

**Memorandum of Understanding
Middle Management
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MEMORANDUM OF UNDERSTANDING

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MIDDLE MANAGEMENT BARGAINING UNIT

PREAMBLE:

This Memorandum of Understanding, hereinafter referred to as "Memorandum", is made by and between the County of San Joaquin and the San Joaquin County Management Association, Inc., hereinafter referred to as "SJCMA" or "Association", representing employees who are members of the Middle Management bargaining unit. This Memorandum of Understanding constitutes the result of meeting and conferring in good faith pursuant to the California Government Code and the San Joaquin County Employer-Employee Relations Policy.

DURATION:

The term of this Memorandum shall be in effect from June 22, 2021, through June 30, 2023.

1 EMPLOYER-EMPLOYEE RIGHTS AND RESPONSIBILITIES

1.1 Management Rights

SJCMA and the County of San Joaquin recognize that it is the exclusive right of the County except as may be provided otherwise by Civil Service Rules, this Memorandum of Understanding, or the Employer-Employee Relations Policy to make all decisions of a managerial or administrative character, including but not limited to:

- (a) Hire, promote, transfer, assign, classify positions, retain employees, and to suspend, demote, discharge or take disciplinary action against employees.
- (b) Lay off or demote employees from duties because of lack of funds, in the interest of economy, or other legitimate reasons.
- (c) Determine the policies, standards, procedures, methods, means and personnel by which County operations are to be conducted.
- (d) Take whatever actions may be necessary to carry out the mission of the County in situations of emergency.
- (e) Nothing in this Memorandum shall be construed to interfere with the County's right to manage its operations in the most economical and efficient manner consistent with the best interests of all the citizens of San Joaquin County.
- (d) CLASSIFICATION STUDIES: Any classification or organizational study performed as a result of the meet and confer process shall, upon its completion by

the appropriate County department, be submitted to SJCMA for its comments prior to implementation. By this Memorandum the County is not making classification or organizational studies a subject for negotiations. They shall remain management rights. The Civil Service Commission shall not be bound by any recommendations or comments by SJCMA.

1.2 Labor - Management Committees

The County and SJCMA shall establish committees comprised of labor and management representatives to deal with specific areas of concern as specified by separate letter.

1.3 Employees' Rights - Employer-Employee Relations

SJCMA and the County of San Joaquin recognize that each employee shall have the following rights which he/she may exercise in accordance with this Memorandum, Employer-Employee Relations Policy, applicable law, ordinances and rules and regulations:

- (a) The right to form, join, and participate in the activities of any labor organization of his/her own choosing for the purpose of representation on all matters within the scope of representation.
- (b) The right to be free from interference, intimidation, restraint, coercion, discrimination, or reprisal on the part of the County, other employees or employee organizations, with respect to his/her membership or non-membership in any employee organization or with respect to any lawful activity.
- (c) The right to refuse to join or participate in the activities of any employee organization.
- (d) The right to represent himself/herself individually in his/her employee relations with the County.

The Association or any employee or group of employees who has a complaint regarding the exercise of rights under this provision may file charges in writing with the Board of Supervisors and serve the charged party in accordance with Section 13 of the Employer-Employee Relations Policy.

1.4 Discrimination in Employment Prohibited

No employee, or applicant for employment, shall be discriminated against in any aspect of employment because of race, color, creed, gender expression, gender identity, genetic information, political affiliation or belief, pregnancy, sex, or sexual orientation, physical or mental disability, medical condition, age, religion, ancestry, marital status, or national origin as outlined in Civil Service Rule 20.

Any employee who believes he or she has been harassed or discriminated against because of any of the above reasons, may bring the matter to the attention of the supervisor or may consult with his or her Department Equal Employment Opportunity Coordinator. The initial contact should be

made as soon as possible, but no later than 60 days after the alleged act of discrimination or harassment occurred.

The Department Equal Employment Opportunity Coordinator shall process the complaint in accordance with Civil Service Rule 20 Section 3. Informal Complaint Process.

San Joaquin County shall comply with the provisions of the Americans with Disabilities Act (ADA). Individuals requesting reasonable accommodation under the ADA shall make a request in writing to their supervisor or manager supported by medical documentation provided by an approved medical physician. The request shall identify the specific accommodation required and the anticipated duration needed for the accommodation. The manager or supervisor shall meet with the employee to confirm any documentation or verification received in compliance with the ADA. Any such documentation, which discloses employee medical information, shall be provided to the Human Resources Disability Management Unit. Human Resources shall be consulted if any dispute arises in regard to an ADA accommodation.

