

Personnel Policies and Procedures

1.2 Application

Add employment contract in the event terms differ from the Township personnel policies.

Refers employees in the union to refer to their respective collective bargaining agreement or employees with a contract to their employment contract as the governing document. If any area differs, the employee's governing document is what they must follow.

2.8 Smoking & Vaping Policy

Added a smoking and vaping policy to enforce Public Act 188 of 2009, Michigan's Smoke-Free Air Law to all Township vehicles, public buildings and facilities.

3.2 & 3.2.a At-Will Employment for Non-union Employees

Protects the Township by clarifying the employment status of non-union employees. It also removes the probationary period for non-union employees since they can be terminated at will at any time.

4.4 Classification Review

Added language to clarify that a department head may also request a review without employee knowledge.

4.5 Request to Create New Position Classification

Gave process its own title header and cleaned up language and order to flow better. Only real change is that the in-house officials wanted a unanimous vote under 4.5. no. 3 to move the new position forward to the board.

7.0 Grievance Procedure for Benefits and Wages – Non-Union

It gives non-union employees a process to follow to deal with issues to do with benefits and wages and the definition of grievance for this group.

7.2 Procedure

Removed step 4 regarding the Grievance Committee as non-union employees do not have a grievance committee. The various union grievance processes remain intact in the various union agreements.

8.1 thru 8.5 Employee Conduct

Revised to just address employee conduct in general as the various union agreements govern the process part of the remaining sections. A non-union employee is at-will and HR will investigate situations as needed for non-union employees.

10.3 Method of Payment

Added to update to our current business practices, which is direct deposit only for pay.

13.1 (Vacation) Eligibility for Employees Hired Before 9/15/98

Added refer union employees to their union agreement for vacation eligibility.

Redundant sentence regarding termination and not being eligible for vacation.

Recommend making 10- and 20-years vacation eligibility a full 4 and 5 weeks respectively by adding an additional day at 10 years and an additional day at 20 years.

The increase in vacation at 10 and 20 years by 1 day only applies to non-union until and if unions negotiate into contracts in upcoming negotiations.

13.1.a Schedules for Employees Hired Before 9-15-98

Removed as this addresses the first 6 months and 1 year regarding how vacation is handled and isn't needed since it is for employees who have been here since 1998 or earlier. See section 13.2 Eligibility for employees hired after 9-15-98.

13.2 Eligibility for Employees Hired After 9/15/98

Added refer union employees to their union agreement for vacation eligibility.

Recommend making 10- and 20-years vacation eligibility a full 4 and 5 weeks respectively by adding an additional day at 10 years and an additional day at 20 years.

The increase in vacation at 10 and 20 years by 1 day only applies to non-union until and if unions negotiate into contracts in upcoming negotiations.

Added language that is missing regarding the additional weeks' vacation payout and terminating prior to 6 months.

13.2 a. Schedules for Employees Hired After 9/15/98

Allow employees hired in the last quarter, be able to roll those 5 days' vacation for use in the first quarter. In the past, the issue has arisen where newer employees have not had enough time to use the vacation. This will help alleviate the issue.

13.3 Unused Vacation Non-Union

Added non-union.

Increases the amount of vacation that can be rolled over with manager approval from 2 to 3 days.

14.0 Earned Sick Time Policy for Full and Part-Time Employees

Change title to reflect newer earned sick time policy. This is currently in a separate document which after approval we will insert here. This will put all pertinent information regarding the policy in one document. Refer to the separate Earned Sick Time Policy to see any changes to the policy.

14.1 Use – Removed

Use has changed and is outlined in the newer Earned Sick Time Policy.

14.1 Accumulation and Payout

Add title for clarity. Added no payout of sick time if employee is terminated or separates prior to one year anniversary. Added missing language regarding using 2 sick days for personal time and language regarding the ability to earn two more personal days by not using sick time. This is in union contract and applies to non-union employees too, but the policy manual was not updated to reflect this language.

14.2 Misuse

Change to allow other reasons for sick time use as defined in the Earned Sick Time Policy.

14.3 Proof of Illness - Non-Union

5 days is a more reasonable number of days to recover from an illness i.e. covid, flu, etc. vs. current number of 3 days. Many large corporations do not place employees on sick leave or FMLA until the employee has been off sick for 5 consecutive days. This makes our current policy more reasonable for illnesses as to not force the employees on FMLA after 3 days of illness or make them leave home when they may still be too ill to go and get a doctor's note. Union can negotiate during contract negotiations.

14.4 Accrual of Earned Sick Time for Full-Time Non-Union Employees

Requesting Non-union employees hired after October 1, 2008, accrue 12 sick days (7.5 hours per month) to be commensurate with the police and fire contracts which already earn 1 full sick day per month. Also requesting all sick time be front loaded upon hire and each year in the new year. Unions can negotiate front loading in upcoming negotiations. MAPE can negotiate increase in sick hours during negotiations.

14.5 a – Short Term Disability

Clarifying the process. Regarding being able to reserve the 1 week of vacation time, this is consistent with all the Township union agreements.

17.2, 17.3, and 17.5 Reimbursement for Travel, Parking, and Expenses Not Covered

Removed. Refer to the Administrative Policies and Procedures to see the policy.

18.0 Longevity Pay Program thru 18.3

This is no longer offered to employees. This is still addressed in the union agreements for eligible employees.

20.2 Health Insurance

Added title for Retiree Health Insurance for clarity. Rearranged some sentences so they fall under the correct area. Added dates for clarity.

23.7 Public Criticism

Add retirees who collect a pension from the Township.

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Personnel Policies and Procedures
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White Lake Charter Township
Personnel Policies and Procedures

1.0 - Introduction

1.1 - Purpose

The White Lake Charter Township Personnel Policies and Procedures manual is prepared for the purpose of providing a set of rules that will standardize the relationship between the Township, as employer, and the employees of the Township. It is also intended that these policies aid the township administration in providing a work environment for all employees which is fair, unbiased, career fulfilling, and free of political interference.

1.2 - Application

These policies, as directed by the Township Administrative Policies and Procedures Manual, apply to all Township employees. Those employees, however, who are governed by Township Board approved rules and regulations, union contracts, employment contracts, civil service rules and regulations, and/or other specific orders which may be in conflict with these policies are accordingly exempted from their application. That exemption applies only to those sections of policies which are determined to be in conflict, and do not exempt an employee from compliance to any policy or section thereof which is not in conflict.

In the event these rules differ with the terms expressed in your collective bargaining agreement or employment contract, you should refer to and follow the specific terms of your governing agreement.

These policies shall not be construed as an employment contract between the Township and any employee.

1.3 - Authority

Authority and application of the Personnel Policies shall be in accordance with the White Lake Charter Township Administrative Policies and Procedures.

1.4 - Interpretation

The Supervisor as the township personnel officer shall provide interpretation of these policies as prescribed by the Administrative Policies and Procedures.

1.5 - Modification

Personnel policies may be modified, amended or abolished only at the direction and/or approval of the Township Board.

1.6 - Rights and Responsibilities

The township administration, by the distribution of these provisions, does not surrender any prerogative or responsibility in maintaining and exercising all legal management rights traditionally or historically held by the Township government. Employees of the township have the right and responsibility to appeal township policy as directed by the Administrative Policies and Procedures.

1.7 - Non-discrimination

The Township of White Lake is an Equal Opportunity Employer. The Township endorses and supports a policy of non-discrimination against any person on the basis of race, color, religion, sex, national origin or any disability covered by the Americans ~~With~~with Disabilities Act. Such practice and policy of non-discrimination shall be extended to all persons, including, but not limited to, applicants for employment, employees for promotion, transfer and/or disciplinary action involving employees of the general employee class and those governed by Civil Service provisions. Any applicant for employment, transfer or promotion protected by the Americans ~~With~~with Disabilities Act must notify the Township within the prescribed notification period if a reasonable accommodation is requested.

2.0 - Conditions of Employment

2.1 - General

Employees of the Charter Township of White Lake are "Public Servants". The very purpose of employment is to serve the local governmental needs of the citizens of the Township. Employees are expected to serve the citizens of the Township with courtesy, helpfulness, tolerance and patience.

2.2 - Hours of Work

Normal hours of work shall be established by the Township Supervisor and department head.

The normal work week for a full-time employee shall consist of established workdays with an unpaid lunch period each day.

Employees shall be paid at an overtime rate of time and one half for all hours worked over their regularly scheduled work week or workday.

Each employee shall be subject to the work schedule established by the Township supervisor or department head. However, a department head may temporarily approve deviations from an employee's normal work schedule when dictated by Township needs or at the request of the employee when supported by sufficient need. All employee requests for variations in the normal work schedule shall be approved in advance, and the Township shall accrue no overtime liability as a result of approving the employee's request.

2.3 - Attendance

Employees are expected to be regular in their attendance and to observe the working hours established by the Township. All employees absent without authorized leave, or who report late on any given shift shall be penalized by way of pay deduction in multiples of 1/6 of an hour for each 10 minutes or fraction thereof, of absence. Habitual tardiness shall be cause for discharge. Arrangements for time off must be made with an employee's immediate supervisor in advance and in accordance with the provisions of the leave regulations under which the time off is to be taken.

If, for some legitimate reason, an employee is unable to report for work at the established time for his shift to begin, he/she shall notify the supervisor on duty of the reason of such tardiness or absence. Notification shall be made as soon as it is known that the employee will be late or absent but at least within one hour of the scheduled starting time.

A record of each employee's vacation leave, sick leave and unpaid personal time credits shall be kept on the employee's personnel record, maintained in the clerk's office.

2.4 - Absence Without Leave

Any employee who is absent from duty a day or part of a day without authorization shall be deemed absent without leave and may be subject to disciplinary action. If conditions warrant, such absence may be reconciled by a subsequent grant of leave. Any employee absent without leave, for more than three (3) days, without notification to his department head or the Township supervisor, will be considered to be resigned from Township employment.

2.5 - Suspension of Leaves

The leaves provided for herein may be ~~temporarily-suspended~~suspended during any period of emergency declared by the Township Supervisor.

2.6 - Political Activity

2.6(a) - Permitted Activities

Except as otherwise provided in this rule, any employee in the classified service may engage in the following activities. These are to serve as illustrations and do not constitute a complete list of permitted activities.

- 1.) Become a member of a political party committee formed or authorized under the election laws of the State of Michigan;
- 2.) Be a delegate to a state convention or a district or a county convention held by a political party in the State of Michigan;
- 3.) Become a candidate for nomination and election to any state elected office or any district, county, city, village, township, school district or other local elective office. If the employee is elected to an office of the Township, he or she must resign. (Amended 3/20/2012)
- 4.) Engage in other political activities on behalf of a candidate or issue in connection with partisan or non-partisan elections.

2.6(b) - Prohibited Activities

No employee in the classified service shall:

- 1.) Use his official authority and influence over other employees for the purpose of interfering with or affecting the result of an election or a nomination for office;
- 2.) Directly or indirectly coerce, attempt to coerce, command or advise another to pay, lend, or contribute anything of value to a party, committee, organization, agency or person for political purposes;

- 3.) Engage in any election activities, intended or tending to influence others for the purpose of interfering with or affecting the result of any election or a nomination for office during those hours when the employee is being compensated for the performance of duties as a public employee, or while wearing or displaying a uniform, badge or other indication of office which identifies the employee of the Township of White Lake. Examples of prohibited activity during working hours include wearing political buttons, soliciting political contributions, endorsements, or support, displaying political bumper stickers or posters on Township vehicles or property, or distributing political material. (Amended 3/20/2012)

2.7 - Drug Free Workplace Policy

2.7 - (a) Purpose and Intent

The purpose of this policy is to provide a workplace that is free from substance abuse. The employees of the Township cannot work safely and productively if they report for work under the influence of drugs and alcohol, or their safety and welfare are jeopardized by an employee impaired by a controlled substance.

2.7 - (b) Application

The provisions of this policy apply to all departments and divisions of the Township of White Lake. "Employees" includes full time, part time, seasonal and temporary personnel. "Employees" shall specifically include "direct charge" employees (i.e., those whose services are directly and explicitly paid for by federal grant funds) and "indirect charge" employees (i.e. those members of the grantee's work force who may perform support or overhead functions related to federal grant funds.)

All employees are hereby notified that ~~the~~ unlawful manufacture, distribution, dispensation, possession, or use of controlled substances is prohibited in the workplace, and disciplinary action up to and including discharge action may be taken against employees for violations of these provisions.

2.7 - (c) Guidelines

The following guidelines list violations which shall be grounds for immediate action

Possess, use, distribute, sell, or offer for sale narcotics, or any controlled illegal substance, including marijuana, while on duty.

Report for work or work while under the influence of alcohol, narcotics or any controlled or illegal substance, including marijuana, except a drug prescribed for the employee by a licensed

physician. An employee whose ability to work is impaired by a drug prescribed for the employee by a physician, and used by the employee as prescribed, will not be permitted to remain at work, and may use personal business or other leave hours, but will not be subject to discipline.

2.7 - (d) General Provisions

An employee must report to the Township any drug-related criminal conviction for violations occurring in the workplace within five (5) days. The Township must both report and notify the federal grant agency of such conviction for violation of a criminal statute occurring in the workplace within ten (10) days and is required to impose “sanctions” on the employee involved. “Sanctions” may mean either termination, satisfactory participation in a rehabilitation program, or progressive disciplinary step between the two.

The Township is committed to a drug-free workplace. It will not hire a job applicant with a “positive” pre-employment drug screen test.

The Personnel Department may be contacted for information on a Township sponsored Employee Assistance Program that provides voluntary counseling and rehabilitation services.

2.8 Smoking and Vaping Policy

The Township shall follow Public Act 188 of 2009, Michigan’s Smoke-Free Air Law and will apply this standard to all vehicles, as well as public buildings and facilities.

Employees shall not smoke or vape in any Township vehicles or facilities, or within 100 feet of an entrance to the Township facilities.

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Citizens and visitors who are smoking or vaping in a Township facility or within 100 feet of an entrance way, shall be asked to extinguish their smoking material. If the person refuses to comply or leave the building, the police department should be contacted for assistance.

3.0 - Seniority

3.1 - Seniority Date

Seniority date shall be based on the length of continuous service after the date of regular appointment to a position in the Township service.

Employees transferring from part-time employment to full-time employment shall not receive credits toward seniority for the period of part-time employment.

3.2 - ~~At-Will Employment for Non-Union Employees~~ Probationary Period

~~Unless specified otherwise in an employment contract, Michigan is an at-will employment state. This means that either the employee or the employer may terminate the employment relationship at any time, with or without cause or advance notice, and for any reason not prohibited by law. This policy manual is not intended to create a contract of employment for any definite term and does not guarantee continued employment for any specific duration. A probationary period of six months is established for new employees starting on the date of hire. The probationary period shall not include any time served as a part-time employee. The Township may extend a probationary period for up to six more months, but in no event shall any probationary period extend beyond one year.~~

~~Written notice shall be given to the employee, by the department head, at the end of the probationary period indicating the successful or unsuccessful completion of the probationary period.~~

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3.2 - (a) Dismissal

~~An at-will probationary~~ employee may be dismissed by the department head, with the concurrence of the ~~Township~~ Supervisor, at any time, ~~during the probationary period~~. Written notice of the dismissal, stating the reasons for the dismissal, shall be given ~~to the probationary~~ employee.

3.3 - Leaves of Absence and Suspension

Employees off duty for personal reasons, on leave of absence or employees suspended for cause shall have such periods deducted from seniority.

The following shall not be considered as breaks in service:

- (a) Military leave during the time of war as defined in the Veterans' Preference Act.
- (b) Absence from work due to injuries compensated for under Worker's Compensation Act.
- (c) Approved educational leave.
- (d) Approved medical leave - no longer than one year.

3.4 - Layoff

Time elapsed between periods of layoff and re-employment shall be deducted from seniority.

3.5 - Termination

Any termination of employment (either voluntary or involuntary) shall nullify ~~employee's~~employees' right to all accumulated seniority in the event of re-hire.

4.0 - Job Classifications

4.1 - Classifications

Following are the White Lake Township job classifications:

SALARIED EMPLOYEES

1. Elected Officials (Supervisor, Clerk, Treasurer)
2. Fire Chief
3. Police Chief
4. DPS Director
5. Building Official
6. Community Development Director
7. Finance Director

HOURLY EMPLOYEES

1. Accounting Clerk
2. Administrative Assistant
3. Assistant Finance Director
3. Property Appraiser II
4. Assessor
5. Building Inspector
6. Building Specialist
7. Clerical II
8. Deputy Clerk
9. Deputy Supervisor
10. Deputy Treasurer
11. Election Specialist
12. Senior Election Specialist
13. Executive Secretary
14. Executive Secretary to Chief of Police
15. Executive Secretary to Fire Chief
16. Fire Cadet
17. Fire Captain
18. Fire Lieutenant
19. Fire Engineer
20. Fire Driver
21. Human Resources Manager
22. Human Resources Generalist
23. Maintenance Worker
24. Ordinance Officer
25. Staff Planner
26. Senior Center Director
27. Senior Planner
28. Senior Treasury Specialist
29. Police Academy Recruit

- 30. Police Dispatcher
- 31. Police Lieutenant
- 32. Police Sergeant
- 33. Police Officer
- 33. Records Secretary
- 35. Program Developer – Senior Center
- 36. Utility Maintenance Foreman
- 37. Utility Maintenance Worker

PART-TIME EMPLOYEES - (less than 29 hours per week)

- 1. Part Time Fire Fighter
- 2. Part-Time Fire Recruit
- 3. Part-Time Police Recruit
- 4. Part Time Clerical
- 5. Fire Cadet
- 6. Police Cadet
- 7. Part-Time Seasonal Maintenance
- 8. Part-Time Elections

4.2 - Job Specifications

The Human Resources Manager shall maintain complete and up-to-date specifications for each job classification as established by the township Administrative Policies and Procedures. The specifications will include:

- (1) The title of the class
- (2) A general statement of duties
- (3) Essential functions
- (4) Typical examples of work
- (5) Desirable qualifications for employment
- (6) Training and experience requirements

New positions shall be established in accordance with the Administrative Policies and Procedures.

4.3 - Classification Changes

The Township Supervisor may periodically, after conference with the department heads, recommend establishing new classes, and/or abolishing, merging or dividing existing classes. Additionally, the Township Supervisor may recommend amending the class specifications to meet with changing conditions. Requirements for this activity are specified in the Township Administrative Policies and Procedures.

4.4 - Classification Review

An employee may, at any time, request in writing, to their department head, a review of their classification. –An investigation will be conducted by the department head regarding the

employees' current duties, qualifications and responsibilities. Upon completion of the investigation, the department head will make a recommendation as to amending the classification, if appropriate, to the Township Supervisor. A department head may also make a request to the Township Supervisor without the employees' knowledge. The Township Supervisor will either approve or provide rational for declining to amend the classification to the department head.

4.5 – Request to Create New Position Classification

In the event a ~~d~~Department head or the Township Supervisor believes that a bargaining unit position should be considered for a new classification or position not currently established, the following procedure shall be utilized. This shall also apply to non-union personnel.

Commented [PP1]: This is not new, just cleaning up the language as it was not well written. Only real change is adding that it must be voted on unanimously by the committee to move forward as it did not give instruction as to what happens if committee members disagree.

1. The department ~~head~~supervisor shall prepare a written memorandum of request to be submitted to ~~the~~ Human Resources ~~Manager~~ which shall include the current wage of the employee and the proposed new wage and placement of reclassification. In addition to the recommendation for the adjustment in salary, the department head will be required to submit, with the request to ~~the~~ Human Resources ~~Manager~~, a detailed report of the job changes and justifications for the request of a new wage and new reclassification request. Included with this information, the department head must provide external, and internal if applicable, wage comparable data in support of the new position. Human Resources will use this information to propose a new wage scale for the new position.
2. ~~Upon receipt of the request, the~~ Human Resources ~~Manager~~ shall then convene a meeting of the committee, which shall consist of the Township Supervisor, Clerk, and Treasurer ~~to serve as a panel~~ to assess the merits of the new position reclassification request. In order to consider the request, it shall be the obligation of the department manager seeking the adjustment to provide both internal and external wage comparable data in support of the position as well as a detailed explanation of the job requirements which justify the change in the wage classification.
3. ~~The~~ ~~In the event a majority of the~~ committee members must unanimously vote in favor of the new position reclassification for it to move forward. If approved, the new classification request and all associated materials will be placed on an upcoming board meeting agenda for review and potential approval by submitted to the Board of Trustees. In the event the new reclassification request is denied at either the committee level or the Board of Trustees level, the matter shall not be subject to grievance arbitration and shall not be appealable at any step. The Township Board shall not create any new positions without approval of any necessary budget amendments.

