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## *Section: Employee Standards*

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### **Gifts and Entertainment** (pages 10-11)

Although the Miami-Dade County Conflict of Interest and Code of Ethics is incorporated herein above, it is restated herein to provide additional clarification. The term "gift" refers to the transfer of anything of economic value, whether service, loan, travel, entertainment, hospitality, meals, cash payments, a loan, gratuity, favor, tickets or gratuitous entry to events or fundraisers, baskets, fruit, wine or promise of future employment. Monetary, cash payments / gifts, or gift cards of any value cannot be accepted by employees in association with their work with The Trust under any circumstance.

Prohibited gifts: Elected officials, public employees and members of advisory boards and quasi-judicial bodies may never request or accept gifts intended to persuade them to take (or not take) an official action or to perform (or not perform) a duty required by their government service.

Acceptable gifts, if disclosed. Gifts that are not intended to influence an official action and that are not travel expenses paid for by a government vendor may be accepted. If the value of a gift from a person or entity exceeds \$100.00 during a calendar quarter, a conflict of interest disclosure form should be completed by the recipient and filed with the Clerk of the Board in the quarter after it is received and simultaneously filing with the Secretary of State, as required by the Code of Miami-Dade County. This requirement extends to the reporting of a series of gifts/tickets to events/fundraisers, for entry to an event, holiday party, or other occasion, where each ticket would be valued over \$100.00.

Food and beverages consumed at a single sitting or meal are considered a single gift, and the value of the food and beverage provided at that sitting or meal is considered the value of the gift.

The provisions of this conflict-of-interest policy do not apply to:

- (a) Gifts from relatives or members of one's household;
- (b) Awards for professional or civic achievement, or honorariums;
- (c) Sample materials such as books, reports, periodicals or pamphlets that are solely informational or of an advertising nature.

The policy that employees are not to accept or solicit gifts is not meant to apply in connection with and related to program items officially sponsored by The Children's Trust and bearing The Children's Trust logo, such as: hats, shirts, or cups, pens related to The Children's Trust sponsored programs or initiatives.

- Updated language to reflect policy on this topic and to align with the definitions of acceptable and non-acceptable gifts, gift thresholds and reporting guidelines that apply.

## **Two-Year Rule Miami Dade Ethics Code, Sec. 2-11.1**(page 12)

All employees of The Trust are subject to the Two-Year Rule. This rule states that no Trust official, employee, or personnel may lobby any Trust officer, departmental personnel/employee for two years after leaving a Trust position. Leaving the Trust includes but is not limited to resignations, terminations, or retirement. Lobbying would include, but not be limited to, any departmental personnel or employee in connection with any application, RFP, RFQ, bid, request for ruling, or other determination, contract, claim, controversy, charge, accusation, or other particular subject matter in which The Trust or one (1) of its agencies or instrumentalities is a party or has any interest whatever, whether direct or indirect. This rule is in place despite the relationship the former Trust employee has with an agency (i.e., paid position, contracted employee, consultant, volunteer, or advisory position). This rule does not prohibit "routine administrative requests" to the Trust.

Since The Children's Trust has a heightened Conflict of Interest policy that is intended to "avoid the appearance of impropriety," any exception of representing an organization, including a non-profit or educational entity, in the Two-Year Rule Miami-Dade Ethics Code, Sec. 2-11.1.

Violation of this rule subjects the former employee to a fine levied by the Commission on Ethics and places the provider/vendor entity employing the former staff member in jeopardy of not being eligible, losing or having to repay any award from The Trust.

- Added this language of the existing Two-Year Rule Miami-Dade Ethics Code Sec. 2-11.1 to inform staff of The Trust more restrictive language due to our heightened Conflict of Interest policy that is intended to "avoid the appearance of impropriety."

