industrial Hygiene: Competent in noise and air sampling

Communication and Collaboration: Effective communicator with peers and clients; efficient working in a collaborative environment as well as independently

SHELBY TOTH

CAREER PROFILE

Detail-oriented and results-driven Training and Administrative Assistant with experience supporting nonprofit, for-profit, and Native American organizations. Skilled in coordinating complex training programs, managing calendars, and ensuring seamless execution of both virtual and in-person events. Adept at overseeing training logistics, preparing materials, supporting speakers, and facilitating participant engagement to maximize learning outcomes. Experienced in maintaining training content across learning platforms, tracking evaluation data, and producing reports to meet grant and organizational deliverables. Known for exceptional communication and organizational skills, with a proven ability to manage multiple priorities while maintaining accuracy, professionalism, and confidentiality. Collaborates effectively with cross-functional teams, external partners, and stakeholders to ensure smooth operations and consistent, high-quality program delivery. Recognized for a proactive, solutions-oriented approach to administrative and training support, contributing directly to organizational goals and program success.

PROFESSIONAL EXPERIENCE

CALIFORNIA PRIMARY CARE ASSOCIATION

04/2023- Present

Sacramento, CA

SENIOR ADMINISTRATIVE ASSISTANT

Provides comprehensive administrative and programmatic support for CPCA's Training Team, with responsibility for overseeing all aspects of training coordination, scheduling, and delivery. Manages a robust training calendar, processes incoming requests, and leads the seamless execution of webinars and in-person sessions, including speaker preparation, participant engagement, and real-time technical support. Administers all on-demand training content by curating, uploading, and maintaining materials across CPCA's LMS to ensure ongoing accessibility and relevance. Leads training-related marketing efforts in collaboration with the Communications Team, ensuring consistent, timely, and strategic promotion of offerings to maximize participation. Collects, analyzes, and reports comprehensive training evaluation data for the Education Team and grant deliverables, providing insights to inform continuous improvement. Serves as primary contact for the Training@cpc.org inbox, ensuring timely, professional communication and efficient routing of member inquiries. Skilled in utilizing CPCA's Association Management Software (iMIS), member engagement platforms, and website to update content, manage event registration, and maintain accurate records. Hosts all partner demonstration webinars and provides high-level support for meetings, including agenda preparation, virtual platform management, detailed note-taking, and distribution of follow-up communications. Contributes to organizational culture by coordinating quarterly all-staff Lunch and Learns, and manages logistics, registration, and event setup for quarterly board meetings.

SHELBY TOTH

SACRAMENTO NATIVE AMERICAN HEALTH CENTER

04/2022- 04/2023

Sacramento, CA

ADMINISTRATIVE ASSISTANT

Effectively coordinated administrative support across multiple departments, demonstrating strong attention to detail and multitasking abilities in a fast-paced, high-pressure environment. Supported department-led training sessions and internal knowledge-sharing efforts by managing logistics, preparing materials, and ensuring seamless communication with staff and stakeholders. Produced internal and external communications, including letters and memoranda, to keep stakeholders informed of recent events and initiatives. Provided essential information and resources to strengthen outreach efforts to tribal communities and organizations. Managed appointment schedules and calendars for department staff, arranged travel, maintained department files, and assisted department directors in the planning and execution of special programs and projects. Oversaw inventory management and procurement of supplies, including materials used for trainings and meetings. Delivered high-level administrative support to enhance overall office operations, implemented efficient filing systems, and coordinated monthly departmental meetings—preparing agendas, capturing minutes, and distributing materials. Supported daily calendar management for the Chief Operations Officer and assisted with the preparation of monthly reports and financial statements for directors and executive leadership.

CALIFORNIA HISPANIC COMMISSION ON ALCOHOL AND DRUG ABUSE, INC

06/2018-12/2021

Sacramento, CA

SENIOR ADMINISTRATIVE ASSISTANT/TRAINING ASSISTANT

Provides primary administrative and training coordination support across behavioral health programs, ensuring efficient operations at three outpatient clinics and two residential treatment homes. Oversees scheduling, communications, and documentation processes to support seamless service delivery and training implementation. Manages executive-level communications, including multi-line phone systems, mail and email routing, correspondence, and visitor reception, to maintain smooth daily operations. Coordinates training and compliance documentation by maintaining accurate personnel records for new hires, transfers, terminations, job classifications, and merit adjustments. Leads efforts to streamline and maintain both digital and paper filing systems, ensuring accurate organization of confidential executive records and training materials to improve accessibility and team productivity. Provides administrative support for special projects to strengthen departmental outcomes and facilitates communication among clients, vendors, and government stakeholders at the county, state, and federal levels. Manages the preparation, distribution, and filing of office and training documentation; supports the development and maintenance of electronic resource libraries; and ensures compliance with organizational policies. Coordinates logistics for internal trainings and meetings, including scheduling, catering, technical support, and follow-up communications. Assists with the implementation of new administrative systems and acts as a liaison across teams to ensure consistent, timely, and professional support for both daily operations and long-term program goals.