5.0 - Sexual Harassment

5.1 - Definition

Sexual Harassment includes any repeated or unwarranted verbal or physical sexual advances, sexually explicit, provocative or suggestive statements, innuendo, or comments, or sexually discriminatory remarks or sexually oriented conduct or physical contact, made by an employee which are reasonably offensive or objectionable to the recipient or which reasonably causes the recipient discomfort or humiliation or which reasonably interferes with the recipient's work performance or which creates an intimidating, hostile or offensive work environment.

5.2 - Policy

It is the policy of White Lake Township that all employees have a right to expect a working environment free from intimidation, humiliation, insult or subject to offensive physical or verbal abuse or actions, direct or insinuated, of a sexual nature, when:

- (a) Submission to such conduct or communication is made on express or implied condition of obtaining employment.
- (b) Submission to or rejection of such conduct is used as a basis of, or factor in, decisions affecting the employment of an employee.
- (c) Such conduct or communication has the purpose, or effect, of interfering with an employee's employment or creating an intimidating, hostile or offensive work environment.

Sexual harassment in any form is prohibited.

5.3 - Enforcement

The Provisions of this policy will be strictly enforced, and appropriate disciplinary action will be taken against any employee violating its terms. Violations of this policy will subject the offending employee to disciplinary action, up to and including discharge from employment.

5.4 - Reporting Procedure

An employee who believes he or she has been subjected to sexual harassment shall report same within twenty (20) days after the alleged occurrence. It shall be reported to either his or her immediate supervisor, or if that supervisor may be involved, to any supervisor, or directly to the department head.

A complaint of sexual harassment shall be promptly investigated by the department head or designate; provided, however, such designate shall not be the subject of or included within the immediate sexual harassment complaint. Every effort will be made to handle all such complaints expeditiously and with concern for the principles of due process and fairness. In order to protect both the person making the complaint and the person against whom such complaint is made, every reasonable effort will be made to handle all such complaints in a confidential and discreet manner.

All supervisory personnel shall be expressly responsible for immediately reporting any instances of claims of sexual harassment which they become aware of through their own observations or reported by others. Such personnel shall initiate immediate documentation of such incidents or claims of sexual harassment.

Retaliatory action or conduct of any kind taken by any member of the Township against an employee as the result of such employee having sought redress under this policy and procedure is strictly prohibited and shall be regarded as a separate and distinct violation of this rule.

6.0 - Transfer and Promotion

6.1 - Transfer

The transfer of an employee from one position to another, within a department, involving substantially similar duties and responsibilities and not involving a change in compensation may be made by the respective department heads at any time. The transfer of an employee from a position in one class to another position in the same or similar class at the same rate of compensation in another department may be made only with approval of the Township Supervisor.

Where different and higher duties and responsibilities are required, the rules governing promotions and selection shall apply. Where different and less responsible duties are required, the rules regulating demotions shall apply as far as practicable.

Employee selection shall be in conformance with the Township Administrative Policies and Procedures.

6.2 - Promotion

Vacancies in higher positions shall be filled insofar as practicable by promoting persons holding positions in lower classifications. Such promotions shall be based upon merit as determined by the department head and the Township Supervisor. They will determine what classes of employees are eligible for such promotion and the means of determining the fitness of eligible employees for the position. This may be done via interviews or tests, either written or oral, as determined by the supervisor and the department head. Seniority, experience, job performance, and previous training may also be considered.

Should the department head and the supervisor determine that there are no qualified employees eligible for the position, they may then seek an employee from outside the Township service as a new hire.

Employee selection shall be in conformance with the Township Administrative Policies and Procedures.

6.3 - Temporary Appointments

An interim or temporary appointment to a higher position in an "acting capacity" made necessary by reason of sickness, disability or other absence of a regular employee may be authorized by the appointing authority without examination in the absence of a promotional employment list. All such appointments shall terminate upon the return of the regular appointee to active duty or permanent appointment of another individual.

7.0 - Grievance Procedure For Benefits and Wages – Non-Union

7.1 - Employee Rights

An employee has the right to file a grievance if he or she feels aggrieved or disagrees with the interpretation or application of the Township Policies and Procedures. Grievance is defined as a disagreement between the employee and the Township regarding benefits and wages.

7.2 - Procedure

The grievance will be processed in the following manner:

STEP 1: The employee will first discuss the matter with the immediate supervisor. If the grievance is not settled at this informal discussion, it will be reduced to writing by the employee and moved to step two (2) of the grievance procedure within seven (7) working days of the discussion mandated in step one (1).

STEP 2: Any grievance not settled at step one (1) may, at the option of the employee, be appealed to the department head in writing. The department head will respond to the employee, in writing, within seven (7) working days after receiving the complaint. If the matter is not settled at this step, it may be appealed to step three (3) within seven (7) working days.

STEP 3: Any grievance not settled at step two (2) may, at the option of the employee, be appealed to the Township Supervisor in writing. The Township Supervisor will respond to the employee, in writing, within seven (7) working days after receiving the complaint. If the matter is not settled at step three (3), it may be appealed to step four (4) within seven (7) working days.

~~STEP 4: Any grievance not settled at step three (3) may, at the option of the employee, be appealed to the Township Grievance Committee in writing within seven (7) working days.~~

~~The Grievance Committee shall schedule a hearing within two (2) weeks after the appeal is filed. It shall conduct a full and impartial hearing. Both parties shall be permitted to be represented by counsel and to produce witnesses or any other testimony pertinent to the matter.~~

~~The employee shall be entitled to first present the grievance, the rationale for the grievance, witnesses if any, and the desired solution. The Township Supervisor shall then present the Township's position.~~

~~The Grievance Committee shall make its decision within seven (7) working days after the hearing is completed. The Committee shall attempt to reach a fair and equitable settlement which is satisfactory to both the employee and the Township.~~

~~Supervisor. The Committee shall have the authority to uphold, modify or to overturn the decision of the Township Supervisor.~~

~~A unanimous decision of the Grievance Committee will be final. If the decision of the Committee is not unanimous, the employee may move the issue to step 5.~~

Step 45:

Any grievance not settled at step ~~threefour~~ (34) may, at the option of the employee, be appealed to the Township Board of Trustees in writing within seven (7) working days.

The Township Board shall schedule a hearing within two (2) weeks after the appeal is filed. It shall conduct a full and impartial hearing. Both parties shall be permitted to be represented by counsel and to produce witnesses or any other testimony pertinent to the matter.

The employee shall be entitled to first present ~~the grievance~~grievance, the rationale for the grievance, witnesses if any, and the desired solution. The Township Supervisor shall then present the Township's position.

The Township Board shall make its decision within seven (7) working days after the hearing is completed. The Board shall attempt to reach a fair and equitable settlement which is satisfactory to both the employee and the Township Supervisor. The Board shall have the authority to uphold, modify or to overturn the decision of the Township Supervisor.

The decision of the Board of Trustees will be final.

All time limits in this process can be extended with mutual agreement between the two parties.

8.0 - Employee ConductDisciplinary Action

8.1 - Employee Conduct

White Lake Township insists upon the highest behavior from its employees in the furtherance of our goal of bringing professional, efficient and courteous service to the citizens of White Lake Township. Employees must always act to maintain the integrity and reputation of the Township and its government. Employees must observe the rules and regulations of the Township as set forth in these provisions, the Township Administrative Policies and Procedures, other official Township orders, lawful directions from supervision and department heads, and all laws. Union employees must abide by the rules of their contract agreement regarding discipline for any alleged misconduct.

Commented [PP2]: I though something needed to be said here since we deleted all of the paragraphs below.

8.2 - Cause

~~Failure of an employee to abide by the Township policies may be cause for disciplinary action up to and including dismissal. Although White Lake Township subscribes to the philosophy of progressive discipline, it is also recognized that there will be exceptions and reserves the option of imposing immediate and strong discipline including immediate dismissal when warranted. Violations will be dealt with through the following disciplinary process.~~

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8.3 - Investigation

~~In all instances of discipline, the department head will initiate a thorough investigation of the alleged violation. Witnesses will be interviewed, and other evidence will be evaluated prior to charges being made. The person conducting the investigation will submit a written report to the employee's department head, making recommendations for the allegations being found, unfounded, or recommending a department head hearing. The department head may be both the investigator and the hearing officer.~~

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8.4 - Hearing

~~If disciplinary action is recommended, the department head will hold a hearing. Present will be the department head as the hearing officer, the person who conducted the investigation, the employee charged and any representation that the employee needs. The department head will review the investigation, question those present and hear any statement the employee may wish to make. The department head will decide if disciplinary action is warranted.~~

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~~If the department head finds that the employee is in violation of Township policy, he/she may issue a verbal reprimand, issue a written reprimand, suspend the employee for up to thirty (30) calendar days without pay, or dismiss the employee from White Lake Township employment. The result of this hearing will be provided to the employee in writing within seven (7) working days of the hearing. Any discipline recommended will not be implemented until the entire appeal process is completed, unless it is accepted by the employee.~~

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8.5--Appeal Process

The decision of the department head may be appealed to the Township Supervisor within seven (7) working days after receiving the written decision from the department head. The Township

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Supervisor will review the investigation and the department head's written decision. The Supervisor may uphold the decision, modify the decision or overturn the decision. The Township Supervisor will provide the employee with the decision, in writing, within seven (7) working days after hearing the appeal.

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The decision of the Township Supervisor may be appealed by the employee to the Township Grievance Committee within seven (7) working days after receiving the written decision of the Township Supervisor.

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The Grievance Committee will schedule a hearing within three (3) weeks after the appeal is filed. The hearing will be conducted in an orderly manner. It will be confined to the issue of the disciplinary action for the purpose of providing a full and impartial hearing for both sides. Both parties shall be permitted to be represented by counsel and to produce witnesses or any other testimony pertinent to the matter.

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The Township's case will first be presented by the Supervisor or legal counsel. The employee or employee's legal counsel will then be allowed to present the defense. At this hearing the burden of proof shall be upon the Township Supervisor to justify the proposed disciplinary action.

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The Grievance Committee shall make its decision on an appeal within seven (7) working days after the hearing is completed. The Committee shall have the authority to sustain the decision, modify the decision or to reverse the decision. The employee shall be notified in writing. A unanimous decision of the Grievance Committee will be final.

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If the Grievance Committee cannot arrive at a unanimous decision, the issue will be referred to the Township Board of Trustees within seven (7) working days.

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The Township Board will schedule a hearing within three (3) weeks after the appeal is referred. The hearing will be conducted in an orderly manner. It will be confined to the issue of the disciplinary action for the purpose of providing a full and impartial hearing for both sides. Both parties shall be permitted to be represented by counsel and to produce witnesses or any other testimony pertinent to the matter.

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The Township's case will first be presented by the Supervisor or legal counsel. The employee or employee's legal counsel will then be allowed to present the defense. At this hearing the burden of proof shall be upon the Township Supervisor to justify the proposed disciplinary action.

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The Township Board shall make its decision on an appeal within seven (7) working days after the hearing is completed. The Board shall have the authority to sustain the decision, modify the decision or to reverse the decision. The employee shall be notified in writing. The decision of the Board of Trustees will be final.

9.0 - Separations from Township Service

9.1 - Abolishing Positions

The Township Board may at any time abolish departments or positions as long as their actions are in compliance with the present labor agreement and the law.

9.2 - Notice of Layoff

In every case of layoff, the Township Supervisor shall give the employee a written statement of the reasons for such action. Notice of layoff will be given at least thirty (30) days before the effective date.

9.3 - Order of Layoff

Except as otherwise provided, all layoffs shall be made by Township seniority by classification. The individual with the least amount of seniority in position shall be laid off first and the individual with the greatest amount of seniority in position shall be laid off last. Any departure from this practice must have the specific approval of the Township Board.

9.4 - Cause

Employees may be laid off for any of the following reasons:

- 1.) Lack of work for a specific position.
- 2.) Lack of funds for a specific position.

9.5 - Re-employment Lists

The names of persons holding positions in the classified service, who have been laid off, shall be placed on a re-employment list in order of their seniority, the longest seniority being first. The list shall be maintained for a period of one (1) year. If any individual on a re-employment list shall refuse an appointment to a position in the Township service having job requirements similar to the position from which that individual was laid off, and which has the same pay maximum, that individual's name shall be removed from the list. Subsequent entry into the Township service shall be through procedures established for new employment.

9.6 - Retirement

Two pension systems are available to Township employees. Employees hired prior to April 1, 1992, had a choice between the Municipal Employees Retirement System (MERS) and the Manulife Insurance system. Employees hired after April 1, 1992, must enroll in the MERS.

Retirement will be under the terms and conditions of the retirement system at the time of retirement.

The employee shall pay all sums required by MERS for this plan in excess of employer contributions. All maintenance, expenses, and cost of the Pension Plan shall be paid by the Township.

9.7 - Resignation

An employee resigning from Township service shall notify his immediate supervisor at least two (2) weeks in advance of the anticipated resignation.

In the event of resignation, the employee shall be deemed to have resigned on the last actual working day, irrespective of accumulated leave due the employee. All funds due the employee shall be made in a single agreement settlement. Payment of fringe benefits is discontinued upon termination. However, an employee may continue hospitalization and dental insurance under the COBRA continuation coverage at the employee's expense providing that application is made within the required time limit.

10.0 - Payroll

10.1 - Pay Plan

The pay plan for Township employees consists of a rate or range for each class of position.

10.2 - Merit Increase

Advancement to the next step within a specific salary range is called a merit increase. As the term indicates, this increase is based not only on the completion of a specified length of service, but also on the quality of that service.

10.3 - Method of Payment

All employees and elected officials shall be paid by direct deposit~~check~~ every two weeks (biweekly). Compensation shall be issued exclusively through direct deposit. Checks- Direct deposits shall be electronically transmitted to the bank account at the financial institution designated in writing by the employee or elected official. distributed by the Township Treasurer or the immediate supervisor not later than every other Wednesday. Funds will be deposited no later than every other Wednesday, in accordance with the established payroll schedule. (Hourly employees will be paid by direct deposit for the time worked through the preceding Friday).

Employees and elected officials are responsible for providing accurate banking information and for promptly notifying the Finance or Human Resources department of any changes to their designated account.

10.4 - Annual Salary

The employee shall be paid one twenty-sixth (1/26) of the authorized annual salary each biweekly period.

10.5 - Deductions and Withholdings

Certain payroll deductions are compulsory on all paychecks, i.e., income tax and social security. The Clerk's office shall be notified at least 10 days prior to the end of the pay period of any changes in voluntary deductions or withholding allowances desired by and employee. All voluntary deductions shall be authorized in writing.

10.6 - Pay Advances

Paychecks may be issued in advance of normal issue with the approval of the employee's supervisor for emergencies or other specific reasons. Payroll advances preceding vacation periods must be requested in writing by the employee fifteen (15) days in advance of such vacation leave.

10.7 - Time Cards

All completed timecards shall be submitted to the Clerk's office on Monday by 9:00 a.m. following the end of each pay period. Time slips will be signed by the employee and the Employee's department head.

10.8 - Payroll Problems

Employees will immediately notify the Clerk's Office of any problems or errors on their paychecks. A written account of the problem and its resolution shall be created by the Clerk's office.

10.9 - Leave of Absence Without Pay

Except where specifically granted or provided for in other Township policies, all Township paid benefits and accrual of leave shall cease immediately upon expiration of all earned leave time and/or removal from the payroll. An employee may elect to continue in programs where provided at the employee's own expense. In such cases, coverage of insurance premiums, etc., shall be paid in advance of any coverage.

10.10 - Overtime Compensation

Career employees shall be paid at a time-and-one-half rate for all hours worked over their regularly scheduled workday or week, unless such hours are a result of a work schedule adjusted at the employee's request. Payroll vouchers for the pay period, including overtime, holiday pay, etc., will be accepted by the Clerk's Office until 9:00 a.m. on the Monday following the end of the payroll period.

10.11 - Classification Changes

10.11(a) - Reclassification

When an employee is promoted from a lower classification to a higher classification, he shall advance to a pay step in the classification which is commensurate with his new classification.

10.11(b) - Demotions

When an employee is demoted to a lower classification, his pay rate shall be reduced to the rate in the new classification.

10.11(c) - Temporary Appointments

When a vacancy is filled by a temporary appointment, the employee shall be paid at the minimum of the approved salary range for the position unless, in the judgment of the department head and Township supervisor, the employee's background or experience warrants a higher pay rate.

10.12 - Call-in Pay

Employees called in to work outside of their regular work hours shall receive a minimum of two (2) hours pay at the appropriate overtime rate unless the call-in occurs within two (2) hours of the start of their regular work shift.

11.0 - Fringe Benefits

11.1 - Eligibility

Employees who are classified as full-time employees are eligible for all fringe benefits.

11.2 - Benefits

Following are the fringe benefits:

- Social Security
- Life Insurance
- Hospitalization (Blue Cross/Blue Shield)
- Dental Insurance
- Employees Retirement System
- Accrued Vacation Leave
- Accrued Sick Leave
- Accrued Personal Leave
- Holidays - With Pay
- Longevity Program
- Deferred Compensation

Additional benefits are available on a voluntary basis

11.3 - Separations

An employee separating from the Township has a choice of options regarding reimbursement of moneys he has contributed to the retirement plan. The employee should file an application with the Township Clerk's office indicating the choice of option. Options shall be limited to those allowed in the pension plan.

12.0 - Paid Holidays

12.1 - Eligibility

All classified full-time employees are entitled to the following holidays off with pay.

12.2 - Holidays

New Year's Day	Martin Luther King's Birthday
President's Day	Good Friday
Memorial Day	Independence Day
Labor Day	Columbus Day or Law Day
Veteran's Day	Thanksgiving Day
Post Thanksgiving Day	Christmas Eve
Christmas Day	New Year's Eve

If a designated holiday falls on a Saturday, the holiday will be observed on the preceding Friday.

If a designated holiday falls on a Sunday, the holiday will be observed on the following Monday.

Employees who are on earned vacation when a holiday falls on a scheduled workday will be entitled to an additional day off with pay.

12.3 - Holiday Pay

Time and one half will be paid for all hours worked on holidays, as defined in these provisions, in addition to regular pay for such holiday.

13.0 - Vacation Leave

13.1 – Eligibility for Employees Hired Before 09/15/98

Rev. 3-19-26 - Union employees should refer to their specific union contracts for eligibility.

Vacation leave is authorized absence from duty, with pay. The vacation year is the calendar year (January 1 through December 31) which applies to all employees except as otherwise provided herein. Full-time employees will be granted vacation leave according to the following schedule:

LENGTH OF SERVICE		Vacation Days
At Least	Less Than	
6 mo.	1 yr.	5
1 yr.	5 yr.	12
5 yr.	10 yr.	17
10 yr.	15 yr.	20+9
15 yr.	20 yr.	22
20 yr.		25+4

An employee who terminates before 6 ~~months~~months' employment is not eligible for vacation Reimbursement.

~~An employee who terminates before (6) months of service is not eligible for vacation~~

Commented [PP3]: This is redundant

13.1a – Schedules for Employees Hired Before 09/15/98

~~After six (6) months of service, vacations may be taken at any time during the calendar year in which they are accumulated.~~

Commented [PP4]: No longer needed. This is people hired prior to 9-15-98 so that group has already earned their vacation time for the 6 month and 1 year periods.

~~If both the six (6) month and the one (1) year service anniversary dates fall within the same calendar year, only twelve (12) days of vacation leave will be granted within that calendar year as follows:~~

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- ~~_____ After six (6) months of service _____ 5 days~~
- ~~_____ after one (1) year of service _____ 7 days~~

~~If an employee becomes eligible for seven (7) additional days' vacation in December per the above paragraph, such vacation may be taken in the following calendar year prior to April 1, and prior to the taking of any current year's vacation.~~

Vacations must be arranged by the individual with his or her department head with at least 30 days' notice preceding the beginning date of the vacation.

An employee's vacation pay shall be calculated by reference to the number of regular hours scheduled for that employee per week (i.e. 37 1/2 or 40).

The scheduling of vacation time should be by seniority and in ~~aceord~~accordance with departmental need or seasonal workload.

Vacation time can be taken in (2) two-hour increments.

13.2 - Eligibility for Employees Hired After 09/15/98

(Added 09/15/98) Amended 3/15/2022

Rev. 3-19-26 - Union employees should refer to their specific union contracts for eligibility.