## **Americans with Disabilities Act** (pages 15-16)

The Americans with Disabilities Act (ADA) protects qualified individuals with disabilities from employment discrimination. Employees with disabilities may request an accommodation to overcome obstacles that restrict their ability to do their jobs. A reasonable accommodation is any change or adjustment to a job or work environment, or the way things are done, that enables a qualified employee with a disability to perform essential job functions or enjoy the benefits and privileges of employment equal to those enjoyed by employees without disabilities. Some examples of possible accommodations include making existing facilities accessible; job restructuring; modified work schedules; acquiring or modifying equipment; changing tests, training materials, or policies; and providing qualified readers or interpreters.

Any employee who requires an accommodation to perform the essential functions of the job should request the accommodation from his/her supervisor. To request an accommodation an employee may use "plain English" and does not need to specifically mention the ADA or use the phrase "reasonable accommodation." The employee with the disability should specify what accommodation he/she needs to perform the job. The supervisor, in consultation with other supervisory staff as needed, will then review and evaluate the request. If the accommodation is reasonable and will not impose an undue hardship on The Trust, the accommodation will be implemented. If not, the Supervisor, and other members of management as needed, will engage in an interactive process with the employee in which the needs and the possible solutions are discussed. A medical examination may be required to determine if an individual has a disability covered by the ADA and is entitled to an accommodation, and if so, to help identify an effective accommodation.

- Updated language to be in line with federal law.

## **Employee Eligibility Compliance** (page 16)

In compliance with the Immigration Reform and Control Act of 1986, as amended, each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility. Former employees who are rehired must also complete the form if they have not completed an I-9 with The Trust within the past three (3) years, or if their previous I-9 is no longer valid.

Furthermore, pursuant to section 448.095, Florida Statutes, public employer requirements as of January 1, 2021, state that every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees.

"E-Verify system" is an Internet-based system operated by the United States Department of Homeland Security that allows participating employers to electronically verify the employment eligibility of newly hired employees.

You must notify Human Resources immediately if you are no longer legally authorized to work in the United States.

- Added language to reflect compliance with Florida Statutes 448.095 regarding use of E-Verify system.

## **Personal Relationships** (pages 17-18)

To minimize the risk of conflicts of interest, promote fairness, and maintain a work environment free of harassment or favoritism, The Children's Trust maintains the following policy with respect to romance in the workplace:

No person in a management or supervisory position shall have a romantic or dating relationship with an employee whom he or she directly supervises or whose terms or conditions of employment he or she may influence (examples of terms or conditions of employment include promotion, performance review, termination, discipline, and compensation). Staff in executive, director and associate director positions have influence on employee decisions across all departments, and as such, may not have a romantic or dating relationship with any employee at The Trust.

To the extent possible, a supervisor or manager who has had a previous romantic or dating relationship with a subordinate or employee whose terms and conditions of employment he or she may influence will not be involved in decisions relating to that individual's promotions, performance reviews, raises, termination, or other terms and conditions of employment.

In the case where there is no supervisory relationship, employees engaged in a romantic, or dating relationship are required to immediately notify the Human Resources Manager in writing. Failure to do so may be subject to disciplinary action including termination of employment. Individuals involved in a relationship covered by this policy may be asked to sign a document acknowledging that their relationship is entirely consensual and free from coercion and harassment.

All employees are expected to always conduct themselves in a professional manner. To the extent they occur, workplace dating, or romantic relationships must not interfere with any employee's professionalism, including treating others with respect and refraining from behavior that may make others feel uncomfortable (for example, overt physical displays of affection and using sexual language). Failure to demonstrate professional behavior may lead to disciplinary action including termination of employment.

- *Previous version of the handbook had this topic covered in two separate sections. These have been combined and language was added to clarify that Executives/Directors are held to a higher standard due to the nature of their positions' influence across the entire organization.*

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## Section: Workplace Safety

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### Section Introduction (page 20)

Safety can only be achieved through teamwork. Each employee, supervisor and manager must practice safety awareness by thinking defensively, anticipating unsafe work situations, and reporting unsafe conditions immediately.