SARA CLONCE

PROFESSIONAL SUMMARY

Accomplished Senior Resolution Manager at Gallagher Bassett Services Inc., adept in claims investigation and settlement negotiation. Holds a CA claims adjuster license, excelling in applying Workers' Compensation Laws to manage complex claims. Proven leadership in mentoring adjusters and achieving high service standards, fostering strong professional relationships for efficient claim resolution.

EXPERIENCE

Gallagher Bassett Services, Folsom, CA — 2/2014-Current

- Possess a California Self-Insurance Administrator's Certificate and Certified Claims Professional designation. Post designation training recently completed 2/2025.
- Applied comprehensive knowledge of Workers' Compensation Laws, both statutory and judicial, to effectively manage and adjust claims.
- Continuously studied and implemented relevant changes in Workers' Compensation Laws, Rules, and Regulations, ensuring compliance and up-to-date claim management practices.
- Conducted thorough investigations into claims and potential claims against insured parties, determining their appropriateness in accordance with California Labor Code.
- Provided leadership and guidance by coaching and mentoring new adjusters, managing critical claims, and overseeing reserve approvals.
- Ensured superior customer service by consistently exceeding time service, referrals, inventory, and training standards.
- Negotiated and authorized settlements within prescribed limits, providing strategic recommendations to the client and excess carriers for amounts exceeding established authority.
- Resolved complex and high-exposure claims with exceptional file management, ensuring high service standards.
- Fostered strong relationships with claimants, insured parties, defense attorneys, and other professionals in the claims process to support efficient claim resolution.

JULIA GRIFFIN

COMMUNICATIONS & MARKETING PROFESSIONAL



SKILLS

Marketing Campaigns

Social Media Management

Public Sector Communications

Public Relations

EDUCATION & AWARDS

Bachelors of Science
Sacramento State University

J. Lindsey Wolf Certificate in
Communications
**California Association of Public
Information Officials**

2025 Water Warrior Award
PCWA

BACKGROUND

Communications & Marketing Professional with 7 years experience in public sector and nonprofit communications. Skilled in digital strategy, social media growth, crisis communication, and cross-functional team leadership. Proven success increasing engagement and leading campaigns that strengthen community trust and awareness.

WORK EXPERIENCE

Communications Specialist

Placer County Water Agency, Auburn CA

2024-Current

- Growing social media audiences and engagement through creative campaigns and multimedia storytelling.
- Organically growing Placer County Water Agency's Facebook by 154% in one year.
- Building community partnerships with nonprofits, NGOs, and local agencies to strengthen outreach.
- Supporting leadership team with clear, consistent messaging on projects, policies, and legislation.
- Supervising staff and coordinators while also being willing to execute projects directly when needed.
- Skilled at planning, writing, editing, and managing digital and print content across websites, social media channels, newsletters, and public-facing materials.
- Adept at producing high-impact multimedia campaigns, designing signage, brochures, and e-blasts, and coordinating advertising and marketing initiatives that inform and inspire diverse audiences.

Communications Specialist

El Dorado Hills Community Services District, El Dorado Hills CA

2021-2024

- Managed social media content development, marketing campaigns, and audience growth strategies.
- Increased email marketing database by 15% with an average 6% CTR.
- Oversaw website management, SEO, and Google Analytics to improve digital presence.
- Developed and managed the District's E-newsletter, email campaigns, and outreach efforts.
- Served as emergency communication lead, managing all crisis communications and media relations.
- Managed direct reports and cultivated partnerships with community organizations.
- Project manager for the District's triannual Community Resource and Recreation Guide.
- Developed, implemented, and marketed new statewide legislation initiatives.
- Drafted media advisories, press releases, speeches, and managed press kits.
- Acted as in-house branding manager, leading staff on rebranding projects.
- Planned and executed District-wide community engagement events.
- Collaborated with leadership, including the General Manager and Board Members, on District initiatives.
- Supported HR with high-level recruitment marketing campaigns.

Communications and Media Specialist

Placer County Office of Education (PBIS), Auburn CA

2021

- Social media management for the CA PBIS Coalition.
- Develop new marketing projects and campaigns.
- Email marketing.
- Media marketing consultant for Los Angeles County Office of Education (LACOE).
- Website development and SEO.
- Proficient in Canva, Google Analytics, Go Daddy, Mail Chimp, and Constant Contact.
- Event and conference management.