1.5 SJCMA Rights

SJCMA shall have the following rights:

- (a) REPRESENTATION: Upon request, to meet and confer in good faith with appropriate levels of County management regarding matters within the scope of representation.
- (b) ADVANCE NOTICE: Except in cases of emergency, SJCMA shall be given reasonable advance written notice of any ordinance, resolution, rule or regulation, proposal or other action directly relating to matters within the scope of representation proposed to be adopted by the County and shall be given the opportunity to meet and confer in good faith with management prior to its adoption. Written notice will customarily be provided by furnishing SJCMA with advance copies of the agenda of the Board of Supervisors and Civil Service Commission meetings.

In cases of emergency when County management determines that an ordinance, resolution, rule or regulation must be adopted immediately without prior notice or negotiations with the Association, County management shall provide such notice and opportunity to negotiate at the earliest practicable time following the adoption of such ordinance, resolution, rule or regulation, proposal or other action.

- (c) REPRESENTATIVES – MEETING ATTENDANCE: SJCMA may have a reasonable number of employees who serve as official representatives released from work without loss of compensation when meeting and conferring with management representatives where matters within the scope of representation are being considered. SJCMA shall submit a request for such release and shall include therewith a listing of such employees including their titles and departments to the management representative and departments concerned in advance of the meeting. The use of County time for this purpose shall not be excessive, nor shall it unreasonably interfere

with the performance of County services as determined by the County. The reasonableness of the number of such employees shall be the subject of negotiation. Requested release time pursuant to this section is not synonymous with and not subject to conditions set forth in Sections 1.12 and 1.13.

1.6 SJCMA Access

Authorized representatives of SJCMA shall be allowed reasonable access to employees of the unit at their work locations during the working hours of the employees concerned for the purpose of discussing matters within the scope of representation, including but not limited to the processing of grievances and complaints and distributing materials and information provided that the work of the employee and the service to the public are not unduly impaired. The authorized representative shall give advance notice to the Department Head when contacting departmental employees during their duty period.

Reasonable solicitation for membership or other internal Association business or campaigning shall be conducted only during the non-duty hours of all employees concerned, so long as normal work functions of County are not interfered with.

1.7 New Employee Orientation

An SJCMA representative or designee will be allowed thirty (30) minutes at the end of each scheduled orientation to present information about the Association to employees who are represented by SJCMA, including the following conditions:

- (1) The County will provide at least thirty (30) days advance notice to SJCMA regarding the orientation schedule by providing SJCMA with a calendar of orientation dates.
- (2) The County will provide a roster of the individuals scheduled to attend an orientation session at least 48 hours prior to the session.
- (3) In the event that audio visual equipment is available and being utilized by the County for the presentation of orientation information, SJCMA shall be provided reasonable access to such equipment.

1.8 Association Representatives

Association representatives employed and recognized by San Joaquin County may assist employees in resolving complaints and grievances at the lowest possible administrative level of review. One employee representative will be authorized up to three hours release time per case at all levels of the grievance and complaint process.

Association representatives may be present during meetings in which employees have a "right to representation" under Weingarten based on the manager or supervisor's statement of the purpose of the meeting. Once it is determined that a right to representation exists, Association representatives may then represent employees using no more than three hours per case. An association representative

may be present during the discipline appeal process. Association representatives may not be a witness to the party or the case.

A request for release time for the purposes outlined above shall be made prior to taking the release time. Such a request shall not be unreasonably denied.

The County authorizes a reasonable number of SJCMA representatives. The Association shall provide a current list of all designated representatives to the Labor Relations Division at the beginning of each calendar year and whenever there is a change in the list of representatives. The list shall show the employee name, classification, department and work location and normal area to be covered. No representative shall be recognized as such by the County without written authorization from SJCMA.

1.9 Use of County Facilities

SJCMA - COUNTY FACILITIES USE: County facilities shall be available to SJCMA as follows:

- (1) County Buildings: SJCMA may be granted the use of County facilities for meetings composed of County employees within the bargaining unit provided space can be made available without interfering with County needs. SJCMA shall obtain the permission of the designated County official for the use of such facilities.
- (2) Bulletin Boards: SJCMA has the right to the reasonable use of existing bulletin board space in each building or department at a location agreed upon by the Association and the department, under the following conditions:
 - (a) Material shall be posted on space as designated.
 - (b) Posted material shall bear the name of the Association.
 - (c) Posted material shall not be misleading, contain any deliberate misstatements or violate any Federal, State or County laws.
 - (d) Material shall be neatly displayed and shall be removed when no longer timely.