Please observe the following precautions:

1. Notify your supervisor of any emergency. If you are injured or become sick at work, no matter how slightly, you must notify your supervisor immediately.
2. The unauthorized use of alcoholic beverages or illegal substances during working hours will not be tolerated. The possession of alcoholic beverages or illegal drug/substances on Trust property or work locations is forbidden.
3. Use, adjust and repair equipment only if you are trained and qualified.
4. Get help when lifting or pushing heavy objects.
5. Understand your job fully and follow instructions. If you are not sure of the safe procedure, do not guess! Ask your supervisor.
6. Know the locations and use of first aid and fire extinguishing equipment.
7. Wear personal protective equipment in accordance with the job you are performing.

- *This section was relocated to the beginning of the section, in previous version it was located on page 22.*

## **Duty to Report – Abuse & Molestation (page 22)**

Protecting the physical and emotional well-being of children/youth in Trust-sponsored activities is of paramount importance. Pursuant to the laws of the State of Florida, professionals, employees, volunteers and other representatives shall immediately report to the proper legal authorities (law enforcement and Department of Children and Families) any sign of suspected child abuse or neglect. This policy supplements, and in no way attempts to replace, reporting requirements applicable to any professional, employee, volunteer or other individual who also holds a license or certificate that mandates reporting of abuse or molestation. (See Policy and Procedures Manual: Abuse & Molestation Policy)

- *Section added to ensure staff is aware of their responsibility to report Abuse & Molestation.*

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## *Section: Workplace Expectations*

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## **Attendance and Punctuality (page 32)**

Employees are expected to be punctual. This means employees must be at their designated work location ready to work no later than the scheduled starting time. If unforeseen circumstances prevent you from reporting to work on time, you must notify your supervisor immediately. If you are unable to report to work for any reason, your supervisor must be notified no later than your normal starting time. If you are physically unable to give timely notice of your absence or tardiness, a family member or friend is

permitted to provide such notice. The above expectations are in place for both in office and remote office days.

- Language updated to allow for extenuating circumstances when reporting to supervisor.

## **Business Hours & Work Schedule** (pages 25-26)

You are expected to be ready to work at your scheduled starting time. To maximize accessibility to the community we serve, the core operating hours of The Children's Trust are 8:00 a.m. to 5:30 p.m. Monday-Friday. Full-time employees must complete 40 hours of work each week, generally working eight hours each business day. This does not include time off for a bona fide meal break (30 minutes or one hour). Time off for a meal period is unpaid.

Alternate schedules such as 8:30 a.m. – 5:00 p.m. with a thirty-minute meal break are acceptable, subject to approval by and at the discretion of your supervisor. Nothing in this policy is intended to prevent this type of flexible work schedule when approved by a supervisor. Your immediate supervisor will discuss with you a specific work schedule. However, all services must be available to the public during our core operating hours. Therefore, most employees are expected to be working during our primary core hours between 8:00 a.m. to 5:30 p.m.

To enhance The Trust's organizational culture, support individual and team productivity, and optimize the staff's quality of life, the executive team adopted an Optimized Work Arrangement Policy and Remote Work Policy on August 6, 2021. It provides management with the ability to establish an alternative work schedule.

The Trust may unilaterally end an agreement to work remotely at any time. See Optimized Work Arrangement Policy and Remote Work Policy in the Policies & Procedures Manual.

Actual working hours vary among the different jobs in The Trust; however, the expectation is all employees will work 40 hours a week around the core business hours of The Trust (8:00 a.m. to 5:30p.m.). Frequent tardiness for work may result in disciplinary action.

During any week in which employees are released early by management (such as may occur periodically during certain holiday weeks) and the opportunity to complete all regularly compensated hours is not provided by The Trust, employees will be paid for their customary hours.