Vacation leave is authorized absence from duty, with pay. The vacation year is the calendar year (January 1 through December 31) applies to all employees ~~not otherwise covered under a collective bargaining agreement~~, except as otherwise provided herein. Full-time employees will be granted vacation leave according to the following schedule:

Full-time employees hired after 09/15/98 will be granted vacation leave within the vacation year in which the Length of Service anniversary date occurs according to the following schedule:

LENGTH OF SERVICE		Vacation Days
At Least	Less Than	
Date of Hire	6 mos.	5
6 mo.	1 yr.	5
1	5	12
5	10	17
10	15	20+9
15	20	22
20		25+4

Commented [PP5]: Suggest making 10 and 20 years an even number so the employee has a full extra week. This will be non-union only until negotiations when the unions can ask for the same.

An employee who terminates before 6 months' employment is not eligible for vacation reimbursement.

An employee who terminates before 6 months' employment is not eligible for their additional 5 days of vacation.

Commented [PP6]: This is in the union contract and applies to non-union employees too.

13.2 a - Schedules for Employees Hired After 09/15/98

(Added 09/15/98)

~~Vacation time must be taken in the same year it is earned.~~

If both the six (6) month and the one (1) year service anniversary dates fall within the same calendar year, only ten (10) days of vacation leave will be granted within that calendar year as follows: (Amended 7/20/2021)

At date of hire _____	5 days
A after 6 months of service	5 days

If an employee becomes eligible for five (5) additional days' vacation in the last quarter of the year ~~December~~ per the above paragraph, such vacation may be taken in the following calendar year prior to April 1, and prior to the taking of any current year's vacation. This applies to employees hired in the last quarter as well.

Vacations must be arranged by the individual with his or her department head with at least 30 days' notice preceding the beginning date of the vacation.

An employee's vacation pay shall be calculated by reference to the number of regular hours scheduled for that nonunion employee per week (i.e. 37 1/2 or 40).

| The scheduling of vacation time should be in accordance with departmental need or seasonal workload.

Vacation time can be taken in (2) two-hour increments.

13.3 - Unused Vacation

A maximum of 22.515 hours of unused vacation time can be carried over through March 31, of the next year with department supervisor approval.

An employee who is laid off, quits, retires, or is terminated, will receive any unused vacation credit including that accrued in the current year. A recalled or re-hired employee who received credit for the current year at the time of leaving for any of the foregoing reasons will have such credit deducted from his or her vacation the following year.

14.0 -- Earned Sick Time Policy for Full and Part-Time Employees Leave Insert Policy Here

14.1 -- Use

~~Sick days shall be allowed only in cases of actual sickness or disability.~~

~~Sick leave may be used for the following purposes:~~

~~(a) Acute personal sickness or incapacity over which the employee has no control. (Note: sick leave may be taken in connection with leave of absence for pregnancy.)~~

~~(b) Absence from work because of exposure to a contagious disease which according to health standards would create a danger to the health of fellow employees and other people.~~

~~(c) Sick time may be used for the employee for doctor's office calls for the employee. (Added 12/18/01)~~

~~Employees shall notify their supervisor or department head of any anticipated absence as soon as possible after it is known, but at least within one hour of the start of their normally scheduled work period.~~

14.1 - Accumulation and Payout

Employees may accumulate a maximum of six hundred fifty (650) sick hours. After six hundred fifty (650) hours of sick leave are accumulated, each employee will receive payment once annually for the amount of sick leave necessary to return the accumulated sick leave to six hundred fifty (650) hours.

Employees with more than six hundred and fifty (650) hours shall be permitted to sell not more than (100) hours per year until six hundred and fifty (650) hours are reached.

Upon separation from service, an employee who has 650 sick hours shall be paid unused accumulated sick leave, not to exceed four hundred (400) hours.

The rate of payment shall be based upon the regular annual salary of the employee at the time of separation. If an employee is separated upon termination of a leave of absence, the rate of payment shall be based upon the employee's regular annual salary that he was receiving at the beginning of his leave of absence. Any sick leave sold according to the above provisions shall not count towards an employee's Final Average Compensation (FAC).

Employees shall be able to use 2 of their 12 sick days for personal time off.

An employee who has been employed continuously during any one calendar year and who has not taken more than two (2) days off sick in any one calendar year shall be granted an additional two (2) days of personal leave for the next calendar year. Any time earned subject to the aforementioned shall not accumulate and must be used in the year for which it was earned.

No payout of sick time shall be allowed if an employee is terminated or separates prior to their one-year anniversary date.

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Commented [PP7]: Added because it is a policy being used but is not in the manual.

14.2 - Misuse

It shall be the duty of the department head to determine the validity of an employee's request for absence due to illness if a pattern of abuse is evident. The department head shall refuse to allow use of sick days when the results of the investigation shows insufficient evidence to support the employee's claim of illness; or other allowed reasons for use, or when it is believed that the employee has not ~~exercised~~made a reasonable effort to promptly notify the department of the absence as specified in the policy.

14.3 - Proof of Illness – Non-Union

A physician's examination certification shall be required as evidence of illness before compensation for an illness period of more than five (5) successive workdays is allowed.

At this time, if the employee is eligible for the Family Medical Leave Act (FMLA), the employee will be placed on FMLA effective the 6th successive missed workday. Once on the FMLA, the employee shall be required to provide a physician's statement with the date the employee is able to return to work. If the employee is not eligible for FMLA, the same process for proof of illness will apply to sick time used but the employee will not be placed on FMLA. An employee taking a scheduled FMLA or known in advance FMLA for a medical procedure will be required to be placed on FMLA on the first day of leave if eligible. See FMLA Policy for all rules of this leave.

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Commented [PP8]: Added this for clarity because employees have suggested we can't make them go on FMLA even though it clearly states it in the FMLA policy.

If an employee takes five (5) or more sick days within the same pay period, the Township may request a physician's examination certification verifying illness and the employee's ability to work. Under these circumstances, certification from a physician may also be required to verify when the employee is fit to return to work. An examination certificate from a physician shall be required as evidence of illness before compensation for an illness period of more than three (3) successive workdays is allowed. If an employee takes five or more sick days within the same pay period, the Township may request a physician's statement verifying the illness. A statement from a physician may also be required to verify the employee's fitness to return to his regular duties.

14.4 – Accrual of Earned Sick Time for Non-Union Full-Time Employees

Rev. 3-19-26 - Union employees should refer to their specific union contracts for eligibility.

A full-time employee shall accrue sick days at the rate of one (1) working day per month on the last day of each month, or 12 days per year. Sick days will not be used until after they are earned. An employee with less than ninety (90) days of service cannot use sick days.

Non-Union Employees hired after October 1, 2008, will accrue ~~twelve~~eight (12~~8~~) sick days per year (7.5 hours a month), two (2) of which may be used for personal use.

Sick days will be available in the employee's sick bank on January 1st of each new year.

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New full-time employees will have their sick time prorated based on their hire date and the sick days will be available for use immediately.

A full-time employee with less than twelve (12) months of employment on January 1st in the new year following their first year of employment, will have their sick time prorated based on the number of months worked since the date of hire. The remainder of their sick time will be put in their bank on their one (1) year anniversary date, providing service has not been broken.

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Employees will accrue at least an amount of sick time as required in the Earned Sick Time Policy.

Sick days earned by an employee shall, if not used during the year earned, ~~be accumulated without limit, and shall~~ be kept as credit for future sick days with pay. Payout is defined under section 14.1 Accumulation and Payout.

An employee transferred from part-time status to ~~full-time~~probationary status shall accrue sick days from the ~~full-time hire~~at date forward as specified above.

14.5a – Short Term Disability

Employees whose sick days extend beyond 30 consecutive days shall be eligible to receive a weekly ~~payment in the amount~~payment of \$450.00, until they become eligible for Long Term Disability. Employees must first use any combination of sick, comp, and vacation time to cover the first 30 days prior to being placed on ~~of short-term~~ disability leave. Employees must exhaust all paid time prior to being placed on short term disability but may reserve 37.5 hours of vacation time. However, if the leave will extend into the next year, the employee may elect to use the 37.5 hours vacation prior to being placed on short term leave, so they don't lose their vacation time. Employees are only eligible to roll over 15 hours of vacation, which must be used by March 31st of the new year. Employees may also elect to be paid out for remaining comp time in lieu of taking the comp time days prior to short term leave.

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Employees shall not earn sick time and personal time for sick leaves greater than 30 days. (Amended 3/15/2022)

14.5b - Long Term Disability

The Township will provide a long-term disability policy for members who are on sick leave for 6 months, not to exceed 18 months.

Employees shall not earn sick time and personal time for sick leaves greater than 30 days. (Amended 3/15/2022)

15.0 - Miscellaneous Paid Leave

15.1 - Personal Business Leave

Classified full-time employees will receive six (6) days as of January of the year, to be used at the rate of no more than two (2) days per month with approval of the department head or his designee. The days must be used, or they are lost. Employees hired after October 1, 2008, will accrue eight (8) sick days per year, two (2) of which may be used for personal use.

Should an employee leave their employment with the Township, they will be required to repay the Township the pro-rata days which they had not yet earned but had used. (Amended 09/15/98)

Deleted 15.1 a (12/18/01) See 15.1

No payment will be made for accrued personal leave days at termination of employment for any reason. Increments as low as a quarter hour may be taken.

15.2 - Bereavement Leave

In case of death in the employee's "immediate family", a consecutive five-day leave of absence will be granted with pay, excluding Saturdays, Sundays, and holidays. (Amended 12/18/01)

In case of death of other family members, a leave of absence may be granted with pay for three consecutive days, excluding Saturdays, Sundays, and holidays.

One (1) additional day (that day following the funeral) shall be allowed for travel time for those traveling from a funeral located two hundred (200) miles or more from White Lake Township.

An employee's immediate family shall consist of spouse, child, stepchild living in household, brother, sister, parent, or a member of the employee's household, who resides permanently in the household.

An employee's other family members shall consist of ~~a~~ parent of spouse, grandchild, grandparent, brother-in-law, sister-in-law, son-in-law, daughter-in-law, and a stepchild not living in the household.

15.3 - Jury Duty

An employee who is summoned for jury duty and who provides satisfactory evidence of such jury duty, including the hours of such duty, shall be compensated for those hours spent (in performing jury duty) during such hours the employee was scheduled to work.

Prior notice must be given to the department head of such jury duty and jury duty fees or remuneration earned while performing jury duty during working hours shall be surrendered to the Township treasury. Compensation for mileage to and from court for jury duty may be retained by the employee.

Employees required to serve jury duty shall suffer no salary deduction.

Employees required to serve jury duty shall suffer no salary deduction.

16.0 - Leave of Absence Without Pay

16.1 - Military Leave

An employee who has served three (3) months, but less than one (1) year with the Township, and enters military service, shall be allowed prorated vacation time with a maximum not to exceed five (5) days, paid to him at the time he leaves the Township to enter military service. Vacation and sick leave time shall not accrue during periods of military leave. However, upon reinstatement, for the purpose of determining any vacation time, the years of service with the Township shall be the total of years employment plus years, or fraction thereof, of required military service.

A full-time employee who enters military service shall be granted a leave of absence without pay for the duration of the required military duty, and for a period of ninety (90) calendar days after discharge. At any time before the expiration of such military leave, the employee shall have the right to return to employment with the Township provided:

- (1) Employee is still qualified for employment
- (2) Employee has been honorably discharged
- (3) Employee can pass required physical examination

In the event employee's former position is not available or employee is no longer physically qualified for his former position and is able to satisfactorily perform duties of another position, every effort shall be made to place such employee in another position.

Upon reinstatement from military leave to Township employment, employees shall be returned to range and step comparable to that held before leaving for military service.

Employees belonging to the National Guard, Service Reserves or other such units, are permitted to take leave of absence without pay during the annual training period; this leave is not to exceed two (2) weeks per calendar year. Vacation privileges are not affected by such leaves. However, an individual who receives military training leave will automatically be considered last when the schedule for vacation leave is determined. An employee may use vacation time for this absence.

16.2 - Maternity Leave

Maternity related absences shall be treated as a non-duty related disability for purposes of use of leaves and benefits as provided elsewhere in these rules.

Where an employee desires to use sick leaves to cover such absence, the Township shall require the same certifications of doctors as is required in the case of other types of non-duty disabilities before the employee shall be eligible to receive such benefits.

Employees may, at their option, elect to take a leave of absence without pay and benefits to cover all, or a part of, a period of absence due to maternity.

Employees shall notify their department head prior to the seventh month of pregnancy in order to make arrangements for continuation of benefits and/or leave of absence.

16.3 - Disability Leave

An employee may, with the approval of the department head and the supervisor, elect to take leave of absence without pay or benefits to cover all or part of an absence due to a non-duty related disability.

17.0 - Travel Expense

17.1 - Authorization

It is mandatory that employees driving personally owned vehicles on official Township business have properly licensed vehicles. ~~Further, that they are adequately protected by liability and property damage insurance at their own expense. Department heads shall verify this fact prior to authorization.~~

Employee transportation, personal vehicle mileage, parking, meals and lodging for authorized Township business or functions (except fire or police emergency calls) shall be reimbursed as authorized in ~~4.8 the~~ Expense Reimbursement section of the Township Administrative Policies manual.

Department head approval must be obtained in advance for public transportation or lodging.

~~17.2 - Reimbursement~~

~~All reimbursement requests must be documented on a Request for Payment or Conference and Training Authorization form for submission to the Township Clerk's Office. If the exact cost is unknown, an estimated cost shall be submitted which will then be subject to adjustment. Reimbursements will be based on official township, county or state maps and the most direct routes shall be used.~~

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~~All expense reports and reimbursement vouchers must be accompanied by receipts or copies of conference programs indicating the actual meal cost. Vouchers exceeding the maximum allowed per meal (or combination of meals per day), or not accompanied by receipts or programs, will be disallowed to the extent costs exceed the maximum allowed or lack documentation as to proof of the expense.~~

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~~17.3 - Parking~~

~~Reimbursement for parking charges is allowable. Receipts must be attached to mileage reports for all such claims.~~

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~~17.4 - Meals~~

~~Reimbursement will be allowed for meals when traveling on official business for the Township or attending authorized conferences or training away from the established place of work, when the meal is not part of the program.~~

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~~The authorized meal allowance schedule does not include tips or gratuities, which may be allowed up to a maximum of 15% above the cost of the meal.~~

17.5 - Expenses Not Reimbursed

~~Fines for parking or other traffic violations shall not be reimbursed.~~

~~Charges for gasoline, lubrication, repairs, towing, and such other expenditures associated with the use of a personal vehicle shall not be reimbursed.~~

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~~18.0 – Longevity Pay Program~~

~~18.1 – Benefit Schedule~~

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~~The Township shall provide five hundred dollars (\$500.00) longevity pay to full-time employees after five (5) years of service. An additional five hundred dollars (\$500.00) will be paid after each additional five (5) years of service.~~

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~~18.2 – Payment~~

~~The longevity payment shall be added to the eligible employee's base annual wage and pro-rated into the biweekly payroll schedule. Partial payments when five (5) year anniversary dates occur will be prorated in that year based on the employee's anniversary date~~

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~~18.03 – Eligibility~~

~~Full-time employees hired after 09/15/98 longevity pay is not authorized. (Added 09/15/98)~~

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19.0 - Insurance Coverage

19.1 - Life Insurance

A group life term insurance policy in the minimum amount of \$50,000 is provided by the Township for all full-time employees and Elected Officials. (Amended January 1, 2012)
All life insurance policies provide a double indemnity clause for accidental death. This policy is effective date of hire or election to office.

Additional Life Insurance for employees and their immediate family members may be purchased. The total cost of the additional insurance must be paid by the employee. Payment may be made through payroll deduction. This insurance may be continued at the employee's expense following separation from township employment.

19.2 - Miscellaneous Insurance

All employees are covered by the Township for liability, unemployment and worker's compensation

Policy Regarding on the Job Injuries:

- A. The Township of White Lake will continue to pay the difference between worker's compensation and base pay to each employee qualifying under this section up to a maximum of (6) months. The employee may apply to the Township Supervisor for an extension. Provided, however, that it is not intended that any employee is to receive more than a full year's pay as a result of this policy.
- B. In the event of a disputed worker's compensation claim, the Township will pay the difference between worker's compensation and base pay for the period if any, that the claim is settled or recognized as compensable under worker's compensation, subject to the provisions of Section A above. (Amended 2/2006)
- C. An employee who is off work because of an on-duty accident or illness and is receiving Worker's Compensation will lose their healthcare or seniority after two (2) years except that their seniority and health insurance will continue if they have made an application for a disability retirement within the two (2) year period and have cooperated and provided timely information as requested by MERS. Until a final disposition is made regarding that request, and as long as the employee meets the obligation above, their seniority and healthcare will continue.

The employee will not lose seniority in any instance where the employee's application for disability is denied, and the employee subsequently returns to work. (Amended 8/31/11)

Insurance herewith shall cease when an employee retires or otherwise terminates employment.

20.0 - Health Insurance Program

20.1 - Health Insurance

The Township provides health insurance (one per family) for all full-time employees through Blue Cross/Blue Shield of Michigan. This program includes a drug prescription and vision plan. The township has the right to self-insure and/or utilize plans. The township reserves the right to change all insurance carriers as long as the benefits are equivalent. (Effective 1/1/2009)

Full-time employees will have the option to choose between two health insurance plans, a Blue Care Network HMO and a Blue Cross Blue Shield Simply Blue PPO.

Employee contributions for the HMO plan are \$25 for a Single plan, \$37 for a 2-Person plan, and \$50 for a Family plan. Employee contributions for the PPO plan are \$50 for a Single plan, \$75 for a 2-Person plan and \$100 for a Family plan. Payments under these plans will not continue into retirement. (Amended 3/15/2022)

The Township will pay two thousand four hundred (\$2,400) dollars cash per year incentive to eligible employees who elect to decline the Township medical plan. Employees may opt out of the township's health insurance plan at any time during the plan year. The cash incentive will then be prorated for the months the employee was not insured. The payment will be paid to eligible employees in December of each year. (Amended 12/17/96 & 09/15/98)

If an employee's spouse or parent is also an employee or retiree of the Township and is receiving any form of health care from White Lake Township, the employee shall not be entitled to the cash incentive.

Employees can only enroll for coverage or change existing coverage during open enrollment or when there is a qualified family status change. (Amended 1/1/2009)

Employees are required to enroll within thirty (30) days from the date of employment if they choose to enroll in the Township's group insurance plans. Any employee failing to enroll within that period cannot enroll thereafter until the annual open enrollment period each year.

Township Board Trustees may enroll in the Township's health insurance plan. Coverage is available for Trustee, spouse or family at the Trustees expense, payable in advance of any coverage. (Amended 12/18/01)

20.2 - Retiree Insurance:

The Township will provide hospitalization for retiring employees hired before January 1, 2010, that meet the following criteria. (Amended 09/15/98)

1. 25 years of service and 50 years of age
2. 10 years of service and 60 years of age

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3. Employees hired after 09/15/98 will be eligible only if their years of service are with White Lake Township.

Health insurance is available for spouses at the eligible retiree's expense, payable in advance of any coverage.

The Township will provide supplemental medical insurance for eligible retirees who are 65 years of age or older and have 10 years or more continuous employment with the Township. The retiree must be enrolled in Medicare to apply for the Medicare Advantage Plan offered by the Township. An eligible employee's spouse can continue to be enrolled in the Township's group at the retiree's expense. Coverage must be paid in advance of any coverage.

Retiree health insurance is eliminated for employees hired after January 1, 2010. A health care savings program will be provided for full time employees hired after January 1, 2010. (Amended 10/1/08 and 9/1/2011)

Retiree health insurance is eliminated for the public safety group (Elected Officials, Deputies, Police Chief and Fire Chief) if elected or hired after October 15, 2019. It will be replaced with a health care savings account.

The Township will carry medical benefits for eligible full-time employees and full-time elected officials in the Public Safety group and their for spouses of full-time in-house elected officials at retirement, if the employee or elected official was hired on or before October 15, 2019, and if they meet 25 years of service and 50 years of age or 8 years of service and 60 years of age. (Added 12/18/01)

Commented [PP9]: Added for clarity

~~Health insurance is available for spouses at the eligible retiree's expense, payable in advance of any coverage.~~

Commented [PP10]: Moved this paragraph and one below up because it flowed better.