Freelance Social Media Manager

Self Employed, Rocklin CA

2018-current

- Create custom content strategies for small businesses, including salons and real estate agents.
- Produce high-impact video, audio, photography, and multimedia content and campaigns.
- Manage social media content calendars, focusing on short-form video and brand storytelling.
- Develop brand voice, tone, and visual identity tailored to each client.
- Rebranding, logo production, and creating branding guidelines
- Provide analytics and insights to guide content decisions and improve engagement and sales.

EDUCATION

UNIVERSITY OF CALIFORNIA, BERKELEY

Graduated May 2006

Bachelor of Arts, Double Major in Political Science and Legal Studies

QUALIFICATIONS AND SKILLS

- Experience overseeing programs in risk management, commercial property and casualty insurance and risk financing with a broad knowledge of healthcare risk programs and self-insurance programs for public entities.
 - Knowledge of insurance concepts, policies, coverage analysis, contractual insurance requirement and indemnification provisions, and loss prevention best practices.
 - Oversight of auto liability claims and familiar with fleet management and employee driving guidelines and policies.
 - Exceptional organizational and project management skills with the ability to prioritize workload and meet deadlines.
 - Collaborative partner with executive teams and multiple departments to coordinate meetings for key stakeholders and Board members.
 - Ability to deliver group presentations and facilitate meetings for leaders, brokers, and insurance underwriters.
 - Efficient in Microsoft Office programs: Word, Excel, Outlook, Teams, PowerPoint, and Adobe.
 - Highly detail-oriented and excellent proofreading skills to deliver professional work products.
 - Supervisory, mentoring, and teaching experience.
 - Bilingual in Hmong and English.
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WORK EXPERIENCE

SUTTER HEALTH, Sacramento, CA

March 2016 - August 2025

Risk & Insurance Services Specialist

- Managed system-wide commercial lines of property and casualty insurance and self-insurance programs for Sutter Health. Assigned insurance programs included Professional Liability, Directors & Officers Liability, Employment Practices Liability, Privacy and Network Security/Cyber Liability, Managed Care Errors & Omissions, Fiduciary Liability, Auto Liability, Crime, Aviation, and Wage & Hour. Worked directly with the Insurance Services Director to identify emerging risks, develop proactive risk management programs, and offer recommendations to mitigate risk or loss throughout the organization.
- Served as the subject matter expert and liaison for communication with insurance brokers and claim adjusters and the internal legal and risk department to analyze coverage for claims and oversee proactive handling of claims. Scheduled and facilitated periodic claim reviews for all parties involved to discuss claim status and resolve any issues that may arise.
- Led each program renewal by scheduling renewal strategy meetings with brokers, executives, and other stakeholders. Worked with other departments and teams to collect, verify, and analyze underwriting and exposure data used for the renewals. Developed and delivered communications to leadership and other audiences regarding program renewal proposals, binding authority requests, loss trend updates, and important renewal timelines.
- Developed the annual insurance budget for the organization through strategic planning and analysis and collaboration with leaders within the Sutter Health Finance Department. Developed premium allocation for assigned insurance programs.
- Reviewed third party contracts, specifically the insurance and indemnification provisions, to evaluate risks and provide guidance to contract managers and business owners on risk mitigation and negotiation of insurance and/or indemnification language as needed.
- Participated in continuous educational opportunities such as webinars and conferences for professional growth and knowledge-sharing with colleagues regarding risk management guidelines and best practices and emerging risks.
- Provided support to various departments at Sutter Health on new business initiatives. Consulted with brokers to evaluate any new risks and secure the most effective risk financing solutions to support business operations and expansions. Specifically participated in the ongoing merger and acquisition efforts led by the Sutter Surgery Center Division to expand the ambulatory service area, as well as the recent rollout of the new mobile stimulation lab for the clinical education department.

Senior Legal Analyst

- Assisted Litigation Managers with management of liability claims for assigned clients (public entity joint power authorities comprised of municipalities, housing authorities, school districts, and vector control districts). Primary duties included quarterly review of claim files and reporting of high profile claims to governing board for action; maintaining accurate claims files and documentations; preparing files for annual independent claims audits; and preparing time-sensitive correspondence to defense counsels and clients as needed.
- Assisted with analysis of the effectiveness of defense firms, investigators, and the management of litigation.
- Coordinated meetings with third party claim administrators, excess carriers, and other interested parties to monitor claims which may potentially impact pooled funds.
- Researched laws and policies impacting current cases and advised clients regarding claims and claim procedures, and draft/develop claims forms.
- Participated in transfer of risk education and training, such as review contract insurance requirements and provide guidance to clients, review Certificate of Coverage requests and issue liability/property/workers' compensation certificates, and present at transfer of risk training workshops for clients.