All employees are responsible for reporting all time off requests timely and accurately using the approved payroll management system. Adherence to this policy will ensure the accuracy of payroll records.

# The Children's Trust Summary of Employee Handbook Revisions

- *In previous version of handbook this topic was covered in two separate areas. They have been combined to one section, and language was added to address and include the hybrid work schedule.*

## **Employee Work Area (page 28)**

Each employee is expected to keep his/her immediate work area and common areas (restrooms, kitchens, hallways, etc.) clean. It is the employee's responsibility to maintain his/her work area in a neat, organized and business-like manner. Employees may personalize their work area with items of importance such as pictures, diplomas, professional certificates, small plants, etc. With the use of headphones, employees may use a radio or device to play music at their workstation if doing so is not a distraction from work, such as promptly answering the telephone.

Employees should not leave valuables, purses, wallets, money or other expensive or important items outside a secured area. The Trust is not responsible for loss or damage of personal effects, and all employees should carefully safeguard these items. Any employee who does suffer a loss of any kind should immediately report the incident to his/her supervisor.

Working remotely is a privilege and benefit provided by The Trust that can be modified at any time. Employees who avail themselves of The Trust's Optimized Work Arrangement Policy and Remote Work Policy must ensure that their remote work environments are safe, free of hazards, and conducive to work, which includes secure internet connections/Wi-Fi. Employees should be cognizant of their surroundings to ensure they are in an appropriate business setting, especially during hybrid meetings. The environment must not pose any health or safety issues for the employees. The Trust will not be responsible for any injuries that occur during remote work.

- *Updated section to add language addressing hybrid work schedule that includes references to employee's responsibilities to ensure remote locations are a safe work environment and the employee is using secure connections/Wi-Fi.*

## **Leaving Work Premises (page 29)**

No employee may leave the office or be unavailable remotely for an unreasonable amount of time during business hours, without the permission or knowledge of his/her supervisor, unless it is for a scheduled meal break or the end of the scheduled workday. If a nonexempt employee needs to leave work before the end of the workday, or will be unavailable during work hours, the employee must request and obtain his/her supervisor's approval for leaving. The approved time off must be made up during the current workweek, or the time off will be deducted from vacation. If the employee does not have sufficient time, the time off will be reported as unpaid.

- *Language updated to clarify leaving the work premises and include language to address remote work availability.*

## **Outside Employment** (page 30)

The Trust considers this as an employees primary place of employment and discourages outside employment. Prior to obtaining outside employment, you must disclose the name of the business and your position in writing to your supervisor at The Trust. Activities and conduct away from your job at The Trust must not compete with, conflict with, or compromise The Trust's interests or adversely affect your job performance and the ability to fulfill all job responsibilities.

- *Updated language to clarify that employees must get approval for outside employment prior to accepting the additional employment.*

## **Attendance** (page 32)

In addition to the general rules stated above, employees may be counseled for failing to observe the following specific requirements relating to attendance:

- (1) Reporting to work on time, if the employee is physically unable to give timely notice of the absence or tardiness, a family member or friend is permitted to provide such notice. However, as soon as the employee is physically able, he/she should contact his/her immediate supervisor personally to discuss the absence or tardiness directly with his/her supervisor.
- (2) Notifying the supervisor in advance of anticipated tardiness or absence. If the employee is physically unable to give timely notice of the absence or tardiness, a family member or friend is permitted to provide such notice. However, as soon as the employee is physically able, he/she should contact his/her immediate supervisor personally to discuss his/her absence or tardiness directly with his/her supervisor.
- (3) Observing the time limits for meal periods and obtaining approval to leave work early (both in office and remote settings)

- *Language was added to address the use of conseling and rules of conduct in regards to employee attendance.*

## **References and Employment Information** (page 33)

The Trust often receives requests for information regarding current and former employees including verification of employment for credit and/or employment purposes. Any phone calls or written reference requests must be referred to Human Resources for response. Only Human Resources is authorized to disclose information, verbal or written, regarding current and former employees.