~~The Township will provide supplemental medical insurance for retirees who are 65 years of age or older and have 10 years or more continuous employment with the Township. The retiree must be enrolled in Medicare to apply for the Medicare Advantage Plan offered by the Township. An employee's spouse can continue to be enrolled in the Township's group at the retiree's expense. Coverage must be paid in advance of any coverage.~~

~~Township Board Trustees may enroll in the Township's health insurance plan. Coverage is available for Trustee, spouse or family at the Trustees expense, payable in advance of any coverage. (Amended 12/18/01)~~

Commented [PP11]: Moved this under health insurance. Does not belong under the retiree category.

20.32 - Dental Insurance

A dental insurance family policy is provided at Township expense for full-time employees. The policy provides one hundred (100%) percent of treatment cost for preventive, diagnostic (except radiographs) and emergency palliative (Class I) services, and seventy-five percent (75%) of the balance of Class I benefits paid by the dental plan and fifty percent (50%) of treatment costs paid by the dental plan on Class II benefits. The coverage includes fifty percent (50%) of Class III benefits orthodontic dental service up to age nineteen (19). Maximum contract benefit is \$1,250 per person total per contract year for Class I and Class II benefits. The dental plan payment for Class III benefits shall not exceed a lifetime maximum of \$1,250.00 per eligible person. (Amended 06/01/2022)

The Township reserves the right to change insurance carriers as long as the benefits are equivalent or better.

20.43 - Voluntary Benefits

Supplemental insurance including critical illness and accident insurance is available for full time employees. The Township does not sponsor this program or endorse it but cooperates with employees who desire to avail themselves of this insurance on a strictly voluntary basis through payroll deductions authorized by the employee. This insurance may be continued by the employee through direct payment after retirement.

21.0 - Deferred Compensation

The Township offers two 457 (b) plans through VOYA and MERS. Full-time township employees may contribute to either or both plans voluntarily. Contribution limits are established by the IRS annually.

Employees hired after 2011, and on the Tier 2 MERS pension are eligible to receive 2% matching into the 457 (b) plan from the Township. To be eligible, the employee must also contribute at least 2% into the plan. (Amended 3/15/2022)

22.0 - Personnel Records

Employee personnel files shall be established and managed by ~~the~~ Human Resources ~~Manager~~.

~~The~~ Human Resources ~~Manager~~ should be informed by the employee of any record change requirements due to marriage, divorce, address change, dependent change, etc.

23.0 - Miscellaneous Provisions

23.1 - Social Security

All Township employees, except those paid on a fee or contract labor basis, shall be covered by Social Security Benefits.

23.2 - Credit Union

Employees may participate in a payroll deduction plan to deposit savings with the Pontiac Municipal Credit Union. Authorization for payroll deductions can be obtained from the Township Clerk.

23.3 - Garnishments

Law requires compliance to the garnishment statutes. When served by such orders, the Township must withhold that portion of an employee's wages to satisfy a garnishment order. Only an order from a court of competent jurisdiction can supersede garnishment demands.

23.4 - Personal Injury

Any employee injured while on Township business or property shall report such injury without delay to their immediate supervisor. An investigation of such incident shall be made to determine liability, equipment failure, lack of training and/or faulty operational procedures.

23.5 - Property Damage

Public or private property damage resulting from an employee's actions shall be reported, in writing, without delay so that an investigation and/or assessment of such damage can be made.

23.6 - Citizen Inquiries

Employees should exercise great care in responding to citizen's inquiries, to ensure that an accurate and timely response is provided. Prompt attention shall be given a citizen's request for information and/or service. The response shall be made in a courteous and professional manner. If an employee cannot respond to a citizen query, the citizen shall be courteously referred to an employee who can respond.

23.7 - Public Criticism

Employees, including retirees collecting a pension, shall not publicly criticize or ridicule a Township official, other employee, the Township government or any policies, programs or actions, when such criticism or ridicule impairs the operation of the Township government or any department thereof when:

- a) The employee knows such criticism or ridicule is false or who makes it with disregard for its truth or falsehood.
- b) The employee has not, before making such criticism or ridicule, made a reasonable effort to communicate the criticism to proper supervisory personnel.
- c) The employee has received an order not to make the criticism or ridicule public, and it has been explained to the employee why making the criticism or ridicule public would tend to impair the operations of the Township government, the effectiveness of a department or the maintenance of discipline or employee morale.

**White Lake Charter Township
Personnel Policies and Procedures**

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WHITE LAKE TOWNSHIP
FAMILY AND MEDICAL LEAVE ACT POLICY

POLICY:

This addition to the leave of absence policy is incorporated into the existing leave of absence policy pursuant to the implementing regulations for the Family and Medical Leave Act of 1993 (FMLA) (29 C.F.R. 825.301).

This policy is not meant to be all-inclusive and merely highlights the provisions of the FMLA, which are subject to detailed and specific implementing regulations. This policy is not meant to conflict with either the FMLA or its implementing regulations, should there be any inconsistency between this policy, the FMLA or the implementing regulations, the statute and the regulations control.

ELIGIBILITY:

Employees are entitled to up to twelve (12) weeks' unpaid job protected leave for certain family and medical reasons if they have worked for at least one (1) year and for 1,250 hours over the previous twelve (12) months. This is based on a 40-hour work week and would be adjusted depending on the number of hours in the employees' work week.

INTERMITTENT OR REDUCED LEAVE:

An employee may take leave intermittently (sporadic utilization in daily or hourly increments) or on a reduced leave schedule. An employee utilizing FMLA in accordance with this provision may be required to transfer temporarily to a position with equivalent pay and benefits that better accommodates recurring periods of leave. An employee may not take intermittent leave following the birth or placement of a child.

REASONS FOR TAKING FMLA LEAVE:

- To care for the employee's child after birth or placement for adoption for state supervised foster care.
- To care for the employee's spouse, son or daughter or parent who has a serious health condition; or
- For a serious health condition that makes the employee unable to perform the employee's job.
- Any qualifying exigency arising out of the fact that the employee's spouse, son, daughter, or parent is a covered military member on "covered active duty"; or has been notified of an impending call or order active duty in the Armed Forces.

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ADVANCE NOTICE AND MEDICAL CERTIFICATION:

The employee is required to provide advance leave notice and medical certification should FMLA leave be desired by the employee. An FMLA leave may be denied if the notice and certification requirements are not met.

- The employee must ordinarily provide thirty (30) days advance notice when the leave is "foreseeable".
- If thirty (30) days' notice is not practical, taking into account all the facts and circumstances in the individual case, then notice must be given within one (1) or two (2) business days of when the need for leave becomes known to the employee.
- Leave requests must be in writing and must set forth the reasons, anticipated duration, and anticipated start of the leave with medical certification attached.
- The Township may require an employee to obtain a second medical opinion at Township expense. If the opinion of the two health care providers differs, the Township may require a third opinion, at Township expense, from a health care provider mutually agreed upon by the employer and employee.
- Medical treatment must be scheduled so as to minimize loss of work time. Appointments scheduled during work hours must have written verification from the provider of the health care service that such provider does not offer appointment hours, which do not conflict with the employees' shift hours and does not offer Saturday hours.

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JOB BENEFITS:

- For the duration of FMLA leave, health insurance coverage will be maintained. Employee contributions will be required through payroll deduction or by direct payment to the Township.
- **Because FMLA time is otherwise unpaid, an** employee is NOT entitled to seniority or benefit accrual during periods **for sick, personal, and vacation time during periods** of unpaid leave but will not lose benefits already accrued prior to the start of the leave. Paid time off will **not only** accrue while on FMLA **for the first 30 days**.
- Employees will be returned to their original or equivalent position upon return from FMLA leave.

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- Employees paid time off such as sick days, personal days, and vacation time will be charged for FMLA leave pursuant to the statutory option granted to the employer. Employees will be allowed to reserve 1 week of vacation time while on FMLA. Unpaid FMLA will ~~not~~ be granted until all other paid time off is used except for the reserved 1 week of vacation.
- The reserved 1 week of vacation may be retained while on FMLA and short-term disability. However, if the leave will extend into the next year, the employee may elect to use the reserved vacation prior to being placed on leave, so they don't lose their vacation time until all paid time off to which an employee is entitled is exhausted. Per the Personnel Policies and Procedures manual, they may only roll over 15 hours of vacation, which must be used by March 31st of the new year.
- ~~Township employee provisions and current contracts do now allow sick time use for a family member's illness. Employees must first use all accrued vacation, personal, and comp time for a qualified family member FMLA leave, before sick time can be used.~~
- Accrued benefit time, no matter when earned, will be charged for FMLA leave time taken.
- The FMLA does not require an employee actually askask for FMLA leave in order that the employer be permitted to charge paid time off programs if the purpose for the leave is a purpose contemplated by the law.
- Because FMLA leave time is otherwise unpaid, benefit time on FMLA leave time does not accrue except as may be required under applicable collective bargaining agreements.
- FMLA leave will be based on a rolling basis. calendar year. Ex: 4 weeks used in current year would leave 8 weeks in the next year. FMLA would reset once the employee exhausted the 12 weeks and once again meets the hours worked requirement in the eligibility section.

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- Commented [PP1]: MAPE and other contracts say employee must be allowed to keep equivalent of 1 week of vacation if they have it to keep.
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- Commented [PP2]: If approved to roll over one more day, this will be revised.
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- Commented [PP3]: This no longer applied due to Earned Sick Time Act
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- Commented [PP4]: This is redundant to the first bullet above.
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- Commented [PP5]: Remove as this is redundant to bullet # 2 under job benefits
- Commented [PP5R2]: We are allowing the 1 week vac time as req'd in the barg agreements.

ATTENDANCE RULES:

- Absence permitted by the FMLA will not be counted under the attendance policy as absence incidents.

NOTICE OF EMPLOYER EXPECTATIONS AND OBLIGATIONS OF EMPLOYEE:

- Paid and unpaid leave pursuant to the FMLA will be counted against the employee's FMLA entitlement.
- An employee must furnish to the employer medical certification of necessity for the leave within fifteen (15) days of any request for FMLA leave. The forms required are the US Department of Labor Certification of Health Care Provider forms. If the medical certification is found to be incomplete the employee will be provided a reasonable opportunity to cure such deficiency. In the case of foreseeable leave, failure to provide medical certification will cause the leave to be denied until the required certification is provided. When the need for FMLA is not foreseeable, certification must be provided at least fifteen (15) days after the employee gives notice of the need for the leave or as soon as practical under the facts and circumstances requiring the leave. Employees are also required to complete a HIPPA authorization.
- Within five (5) days after the employee requests or the Township learns of the need for FMLA leave, the Township will provide a written notice stating whether the leave has been approved, and how much of the leave will be an FMLA leave. If the leave is not approved, the Township will provide written notice of the reason for denial.
- The Township may designate a leave as FMLA if the employee's leave qualifies as an FMLA Leave. The employee is required to complete the necessary medical certification.
- The employer requires exhaustion of all paid leave prior to taking unpaid leave, with the exception of 1 week of vacation-
- If the employee has an obligation to pay part of that employee's health care premiums as of the time of the FMLA leave, the employee must make provisions with the personnel department to continue such payments during the leave.
- Upon return to work, the employee may be required to submit a fitness for duty certificate on the same basis as exists under current return from medical absences.
- If an employee is designated as a "key employee", the employee will be advised at the time an FMLA leave is requested. Upon determination by the employer that substantial and grievous economic injury to the operations of the employer will occur, reinstatement of such key employee may be denied. Adverse effects on health care entitlement may also occur.
- A non-key employee will be reinstated to the same or an equivalent job upon return from leave.

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Commented [BF5]: Need to keep this as discretionary. There are cases that have found post pregnancy cases as discriminatory.

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- Should an employee on FMLA leave decide not to return to work, the employer is entitled to recover its share of health plan premium paid by the employer during such a period of FMLA leave subject to certain exceptions.
- The Township will invoke FMLA concurrently with Workers' compensation, ~~and long-term disability.~~

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**CHARTER TOWNSHIP OF WHITE LAKE
Earned Sick Time Policy
For Full Time and Part Time Employees**

Purpose

The Earned Sick Time Act replaces the Paid Medical Leave Act. This benefit is intended to provide an opportunity for eligible full-time, part-time and temporary employees to accrue paid sick leave to be used in accordance with the Earned Sick Time Act.

Application

This Policy establishes the parameters of the Township of White Lake Policy and is not intended to amend, expand or reduce, the benefits provided to employees in accordance with Township Policy or an applicable collective bargaining agreement.

Policy

The Township of White Lake is required to adhere to State of Michigan Earned Sick Time Act. An act to require certain employers to provide certain employees with paid medical leave for personal or family health needs, as well as purposes related to domestic violence and sexual assault and to specify the conditions for accruing and using paid medical leave. Eligible employees shall include any individual engaged in service to the Township of White Lake except as noted herein.

Eligible Employees

Full-time, part-time and seasonal or temporary employees including employees provided through a temporary service or similar entity. Employees working at least 30 hours in a calendar year will be eligible to earn and accrue sick time.

Accrual of Earned Sick Time for Part-Time Employees

Accrual of sick time begins on February 21, 2025 or upon the commencement of the employee's employment, whichever is later in accordance with the Earned Sick Time Act. Employees will accrue one (1) hour of sick time for every thirty (30) hours worked. Employees shall be allowed to use at least (72) hours of paid sick time in a calendar year.

A **part-time** employee is required to wait until the **390th** calendar day after commencing employment before using accrued earned sick time.

Unused sick time will carry over from year to year **unless the part-time employee leaves employment with the Township for more than two (2) months. Unused sick time for part-time employees** but is not compensable at termination of employment.

Accrual of Earned Sick Time for Full-Time Employees

See section 14.4 (Sick Time Accrual for Full-Time Non-Union Employees of the Personnel Policies and Procedure manual. Union Employees should refer to their respective collective bargaining agreement,

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Leave Usage

An employee may use earned sick time accrued for any of the following:

- An eligible employee or an eligible employee's family member's mental or physical illness, injury, or health condition; medical diagnosis, care, or treatment of a mental or physical illness, injury, or health condition; or preventative medical care.
- If the eligible employee or his or her family member is a victim of domestic violence or sexual assault, for the medical care of psychological or other counseling for physical or psychological injury or disability; to obtain services from a victim services organization; to relocate due to domestic violence or sexual assault; to obtain legal services; or to participate in any civil or criminal proceedings related to or resulting from the domestic violence or sexual assault.
- For meetings at a child's school or place of care related to the child's health or disability, or the effects of domestic violence or sexual assault on the child.
- For the closure of employee's workplace or a school or childcare of employee's child due to public health emergencies.
- Earned Sick Time shall not be considered as a right which an employee may use at his/her discretion but shall be allowed only in case of necessity. All full-time employees are required to use earned sick time concurrent with FMLA time if eligible for FMLA – see the FMLA policy.

In order to receive compensation while absent on Earned Sick Time (EST),

- For leaves that are unforeseeable, an employee shall notify his/her supervisor within one (1) hour of the start of his/her shift that he/she will not be in to work, unless proof is presented that it was impossible for him/her to make contact.
- For leaves that are foreseeable, employees are required to give 7 days' notice prior to the day missed to their supervisor or as soon as possible. This provision shall not diminish the right of the Township of White Lake to require doctor's certificates or statements within three days for each instance of EST in which abuse is reasonably suspected.

Documentation

If an employee uses earned sick time due to sexual assault or domestic violence, the Township may require documentation showing that the leave was used for that purpose. Satisfactory documentation includes:

- (a) a police report.
- (b) a signed statement from a victim and witness advocate; or
- (c) a court document.

The Township does not require that the documentation explains the details of the violence or sexual assault or the details of any medical condition. Any information the Township of White Lake has on the violence, sexual assault, or medical condition will be kept confidential.

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Medical certification will not normally be required to substantiate earned sick time of three consecutive calendar days or less.

Family Members

Under the Earned Sick Time Act family members include all of the following:

A biological, adopted or foster child, stepchild or legal ward, or a child to whom the eligible employee stands in loco parentis (i.e., is the legal guardian).

A biological parent, foster parent, stepparent, or adoptive parent or a legal guardian of an eligible employee or an eligible employee's spouse or an individual who stood in loco parentis when the eligible employee was a minor child.

An individual to whom the eligible employee is legally married under the laws of any state.

A grandparent.

A grandchild.

A biological, foster, or adopted sibling.

An individual related by blood or affinity whose close association with the employee is the equivalent of a family relationship.

Payment of Sick Time Leave

Eligible employees using earned sick time shall be paid at a pay rate equal to their base hourly wage in effect as of the date of earned sick time usage.

Leave Increments

Employees using EST for eligible absences must use their leave time in 30-minute increments.

Presumption

The Township of White Lake is in compliance with the Earned Sick Time Act with those employees that are already provided with at least 40 hours of paid leave. Paid leave includes vacation, sick, personal, and paid time off. Those employees will not receive additional PML.

Full-time employees will ~~however~~ be allowed to use sick time under this law as designated for personal or family health needs, as well as purposes related to domestic violence and sexual assault and other conditions under the law.

This policy shall not reduce an employee's benefits as provided under the collective bargaining agreement.

Commented [PP1]: It does reduce some employees benefit because no additional sick time was given. MAPE and non-union employee would have to use vacation time to meet the 65 hours that should have been allotted. We currently only receive 60 hours for MAPE and non-union employees.

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Administrative Policies and Procedures

3.1 (b) Personnel Officer's Duties

Change to be all encompassing of the law.

3.2.(b) Confidentiality

Clean up of some language and clarify what is allowed by law.

3.2.(c) Freedom of Information Act Requests

Corrected language.

3.3 Classification Compensation

Request to change to in-house approval required instead of Board.

3.6 New Position Procedure

Delete and refer readers to Personnel Policy section for more details.

3.7 (a) Notice of Vacancy

Correction – should be 5 days per union policy.

3.7 (b) Publication

Clean up to reflect modern times and current best practices.

3.7 (e) Selection

Clean up of process language.

3.9 Employee Evaluation

6 months' probation is incorrect; it is 1 year in bargaining agreements. Other than that, clarify evaluation requirements for new employees and add eval period for current employees when transferring to a new position or department.

3.10 – 3.10 (a) and (b) Employee Discipline

Refers to collective bargaining agreement and removed grievance Committee since we don't need this for at-will employees and the grievance procedure is outlined in the collective bargaining agreements for union employees.

3.12 Collective Bargaining

Adding Deputy Supervisor for clarity even though the deputy is technically able to cover the Supervisors duties as requested.

4.7 (b) General Purchasing Policies

No. 6.c. & d. Clean up from last update changes that we forgot to add based on the increased approval limit.

4.7(c) Procurement Methods

No. 1 & 2. Clean up from last update changes that we forgot to add based on the increased approval limit and language clean up.

5.2 Building Access

Changes to reflect keyless entry and to set a process for new buildings based on our current practices.

5.3 Security

Changes to reflect keyless entry and to set a process for new buildings based on our current practices.

5.5 (c) Phone Calls

Most people have cell phones and should use their personal phone to make calls out of the country.

6.3 (b) Public Notice Responsibility

Correcting SAD hearings to Assessor.

White Lake Charter Township

Administrative Policies and Procedures

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White Lake Charter Township

Administrative Policies and Procedures

1.0 - Introduction

1.1 - Purpose

This Administrative Policies and Procedures manual is adopted to provide for the efficient and uniform application of administrative policies and procedures in White Lake Charter Township, where such procedures have not been provided for under state law.

2.0 - Township Board Administration

2.1 - Township Board Powers

The Township Board of White Lake Charter Township retains the power to determine the administrative policies and procedures for White Lake Charter Township, except where the laws of the state of Michigan have assigned such power to a specific elected township official. The authority to adopt any administrative policy or determine appropriate procedures not provided for in this manual or provided for by State law shall be retained by the Township Board. The Township Board also reserves the right to alter, modify, amend or repeal any or all provisions of this administrative policies and procedures manual.

2.2 - Authority Delegated from the Board

In the interest of promoting the efficient operation of the township and pursuant to MCLA 41.96, as well as implied powers of the Township Board, the White Lake Charter Township Board assigns to various township elected and appointed officials the authority to exercise the following non-statutory administrative responsibilities, in accordance with the specific policies and procedures contained herein.

2.3 - Interpretation Authority

The Township Supervisor shall provide interpretations of the provisions of the administrative policies and procedures manual. These interpretations shall be considered authoritative and binding unless the interpretation is appealed to the Township Board. Any such appeal be made at the next regular meeting of the Township Board. The Township Board may uphold, overturn or alter all or a part of any interpretations made pursuant to this section.

2.4 - Board Meeting Administration

2.4 (a) - Posting Meetings

The Township Clerk shall be responsible for posting all regular and special meetings of the Township Board in conformance with the Michigan Open Meetings Act. The posting of all meetings of the various township boards and commissions that are required to conform to the Open Meetings Act and the Americans with Disabilities Act (ADA) shall be the responsibility of the Township Clerk.