Self-Insurance Pool Program Administration Analyst

- Joined company as an Administrative Assistant and received two promotions to the role of a senior Analyst. Increased job duties to include supervisory/oversight responsibilities and leadership. Developed training program for assistants and new analysts and provided oversight of the day-to day client operations.
- Acted as Board Secretary for multiple joint power authority boards; prepared and produced meeting agendas, staff reports, and minutes for client meetings; scheduled client meetings and annual retreat conferences in accordance with the Brown Act and client budget requirements.
- Scheduled and attended client site visits with Program Administrators to provide risk management education and guidance to clients. Developed marketing materials for new prospective clients.
- Effectively managed annual program renewals by overseeing the collection of underwriting data from various sources and working with brokers to renew various coverage policies timely. Handled payroll collection and other mandatory state filings, loss run reports, and coverage policy renewals.
- Monitored vendor contract compliance, and maintained accurate records of client documentation, mails, actuarial, financial and claims audit reports.
- Assisted Program Managers with adjusting auto and property claims and preparing settlement requests for approval.
- Maintained client websites and upgraded other online databases as needed.

Tutor (part-time)

- Provided academic tutoring services to K-12 students, which included preparing individual lesson plans and study materials to improve students' academic performance and prepare them for exams; developing and implementing intervention strategies and tutoring plans; and maintaining records of students' assessment results and performance with confidentiality.
- Collaborated with students, parents, teachers, and school staff to determine student needs or assess student progress. Built and maintained positive relationships with parents and encouraged parental involvement in students' education.

PROFESSIONAL CERTIFICATIONS AND ACHIEVEMENTS

- Associate in Risk Management (ARM)
- Associate in Insurance (AINS)
- Toastmasters: Competent Communicator & Leader Certificates; Speech Contests
- Sutter Health's Privacy & Information Security University (50 hours)
- California Society for Healthcare Risk Management (CSHRM) Conference
- ASHRM Academy Course: Essentials in Healthcare Risk Management
- Hmong Language & Culture De-Cal Course, Instructor, UC Berkeley (2003-2005)

ACWA JPIA
Recruitment Status
January 21, 2026

BACKGROUND

The Personnel Committee is to be kept apprised of the JPIA's recruitment status.

CURRENT SITUATION

Below is a detailing of upcoming recruitments for existing positions and new positions for which authority to hire has already been granted.

The following recruitments are for replacement positions:

- **IT Manager:** As noted under agenda item IV. Staffing Status, in October, staff were informed that Erik Kowalewski, IT Manager, would be transitioning to the role of Interim IT Manager and eventually, Lead IT Analyst, once a new IT Manager is hired. This decision was made in collaboration with leadership and at Erik's request to allow for him to continue to best support the IT Team and the organization. An external recruitment was opened shortly thereafter in late October. In-person interviews were conducted on December 8th and 11th and on January 7th. We expect to have a new IT Manager in place in February 2026.
- **Risk and Safety Technician:** Recruitment is underway to fill the position vacated by Syreeta McGaskey's departure. The job announcement will be posted on Friday, January 23, 2026, and we expect to have a new Risk and Safety Technician in place by the end of March 2026.
- **HR Assistant/Administrative Assistant II/III:** Robin Hudson has elected to retire from the JPIA effective February 21, 2026, with her last day of employment being Friday, February 20, 2026. Tony Waterford is collaborating with JPIA Managers to assess whether the essential duties of the Receptionist/Administrative Assistant role can be absorbed by existing administrative assistant staff. Further analysis will determine whether recruitment is necessary to fill the vacancy with a full-time Human Resources Assistant/Administrative Assistant II/III position.

The following recruitment is for a new position for which authority to hire has already been granted:

- **Claims Adjuster II / III:** Recruitment is underway for a previously approved added position. The job announcement was posted on Friday, January 9, 2026, and we expect to have a new Claims Adjuster II/III in place by the end of March 2026.

The following recruitment is being discontinued:

- **IT Support Specialist:** This position is vacant due to the departure of Fernando Ochoa on June 17, 2025. As the IT department FTEs for approved positions consist of five (5): an IT Manager and four (4) other staff, with the transition of Erik Kowalewski to Lead IT Analyst, that completes the five (5) existing FTE, therefore we are no longer planning to recruit for this position.