In addition, The Trust is a public entity subject to Florida's Public Records Laws, chapter 119, Florida Statutes, which provides the public with a right of access to public records, including personnel files. As provided in section 119.071(4)(d), Florida Statutes, certain

# The Children's Trust Summary of Employee Handbook Revisions

information related to identified occupational groups that is maintained by The Trust may be exempt from public disclosure. It is the responsibility of the individual applicant/employee to notify The Trust if such an exemption applies.

- Language was added to address the fact that The Trust complies with Florida Public Records Law, and that it is the employee's responsibility to notify their employer of any application of the exemption to comply with the law.

## **Social Media** (page 34)

Employees shall not post confidential, sensitive or proprietary information pertaining to The Children's Trust, its board members, providers, services, or employees on any social media platforms.

Employees may not post obscenities, slurs, personal attacks or other messages on personal social media platforms that can damage the reputation and/or operational interests of The Trust, including its board members, providers, and employees.

Employees shall not present themselves as representatives of The Trust on any social media platform, website, blog, networking site or other public posting platforms or use their Trust email address to establish a social media account, unless expressly authorized by the President/CEO. When posting on personal social media platforms, employees must use the following disclaimer when discussing job-related matters, "The opinions expressed on this site are my own and do not necessarily represent the views of The Children's Trust." Please note that posting about The Trust business on personal social media platforms may, in some circumstances, render that post and/or platform to be a public record subject to request by members of the public and public records retention laws.

- Language was updated to bring social media policy in line with current trends.

## **Technology Resources (formerly known as Information Technology Resources)** (pages 34-35)

The Children's Trust's technology resources are critical to The Trust's mission of partnering with the community to plan, advocate for and fund strategic investments that improve the lives of all children and families in Miami-Dade County. To ensure a robust, continuously available, fair, and effective technology environment that serves The Trust's digital needs, institutional standards for acceptable use must be applied. Each individual user must comply with these standards for acceptable use of these shared resources. Although limited personal use of Trust-supplied technology resources is allowed, these resources should be primarily used for Trust related business, research, and administrative purposes. Employees have no expectation of privacy while using the Trust-owned or leased equipment, even when using this equipment to access personal email accounts or any social media site or platform. By using Trust technology facilities, resources, and data, users agree to abide by all Trust related policies and procedures,

as well as applicable federal, state, and local laws. Violations may result in disciplinary action or referral to appropriate external authorities.

The use of Trust technology resources—like the use of any other Trust-provided resource and/or Trust-related activity—is subject to of legal and ethical behavior within the community where The Trust operates. Although some limitations are built into computer operating systems and networks, those limitations shall not be viewed as the sole restrictions on what is permissible use of Trust resources. Users must abide by all applicable restrictions, whether or not those restrictions are built into the operating system or network, and whether or not they can be circumvented in any way.

- Language was updated to reflect new name of technology division as well as bring in line with current practice.

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## Section: Time Off

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### **Annual Leave (“Vacation”)** (page 43)

Use of vacation leave is normally a planned future event that must be discussed with the employee’s supervisor prior to taking time off. Requests for time off must be reported through the current payroll system. Supervisors will promptly approve or deny requests. Prior to approving your request, your supervisor will review your paid leave accruals to ensure there is sufficient accrued time to satisfy your request. Under normal circumstances an employee may not request more than 30 days of accrued vacation leave. Once sick leave is exhausted, vacation leave will be used for approved medical leave or other needs but must first be reviewed by HR and management for approval. (See Other Leave)

Because The Trust believes that time away from work is essential for the well-being of employees, employees are required to take five days off annually. In lieu of, or in fulfillment of this ideal, The Trust may choose to officially close the entire organization for a workweek.