The Township Clerk is responsible for accommodating requests to provide various forms of media to comply with the Americans with Disabilities Act (ADA) for the hearing and verbally impaired, and the blind. Request for special accommodations must be made no later than 5 days in advance of the scheduled board meeting.

2.4 (b) - Meeting Agenda

The Township Supervisor and Clerk shall prepare the proposed agenda at least five working days prior to every Township Board meeting. Any board member or department head who desires to have an item placed on the agenda will make a request to the Supervisor. That request must be in writing with explanatory memo, supporting documentation and must be received by the Supervisor's Office by 12:00 p.m. seven working days prior to the meeting (this will always fall on a Friday). When the need to place an item on the agenda arises after this deadline, the business item may be added to the agenda by a majority vote of the Board. A copy of the proposed agenda shall be posted and emailed to the Township Board at least four working days prior to the Board meeting.

The agenda shall be approved by majority vote following the roll call of the Board at each Board meeting. Subject to change by the Supervisor, the agenda should contain the following:

1. Call to order
2. Pledge of Allegiance
3. Roll call
4. Approval of meeting agenda
5. Approval of consent agenda
6. Approval of prior meetings minutes
7. Presentations/Proclamations/Appointments (as needed)
8. Public comment (not to exceed 3 minutes)
9. Public hearings (as needed)
10. Resolutions (as needed)
11. Study session
12. Old business
13. New business
14. FYI (as needed)
15. Board member comments
16. Closed session (as needed)
17. Adjournment

2.4 (c) - Consent Agenda

The Supervisor and Clerk shall prepare a consent agenda for the Board, which shall be provided to each board member prior to the meeting. The consent agenda should contain all routine items of business such as, but not limited to, the following:

1. List of bills
2. Revenue and expense report
3. Check disbursement report
4. Budget amendments (as needed)
5. Acceptance of utility easements (as needed)
6. Acceptance of deeds (as needed)
7. Departmental reports
8. Notification of emergency expenditures if over \$10,000
9. Committee reports (as needed)

Approval of the consent agenda shall be accomplished by a single majority vote without discussion. Any board member may request that an item be removed from the consent agenda and be placed on the regular agenda under new business for discussion.

2.4 (d) - Board Rules

All Board meetings shall be conducted in accordance with Robert's Rules of Order, 9th edition, dated 1990, to the extent reasonably practical.

2.4 (e) - Public Participation

Members of the public shall have an opportunity, under Public Comment, to address the Board for no more than three minutes on any item that is not on the agenda.

Members of the public may also address a specific agenda item at the time that the item is taken up by the Board. The member of the public may speak only once for up to three minutes per agenda item. When all persons who wish to address that agenda item have been heard, the Supervisor shall announce that public comment on the agenda item is concluded. Board members shall then discuss the agenda item, and no further public comment shall be entertained.

There shall be no sharing of minutes during public comment. Neighborhood spokespersons may be allowed more time to speak on behalf of their community if the board decides more time is needed.

2.4 (f) - Consultants

The Township Board reserves to itself the authority to appoint the following consultants:

1. Attorney
2. Auditor
3. Engineer
4. Labor negotiator
5. Planner
6. Risk manager
7. Information technology

A letter of agreement shall be executed between the Board and each consultant that will address the following:

1. Term of the agreement
2. Description of services
3. Method of payment (retainer, hourly or by project)
4. Schedule of payment
5. Documentation of services provided
6. Method of resolving disputes
7. Which township officials are authorized to direct work or assign tasks to consultant

The term of the agreement with any consultant shall not exceed the end of the current Board's term of office.

The Board may establish a line item for consulting services within the cost center of each township official who is authorized to assign tasks to a consultant. The official may incur costs in utilizing a consultant up to the amount appropriated by the Board.

2.4 (g) - Litigation

The initiation of any lawsuit, litigation, claim for injunctive relief or writ of mandamus shall require a majority vote of the Township Board, except when there are extenuating circumstances, as defined below.

Extenuating circumstances are defined as an emergency situation or a situation in which a violation of any state, federal or local ordinance constitutes a public nuisance or otherwise endangers the public and in which the continued existence of such a condition, emergency or violation shall be detrimental to the health, safety and welfare of the township.

Extenuating circumstances also include any case where the continued existence of any condition, emergency or violation may jeopardize the legal position of the township in securing the intended remedy in any lawsuit, litigation, or other proceeding.

The initiation of a lawsuit, litigation or other proceeding for extenuating circumstances shall be allowed only upon the written directive of the Township Supervisor. In the event that such action is taken, the matter shall be brought to the Board's attention at its next meeting.

2.4 (h) - Control of Day-to-Day Administration

To promote efficient administration, the Township Board authorizes the Supervisor to provide day-to-day direction and control over all township activities that are not assigned by state law to another official, and to provide a liaison between the Board and the various township departments.

Board members should make all requests or complaints directed at department heads or employees to the township Supervisor. Any directives, complaints or requests made by a member of the Board directly to a department head or employee, other than from an elected official with statutory authority over the department head or employee, shall be brought to the attention of the Supervisor prior to initiating any response.

2.4 (i) – Communication to the Board of Trustees

The Supervisor's office will notify the Township Board of all appropriate community invitations or communications in a timely manner.

2.4 (j) – Proclamations and Tributes by the Township Board

Board members will be given the opportunity to sign proclamations or tributes that will be presented on behalf of the Township Board. Board members will be notified of the deadline by which he/she must sign the document to ensure the proclamation or tribute is ready for timely presentation. A Board member who fails to meet the deadline waives his/her right to sign the document.

3.0 - Personnel Administration

3.1 - Personnel Officer

3.1 (a) - Designation of Personnel Officer

To provide for efficient and uniform administration of personnel matters, the Township Board appoints the Supervisor as the township personnel officer.

3.1 (b) - Personnel Officer's Duties

The personnel officer and/or their designee shall do all of the following:

1. Develop job descriptions for all township positions. The descriptions will comply with all state and federal employment law~~the requirements of the ADA.~~
2. Update job descriptions as needed and review the accuracy and currency of all job descriptions at least once every three years.
3. Recruit applicants for position vacancies in accordance with the Employee Selection Policy Section.
4. Provide all new employees with a current copy of the township Personnel Policies and Procedures Manual.
5. Monitor changes in state and federal law that have an impact on township personnel practices.
6. Recommend to the Township Board necessary changes in the Personnel Policies and Procedures Manual and provide all employees with copies of amendments to the policies.
7. Provide interpretations of the township personnel policies and procedures when requested by department heads or employees. The interpretation of the personnel officer shall be considered final unless an appeal of the interpretation is filed with the Township Board.
8. Determine appropriate pay grade or compensation for all employees, subject to Board policies and appropriations.
9. Authorize department heads to impose employee sanctions that exceed the severity of a verbal or written warning.
10. Develop and implement a standard employee evaluation form for use by department heads in periodically evaluating the performance of employees under their supervision.
11. Authorize the use of extended leave by employees pursuant to the township Personnel Policies and Procedures Manual.
12. Monitor township and union compliance with collective bargaining agreements.
13. Conduct exit interviews of all terminating employees following a voluntary separation from township employment.

3.2 - Employee Record keeping

3.2 (a) - Personnel Records

The Township Supervisor's Human Resources representative~~Manager~~ shall maintain a permanent personnel record of each township employee. Each employee's personnel file shall contain the following:

1. Personal data, including full name, social security number, current address, education, training, skills profile, medical history and resume or application.
2. Performance evaluations
3. Use of authorized leaves
4. Commendations and/or disciplinary actions
5. Record of information receipt or coverage
6. Tax withholding information
7. Beneficiary information
8. Record of positions held and wage rates
9. Insurance and pension records

3.2 (b) - Confidentiality of Personnel Files

The contents of the employee personnel files shall be considered confidential. With reasonable advance notice to Human Resources, an employee may examine the contents of his or her personnel file under the direct supervision of the Human Resources representative-Manager. Board members and the personnel officer shall be provided viewing of any personnel file except for HIPPA protected medical records, social security numbers, and other private personal data. The contents of an employee's personnel file shall not be removed by anyone. Confidential information contained in a personnel file shall be released to others only with the written authorization of the employee. Personnel files will be kept for at least five years following an employee's termination.

3.2 (c) - Freedom of Information Act Requests

Requests for copies of documents contained in the personnel files that are made pursuant to the Freedom of Information Act will be released only after confidential information that may be contained on the document is deleted. The Human Resources representative or the FOIA Officer Manager may contact the township attorney for advice in responding to a Freedom of Information Act request involving personnel records. Pursuant to the Michigan Freedom of Information Act, the FOIA Officer Deputy-Supervisor, after consulting with the Township Attorney, shall Attorney, shall notify in writing any party requesting confidential information that the request is denied.

3.3 - Classification and Compensation

The Township Board shall establish an equitable compensation system for township employees. The Board shall determine a pay range for all township positions.

New employees shall be assigned to the first salary step of the position pay range. With the unanimous approval of the three in-house elected officials Township Board, a department head may authorize a new employee with prior years of comparable experience to be placed in an appropriate salary step.

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Commented [PP1]: Change to in house approval to expedite hiring.

Deputy Appointments will be subject to a two (2) step wage scale with a starting wage and 1 year step increase as approved by the board. These positions are at will appointees of the Township Supervisor, Township Clerk and Township Treasurer. (Amended June 29, 2021)

3.4 - Employee Safety

The Building Official is hereby appointed as the township safety officer. It shall be the duty of the safety officer to assess the general working conditions of the township on a continual basis. Any conditions that create a safety hazard shall be corrected immediately. The safety officer shall report to the Township Board any unsafe condition that will require a modification of any Board adopted policy or procedure or the expenditure of funds exceeding \$100.00 to eliminate that condition.

3.5 - Authorized Work Force

The Township Board shall determine the number of employees assigned to the various township offices. At its discretion, the Board may declare a moratorium on filling any vacancies.

3.6 - New Position Procedure

See Section 4.5 Request to Create New Position Classification in the Personnel Policies & Procedures manual. The following procedure shall be used to authorize new positions:

~~The department head shall discuss the need for the new position with the Supervisor.~~

~~If the Supervisor agrees that the proposed position should be recommended to the Board, the department head shall submit a draft job description along with pay scale, and written position justification to the Supervisor, who may approve, modify, or reject the draft job description and/or position justification. Following the approval of the Supervisor, the proposed job description, position justification and pay scale shall be submitted to the Township Board for final approval.~~

~~If the Supervisor does not agree to recommend creating the proposed position, the department head may appeal the decision to the Township Board. The Board may concur with the recommendation of the Supervisor or may approve creating the new position and direct the Supervisor to develop a job description for the position.~~

~~The Township Board may accept or reject the implementation of the new position. The Board shall not create any new position without prior adoption of any necessary budget amendments.~~

3.7 - Employee Selection

The Supervisor and/or their designee (s) shall utilize the following procedures in filling any vacant employment positions except the Deputy Clerk, Deputy Treasurer, and Administrative Assistant to the Supervisor:

3.7 (a) - Notice of Vacancy

A notice of position vacancy shall be ~~developed, and developed and~~ posted ~~internally-house~~ so that existing employees have an opportunity to apply based on the current job description and discussions with the department head. The posting shall provide the title, brief position description, education and experience requirements, current pay grade, application deadline and the township's equal employment opportunity policy. *This shall be posted on the bulletin board for five seven (57) days.*

Commented [PP2]: This is 5 days in the union contract.

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3.7 (b) - Publication

The position vacancy notice shall be posted on the Township's employment opportunity web page, published in the local newspaper and/or other appropriate job search publications, as determined by the Human Resources representative and the Township Personnel Officer.

3.7 (c) - Screening

The applications or resumes submitted will be screened with the department head, and a list of qualified candidates will be developed.

3.7 (d) - Interviews and Tests

Interviews will be conducted with the department head's participation. Additional screening procedures, such as employment testing, routine physical examination and drug testing shall be included. At least three non-related references shall be contacted.

3.7 (e) - Selection

The ~~Township Personnel Officer~~Supervisor and/or their designee-(s), with input from the department head, shall select the candidate that best meets the job prerequisites for education, experience, personal traits and management style, if appropriate.

If desired under certain circumstances, ~~t~~he selected candidate may be submitted to the Township Board for concurrence of decision or for additional selection input.

3.8 - Employee Supervision

Department heads shall provide direction to employees in a manner that complies with the provisions of this Administrative Policies and Procedures Manual, as well as all federal and state laws, township ordinances and the township Personnel Policies and Procedures Manual.

3.9 - Employee Evaluation

All new employees covered by a bargaining agreement shall be considered probationary orientation employees for a period of at least one (1) year~~six months~~ following their initial date of employment. During the probationary orientation period, employees will be evaluated on an on-going basis and shall receive a formal written evaluation at the end of three months, ~~and at the end of six months~~, and at the start of 11 months. A probationary~~n-orientation~~ employee may be discharged without recourse to the appeal process. All non-orientation employees will be evaluated by their department head ~~at one-year intervals~~, within one month of the employee's anniversary date. Department heads shall be evaluated by the Supervisor.

Employees new to a position but not new to the Township will be evaluated at 3 months and 6 months.

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3.10 - Employee Discipline

Department heads may administer verbal or written warnings pursuant to guidelines in the employees' respective bargaining agreement, ~~adopted in the township Personnel Policies and Procedures Manual~~.

3.10 (a) - Suspension or Discharge

The application of suspension or discharge shall be authorized by the personnel officer, pursuant to guidelines in the employees' respective bargaining agreement~~adopted in the township Personnel Policies and Procedures Manual~~.

3.10 (b) - Appeal

A suspension or discharge may be appealed or grieved pursuant to guidelines adopted in the township Personnel Policies and Procedures Manual~~the employees collective bargaining agreement~~.

~~3.11 - Grievance Committee~~

~~The Grievance Committee shall be composed of three persons serving concurrent two (2) year terms. Selection of the committee membership shall be made as follows:~~

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- ~~1. The chairperson of the committee shall be a member of the Township Board, appointed by the Township Board.~~
- ~~2. A full-time employee selected by the full-time employees.~~
- ~~3. A citizen selected by the first two members.~~

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~~4. Part-time employees and on-call firefighters will be represented by the above committee. (Added 02/03/98)~~
~~The Grievance Committee, when convened to consider a grievance, shall consist of all three members.~~

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3.12 - Collective Bargaining

The Township Board delegates to the Supervisor, Deputy Supervisor, and/or his HR designee, Clerk, Treasurer, and the Township Labor Attorney the authority to represent the Township Board in collective bargaining negotiating sessions. Prior to beginning negotiations, the Township Board shall meet in closed session to develop negotiation strategy regarding wages, hours, conditions of employment and any non-mandatory topic to which the Township Board agrees to negotiate. Any proposed agreement shall be brought to the Township Board for its ratification or rejection.

3.13 - Employee Recognition

Department heads shall bring any incidences of meritorious conduct by any township employee, volunteer or appointed official to the attention of the Supervisor. Upon recommendation by the Supervisor, the Township Board shall recognize meritorious actions that the Board deems worthy through the adoption of resolutions of tribute.

3.14 - Ethical Standards

All elected and appointed officials, employees and volunteers shall fulfill their duties with the utmost attention to serving the best interests of the township citizens, and no official, employee or volunteer shall participate in a decision or transaction on behalf of the township that would result in a direct financial benefit to the township official, employee or volunteer.

Any official, employee or volunteer who believes that he or she may be placed in a potential conflict of interest shall immediately notify the Township Supervisor, and any subsequent action shall be in conformance with state law.

No employee shall accept employment that conflicts with performing his or her township duties.

No officer or employee shall solicit, accept or receive, directly or indirectly, any gift or consideration, whether in the form of money, service, loan, travel, entertainment, hospitality, thing or promise, or in any other form, under circumstances in which it can reasonably be inferred that the gift is intended to influence him or her in the performance of their official duties or is intended as a reward for any official action on their part.

Township of White Lake and ~~sub-grantees~~subgrantees will maintain a written code of standards of conduct governing the performance of their employees engaged in the award and administration of contracts. No employee, officer or agent of White Lake Township shall participate in selection, of in the award or administration of a contract supported by Federal Funds if a conflict of interest real or apparent is involved. Such a conflict would arise when:

- i. the employee, officer, or agent,
- ii. any member of his immediate family,
- iii. his or her partner, or,
- iv. an organization which employs, or is about to employ any of the above, has a financial or other interest in the firm selected for award. The grantee's or ~~sub-grantee's~~subgrantee's officers, employees, or agents will neither solicit nor accept gratuities, favors or anything of monetary value

from contractors, potential contractors, or parties to sub-agreements. Grantee and sub grantees may set minimum rules where the financial interest is not substantial, or the gift is an unsolicited item of nominal intrinsic value. To the extent permitted by State or local law or regulations, such standards or conduct will provide for penalties, sanctions, or other disciplinary actions for violations of such standards by the grantee's and ~~sub-grantee's~~subgrantee's officers, employees, or agents, or by contractors or their agents. The awarding agency may in regulation provide additional prohibitions relative to real apparent or potential conflicts of interest.

1. A public officer or employee shall not divulge to an unauthorized ~~person,~~person confidential information acquired in the course of employment in advance of the time prescribed for its authorized release to the public.
2. A public officer or employee shall not represent his or her personal opinion as that of an agency.
3. A public officer or employee shall use personnel resources, property, and funds under the officer or employee's official care and control judiciously and solely in accordance with prescribed constitutional, statutory, and regulatory procedures and not for personal gain or benefit.
4. A public officer or employee shall not solicit or accept a gift or loan of money, goods, services, or other thing of value for the benefit of a person or organization other than White Lake Township which tends to influence the manner in which the public officer or employee or other public officer or employee performs official duties.
5. A public officer or employee shall not engage in a business transaction in which the public officer or employee may profit from his or her official position or authority or benefit financially from confidential information which the public officer or employee ~~has-obtained~~obtained or may obtain by reason of that position or authority. Instruction, which is not done during regularly scheduled working hours, except for annual leave or vacation time, shall not be considered a business transaction pursuant to this subsection if the instructor does not have any direct dealing with or influence on the employing or contracting facility associated with his or her course of employment with White Lake Township.
6. Except as otherwise provided by State law, a public officer or employee shall not engage in or accept employment or render services for a private or public interest when that employment or service is incompatible or in conflict with the discharge or the officer or employee's official duties of when that employment may tend to impair his or her independence of judgment or action in the performance of official duties.
7. Except as otherwise provided by State law, a public officer or employee shall not participate in the negotiation or execution of contracts, making of loans, granting of sub sidles, fixing of rates, issuance of permits or certificates, or other regulation

or supervision relating to a business entity in which the public officer or employee has a financial or personal interest.

8. No public servant shall be a party, directly or indirectly, to any contract between himself and the public entity of which he is an officer or employee, except as provided by State law.
9. No public servant shall directly or indirectly solicit any contract between the public entity of which he is an officer or employee, and
 - a. himself;
 - b. any firm (meaning a co-partnership or other unincorporated association) of which he is a partner, member, or employee;
 - c. any private corporation in which he is a stockholder owning more than 1% of the total outstanding stock of any class where such stock is not listed on a stock exchange or stock with a present total market value in excess of \$25,000.00 where such stock is listed on a stock exchange or of which he is a director, officer, or employee, or
 - d. any trust of which he is a beneficiary or trustee; nor shall he take any part in the negotiations for such a contract or the renegotiation thereof or amendment thereto or in the approval thereof, nor shall he represent either party in the transaction except as provided by State law.

4.0 - Financial Administration

4.1 - Accounts Payable

4.1 (a) - Department Head Authorization

All requests for payments, i.e., invoices or expense vouchers, shall be processed in accordance with the Processing of Claims section of this manual, and shall be approved by the department head responsible for the cost center to which the expense shall be posted. The department head shall indicate that the expense is authorized and correct by affixing the account number and his or her initials to the invoice. All approved bills must be submitted to the Clerk's office for processing.

4.1 (b) - Petty Cash

The Treasurer shall maintain petty cash for small emergency purchases, reimbursements to employees or to pay for a service where payment is demanded prior to delivery.

Petty cash will not be used for purchases that exceed the amount approved by the Township Board. A copy of each receipt and a receipt signed by the recipient of a petty cash disbursement shall accompany all disbursements.

The amount of petty cash to be retained shall be the amount approved by the Township Board.

4.2 - Payroll

The township payroll will be administered in accordance with the Personnel Policies and Procedures Manual.