The following recruitment remains on hold, pending further analysis of organizational needs:

- **Director of Member Outreach:** This position is vacant due to the departure of Elisa Sabatini on July 4, 2025.

RECOMMENDATIONS

None, information only.

ACWA JPIA
Request for New Position
January 21, 2026

BACKGROUND

The Personnel Committee is to be kept apprised of future staffing needs.

CURRENT SITUATION

At this time, the CEO is requesting authority to create, and recruit for one (1) new position:

- Member Services Manager, grade 52, with a pay range of \$131,568 (minimum) to \$197,353 (maximum).

It should be noted that this position does not add an additional FTE to the JPIA, as the Director of Member Outreach position has been vacant since July 2025 and there is not currently a plan to fill that position.

The Member Services Department is currently the only department without a full-time Manager. Jennifer Jobe, the Director of Pooled Programs, effectively serves as the acting Manager of the department – supervising a line staff of six (6) – while also supervising the Risk Control and Employee Benefits departments – with the dedicated Managers of those departments making up her seventh and eighth direct reports. Because Ms. Jobe serves as acting Manager of that department, she is limited in her ability to perform other higher level and/or strategic functions that could significantly benefit the JPIA and assist the CEO.

The Member Services department provides day-to-day support to approximately 350 Members in ACWA JPIA's Liability, Property, and Workers' Compensation Programs as well as all members participating in any group-purchase programs. The team's collective responsibilities include assisting Members with insurance coverage selection, identifying high-risk exposures, addressing a variety of coverage and programmatic inquiries, preparing and distributing Certificates of Coverage, analyzing data for contribution calculations, reviewing contracts, providing risk transfer consultations, marketing to – and assisting in the underwriting of – prospective members, assisting in the completion of applications for coverage, providing guidance on claims and underwriting data, conducting the annual renewal activities for the excess insurance and reinsurance placements supporting the pooled and group-purchase programs, and assisting Members with best practices.

For context, the amount of data collected/processed by the department includes:

- Issuing approximately 3,000 Certificates of Coverage annually.
- Spending approximately 15 hours per week assisting members with risk transfer advice and guidance.
- Assisting approximately 15 prospective members annually through the application/underwriting process.
 - Each application process lasts approximately six (6) months, at minimum.

- Assisting 348 members in completing detailed Liability Program renewal applications, annually.
- Assisting 291 members in the Property Program with property schedule assistance, coverage questions, etc., annually.
- Assisting 208 members in providing Workers' Compensation Program underwriting information, annually.
- Responding to approximately 300 audit confirmation requests from member agency financial auditors, annually.
- Assisting all members of ancillary programs (Cyber Liability, Crime, UST, Pollution, Dam Liability, D&O) with annual underwriting processes/renewal applications and advising all members of available ancillary program coverage options.

As has been previously noted, the membership within the Property, Liability, and Workers' Compensation Programs – as well as the overall size and complexity of member payroll and operations – have grown significantly in the past ten years, ranging from 10-20% increases in membership and 80-140% increases in exposure base (payroll and total insured values).

It was for this reason that staff requested – and the Executive Committee approved in January 2025 – adding a third (3rd) Member Services Representative II position to the department, for the first time in over 15 years.

Adding a dedicated Manager to the department will add to the depth of leadership for the department, assist the Director of Pooled Programs and the CEO in focusing on more strategic initiatives, and provide an overall benefit to the membership, allowing for more operational level staff to be available to assist members with ongoing and increasingly complex risk and coverage matters.

A job description for this position has been attached as well as an updated Salary Schedule.

RECOMMENDATIONS

That the Personnel Committee recommend to the Executive Committee approval of the new Member Services Manager position.

ACWA JPIA

Member Services Manager

Name: **Reports to: Director of Pooled Programs**
Grade: 52
Status: Exempt **Date: January 2026**
Other: Full time, 40-hour week, supervises Member Services staff

Definition/Summary

Under direction from the Director of Pooled Programs, the Member Services Manager leads and oversees the daily administrative, underwriting, and operational activities of the Member Services Department. This position is responsible for member engagement and support, underwriting coordination, risk assessment, and service delivery for ACWA JPIA member agencies; participates in committee meetings; develops and implements member service strategies, underwriting guidelines, and communication plans; coordinates member onboarding, renewals, and ongoing consultation; serves as a primary liaison with internal departments and external partners; supervises assigned staff; and ensures accurate records, reporting, and compliance with established program standards.