1.10 Payroll Deduction

SJCMA shall have the regular dues of its bargaining unit members deducted from their paychecks under procedures as follows:

SJCMA is solely responsible for distributing to, and collecting from, employees the dues and voluntary deduction authorization forms. It is the employees' responsibility to submit requests to start or stop deductions directly to SJCMA and not to the County. SJCMA is responsible for maintaining the deduction forms form individual employees. Copies of an individual employee's deduction

authorization need not be provided to the County unless a dispute arises about the existence or terms of the authorization. Questions regarding SJCMA membership, dues amounts, and payroll deductions must be directed to SJCMA and not the County.

SJCMA will give the County timely notice of any change to an employee's deductions, including starting and stopping deductions, or validly cancelling or revoking a deduction authorization. Deductions will begin the next applicable pay period following receipt of notice.

SJCMA shall defend, indemnify and hold the County harmless against any and all claims, demands, suits, orders, judgments or other forms of liability that shall arise out of or by reason of, action taken or not taken by the County under this Agreement. This includes not only the County's reasonable attorney fees and costs but the reasonable cost of management preparation time as well. The County shall notify SJCMA of such costs on a case-by-case basis.

1.11 Association Reports

At least every 30 days, the County will furnish SJCMA with the following information, on file within the County's Human Resources database system (currently PeopleSoft), for all employees represented by SJCMA:

- Name
- Job title
- Department
- Work location
- Work phone number
- Home phone number
- Personal cellular phone number
- Personal email address
- Home address

Notwithstanding the foregoing, limited to the express purpose of the requirements of Government Code 3558 only, an employee may opt out via written request to the County to direct the County to withhold disclosure of the employee's:

- Home phone number
- Personal cellular phone number
- Personal email address(es)

1.12 Reimbursable Short Term Paid Release Time

SJCMA representatives shall be allocated a total of 50 hours for Association business, for each 365-day period or part thereof under this Memorandum. The Association shall pay to the County the cost of such representatives' County salary for this period in cash or method to be agreed upon by the Human Resources Division and SJCMA.

1.13 Reimbursable Long Term Paid Release Time

Pursuant to the provisions of SB 1085/Government Code section 3558.8, the County shall grant an employee, with prior department approval and upon written request of SJCMA, a reasonable leave of absence without loss of compensation or other benefits for the purpose of enabling employees to serve as representatives or officers of SJCMA. Leave may be granted on a full-time, part-time, periodic, or intermittent basis under the following procedures:

- (1) The Association officer or representative shall submit a written request to Human Resources at least 15 business days in advance of the requested leave. The request shall include dates/duration, and classification.
- (2) No more than three unit members shall be on leave at the same time; and employees must have a minimum overall satisfactory evaluation rating for the most recent evaluation period, and employees cannot be in any probationary status and/or on administrative leave. For any employee going on leave, who is on a medical leave, SJCMA will ensure compliance with all medical restrictions.
- (3) SJCMA shall reimburse the County for all benefits and compensation paid to and earned/realized by the employee on leave, including but not limited to all wages and benefits, and including reasonable County administrative fees of \$2.50 per employee on leave, per pay period. Upon written notice from the County, SJCMA agrees to reopen and meet within 30 calendar days of notice regarding administrative fees.
- (4) Reimbursement by SJCMA shall occur within thirty (30) days of the County billing SJCMA.
- (5) The leave of absence will be approved only if it does not interfere with the performance of County services and department operations, as determined by the County.

At the conclusion or termination of the leave granted under this section, the officer or representative shall have a right to reinstatement to the same position and location they held prior to such leave, or if not feasible, a substantially similar position without loss of seniority, rank, or classification. If an employee was due a merit increase during this leave, the merit increase will be delayed by one full pay period for each full pay period the employee was on leave.

The County shall not be liable for any act, omission, or injury suffered by any employee of the County if that act, omission, or injury occurs during the course and scope of the employee's leave under this section to work for SJCMA. To the extent that the County is held liable for any such act, omission, or injury, SJCMA shall indemnify and hold harmless the County.

1.14 Work Stoppage

It is mutually agreed and understood that during the period this Memorandum is in force and effect the Association will not authorize or engage in any strike, slowdown, or work stoppage.

Represented employees are also bound by the above.

2 INSURANCE

2.1 Cafeteria Plan Benefits

Regular employees may elect to purchase health, dental, vision and life insurance coverage in accordance with this Memorandum for the employee and, where applicable, his/her dependents from a cafeteria plan account established for each regular employee. For the purposes of this Memorandum, a "regular employee" is any employee occupying a budgeted position, whether or not such employee is scheduled to work eighty (80) hours in a pay period. Employees hired into this unit on or after January 16, 2012, are not eligible for Cafeteria Plan Benefits and are covered by Section 2.3 and 2.3.1 of this Memorandum.