4.3 - Cash Receipts

4.3 (a) - Authorization to Receive Cash

The Treasurer's office has exclusive authorization to receive cash.

4.3 (b) - Fiduciary Bonds

All employees of the Treasurer's office, authorized to receive cash, shall be bonded to the amount of \$10,000.00.

4.3 (c) - Receipts

A pre-numbered township receipt shall be issued for all cash, including checks, received by a township employee. The receipt shall include the amount received, name of the payer, and purpose.

4.3 (d) - Deposits

Total cash collected shall be reconciled to the sum of the pre-numbered receipts and shall be deposited at least weekly in the appropriate township bank account. The Treasurer and Deputy Treasurer are authorized to make bank deposits.

4.3 (e) - Bank Reconciliation

The cash balances of the various fund ledgers shall be reconciled to the bank statements monthly. The cash balances should be the result of the cash receipts and disbursement activities and shall be derived from the same accounting records used in preparing the financial reports discussed in the Financial Reporting section of this manual.

4.4 - Financial Reporting

4.4 (a) - Periodic Expenditure and Revenue Report

The Clerk shall prepare a monthly financial report for the Board. The report will be current through the last day of the previous month and shall be presented to the Board at its regularly scheduled Board meeting each month. The financial report for each fund will show the following information for revenues and expenditures:

1. Account number
2. Description
3. Amended budget
4. Current period
5. Year to date
6. Budget balance

4.4 (b) - Investment Performance Report

The Treasurer shall prepare a monthly report of all interest-bearing activities, including the name of the financial institution and type of investment.

4.4 (c) - Financial Reports Review

The Supervisor, Clerk and Treasurer shall review the financial reports prior to the Board meeting and shall recommend to the Board any necessary budget amendments or fund transfers.

4.5 - Inventory of Fixed Assets

4.5 (a) - Responsibility

The Clerk shall maintain an inventory of the township's fixed assets that are tangible, have an expected useful life of at least one year and have a value of at least ~~\$10,000.00~~\$5,000.00 (Amended 12/30/03)

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4.5 (b) - Updating

The Clerk shall add or remove fixed assets from the inventory at the time of acquisition or disposal. The inventory shall include the following information on each asset:

1. Acquisition date
2. Name and address of vendor
3. Description
4. Location
5. Acquisition cost (if gift, estimated fair value at time of donation)
6. Date and method of authorized disposition*
7. Permanent identification number

4.5 (c) - Inventory Responsibility

Department heads shall annually inventory all assets assigned to their department and submit the inventory to the Clerk's office.

4.5 (d) - Disposal of Fixed Assets

Department heads shall make note of the annual inventory, or shall notify the Clerk sooner if desired, of any equipment that would be appropriate for disposal. The Clerk shall prepare a list of all such equipment recommended for disposal and shall submit the list to the Supervisor. The Supervisor will submit the recommended disposal of fixed assets list to the Board for approval. The Board shall determine the method of disposal, which may include sealed bids, auction, negotiated sale, gift or disposal. Township officials and employees are not eligible to purchase township fixed assets by negotiated sale without the approval of the Board. An elected official shall refrain from voting, with the unanimous consent of the Board, on any negotiated sale involving the elected official.

4.6 - Budgeting

4.6 (a) - Designation of Budget Officer

The Supervisor shall be the township budget officer and shall be responsible for the development and administration of the township budget.

4.6 (b) - Timetable

The proposed budget shall be developed according to the following schedule

<u>Date</u>	<u>Activity</u>
Jul. 1	Budget policies developed by Township Board
Jul. 15	Informational meeting for department heads
Aug. 1	Department heads submit proposed revenue and expenditure plans to budget officer
Aug. 15	Budget officer meets with department heads
Sep. 1	Budget officer presents proposed budget to Township Board

- Oct. 1 Township Board adopts tentative budget
- Nov. 1 Budget public hearing held by Township Board
- Nov. 1 General Appropriations Act adopted

(Note: Events which require Township Board action shall be completed at the first Board meeting of the month indicated.)

4.6 (c) - Adoption

Unless noted in the General Appropriations Act, all township funds are adopted on a cost center basis.

4.7- Procurement Policy

4.7 (a) – Purpose

1. The Procurement Policy establishes standards and guidelines for the procurement of supplies, equipment, vehicles, construction, and services for the Charter Township of White Lake. These policies have been developed within the limits set by the Charter Township Act and are furnished to ensure that supplies, equipment, and services are obtained efficiently and economically.
2. Under the Charter Township Act, the Township Supervisor is established as the Purchasing Agent for the Township. The Supervisor may delegate such duties to some other officer or employee.
3. Interpretation of the requirements contained herein shall be made by the Township Supervisor. Any revisions of these policy requirements shall be made by the Township Board. Any requests for revisions shall be made through the Township Supervisor.
4. The Supervisor’s Office shall be responsible for the administration of the procurement system of the Township. The functions of purchasing shall be managed by the Township Supervisor.

4.7 (b) - General Purchasing Policies

Notwithstanding any other provision in these policies, applicable State and Federal law/regulations shall prevail regarding procurement under regulated grants to the Township of public funds.

1. Procurement of all goods, services, and equipment shall be in accordance with the following schedule, except in the case of emergency expenditures:
 - a. Purchases up to \$1,000 may be made by any department head within their departmental budget, with notice to the Township Supervisor within seventy-two (72) hours.

- b. Purchases from \$1,001 to \$5,000 must have prior approval of the Township Supervisor.
 - c. Purchases from \$5,001 to \$10,000 must have prior approval of the Township Supervisor and the Township Clerk or Township Treasurer. The Township Board shall be informed of purchases over \$5,000.
 - d. Purchases over \$10,000 must have prior approval of the Township Board, with the exception of pass-thru expenditures which were pre-paid by the customer and approved by the Supervisor, i.e., grinder pumps or other items for a development or project.
2. Emergency Expenditures – when necessary to protect the health, safety and welfare of the community, the Township Supervisor may make or authorize expenditures higher than \$10,000 after receiving consent of the Township Clerk or Township Treasurer. If neither is available, consent must be obtained by at least one Township Board member for a total of two.
 3. Procurement of shared services, bulk purchases and commonly purchased items shall be standardized across departments when such standardization would be economical for the Township through the realization of economies of scale, administrative efficiency, group discounts or the consolidation of maintenance contracts.

In order to achieve standardization of procurement and greater internal and administrative control, the Township Supervisor shall consult using departments to determine their particular requirements and shall prescribe those standards which meet the needs of the majority of the departments and the minimum requirements of each. The Township Supervisor may initiate purchases of goods and services on behalf of Township departments necessary to standardize administrative processes and controls or achieve interoperability.

4. All procurement transactions within the Township, regardless of whether by: quote; sealed bid; negotiation or other format allowed under this policy, shall be conducted in a manner that provides maximum open and free competition.
5. Whenever possible, in keeping with free and open competitive procedures, Township businesses shall be considered for contracts.
 - a. In such cases where the lowest bid is received from a non-township business and the next lowest qualified bid is received from a township vendor, whose price is within five percent (5%) of that lowest qualified bid, the township vendor may be invited to match the lowest qualified bid when the township vendor meets all other bid requirements.
 - b. In the case of tie bids where all the items are equal, awards will be made to the vendor nearest to the requested delivery site. In situations where both vendors are the same distance and same price, consider the possibility of collusion.

- c. If collusion is suspected, an alternative source should be investigated to fill the department's needs and a re-bid should be instituted.
 - d. In all cases of tie bids, local vendors will be awarded the order, if at all possible.
6. Goods determined to be of surplus nature, i.e., those items deemed of no further use to the Township and/or which are obsolete, worn out or scrapped, shall be subject to disposal in the following manner:
- a. Prior to the sale or disposal of goods and equipment no longer of use to a department, the Department Head shall notify Township Supervisor and Clerk of the availability of the surplus item. The item shall be offered to other Township departments prior to sale or disposal.
 - b. An item with a market value of less than \$500 shall be disposed of at the discretion of the Department Head and is subject to item 4.7 (b) 6. a. above.
 - c. An item with a fair market value of more than \$500 and less than \$105,000 at the time of disposal, as established by the Township Supervisor, shall be disposed of with the approval of the Township Supervisor and one other full-time elected official.
 - d. An item with a fair market value in excess of \$105,000 at the time of disposal as established by the Township Supervisor shall be disposed of with the approval of the Township Board by the best and most efficient means, taking into account such factors as storage, handling costs and advertising.
7. The solicitation of offers and requests for proposals shall include a clear and accurate description of the requirements for the goods or services to be procured. The description should not contain features that unduly restrict competition. A "brand name or equal" description may be used as a means to define the performance or other solicitation requirements of the procurement.
8. Procurement awards should only be madegiven to qualified vendors who possess the potential ability to perform successfully under the terms and conditions of the proposed procurement. Contractor integrity, past performance, financial ability to perform the contract and references may be used as guides for determining contractor ability.
9. No purchase shall be subdivided for the purpose of circumventing any dollar value limitations established by this policy.

4.7 (c) - Procurement Methods

In order to allow department and staff flexibility as to how procurement shall be made, the following types of procurement where specifically allowed, may be used to purchase goods, services and equipment as justified by both the requesting department and the Township Supervisor:

1. Purchase Order – through local vendors already pre-approved by the Township Supervisor, designated departmental employees may purchase products up to \$1,0500. All designated employees are required to use due diligence in purchasing and all purchases are subject to the review and approval of the Township Supervisor and department head.
2. Charge/Credit Card Purchases – departments with authorized charge cards may purchase necessary products up to \$1,0500 if approved by their department head. All employees authorized to use department charge cards are subject to the review of the department head and the Township Supervisor. All purchases must go through the Township Supervisor's Office. Including, but not limited to, travel arrangements, hotel stays, conventions, etc. An e-mail is to be sent the same day to the Township Supervisor stating the company/vendor name, amount of purchase and account number to be used for the purchase. No employee's personal credit card shall be used unless in case of an emergency.
3. Telephone Quotes – the Township Supervisor or his/her designee may solicit bid quotations over the phone from selected vendors (3 or more) describing the product needed. Telephone quotes are limited to total purchases of up to \$5,000.
4. Written Quotes – the Township Supervisor or his/her designee may solicit written quotes from vendors (3 or more) by describing the product in writing and receiving written quotes via hand delivery, first-class mail, electronic mail or fax. Written quotes are limited to total purchases of up to \$25,000. In the event time is of the essence, this amount may be higher.
5. Open Sealed Bids – the Township Supervisor or his/her designee may advertise, through the newspaper or professional trade magazines, for sealed bids to be opened in a public forum. Bid specifications would be made available to potential vendors and the awarding of the bid would be by authorization of the Township Board. Open sealed bids are intended for total purchases over \$25,000.
6. Invited Sealed Bids – the Township Supervisor or his/her designee may seek bids from a restricted list of qualified vendors. Bid specifications would be made available to potential vendors and the awarding of the bid would be by authorization of the Township Board. Invited sealed bids are intended for total purchases over \$25,000 where the specifications or scope of work are limited to a small number of qualified firms.
7. Request for Qualification – the Township Supervisor or his/her designee, may solicit, either through open advertising or a restricted list of qualified vendors, statements of qualifications from vendors seeking to perform professional or technical services for the Township.

Contracts awarded by this method must be authorized by a majority roll call vote of the Township Board.

Types of services which may be procured under this method include architectural, engineering, legal, information technology, mechanical, electrical, and financial and municipal consulting. Competitors' qualifications are evaluated, and the most qualified competitor is selected, subject to the negotiation of fair and reasonable compensation.

A committee of three (3) members shall be established by the Township Supervisor to review applicants and make a recommendation to the Township Board.

The reviewing committee shall consider the concerns expressed in Michigan House Concurrent Resolution No. 206, adopted in 1987, urging political jurisdictions of the State to select the services of a design professional based upon qualification.

8. Single Source Purchase – single source purchasing refers to purchases from one selected supplier. Awarding contracts through single source purchasing is subject to the review of the Township Board and allowed only under any of the following situations:
 - a. The item is available from a single source only. The Department Head shall document in writing, after a good faith review of available sources, that there is only one source of the required good or service. All documentation shall be reviewed by the Township Supervisor, or
 - b. The purchase from a single source is approved by a majority vote of the Township Board, or
 - c. The procurement is for a product that is part of a system in which selection of an alternative brand would alter the ability of the using department to operate and/or maintain the system. Examples of this type of single source are the self-contained breathing apparatus used by the Fire Department, electrical equipment, pumps, fittings and meters used by the Water and Sewer Departments, safety equipment and firearms used by the Police Department, and computer and phone system equipment.
 - d. Due diligence is required in selecting a manufacturer and supplier for those types of products purchased under this provision of single source purchases. Purchases over \$10,000 must be approved by the Township Board.

9. Government Contract – whenever a product has had its price pre-determined at a government rate through the Federal, State or other local government or agency, this product may be purchased without going through the required bid process.

Use of government contracts must be jointly agreed to by the department head and the Township Supervisor. *Contracts up to \$5,000* must be approved by the Township Supervisor. Contracts from \$5,001 up to \$10,000 must be approved by the Township Supervisor and the Township Clerk or the Township Treasurer. The Township Board shall be notified of Contracts over \$5,000. Contracts over \$10,000 must be approved by the Township Board.

10. Emergency Procurement – in the case of an emergency, and subject to the review of the Township Supervisor, employees may make purchases without the constraints placed by the above methods. Subject to the following:
 - a. Emergencies are procurement needs that could not have been anticipated under an effective departmental procurement plan and without such procurement the proper functions of the department or the health and safety of the public will be jeopardized.
 - b. In the event of an emergency procurement, the department is required to notify the Township Supervisor immediately, provide documentation of the purchase, along with an explanation of the emergency.
11. Lease and Lease Purchase – in purchases of products, departments shall consider the possibility of leasing equipment as an alternative to purchasing. Equipment obtained through a lease is subject to the same competitive procurement standards as a purchase.
12. Petty Cash – departments may use petty cash for purchases up to \$75.00. Reimbursement from the Treasurer’s Office will be made with documentation and receipt of purchase. Tax Exempt Certificate should be taken with ~~employee~~employees when purchasing with Petty Cash so no tax is charged. Every effort should be made to avoid any such purchases when a check or credit card can be made available.

4.7 (d) – Purchasing Functions and Responsibilities of Township Supervisor

1. The Township Supervisor has the authority to obligate the Township to contracts for the purchase of supplies, services, material, and equipment.
2. The Township Supervisor or his/her designee shall:
 - a. Have the sole authority to issue Purchase Orders and shall do so within the directions set by this policy.
 - b. Coordinate the purchasing of all departments and shall, to the extent that it is practical, combine specifications for the purchases of equipment and supplies under single purchases where such consolidation is economical for the Township.
 - c. Monitor the compliance of Township department purchasers with the Township Purchasing Policy and Procedures, including the maintenance of economy, efficiency, and accountability.
 - d. Ensure that department orders and requisitions have been authorized by the using department.
 - e. Establish and maintain lists of qualified bidders.
 - f. Establish and maintain purchasing forms, issue, and execute purchase orders and maintain purchase records.

- g. Provide for the gainful disposal of any surplus or scrap items, and in accordance with the provisions of Section 4.7 (b) 6.
- h. Be responsible for locating and ordering goods and services that meet the legitimate needs and specifications of using departments in a timely, ~~economic~~ economic, efficient and ethical manner.
- i. Procure for the Township goods and services of the highest quality and lowest price.
When these two objectives conflict, the Agent must judiciously determine the balance of the two that will be of the greatest benefit to the Township.

The criteria for judging quality may include the quality of the goods or service as well as the vendor's reliability, delivery terms and record, quality of service, capacity to furnish required quantities, interoperability of components and experience.
- j. Secure for the Township all federal tax exemptions to which it is entitled, whenever applicable.
- k. Decide choice of vendor and purchase terms.

In the event that such choices conflict with the preferences of using departments, the Township Supervisor shall choose those standards which meet the needs of the majority of departments while satisfying the legitimate minimum requirements of each.
- l. Document vendors who default on their quotations, misuse Township bid lists or specifications for purposes other than intended by the Township or fail to deliver specified goods and services.

The Township Supervisor may disqualify them from receiving future bid lists from the Township for a period of time set by the Township Board.
- m. Notify Township Departments of surplus equipment or goods that are available to them.
- n. Have the authority to make emergency expenditures.

4.7 (e.) – Purchasing Functions and Responsibilities of Departments

Departments have ~~the~~ responsibility to effectively determine their purchase needs in accordance with their budgets.

1. Specifically, it is incumbent upon departments to:
 - a. Make no purchase without the appropriate authorization as provided in this Section 4.7.
 - b. Determine that prospective orders can be accommodated within the appropriate activity of the Township budget.
 - c. Ensure that all departmental orders have been signed by the authorized person.

- d. Furnish the Township Supervisor with clear and complete specifications for required goods and services, as well as information on vendors' terms of purchase, including any relevant information that would assist the Township Supervisor.
In cases of competitive bidding, using departments shall provide information on the amount of any security or performance bond required with the bids.
- e. In procurement where the department is soliciting bids or quotes, provide the Township Supervisor with all necessary documentation of the process.
- f. Upon receipt of proper approval, the department heads will be authorized to place the order. To that end, and in the interest of economy, departments must plan their procurement.
- g. Department heads shall maintain detailed requisitions or estimates of their requirements in goods and contractual services.
- h. Keep the Township Supervisor advised, as much in advance as possible, of unusually large or uncommon demands.
- i. Maintain adequate inventories of supplies and materials.
- j. Not unnecessarily encumber Township funds by paying in cash for purchases and seeking subsequent reimbursement for such purchases from the Treasurer's Office.
The ability to purchase goods and services with cash and receive reimbursement should occur rarely and, if abused, may be revoked by the Township Supervisor.
- k. Inspect all goods and materials received to determine whether they conform to the order in terms of specifications, quantity, and quality.
- l. Notify the Township Supervisor prior to any deviations from the Purchase Order in the goods received, including specifications, quantity, and quality.

4.7 (f) – Sealed Bid Process

In soliciting, reviewing and awarding bids for either open or invited sealed bids the following procedures shall apply.

1. Public Notice – Adequate public notice of the invitation for bids shall be given a reasonable time before opening of bids. At a minimum, fourteen (14) calendar days, excluding Township recognized holidays, shall be allowed for the return of bids.
Public notice may include publication in a newspaper of general circulation at a reasonable time prior to bid opening. The public notice shall state the place, date, and time of bid opening. If open bids are not solicited by newspaper advertisement, notice thereof shall be posted at the Township Hall.
2. The sealed bids shall be received by the Clerk's Office. Sealed bids shall be reviewed at the Clerk's Office at a predetermined time as scheduled by the Township Clerk. Sealed bids shall be opened by the Township Supervisor and/or Clerk or their designee in the

presence of a representative from the department that is soliciting the bids or the designing engineer if appropriate.

3. Bids shall be turned over to the using department for evaluation and recommendation to the Township Board. The using department's recommendation shall include a synopsis and tabulation of all bids for Board review.
4. After tabulation, all bids may be inspected by the competing bidders.
5. Bid acceptance and Bid Evaluation – Bids shall be unconditionally accepted without alteration or correction, except as authorized by the Township Board.
6. Bids shall be evaluated based on the requirements set forth in the invitation for bids, which may include criteria to determine acceptability such as inspection, testing, quality, workmanship, delivery, and suitability for a particular purpose.

Those criteria that will affect the bid price and be considered in evaluation for award shall be objectively measurable, such as discounts, transportation costs, and total or life cycle costs.

The invitation for bids shall set forth the evaluation criteria to be used. No criteria may be used in bid evaluations that are not set forth in the invitation for bids.

7. Rejection of Bids – The Township Board shall have the right to reject any or all bids and may, by majority vote, waive irregularities in bidding.
8. Award – The contract shall be awarded by written notice generally to the lowest qualified and responsive bidders whose bid meets the requirements and criteria set forth in the invitation for bids. If the lowest bid is not selected, the department must submit written justification to the Township Board.
9. In the event the lowest responding and qualified bid for a construction project exceeds budgeted funds and such bid does not exceed such funds by more than five percent (5%), the Township Supervisor is authorized, when time or economic considerations preclude re-solicitation of work of a reduced scope, to negotiate an adjustment of the bid price with the low responsive and qualified bidder, in order to bring the bid within the amount of available funds. Any such negotiated adjustment shall be based only upon eliminating independent deductive items specified in the invitation for bids.
10. All bidding processes, including any using department's request to depart from the lowest bid, shall be documented and forwarded to the Township Supervisor.
11. Bonding – If required, the contractor shall, at the time of the execution of the contract, file a bond executed by a surety company authorized to do business in the State of Michigan, to the Township, conditioned to pay all laborers, mechanics, subcontractors and suppliers as well as all just debts, dues and demands incurred in the performance of such work and shall file a performance bond when one is required.