Essential Functions

- Manage the day-to-day operations of the Department by directing, supervising, and mentoring Member Services Representatives and Administrative Assistant.
- Oversee underwriting activities for all lines of property and casualty coverage, including data collection, risk evaluation, and contribution calculations.
- Review and approve recommendations on member applications, renewals, and risk transfer issues.
- Collaborate with Risk Management Department on member assessments and risk mitigation strategies.
- Monitor and report on unusual or high-risk exposures, trends, and issues affecting members and the risk pool.
- Assist in the development of agendas, packets, and correlating details for all property and casualty program committees.
- Support the Director of Pooled Programs in strategic planning and program development.
- Drive personal or rental vehicle for JPIA-related travel requirements.
- Regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
- Establish and maintain cooperative working relationships with co-workers, member agency personnel, brokers, attorneys, and other stakeholders.
- Ensure compliance with pool policies, procedures, and regulatory requirements.

Other Duties

- Prepare and deliver presentations to Committees and member agencies regarding program participation and coverage options.
- Supervise the Cost Estimator/Valuation Consultant, overseeing valuation methodologies, data integrity, schedules, deliverables, and coordination with members and reinsurance partners to ensure accurate and defensible property valuations.

- Supervise the Cybersecurity Risk Specialist, overseeing cyber risk assessments, risk mitigation and reporting, incident response planning, and member education to support effective cyber risk management for member agencies.

Job Standards/Specifications

Knowledge of:

- Public agency risk pooling and the relationship between the pool and its member agencies.
- Commercial insurance coverages, certificates of insurance, endorsements, and loss payable provisions.
- Underwriting principles and risk assessment methodologies.
- Property valuation and cost estimation practices.
- Cybersecurity risk management principles and best practices.
- Knowledge of business and management principles involved in strategic planning, resource allocation, and leadership.
- Knowledge of the structure and content of English language including meaning, spelling, composition, and delivery.

Ability to:

- Plan, organize, coordinate, and direct the Member Services Department.
- Provide management, training, and work development for the Member Services team.
- Exercise leadership and manage tactfully and effectively.
- Travel to meet with members, insurance providers, and conduct training.
- Provide advice and consultation to executive leadership on Member Services developments.
- Communicate effectively verbally and in writing.

Typical Physical Activities

- Communicate orally with member agencies, co-workers, and public in face-to-face one-to-one setting; by telephone; and in group setting (gives instructions and information, and responds to questions).
- See and hear within normal range with or without correction.
- Ability to work at a desk for an extended time period.
- Drive auto for extended period of time.
- Insert and retrieve documents from a manual filing cabinet.
- Work in an office environment, lift and move objects up 15 pounds such as binders, supplies, small office equipment.
- Have sufficient finger/hand coordination and dexterity to operate and adjust office equipment such as telephones (modified switchboard and intercoms, fax machines, copiers, postage metering machine, typewriter and computer workstation).

Environmental Factors

1. Exposure to sun: 10% or less work time spent outside a building and exposed to the sun.
2. Irregular or extended work hours: Occasionally required to change working hours or work overtime.
3. This position is eligible for remote work up to two days per week.

Desirable Qualifications

Any combination of education, training and experience which would demonstrate the ability to successfully perform these functions, duties and responsibilities would be qualifying. A typical way to demonstrate the necessary qualifications would be:

- Bachelor's Degree or Master's Degree from an accredited college or university in business administration or closely related field; insurance/risk management certifications, and five years of increasingly responsible experience in insurance underwriting, risk management and related services, **OR**
- Ten years of progressive experience in underwriting, member services, or risk management, preferably in a public agency or risk pool environment.
- Associate in Risk Management (ARM) and Chartered Property Casualty Underwriter (CPCU) designation(s)
- Supervisory experience required.

License Certificate Registration Requirement

Possession of a California driver's license issued by the State Department of Motor Vehicles and proof of valid insurance for vehicle. A good driving record of at least two (2) years duration, as evidenced by freedom from multiple or serious traffic violations or accidents. Possession of and continuance of a driving record that does not cause adverse effect on JPIA's automobile insurance rates is required.

I have reviewed this Job Description with my Supervisor and agree with its contents.

Employee Signature

Date

Supervisor Signature

Date

The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria necessary to successfully perform the job.

