

UNIFIED PERSONNEL SYSTEM

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Holly J. Schoenherr
Director

To: The Honorable Chair and Members of the Unified Personnel Board

From: Holly J. Schoenherr, Director of Human Resources

A handwritten signature in blue ink, appearing to read "Holly J. Schoenherr", written over the "From:" line.

Date: October 6, 2016

Subject: Proposed Housekeeping Updates to *AFIN: Friend in Need* document and creation of *UPB Policy #12*

Recommendation:

It is recommended that the members of the Unified Personnel Board approve some minor housekeeping revisions to the *AFIN: A Friend in Need Program* document. There are no proposed changes for the program itself.

Background:

The Unified Personnel Board adopted 11 Unified Personnel Board Policies at the December 3, 2015 meeting, to be effective January 1, 2016. These policies contained information that was previously found in the former Personnel Rules.

It is recommended that an additional UPB Policy be created for the program guidelines for *A Friend in Need Program*. Changes include:

1. Rename the document from *AFIN* to *Unified Personnel Board Policy #12 – AFIN: A Friend in Need Program*
2. Remove a reference to Personnel Rule XV
3. Add hyperlinks to the donation and request forms mentioned in the text
4. Minor formatting edits such as changing underlined text to italicized text

UNIFIED PERSONNEL BOARD POLICY #12

AFIN: A Friend in Need Program

Summary of Program:

This program is intended to be a fully voluntary program through which an employee may choose to assist fellow employees in times of need by permitting person-to-person leave donation as defined herein. The program will be administered by the Human Resources Benefits Manager or designee ("Administrator") under the general direction of the Director of Human Resources. The Administrator shall develop and implement the necessary guidelines to administer this program.

No employee or officer may use or attempt to use his or her official position or authority to influence, coerce or pressure an employee to make a donation to the program. Doing so will be considered a violation of UPS Rules and may be found to be a violation of state law. Discipline for such violation may include termination.

Any employee who feels he or she has been subjected to such coercion, pressure, or influence is encouraged to report this to the Administrator of the Program, the Director of Human Resources or their Appointing Authority.

Requesting Leave:

Employees are eligible to receive leave in the following instances:

- If the employee has exhausted *all* available leave balances (includes compensatory time, floating holidays, personal day and leave with pay but does not include current pay period leave accrual at time of donation payment) *and* is not eligible to apply for, awaiting determination or receiving any county pay or supplemental pay including but not limited to: workers' compensation indemnity, short term disability or long term disability, and will attest in writing that they are not receiving any state supplemental payments or federal social security disability.
- AFIN leave shall not be granted for waiting periods, as a supplement to, or replacement for, other means of compensation as defined above.
- If the employee can document a temporary inability to work due to **their own** serious health condition; or
- If the employee is needed to care for a spouse, child (of any age), parent, or legal dependent (as that term is defined for IRS purposes), who is suffering from a documented serious health condition; or
- If the employee is needed to care for grandparent or a grandchild who is suffering from a documented serious health condition AND if the employee is the sole responsible caregiver for that person.

An [AFIN Request for Leave Form](#) must be completed. The employee acknowledges that they have not tried to influence, coerce or pressure another employee to donate time, nor have they promised anything of value.

Donating Leave:

Any UPS employee with at least one year of permanent status service may make a donation to a designated person (subject to the limitations listed herein) as long as the donor has at least 80 hours of accumulated leave in the bank from which the donation is made (whether annual leave or extended illness leave) remaining *after* the donation is made. Extended illness (EI) leave will be donated at ½ of face value. (Two EI hours = 1 donated leave hour.) In the event that after the donation is requested, but before it is processed the leave bank falls below 80 hours the transaction *shall* be reversed. No compensatory leave is allowed to be donated or considered in reaching the threshold.

- Donations are voluntary.
- Donors are prohibited from making a donation to anyone in their chain of command, including their supervisors, their rating authority, any lead worker in their work group or anyone who has supervised, rated or been a lead worker in their work group within the 12 months immediately preceding the request. Supervisor means a supervisor who regularly supervises their work or who has regularly done so within the 12 months immediately preceding the request.
- Donors are prohibited from making a donation to anyone whom they supervise or rate, or have supervised or rated within the 12 months immediately preceding the request. Lead workers are prohibited from making a donation to anyone in their work group or anyone who was in a work group for which they were a lead worker within the 12 months immediately preceding the request.
- Donations may be made at any time, but are subject to the rules for requesting leave.
- Rules for the annual exchange program will apply, unless they conflict with the AFIN program.
- Donations are deducted from the donor's leave balance.
- Donations must be made in whole hour increments.
- Donations are irrevocable (except for administrative error).

An [AFIN Donation of Leave Form](#) must be completed. The employee acknowledges that no one has tried to influence, coerce or pressure them to donate time, nor have they been promised anything of value.

Approvals and Other Program Requirements:

- The Administrator shall be the final authority in determining eligibility, leave available based upon payroll records, and amount, if any to be donated to the employee. *No grievances shall be available to contest the decision.*
- Upon written request utilizing the designated forms, the Administrator shall determine eligibility and available leave and determine the amount to be donated to the employee
- Requests should be made in advance of need, whenever possible. The initial request must be a minimum of 8 hours
- Requests will be processed and grants of donations considered and made based on the time of receipt. Time of receipt means time of receipt of all forms required completed in their entirety.

- The Administrator may request additional information if necessary to determine eligibility or determine the quantity of leave to grant.
- In no event may an employee receive leave in excess of their normal scheduled workweek.
- An employee may receive leave up to 4 instances per fiscal year, but in no event may an employee receive leave in excess of 160 hours in any one fiscal year. Multiple periods of absence for the same cause are considered as a single instance for this purpose.
- FRS contributions will be made and credit given, in accordance with state laws and regulations as they may be changed from time to time, on behalf of the receiving employee.
- Donated leave will not be counted as hours worked for any reason, including determination of pay (overtime) or eligibility for other leaves including but not limited to FMLA leave. No leave accruals will be earned for donated leave used.
- All leave donated in excess of the employee's needs shall be returned to the donor(s).
- Donations shall be deducted from donor's leave balances upon approval of payment of leave to the receiving employee.
- Donations received shall be wages paid by the receiving employee's department for all purposes, including but not limited to withholding of deductions for benefits and tax purposes.
- The Administrator will provide authorization reflecting the donation and the receipt to the appropriate payroll department.