- Updated section to clarify the ability to utilize accrued paid leave for approved medical leave or other extenuating circumstance if approved by an executive. In addition, language was removed that previously required additional five consecutive days of leave annually for Finance and IT (TDS) staff for the purpose of internal controls. This was a legacy policy from when The Trust was formed and had a smaller staff responsible for multiple roles that would have them create and approve transactions. Over time, with growth and increased use of technology, the organization now has natural controls, separation of duties, and technological internal controls that have the ability to trace transactions and those responsible for their creation and approval.

## **Payout of Sick Leave** (page 44)

Full-time employees who retire or resign are eligible to receive payment for accrued sick leave in accordance with the following schedule:

<b>Service Required</b>	<b>Payout</b>
Less than 5 years	No pay out
5 years but less than 10 years	20% pay out of accrued sick leave balance
10 years but less than 13 years	40% pay out of accrued sick leave balance
13 years but less than 16 years	60% pay out of accrued sick leave balance
16 years but less than 19 years	80% pay out of accrued sick leave balance
20 years or more	100 % pay out to a maximum payout of 500 hours of accumulated sick leave.

- *Previous version of the handbook utilized a payout schedule that spanned 30 years. It started with a 25% payout at 10 years and had incremental increases each year. An employee would be eligible for the maximum "100% payout to a maximum payout of 500 hours of accumulated sick leave" after 30 years of service. In light of the fact that The Trust is celebrating its 20th year, the payout schedule has been updated. Payout will now start at the completion of five years with 20% pay out and have incremental increases in specified incremental years. An employee will now be eligible for the maximum payout that remains at the same percentage at 20 years. This will be effective for all current and future employees.*

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## *Section: Employee Benefits*

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### **Education Assistance/Tuition Policy** (pages 54-55)

#### **Sub Section: Condition of Repayment** (page 55)

Employees will be required to reimburse The Trust if any of the following occur:

1. No college credit or course credit/completion was earned for the course; or
2. The employee leaves The Trust, for any reason except a reduction in the workforce, prior to the end of the school term for which the employee is enrolled and for which The Trust has pre-paid tuition on behalf of the employee; or
3. The employee voluntarily terminates employment prior to one year from the date of the most recent completed course for which college credit was earned.

If any of the above criteria for reimbursement are met, the employee will reimburse The Trust from an automatic deduction from their last paycheck.

- *This section was added to identify the conditions that would require an employee to pay back the educational financial assistance that was provided by The Trust.*

## **Deferred Compensation; Life Insurance; Short-Term Disability; Long-Term Disability (page 56)**

- **Deferred Compensation**

This IRS-sanctioned, tax-qualified investment plan is similar to 401 (k) or 403 (b) plans. The deferred compensation 457(b) plan is fully funded by employee contributions through payroll deductions. It is deferred compensation, meaning that the dollar amount is funded with pre-tax dollars, and taxes are deferred until the amounts are withdrawn and/or distributed. Funds in this account may be rolled over to another qualified plan, or vice-versa, funds from another qualified plan maybe added. This option is available through The Trust's identified provider and the State of Florida Deferred Compensation Plan. Details of this benefit can be found at the current benefit management website.

- **Life Insurance**

At no additional cost, employees receive life insurance as part of The Trust's benefit package. Details of this benefit can be found at the current benefit management website.

- **Short-Term Disability**

At no additional cost, employees are provided with short-term disability insurance as a part of The Trust benefit package. Details of this benefit can be found at the current benefit management website.

- **Long-Term Disability**

At no additional cost, employees are provided with long-term disability insurance as a part of The Trust benefit package. Details of this benefit can be found at the current benefit management website.

- *All sections were updated to remove reference to specific details from current benefits plans to a more general language to indicate benefits would be described by providers of current and active plans.*

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## *Section: Appendix*

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## **Acceptable Use Policy of Information Technology Resources (pages 58-67)**

- *The entire appendix section was removed from the handbook, since it exists within the Policy and Procedures Guide of The Trust. Having one source document for the policy ensures accuracy and consistency.*