ACWA JPIA Staff

Pay Schedule

Effective Date: January 21, 2026

Job Title	Exempt/ Non-Exempt	Grade	Annual Salary Range	
			Minimum	Maximum
Chief Executive Officer	Exempt	85	\$ 297,193	\$ 445,790
General Counsel	Exempt	70	205,202	307,803
Director of Finance	Exempt	68	195,314	292,971
Director of Pooled Programs	Exempt	68	195,314	292,971
Litigation Manager	Exempt	60	160,303	240,455
Employee Benefits Manager	Exempt	58	152,579	228,868
Finance Manager	Exempt	52	131,568	197,353
Human Resources Manager	Exempt	52	131,568	197,353
Liability and Property Claims Manager	Exempt	52	131,568	197,353
Risk Control Manager	Exempt	52	131,568	197,353
Member Education Manager	Exempt	52	131,568	197,353
Workers' Compensation Manager	Exempt	52	131,568	197,353
Information Technology Manager	Exempt	52	131,568	197,353
Member Services Manager	Exempt	52	131,568	197,353
Lead Risk Control Advisor	Exempt	48	119,194	178,792
Senior Risk Control Advisor South	Exempt	45S	119,194	178,792
Cost Estimator / Valuation Consultant	Exempt	45	110,684	166,026
Senior Risk Control Advisor	Exempt	45	110,684	166,026
Cybersecurity Risk Specialist	Exempt	45	110,684	166,026
Lead IT Analyst	Non-exempt	45	110,684	166,026
Lead IT Solution Developer	Non-exempt	45	110,684	166,026
IT Solution Developer	Non-exempt	44	107,984	161,976
Lead Benefits Analyst	Non-exempt	42	102,781	154,171
Claims Adjuster III	Exempt	40	97,828	146,743
Senior Workers' Compensation Examiner	Exempt	40	97,828	146,743
Employee Benefits Specialist	Exempt	38	93,114	139,672
Training Specialist	Non-exempt	38	93,114	139,672
Senior Executive Assistant	Non-exempt	38	93,114	139,672
Senior Accountant	Non-exempt	38	93,114	139,672
System/Network Administrator	Non-exempt	38	93,114	139,672
Human Resource Specialist	Non-exempt	38	93,114	139,672
Risk Control Advisor II	Non-exempt	38	93,114	139,672
Member Services Representative II	Non-exempt	38	93,114	139,672
Communications Specialist II	Non-exempt	36	88,628	132,942
Workers' Compensation Claims Examiner II	Non-exempt	36	88,628	132,942
Claims Adjuster II	Non-exempt	36	88,628	132,942
Benefits System Analyst II	Non-exempt	32	80,292	120,439
Claims Adjuster I	Non-exempt	32	80,292	120,439
Workers' Compensation Examiner I	Non-exempt	32	80,292	120,439
Risk and Safety Technician	Non-exempt	28	72,741	109,111
Communications and Events Specialist	Non-exempt	28	72,741	109,111
Senior Benefits Administrator	Non-exempt	28	72,741	109,111
Administrative Assistant III	Non-exempt	24	65,900	98,849
Training Coordinator	Non-exempt	24	65,900	98,849
Benefits Administrator II	Non-exempt	24	65,900	98,849
Accountant III	Non-exempt	22	62,724	94,086
Accountant II	Non-exempt	20	59,702	89,553
Administrative Assistant II	Non-exempt	20	59,702	89,553
Receptionist/Office Assistant	Non-exempt	11	47,805	71,707

Retired Annuitants

Project Manager	Non-exempt	Ret An	<u>Hourly</u> 75	<u>Hourly</u> 150
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ACWA JPIA
Update on Retirements, Future Positions, and Office Space
January 21, 2026

BACKGROUND

The Personnel Committee is to be kept apprised of future staffing needs and interrelated logistics.

CURRENT SITUATION

The JPIA's Chief Executive Officer will update the Personnel Committee on potential future retirements, future staffing needs, and office space.

RECOMMENDATIONS

None, information only.

ACWA JPIA
2026 CEO Evaluation and Contract Negotiation
January 21, 2026

BACKGROUND

This report has been drafted with the assistance of Mary Egan, Consultant to the Executive Committee for the CEO annual review and compensation process and the JPIA President and Vice President – Directors Melody McDonald and Bruce Rupp – respectively.

The ACWA JPIA Executive Committee adheres to the best practice of conducting an annual performance evaluation for the Chief Executive Officer. This facilitated evaluation process is conducted according to a specific timeline and includes a variety of steps to provide the Executive Committee with comprehensive performance and compensation information.

In addition to recommended contract and base pay modifications, the 2025 process resulted in process recommendations from the Ad Hoc Committee charged with generating compensation and contract revisions. These recommendations impacting the 2026 process will be discussed at the January 2026 Personnel and Executive Committee meetings.

At the January 22nd meeting, the Executive Committee will also consider the “Annual Bonus” provision included in the CEO’s contract. The Committee deferred this discussion item to the January meeting, and the President requested that it be agendaized for consideration of an annual bonus.