The said contractor shall also file evidence of public liability insurance in an amount satisfactory to the using department and agree to hold the Township harmless from loss or damage caused to any person or property by reason of the contractor's negligence.

12. All proposals and deposits of certified or cashier's checks may be retained until the contract is awarded and signed. If any successful bidder fails or refuses to enter into the contract awarded to him within fifteen (15) calendar days after he has been notified, or to file any bond required within the same time, the deposit accompanying his proposal may be forfeited to the Township and the Township Board may, at its discretion, award the contract to the next qualified bidder. Exception: All deposits except for the top three bidders shall be returned within ten (10) days of bid opening.

4.7 (g) - Ethics and Standards of Conduct in Relations with Vendors

The relations between the Township and vendors are formed by mutual needs. The best efforts shall be invested to build working relationships of reciprocal confidence and benefit in the interests of the Township. In addition to Federal and State laws that govern business ethics, the following standards of conduct shall be observed:

1. All vendors shall be treated equitably. Procurement decisions shall be based on all pertinent business information only, including price, quality, specifications, and previous service record.
2. Board members, employees and agents of the Township shall be prohibited from furnishing, directly or indirectly, to any prospective bidder information that would give any vendor an unfair advantage over other prospective vendors.
3. Procurement records shall be retained by the Township Clerk for public review.
4. Employees shall promptly notify his/her supervisor in writing of any actual or possible conflict of interest pertaining to himself/herself and shall withdraw from further participation, on the Township's behalf, in the business transaction involved. Township Board members must disclose any actual or possible conflict to the Township Board.
5. Any potential conflict of interest shall be reported by the employee's supervisor to the Township Supervisor prior to bidding.
6. A Township employee or any member of a Township employee's immediate family who holds a financial interest in a disclosed blind trust shall not be deemed to have a conflict of interest with regard to matters pertaining to that financial interest.
7. No Township Board member or employee shall accept or solicit any gift, gratuity, or other benefit from vendors to the Township, current or prospective, extended for the purpose of influencing a favorable award.

It shall be unethical for any person to offer, give, or agree to give any Township employee a gratuity or an offer of employment for the purpose of obtaining a favorable award.

8. In cases where a sitting trustee, or any entity in which the trustee is an owner, stockholder, member, director, employee or has any other financial or management interests therein submits a bid on a proposed contract let for bid by the Township, the trustee shall also submit a notarized certification with the bid documents certifying the following:
 - a. The trustee, or trustee's entity, has no actual or potential conflict of interest arising out of the performance of the contract, if chosen as the lowest qualified bidder. In the event such a conflict should arise at any time, the trustee shall immediately disclose the full nature of the conflict to the Supervisor.
 - b. The trustee or trustee's entity certifies that no "insider" information has been provided to the trustee, or trustee's entity, or any other information not available to competing vendors in the request for bid which would give an unfair advantage.
 - c. The certification shall be submitted on forms provided by the Township. Submission of a false certification shall be deemed malfeasance in office.
9. Kickbacks – It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.
10. Contemporaneous Employment – It shall be unethical for any Township employee who is participating directly in the procurement process to become or to be, while such a Township employee, the employee of any person contracting with the Township.
11. The Township Board may grant a waiver from the employee conflict of interest provision or the contemporaneous employment provision upon making a written determination that:
 - a. The contemporaneous employment or financial interest of the Township employee has been publicly disclosed; and
 - b. The Township employee will be able to perform the procurement or contract functions without actual or apparent bias or favoritism; and
 - c. The award will be in the best interests of the Township
12. It shall be unethical for any employee or former ~~employee~~ knowingly ~~employee~~ to use confidential information for actual or anticipated personal gain, or for the actual or anticipated personal gain of any other person.
13. Sanctions – In concert with Township bargaining agreements and employee policies, the Township Board may impose any one or more of the following sanctions for violations of the ethical standards in this Section:

- a. Township Employees,
 - 1. oral or written warnings or reprimands; or
 - 2. suspension with or without pay for a specified period of time; or
 - 3. termination of employment
 - 4. legal sanctions
- b. Contractors,
 - 1. written warnings or reprimands; or
 - 2. termination of contracts; or
 - 3. debarment or suspension
 - 4. legal sanctions

4.7 (h) - Ineligibility of Iran-Linked Businesses

- 1. In accordance with Act 517, Public Acts of 2012 ("Act 517"), an "Iran-linked business", as defined by Act 517, is ineligible to submit a bid to the Township to provide any goods, services or for any other purpose.
- 2. Any bid submitted to the Township shall include a certification that the bidder is not an Iran-linked business.
- 3. This policy shall be effective so long as the provisions of Act 517 are effective.

4.8 - Expense Reimbursements

4.8 (a) - Request Form

The township shall reimburse all officials and employees for necessary expenses incurred in performing their duties. All requests for expense reimbursement shall be made on the proper expense reimbursement form.

4.8 (b) - Reimbursement Rates

Travel shall be reimbursed at the mileage rates authorized by resolution of the Township Board. Mileage Reimbursement: IRS standard mileage rate. (amended 8/19/08)

~~Meal Reimbursement: \$75 per day with gratuity included, \$40 for a half day with gratuity included, but alcohol is excluded. (amended 4/21/20)~~

~~Reasonable meals and lodging expenses will be reimbursed up to the amounts authorized by resolution of the Township Board.~~

~~Any reimbursement in excess of the amounts authorized shall be approved by the Township Board prior to incurring the expenses.~~

Reasonable lodging, parking, and meal allowances (see per diem), shall be provided for expenses incurred by employees while attending approved training, conferences, or professional development events outside of Oakland County. See sections 4.8(c), 4.8(d), 4.8(e) and 4.8(f).

4.8 (c) – Per Diem

Employees are eligible to receive a meal per diem only when meals are not provided as part of the training or conference registration agenda. Per-diem and reimbursement claims must be

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submitted in accordance with standard expense reporting procedures and managed by the accounting department under the supervision of the Township Clerk.

When a meal is provided by the event organizer (e.g., breakfast, lunch, or dinner included in their registration fee), employees shall not receive a per diem or reimbursement for that meal.

If a meal is not provided during the event, employees must submit agendas or any other event materials as requested, to the Clerk's office at the time of registration to receive the designated per diem amount.

Per diem rates shall be calculated in accordance with the standard schedules established by Oakland County, the State of Michigan, or the U.S. General Service Administration, as applicable. The Clerk shall determine the schedule that serves in the best interest of the Township and shall notify the Township Board annually of the applicable schedule.

4.8 (de) - Personal Expenses

Receipts shall accompany any reimbursement requests, i.e. parking. Commuting from residence to the township hall or the employee's official workstation shall not be eligible for reimbursement. Board and committee members shall not receive mileage to attend Board meetings that are a statutory duty of their office. Personal expenses for meal reimbursements shall not exceed the amounts approved by the Township Board within the adopted per diem schedule. Per diem shall be the primary method of payment for meals when traveling. No meal expenses shall be charged to the township credit card without prior authorization. Personal expenses that are unnecessary in conducting township business, such as entertainment and alcohol consumed, shall not be eligible for reimbursement.~~that are unnecessary in conducting township business, such as entertainment and alcohol consumed, shall not be eligible for reimbursement.~~

4.8 (ed) - Travel Advances

Travel advances may be requested from the Clerk's office fifteen days in advance of anticipated travel date. Receipts of all expenses incurred shall be submitted within five business days after concluding the trip, and any approved excess travel advance shall be reimbursed to the township.

4.8 (f) – Other Expenses Not Reimbursed

Fines for parking or other traffic violations shall not be reimbursed.

When using a personal vehicle for travel, charges for vehicle maintenance items, and other expenditures associated with the use of the employee's personal vehicle shall not be reimbursed.

4.9 – Investments

4.9 (a) - Authorized Institutions

The township Treasurer is authorized to invest surplus funds in Michigan banks, savings and loan associations, and credit unions that belong to the Federal Deposit Insurance Corporation or are insured by the National Credit Union Administration.

Lawful investment instruments that are not available from the above-named financial institutions may be purchased from brokerage firms that are licensed by the United States Securities and Exchange Commission.

Financial institutions shall be selected on the basis of their record of satisfactory performance, financial stability and anticipated yields.

4.9 (b) - Authorized Instruments

The Treasurer is authorized to invest in the following instruments:

1. Bonds, securities and other obligations of the United States or an instrumentality of the United States in which the principal and interest is fully guaranteed by the United States
2. Certificates of deposit
3. Savings accounts
4. High grade commercial paper, rated within the three highest grades by at least two national rating services; the term to maturity may not be more than 270 days, and no more than 50% of any fund may be invested in commercial paper at any time
5. Bankers acceptances of United States banks
6. United States government or federal agency obligation repurchase agreements
7. Money market mutual funds composed of investment vehicles which are permitted under state law for direct investments
8. Oakland County Investment Pool

The Treasurer shall select investment instruments that protect principal as the primary goal. While it is also highly desirable to optimize yield, the most important objectives are the safety of the investment and liquidity to meet the township's cash needs.

4.9 (c) - Notice of Investment Policy

The senior management of any firm, dealer, broker, or financial institution shall be given a copy of the township's investment policies prior to the Treasurer investing or depositing any township funds in such institution.

4.9 (d) - Performance Reports

The Treasurer shall report to the Board at least quarterly regarding the status of township investments, including the name of the financial institution, type of investment instrument, date of maturity and rate of return.

4.10 - Audits

The Township Board will engage a certified public accountant to annually audit the financial systems of the township. An audit contract shall not exceed the current Board's term of office. The request for proposals for audits shall require:

1. Proposal due date
2. Date award will be made
3. Date contract begins
4. Length of audit contract
5. Audit period covered
6. Earliest date that audit work may begin
7. Due date for audit report
8. Funds to be audited
9. Requirement of unqualified opinion or clear statement of reason for qualifications
10. Financial statements and other information to be provided by township

11. Other services to be performed by auditor if any
12. Procedures for determining adequacy of internal controls and accounting
13. Authorization to disclose any irregularities
14. Audit shall be performed in accordance with generally accepted auditing standards set forth by the American Institute of Certified Public Accountants
15. Audit shall be reviewed with the Township Board
16. Number of copies that will be provided
17. Auditor's qualifications
18. References for ~~firm~~ firms and individuals performing the audit
19. Estimated hours required, current rates and total anticipated amount

5.0 - Property Management

5.1 - Hours of Business

The township hall shall be open to the public at 8:00 a.m. and shall be closed at 5:00 p.m. on every normal business day.

5.2 - Building Access

~~Building access for General Township employees is controlled by the Supervisor and designated staff via a keyless entry system. The Public Safety building access is controlled by the Police Chief and designated staff also via a keyless entry system. Access will be granted to employees upon hire during the onboarding process. The first person arriving each morning should make sure that all public access doors are unlocked.~~

~~Prior to leaving at the close of business, each employee must will make sure his or her workstation or office is secure by locking drawers, file cabinets, cash drawers and interior doors (if not controlled by a keyless entry system). Each employee must also ensure by checking that computers, typewriters, calculators and lights are turned off; filing cabinets and cash drawers are locked, lights are turned off (unless on a timer), with the exception of designated security lights, and that windows are closed and doors are locked. This includes employees who work outside of normal business hours.~~

~~The last person in each department to leave their office at night shall check to see that the copier and other office machines are turned off; all doors and common area windows are locked; all lights are turned off, except for designated security lights.~~

~~Persons working after hours are responsible for turning off the lights and office machines used and checking that all doors and windows are secure.~~

~~Exterior doors will be controlled by the keyless entry system. However, if an employee notices an exterior door isn't secure when exiting a building that is closed for business, they must notify the Supervisor, Deputy Supervisor, or the police department immediately. If the employee must leave before the door can be secured, they must notify the police department to monitor the unlocked door until the door can be secured.~~

~~Outside lights shall be turned on prior to any evening meeting and shall be turned off by the person responsible for the meeting.~~

Commented [PP4]: Assuming new building will have outside lights on a timer so this is not needed.

5.3 - Security

5.3 (a) - Keys

The Clerk and Supervisor are authorized to have ~~physical and distribute~~ keys to the ~~building main~~ doors. ~~Employees shall only have access to buildings via the keyless entry system. If a key is lost, the appropriate department head shall be informed immediately. A replacement key shall be issued. If the Supervisor has reason to believe that a missing key may be used for unauthorized entry, new locks will be installed.~~ Upon termination of employment ~~the Supervisor/designee or Police Chief/designee shall delete the employees access to the campus buildings., the employee shall return his or her office keys to the Department Head. The Clerk and Supervisor shall consult with each other if a physical key needs to be duplicated. No person shall duplicate a key without authorization from the township Supervisor.~~ No person shall make a key, ~~or their key card/wrist band~~ available to any unauthorized person.

Each department head shall determine who shall be issued a key ~~card/wristband~~ to the department's door or any secured facilities, such as a safe, cash drawer or filing cabinet, within the department.

5.3 (b) - Valuables

Employees ~~that shall not~~ keep money or other valuables in their desks or ~~at their~~ workstations ~~do so at their own risk~~. The ~~T~~ township shall not be responsible for the loss of any employee's personal property.

5.4 - Safety

No boxes, files or other items shall be stored in hallways, stairs, and landings of any Township building. Flammable liquids and power equipment shall not be stored in the township hall. Other flammable materials will not be stored in utility or furnace rooms.

In the event of a fire, all employees will immediately exit the building and follow the latest White Lake Township Emergency Action Plan.

5.5 - Use of Township Equipment, Labor or Premises

5.5 (a) - Lost or Damaged Equipment

Any lost or damaged equipment shall be reported immediately to the employee's department head.

5.5 (b) - Personal Use of Township Property

The personal use of the township premises, equipment, machines, tools, supplies and postage are not permitted.

5.5 (c) - Phone Calls

Employees are permitted to make brief personal ~~local~~ phone calls ~~within the U.S. Personal calls outside of the U.S. must be made on the employees' personal phone.~~

~~Employees are permitted to make brief personal long distance phone calls with the permission of the immediate supervisor, but the calls must be billed to their home phone or reported to the Clerk's office on the Long Distance Phone Call Report for end of month billing.~~

Commented [PP5]: This is outdated, no extra charges for non local calls unless they are out of the country.

5.5 (d) - Copier

Employees are permitted occasional use of the township copier for personal business with permission from their department head.

5.5 (e) - Bulletin Boards

Employees who wish to post notices on township bulletin boards must have the prior approval of the Supervisor, Clerk or Treasurer.

5.5 (f) - Computers

Employees are permitted use of the Township Networked Computers for familial messages as long as the nature of the message shall not consist of any message or material that may be discriminatory based on Race, Color, Religion, Sex, National Origin, or any disability covered by the Americans with Disabilities Act. Further, no message or material may be transmitted that may be offensive to others or be in violation of the Personnel Policies and Procedures Section 5.1 (Sexual Harassment) or Section 23.7 (Public Criticism). Employees are prohibited from installing any software on Township Computers without prior approval of the Township Supervisor. (Added 11/16/99)

5.6 – General Township Vehicle Use – See Appendix A (Attachment)

6.0 - Public Information

6.1 - Public Contact

6.1 (a) - Courtesy

The primary goal of the township is to serve the residential and business citizens of White Lake Township. It is the policy of White Lake Charter Township that all officials and employees will respond to requests for township information from members of the public with courtesy and efficiency. All officials and employees shall communicate with the public in such a way that the image of the township government as friendly, courteous, and efficient is fostered and maintained.

All visitors to the township offices shall be greeted in a friendly, helpful manner.

Telephone calls to the township shall be handled in a polite business-like manner. The name of the township employee who handles the call should be provided to the caller for future reference.

Department heads shall make every effort to see visitors who need their assistance. When workload or other commitments do not allow for an immediate meeting, the visitor will be asked to make an appointment at a mutually convenient time.

6.1 (b) - Complaints and Problems

If a citizen has a problem that is outside the jurisdiction or responsibility of the official or employee, the citizen will be directed to the appropriate office or official.

Complaints or other concerns received from a citizen shall be received with courtesy. The official or employee will make every effort to resolve a complaint or problem, within the official's or employee's scope of authority. Department heads will be notified of all complaints.

The township Supervisor shall also be notified in writing of any citizen complaint arising from official or employee conduct or the administration of a department or Township Board policy or procedure. The notice shall include the name, address, and phone number of the citizen, the nature of the complaint and how the complaint was resolved. The Supervisor may make a subsequent inquiry with the citizen to ensure that the issue was resolved to the citizen's satisfaction.

6.2 - Public Information Officer

The Supervisor shall be the public information officer for the township and shall be responsible for supervising the township newsletter, preparing public service announcements and media releases on township government events, and responding to inquiries from the media or referring contact to other appropriate township officials. Department heads will notify the public information officer of all media contacts.

6.3 - Public Notices

6.3 (a) - Meeting Notices

The Township Clerk shall be responsible for posting all regular, special and rescheduled Board meetings in conformance with the Open Meetings Act, ADA and other state laws. The chairperson of each Township Board or commission will notify the Clerk of all special and rescheduled meetings.

6.3 (b) - Public Notice Responsibility

The associated department shall also be responsible for publishing and mailing all public notices required by state law, including:

<u>Meeting</u>	<u>Department</u>
1. Board of review meetings	Assessing
2. Budget public hearings	Clerk
3. Planning commission/zoning Board hearings	Planning
4. Zoning Board of appeals variance hearings	Planning
5. Special assessment district hearings	Assessing Supervisor
6. Election notices	Clerk
7. Master plan adoption and amendments	Planning
8. Truth-in-Taxation notice	Clerk
9. Board meeting minutes synopsis	Clerk

6.4 - Freedom of Information Act (FOIA) Requests

Individuals making FOIA requests shall follow the White Lake Township Freedom of Information Act Procedures and Guidelines posted on the Township website.

6.5 - Incoming Mail

The Clerk's office shall receive all incoming mail. Correspondence shall be sorted and distributed to the various township offices. Mail addressed to the Township Board shall be forwarded to the Clerk, who shall provide a copy to each Board member. Correspondence addressed to the Board, but requiring action typically handled by a particular official, shall be immediately forwarded to that official as well.

6.6 - Outgoing Mail

The Township Board shall approve the design of all department letterhead stationery. Statements made on township stationery may be construed as the official position of White Lake Township, so all officials and employees should take every precaution that written statements are made within the scope of their authority. Township stationery shall only be used for official township business.

Department heads shall provide the Township Board, via the Supervisor, with a copy of all correspondence that addresses a citizen complaint or when the content may result in a lawsuit to the township or in the Board reviewing or implementing a township policy. Where a department head is unsure of the necessity to provide the Board with a copy of correspondence, department heads should err on the side of caution.

All department correspondence should be considered as a public document unless the contents are specifically excluded from disclosure by state law. Copies of correspondence will be provided to any Board member on request.

6.7 - Confidential Information

Officials and employees shall not release any information to the media or to members of the general public, which would be a violation of a citizen's right to privacy.

All information clearly marked "Confidential" should be held in strict confidence by each individual receiving same.

7.0 - Public Works

7.1 - Capital Improvement Plan

7.1 (a) - Responsibility

The township Supervisor shall be responsible for the development and updating of the township capital improvement plan. The capital improvement plan will be reviewed annually, with such review completed at least two months prior to initiating the development of the proposed township operating budget.

7.1 (b) - Scope

The capital improvement plan shall address the medium and long-range needs of the township regarding building, lands, major equipment, and infrastructure. The capital improvement plan shall prioritize such needs for the next five years beyond the current fiscal year.

7.1 (c) - Content

Department heads and elected officials shall submit any suggested projects to be included in the capital improvement plan to the Township Supervisor, who shall develop a capital improvement plan that includes the following information on each project:

1. Priority in order of need
2. Justification for priority ranking
3. Estimated year project will be commenced
4. Estimated year project will be completed
5. Total estimated acquisition or construction cost
6. Method of financing acquisition or construction
7. Annual debt service from project
8. Estimated annual operating expenses after completion
9. Method of financing operating expenses

7.1 (d) - Public Hearings

The Township Supervisor shall hold a public hearing on the capital improvement plan prior to submitting the capital improvement plan to the Township Board. The Township Board may hold additional hearings on the capital improvement plan. Prior to beginning the development of the proposed budget for the ensuing fiscal year, the Township Board shall adopt the capital

improvement plan as recommended or following any alterations it deems advisable. All parties involved in the development of the proposed budget shall address any implications of the capital improvement plan to the proposed budget.

