

[Company Name]

Benevolence Policy

Approval Date	Effective Date	Last Review Date
Pending	Pending	April

Policy Number:	
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Approved by:	xx Executive Board
Responsibility:	xx Executive Board
Applies to:	All Employees, IUOE Local 727 Executive Board, xx Bargaining Unit Members

1. PURPOSE

- a. The purpose of this policy is to define the conditions and procedure for which I [Company Name] can authorize and disburse funds classified as benevolence.
- b. This policy provides financial assistance where there is little or no financial coverage or protection through salary/wages, sick leave, or insurance benefits.

2. APPLICATION OF THE POLICY

- a. This policy applies to all Employees, Executive Board Members, and Bargaining Unit Members.

3. DEFINITIONS

- a. Employees
 - i. Persons hired or appointed by the Business Manager or Authorized Designate to perform work related explicitly to servicing the membership and who receive remuneration in the form of a payroll check from the Local Union.
- b. Executive Board Members
 - i. Those elected by the membership or otherwise appointed to the Board as may be permitted by the International Constitution or By-Laws of the Local Union.
- c. Bargaining Unit Member

- i. Any person who, either by default or design, is named in and represented by the Local Union via the Collective Agreement between the Local Union and the Employer, including those who may for any reason have no current Employer/Employee relationship with the Employer, but who have an active/outstanding grievance filed for re-establishing that relationship, save and except those who have been intentionally removed from the membership roster by the Local Union.
- d. Benevolence
 - i. Charitable contribution provided to alleviate hardship in a time of need.

4. RESPONSIBILITIES and AUTHORITY

- a. Authority
 - i. Authority to approve lies with the Business Manager (or Authorized Designate) and the Executive Board.
- b. Responsibility
 - i. Employees and Executive Board Members shall report to the Business Manager or authorized designate all known or suspected infractions of this policy, whether accidental or intentional.

5. ELIGIBILITY CRITERIA

- a. For consideration of a benevolent donation, the application must satisfy the following criteria:
 - i. Application is for an [Company Name] Employee, xx Bargaining Unit Member, or former xx Bargaining Unit Member; or their dependant.
 - ii. Death of a wage earner leaving financial hardship; or costly medical care is required leaving financial hardship (may include medications, travel, accommodations for treatment, etc.); or unforeseen and unpreventable financial costs leaving financial hardship.
 - iii. An applicant cannot have had a previous benevolent donation from [Company Name].

6. PROCEDURE

- a. All Benevolence requests must be made in writing to the Executive Board.
- b. Benevolence requests must be made by the person requesting assistance or by someone directly assisting the person in need.

- c. Requests must include details of the purpose of the request and what the benevolent donation will be used for.
- d. The Executive Board will review requests to determine eligibility and appropriateness and then vote for approval.

7. FUNDS

- a. Nine thousand dollars (\$9,000) will be budgeted annually for Benevolent donations. Donations will be, at most, this defined amount unless so changed within the policy by a vote of the Executive Board.
- b. At most, a single donation shall be the value of \$1,500.
- c. The amount of each donation will be determined and voted upon by the Executive Board during the approval process for the donation.
- d. An unused budget for benevolent donations will not be carried over for future use.

8. RECORDS

- a. The details of requests for benevolent donations will not be released in the Executive Board meeting minutes.
- b. The requests for benevolent donations, along with associated details, discussion, and approval, will be kept and stored by the [Company Name] for audit and tracking.

9. INVESTIGATION PROCEDURE

- a. It shall be the Duty of the Business Manager to support this policy and, where required, investigate reports of infractions thereof.
- b. Investigation details shall be kept private.
- c. Those involved (whether the reporting party, witness, or accused) shall not divulge any information about participation in an investigation or interview process except to the Business Manager or other Authorized Person(s).
- d. The Business Manager shall, insofar as possible, practice progressive discipline, save and except that he/she shall reserve the right to make decisions related to discipline based on the severity or impact of the infraction.

SIGN-OFF ([Company Name]- Benevolence Policy)

Employee / Executive Board Member
(Please Print)

Employee / Executive Board Member
(Signature)

Witness

Date