Section 6.3 of the contract states that following CEO’s annual performance evaluation, the CEO shall be eligible for an annual discretionary non-PERS incentive award between zero percent (0%) and ten percent (10%) of the CEO’s base salary. The CEO’s annual compensation adopted because of the increase provided at the September meeting is \$333,396. As such, CEO Beatty is eligible for a one-time bonus of up to \$33,339.

CURRENT SITUATION

The 2025 Ad Hoc Committee recommends the following be considered for the 2026 CEO annual review and contract negotiation process:

- a) Review of a total compensation array that includes base compensation, other cash compensation and relevant benefit enhancements provided to other large public comparator agencies including but not limited to JPIA, PRISM, CJPIA, ASCIP, and SDRMA. All California staffed risk pools that own and operate their own Captive. It is recommended that the compensation for the ACWA General Manager also be included.

- b) This analysis will specially include a comparison of relevant deferred compensation programs.
- c) The compensation adjustment will follow the parameters adopted by the Committee with the October 1, 2025, contract renewal, which contemplates an annual increase of between 3% and 7% based upon performance, not including the one-time bonus provided in Section 6.3.

This compensation analysis will be provided to a new Ad Hoc Committee named by the President in January 2026. The process will adhere to the following timeline:

January 2026	President appoints Ad Hoc Committee for compensation review
May 2026	JPIA CEO direct reports participate in a “360” process to provide feedback on the CEO’s performance (conducted every 2-3 years)
June/July 2026	CEO prepares self-evaluation, suggests annual goals and requests contract modifications Comparability data provided to Ad Hoc Committee Facilitator begins interviews of all Executive Committee members concerning CEO’s performance Ad Hoc Committee meetings to discuss compensation recommendations (through September as needed)
September 11, 2026 (9 AM)	Personnel Committee Meeting Recommendations made by Ad Hoc Committee ready for Executive Committee
September 25, 2026 (8 AM)	Executive Committee Meeting Closed Session CEO Performance Review, Salary and Bonus confirmation, confirmation of any re-negotiated contract terms – and report out in Open Session of actions taken

RECOMMENDATION

That the Ad Hoc Committee recommends to the Personnel Committee to recommend to the Executive Committee the above process and timeline for the 2026 CEO performance review and contract negotiation process.

ACWA JPIA MEETINGS CALENDAR – 2026

MEETING DATES	BOARD OF DIRECTORS	EXECUTIVE	PERSONNEL	FINANCE & AUDIT	P R O G R A M S				RISK MGMT	CWIF
					Emp. Benefits	Liability	Property	Work Comp		
JAN 21			3:00 PM							
JAN 22		10:30 AM							8:00 AM	
FEBRUARY 19-20 STRATEGIC PLANNING SESSION - SAN DIEGO										
MARCH 1-4 AGRIP GOVERNANCE CONFERENCE - NASHVILLE										
MARCH 8-10 CICA CONFERENCE - PALM DESERT										
MAR 26				1:00 PM			3:00 PM			
MAR 27		8:00 AM								
APRIL 30					9:00 AM *					
MAY 4-7 ACWA JPIA SPRING MEMBERSHIP SUMMIT AND ACWA CONFERENCE - SACRAMENTO										
MAY 4	2:00 PM					8:00 AM				
MAY 29										9:00 AM (UTAH)
JUNE 3			10:00 AM *							
JUNE 25								3:00 PM		
JUNE 26		8:00 AM								10:30 AM
JULY 29		3:00 PM			1:00 PM					
SEPTEMBER 15-18 CAJPA ANNUAL CONFERENCE - MONTEREY										
SEPT 11			9:00 AM *							
SEPT 24				1:00 PM		3:00 PM	10:00 AM			
SEPT 25		8:00 AM								11:00 AM
OCT 22		10:00 AM *								
NOVEMBER 30-DECEMBER 3 ACWA JPIA FALL MEMBERSHIP SUMMIT AND ACWA FALL CONFERENCE - ANAHEIM										
Nov 30	2:00 PM									8:00 AM

*Virtual Meeting



Hybrid Meeting Participation Guidelines

For Remote Meeting Participants

Remember to mute yourself until you are ready to speak.

If you have a question or comment, raise your hand in Zoom.

To raise or lower your hand:

1. For PC users:
 - a. Press 'Alt-Y' on your keyboard
 - b. Or go to 'Reactions' on your Zoom screen
2. For IPAD users, go to 'More'.
3. For telephone (audio only) users, press * then 9.

For In-House Meeting Participants

Remember to use your microphone when speaking.

- Remote participants will not hear you if you don't.
- Before speaking, check that your mic is unmuted (green light).

For in-house participants that do not have a microphone, please wait for the mic runner before speaking.