7.2 - Management of Public Works Projects

7.2 (a) - Responsibility

The township Supervisor shall manage all public works conducted by the township.

7.2 (b) - Needs Assessment

The Supervisor shall review the condition of existing township improvements to identify any necessary or desirable repairs or maintenance, identify the need for any new public improvements, and bring such matters to the attention of the Board, if such needs are to be addressed in the current fiscal year. Such items should be included in the township capital improvement plan, if proposed to be addressed in one or more future fiscal years.

7.2 (c) - Preliminary Study

On its own motion or by the presentation of a petition complying with state law, the Board may authorize a preliminary study of a proposed public works project. The Board shall retain one or more consultants as necessary to develop a feasibility study consisting of plans describing the improvement, the location of the improvement and an estimated cost of the improvement on a fixed or periodic basis, as appropriate. The feasibility study shall be received by the Board and filed with the township Clerk.

7.2 (d) - Financing

The Township Board shall determine the method by which the public improvement shall be financed. If the Township Board resolves to tentatively establish a special assessment district, the township Clerk shall give notice of the hearings as provided by law, and the Board shall proceed with creating the special assessment district as provided by law.

If the Township Board determines that borrowing shall be necessary to finance the project, the Treasurer shall contact the Municipal Financial Advisor to initiate approval. The Township Board shall appoint bond counsel to advise the township on all aspects of borrowing and to render a written opinion on the marketability of the bonds.

7.2 (e) - Requests for Proposals

The Township Board shall request proposals from firms interested in contracting to construct, alter, repair, or maintain the public improvement. The township shall utilize its competitive bidding procedures in awarding contracts for public improvements.

The Board shall require the posting of a performance bond by any contractor, as specified in the request for proposal, for all projects that anticipate a total contract cost exceeding \$10,000.00.

7.2 (f) - Project Manager

The township Supervisor shall act as liaison between the contractor, consultants and the Board, or may delegate this responsibility in writing to a department head. The Supervisor shall notify the Board of any significant problems or issues that may arise in the project.

The Supervisor is authorized to sign minor change orders that will result in a decrease in the project cost or that will increase the project cost no more than \$5000.00. The Board will be notified of all change orders. All major change orders shall be approved by the Board.

The Supervisor shall require waivers of liens and sworn statements prior to authorizing the payment for any work performed. The waivers and sworn statements shall be filed by the township Clerk.

The Supervisor is authorized to act as the Board's agent to resolve any problems or disputes arising from the project. The Board shall be notified of all problems or disputes, as well as the nature of the resolution. The Supervisor shall bring any major problems or disputes to the attention of the Board prior to acting, if the time required to notify the Board does not jeopardize the successful completion of the project.

7.2 (g) - Closing Out a Project

At least 10% of the total contract cost shall be retained by the township until final approval is given by the Board. Prior to closing out the project and issuing the contractor final payment, the Board shall authorize final payment based upon the recommendation of the project manager.

8.0 - Identity Theft Prevention Program

8.0 (a) - Purpose

To establish an Identity Theft Prevention Program designed to detect, prevent and mitigate identity theft in connection with the opening of a covered account or an existing covered account and to provide for continued administration of the Program in compliance with the Federal Trade Commission's Red Flags Rule (Part 681 of Title 16 of the Code of Federal Regulations) implementing Sections 114 and 315 of the Fair and Accurate Credit Transactions Act (FACTA) of 2003.

8.0 (b) - Definitions

1. *Identifying information* means any name or number that may be used, alone or in conjunction with any other information, to identify a specific person, including; name, address, telephone number, social security number, date of birth, government issued driver's license or identification number, alien registration number, government passport number, employer or taxpayer identification number, unique electronic identification number, computer's Internet Protocol address, or routing code.
2. *Identify theft* means fraud committed or attempted using the identifying information of another person without authority.
3. *A covered account* means:
 - a. An account that the Township offers or maintains, primarily for personal, family, or household purposes that involves or is designed to permit multiple payments or transactions, such as credit card accounts, mortgage loans, automobile loans, margin accounts, cell phone accounts, utility accounts, checking accounts and savings accounts; and
 - b. Any other account that the Township offers or maintains for which there is a reasonably foreseeable risk to customers or to the safety and soundness of the Township from identity theft, including financial, operational, compliance, reputation or litigation risks.

4. A *red flag* means a pattern, practice or specific activity that indicates the possible existence of identity theft.

8.1 - Policy

8.1 (a) – Identification of Red Flags

The Township identifies the following red flags, in each of the listed categories:

1. Presentation of Suspicious Documents
 - a. Identification document or card that appears to be forged, altered or inauthentic;
 - b. Identification document or card on which a person's photograph or physical description is not consistent with the person presenting the document;
 - c. Other document with information that is not consistent with existing customer information (such as if a person's signature on a check appears forged); and
 - d. Application for service that appears to have been altered or forged.
2. Presentation of Suspicious Personal Identifying Information
 - a. Identifying information presented that is inconsistent with other information the customer provides (example: inconsistent birth dates);
 - b. Identifying information presented that is inconsistent with other sources of information (for instance, an address not matching an address on a credit report);
 - c. Identifying information presented that is the same as information shown on other applications that were found to be fraudulent;
 - d. Identifying information presented that is consistent with fraudulent activity (such as an invalid phone number or fictitious billing address);
 - e. Social security number presented that is the same as one given by another customer;
 - f. An address or phone number presented that is the same as that of another person;
 - g. A person fails to provide complete personal identifying information on an application when reminded to do so (however, by law social security numbers must not be required); and
 - h. A person's identifying information is not consistent with the information that is on file for the customer.
3. Suspicious Account Activity or Unusual Use of Account
 - a. Change of address for an account followed by a request to change the account holder's name;
 - b. Payments stop on an otherwise consistently up-to-date account;
 - c. Account used in a way that is not consistent with prior use (example: very high activity);

- d. Mail sent to the account holder is repeatedly returned as undeliverable;
 - e. Notice to the Township that a customer is not receiving mail sent by the Township;
 - f. Notice to the Township that an account has unauthorized activity;
 - g. Breach in the Township's computer system security; and
 - h. Unauthorized access to or use of customer account information.
4. Alerts from Others
- a. Notice to the Township from a customer, identity theft victim, consumer reporting agency, law enforcement or other person regarding possible identity theft in connection with covered accounts held by the Township.

8.1 (b) – Detecting Red Flags

1. New Accounts

In order to detect any of the Red Flags identified above associated with the opening of a new account, Township personnel will take the following steps to obtain and verify the identity of the person opening the account:

- a. Require certain identifying information such as name, date of birth, residential or business address, principal place of business for an entity, driver's license or other identification;
- b. Verify the customer's identity (for instance, review a driver's license or other identification card);
- c. Review documentation showing the existence of a business entity; and/or independently contact the customer.

2. Existing Accounts

In order to detect any of the Red Flags identified above for an existing account, Township personnel will take the following steps to monitor transactions with an account:

- a. Verify the identification of customers if they request information (in person, via telephone, via facsimile, via email);
- b. Verify the validity of requests to change billing addresses; and
- c. Verify changes in banking information given for billing and payment purposes.

8.1 (c) - Preventing and Mitigating Identity Theft

In the event Township personnel detect any identified Red Flags, such personnel shall take one or more of the following steps, depending on the degree of risk posed by the Red Flag:

1. Prevent and Mitigate

- a. Monitor an account for evidence of Identity Theft;

- b. Contact the customer;
- c. Change any passwords, security codes or other security devices that permit
- d. access to accounts;
- e. Not open a new account;
- f. Close an existing account;
- g. Reopen an account with a new number;
- h. Notify the Township Supervisor for determination of the appropriate step(s) to take;
- i. Notify law enforcement; and/or
- j. Determine that no response is warranted under the particular circumstances.

2. Protect customer identifying information

In order to further prevent the likelihood of identity theft occurring with respect to Township accounts, the Township will take the following steps with respect to its internal operating procedures to protect customer identifying information:

- a. Ensure that its website is secure or provide clear notice that the website is not secure;
- b. Ensure complete and secure destruction of paper documents and computer files containing customer information;
- c. Ensure that office computers are password protected and that computer screens lock after a set period of time;
- d. Keep offices clear of papers containing customer information;
- e. Request only the last 4 digits of social security numbers (if any);
- f. Ensure computer virus protection is up to date; and
- g. Require and keep only the kinds of customer information that are necessary for utility purposes.

8.1 (d) – Program Updates

This Program will be periodically reviewed and updated to reflect changes in risks to customers and the soundness of the Township from Identity Theft. The Township Supervisor’s Office will consider the Township’s experiences with Identity Theft situation, changes in Identity Theft methods, changes in Identity Theft detection and prevention methods, changes in types of accounts the Township maintains and changes in the Township’s business arrangements with other entities. After considering these factors, the Township Supervisor will determine whether changes to the Program, including the listing of Red Flags, are warranted. If warranted, the Township Supervisor will present the Township Board with his/her recommended changes and the Board will make a determination of whether to accept, modify or reject those changes to the Program.

8.1 (e) – Program Administration

1. Oversight

Responsibility for developing, implementing, and updating this Program lies the Township Supervisor's Office. The Township Supervisor, or his designee, will be responsible for the Program administration, for ensuring appropriate training of Township staff on the Program, for reviewing any staff reports regarding the detection of Red Flags and the steps for preventing and mitigating Identity Theft, determining which steps of prevention and mitigation should be taken in particular circumstances and considering periodic changes to the Program.

2. Staff Training and Reports

Township staff responsible for implementing the Program shall be trained either by or under the direction of the Township Supervisor in the detection of Red Flags, and the responsive steps to be taken when a Red Flag is detected. Township staff is required to provide reports to the Supervisor's Office on incidents of Identity Theft, the Township's compliance with the Program and the effectiveness of the Program.

3. Specific Program Elements and Confidentiality

For the effectiveness of Identity Theft prevention Programs, the Red Flag Rule envisions a degree of confidentiality regarding the Township's specific practices relating to Identity Theft detection, prevention, and mitigation. Therefore, under this Program, knowledge of such specific practices shall be limited to the Supervisor's Office and those employees who need to know them for the purpose of preventing Identity Theft. Because this Program is to be adopted by a public body and thus publicly available, it would be counterproductive to list these specific practices here. Therefore, only the Program's general red flag detection, implementation and prevention practices are listed in this document.

APPENDIX A

5.6. GENERAL TOWNSHIP VEHICLE USE – WHITE LAKE TOWNSHIP

1.0 - Vehicles

The following Vehicle Use Policy ("Policy") covers the use of Township owned vehicles ("Township vehicle(s)"), other than Public Safety Vehicles. White Lake Township has the authority to determine who shall drive a Township vehicle, to establish Township vehicle operator standards and to revoke the right to drive for failure to meet the standards. These policies also apply to drivers using their personal vehicles while on Township business.

1.1 - General Provisions

1.1 (a) **Authorized Drivers:** Township vehicles are only to be driven by authorized persons who are employees of the Township.

- 1.1 (b) **Official Business:** Township vehicles are to be used only for official Township business and driven within the Detroit Metro Area.
- 1.1 (c) **Trips Outside the Township or Detroit Metro Area:** Trips outside the Township must be approved by the Department Head. The Township Supervisor must be notified via email of all usage outside of the Detroit Metro area.
- 1.1 (d) **Use of Personal Vehicle:** When a Township vehicle is not available, an employee's personal vehicle may be used. In this instance, mileage will be reimbursed per the reimbursement policy listed in the Township Administrative Policies and Procedures.
- 1.1 (e) **Passengers:** Township Vehicle passengers are limited to other employees, Township officials or authorized Township guests when traveling for Township business.
- 1.1 (f) **Lunch Use:** Use of Township vehicles for lunch is dependent upon circumstances. Lunch breaks will be taken at the closest available location and/or in route to an assignment. Use of a personal vehicle, where possible, should be given priority.
- 1.1 (g) **Taking a Township Vehicle Home:** Employees as determined by the Department Head, may be allowed to take a Township vehicle to their residence due to the nature of their work, such as responding to emergency calls. Employees who do not respond to emergency calls may also on occasion be allowed to take a Township vehicle to their residence if the situation permits. Department Heads will be responsible for determining if the situation is justified. The use of a Township vehicle is not an employee fringe benefit and personal use is prohibited.

The Township Supervisor shall have the exclusive use of a Township vehicle at all times during his employment as Township Supervisor. The Township shall be responsible for the costs of insurance, operation, maintenance, and repair. (Amended 9/20/2005)

Designated employees may also be provided with the use of a Township vehicle for personal use. This includes employees who have vehicle use included in their employment agreement.

1.2 - Driving a Township Vehicle

Employees are only allowed to drive a Township vehicle or a personal vehicle for Township business if:

- 1.2 (a) **Valid Driver's License:** They have a valid driver's license and the correct license/endorsement for the type(s) of Township vehicles driven and provide proof in the form of a copy to Human Resources. They must inform the Human Resources Department of the loss or modification of a valid driver's license by suspension, revocation, expiration, modification, or any other vehicle-related violation. They must have their driver's license with them while they are driving a Township vehicle.
- 1.2 (b) **Proof of Personal Automobile Insurance:** They have provided the Human Resources Department with a copy of their personal automobile insurance to show they are eligible to drive their personal vehicle for Township business.
- 1.2 (c) **Clean Driving Record:** They do not have any of the grounds for revocation/disqualification as provided in section 1.3 below.

1.2 (d) Follow this Policy: They have read and are familiar with the provisions in this policy.

1.3 - Driver Screening Process

- 1.3 (a) **Automatic Revocation/Disqualification:** The circumstances noted below will be cause for automatic revocation of Township vehicle driving privileges or in the event of a new hire, driving privilege disqualification:
1. Conviction of a driving-related felony.
 2. Suspension or revocation of license due to an unsatisfactory driving record as defined by the Michigan Department of State.
 3. An at-fault crash resulting in a fatality (an at-fault crash means the driver was fined, sued, and as a result received an adverse judgement, or the driver's insurance company settled for damages to another party, or the driver settled out of court or otherwise was determined to be liable).
 4. If a driver had any of the following circumstances in the **prior five years:**
 - Accumulated more than six points on their driving record.
 - Convicted of any alcohol/drug related offense.
 - Convicted of driving while license was suspended or revoked.
 5. If driver had any of the following circumstances in the **prior year:**
 - Accumulated more than three points on their driving record.
 - Convicted of any alcohol/drug related offense.
 - Convicted of driving while license was suspended or revoked.

1.3 (b) Lack of Driver's License/Insurance

Drivers that do not have a valid driver's license and/or proof of insurance will be prohibited from driving a Township Vehicle and/or driving their personal vehicle on Township business, and may lose other reimbursement, compensation, and/or allowance related to vehicle expenses. If this prohibition prevents an employee from performing his/her assigned job responsibilities, employment action (temporary or permanent) could occur. Employment action could include, but not be limited to transfer, reassignment, demotion, suspension, or discharge.

1.3 (c) Monitoring

Employee driving records will be screened and routinely monitored by automatic subscription received through the Michigan Department of State. (See also, Township Authority and Responsibilities 1.6 (a).)

1.4 - Operating Standards

- 1.4 (a) **Windows are Clean:** Before operating a Township vehicle the windows must be clean and free of mud, snow, or frost.
- 1.4 (b) **Obey all Traffic Laws:** Employees and their passengers must obey all traffic safety laws and regulations and must wear seat belts. Use headlights, hazard lights (blinkers) or

roof flasher when necessary. The driver is responsible for safe, courteous, and economical use of the Township vehicle.

1.4 (c) Handsfree Communication: Only hands-free communications shall be allowed while operating a Township vehicle.

1.4 (d) Maintenance:

1. No employee will knowingly operate a vehicle found to be in violation of a state safety code or the law.
2. Employees operating Township vehicles are responsible for routine up-keep and cleanliness including fuel and all other fluids as needed, checking tire pressure, washing, and vacuuming of the interior.
3. The employee shall report all mechanical problems or malfunctions to the Maintenance department who shall be responsible for maintenance of the Township vehicle.
4. The Maintenance department shall maintain mechanical vehicle inspection records along with records for repairs (recall or otherwise) for the life of the vehicle. Records for repairs not conducted by the Maintenance department shall be forwarded to the Maintenance department upon receipt to be maintained. Once a vehicle has been decommissioned, the Maintenance department shall send the vehicle records to the Clerk's office to be maintained per the appropriate record retention schedule.
5. Vehicles, tools, and equipment (if applicable) will be inspected for cleanliness and general condition on a regular basis. Employees should see their Department Head for an inspection form. Employees who routinely fail inspection of vehicles and or equipment may be subject to disciplinary action.

1.4 (e) Vehicle Expenses: Expenses shall be monitored by the accounting department by reviewing gas card statements.

1.4 (f) Parking: Township vehicles are to be parked in a Township authorized location during non-working hours. When parking a Township vehicle, remove the key from the ignition, lock the vehicle, and ensure the vehicle is parked in a safe location. Avoid double-parking, blocking entrances or parking in a manner that may result in fines. Vehicles shall not be left running and unattended.

1.4 (g) Accidents: Unless physically unable to do so, employees should contact the police to report all accidents and wait at the scene of the accident for the police to arrive. The employee shall request an accident report number from the officer. Employees should not accept responsibility for the accident or guarantee payment to another party without Township authorization.

1.4 (h) Reporting Accidents: Employees shall promptly report any accident, damage, or traffic violation resulting from the accident to their Department Head who will in turn notify the Supervisor, Human Resources, and the Clerk's office. The Clerk's office is responsible for filing the appropriate insurance claims for the incident.

1.4 (i) Breakdowns: Employees whose vehicle becomes inoperable while in use shall call for towing assistance. If available, warning devices such as flares or reflective triangles shall be placed to reduce the potential for another collision. The vehicle shall be towed to the Township parking lot unless otherwise directed by Maintenance or the employee's

Department Head. The employee shall move to a safe location but remain with the vehicle (in non-injury situations) while waiting for assistance to arrive.

- 1.4 (j) **Fines:** Employees are responsible for paying any fines they receive while driving a Township vehicle or personal vehicle on Township business.
- 1.4 (k) **Working on a Road Right Away:** Employees shall use traffic lights or flashers if a vehicle is parked in the public road right away or if the employee is working outside of a vehicle in the public road right away.

1.5 - Prohibited Conduct

- 1.5 (a) **No Impairment or Extreme Fatigue:** Employees shall not be impaired by alcohol or drugs (legal or otherwise), or by extreme fatigue while driving or riding in a Township vehicle. Employees must immediately inform their Department Head if they have driving limitations due to health problems, are taking prescription medication that may impair their ability to drive or have any driving restrictions.
- 1.5 (b) **Transporting Alcohol or Drugs:** No alcohol or drugs shall be transported in a Township vehicle.
- 1.5 (c) **Vaping, Smoking, or Smokeless Tobacco:** No vaping, smoking, or smokeless tobacco shall be allowed in a Township vehicle.
- 1.5 (d) **Distracted Driving:** Drivers may not read maps/documents, text, program GPS devices, use cell phones, laptops, or any other type of portable media device while operating a Township vehicle. Drivers must pull over to a safe location and park the vehicle if they need to use a portable device or read a document.
- 1.5 (e) **Unauthorized Passengers or Drivers:** Employees shall not have an unauthorized passenger in a Township vehicle or allow someone else to drive unless they become unable to drive due to an emergency or unforeseen impairment.

1.6 - Township Authority and Responsibilities

- 1.6 (a) The Township will continuously evaluate an employee's eligibility to drive Township vehicles and as well, their eligibility to drive on behalf of the Township for business via the Michigan Department of State driving record subscription.
- 1.6 (b) The Township may at their discretion revoke an Employee's use of Township vehicles, and an employee's ability to drive on behalf of the Township, either temporarily or permanently, based on an employee's driving record or for other reasons, such as health concerns, disciplinary action, violations of Township vehicle operating standards, etc.
- 1.6 (c) The Township may at their discretion require that an alcohol or drug test be taken immediately if an employee is involved in an accident and there is suspicion that the employee may be impaired. Human Resources will arrange a time and location for the test.

1.7 - Policy Compliance and Directives

1.7 (a) Failure to comply with this policy may result in discipline, up to and including dismissal.

1.7 (b) This policy may be supplemented by department directives after consultation with the Township Supervisor.

White Lake Charter Township

Administrative Policies and Procedures

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