Cafeteria Plan Cap

The County's bi-weekly contribution to the cafeteria plan is \$707.78, which is equivalent to the 2010-11 biweekly dollar amount contributed by the County for the members of this bargaining unit. If, during the term of this Memorandum, any and/or all unrepresented county employees have their cafeteria plan uncapped from the 2010/11 biweekly dollar amount contributed by the County, and any and/or all unrepresented county employees receive an increase the members of this bargaining unit shall receive the same percentage increase.

2.1.1 Amount of Plan

The County's bi-weekly contribution to the cafeteria plan is \$707.78.

To the extent a regular employee does not fully utilize the County's contribution, the employee may opt to place such excess in the employee's deferred compensation account (subject to legal maximums) or the employee may receive taxable income, on a bi-weekly basis, equal to the amount of the County's contribution less the premium amount of health, dental, vision and life insurance coverage chosen by the employee. Should the premium amount of such coverage exceed the amount of the County's contribution to the cafeteria plan, the excess amount shall be deducted from the employee's paycheck.

For employees opting to participate in the County's health, vision and dental plans, should the cafeteria allowance be less than the County's premium contribution (based on Section 2.3.1) for the HMO or the Restricted PPO health and the PPO dental plan chosen by the employee, the County shall pay the difference. The employee's share of premiums shall be deducted from the employee's paycheck, or, if there is insufficient amount in the paycheck, the employee must make timely payment to the County's Benefits office.

Employees in this unit who are on a protected leave of absence (Family and Medical Leave Act, California Family Rights Act, Pregnancy Disability Leave) retain eligibility for the full amount of the above benefits during the time of protected leave regardless of the number of hours of paid time.

Employees in this unit who are on an unprotected leave of absence retain eligibility for the full amount of the above benefits during the time of unprotected leave so long as they have at least 41 hours of paid time per pay period.

If on leave of absence without pay, see Section 2.9 – Continuation of Insurance Benefits While on Leave of Absence.

2.2 Effective Date of Coverage

The effective date of coverage for newly eligible employee members in the health, dental, and vision insurance plans shall be the first day of the first bi-weekly pay period following the date of appointment to employment as a regular employee or as a contract employee, who, by such contract provisions, is eligible for the stated insurance coverage, provided that coverage shall not be effective until the first day of the first bi-weekly pay period after the employee has completed the required enrollment forms.

Upon first becoming eligible for health insurance coverage, all eligible employees have 60 calendar days to enroll in such insurance coverage or to complete an Opt Out form. Employees failing to enroll within the specified time frame shall be deemed to have waived coverage under the plans. Eligible employees who are not covered under the plan may elect to participate at the next Open Enrollment period by signing the required enrollment forms, or upon the occurrence of a Qualifying Status Change Event, as permitted under IRS regulations.

2.3 Health Insurance Options

The County shall continue to provide an option for health insurance coverage for eligible employees and dependents in one of several plans. The plans shall, at a minimum, include a PPO and an HMO plan. The County may modify the number and type of plans available, subject to prior notice and will be available for discussion with Association representatives. Health plans offered to employees may be either self-funded by the County or fully insured. If any plan is self-funded, a plan document shall be adopted by the Board of Supervisors. A list of current County plan offerings is available on the County's website (www.sjgov.org) under the Human Resources-Benefits section.

If the County decides to provide health insurance coverage with other than the above health insurance providers, at least one of the health providers will be a non-County, fully-insured provider.

Employees may opt-out of health insurance coverage at the time of their initial opportunity to enroll, at a life event, or during each open enrollment period for which they are eligible for benefits, by completing an Enrollment form and selecting the Opt Out option.

The side letters the parties entered into on September 19, 2019, and June 10, 2020, are terminated (see Attachments A and B).

2.3.1 Health Insurance Premiums

Health insurance premiums will be paid as follows:

For the Kaiser Health Maintenance Organization (HMO) and High Deductible Health Plan (HDHP), Sutter Health Plus HMO and HDHP, and Select plans, the County will pay 80% of the premium for the coverage level selected (employee only, employee +1, employee plus family) and the employee shall pay 20% of the premium.

For the Premier plan, the County will pay the amount that is equal to 80% of the Select plan for the coverage level selected, and the employee will pay the remaining amount.

If on Leave of Absence Without Pay — Refer to Section 2.9 — Continuation of Insurance Benefits While on Leave.

2.3.3 Coverage for Surviving Dependents

Consistent with the Federal Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA), any County employee who is covered by County-offered health insurance and who dies while employed, whether in paid or unpaid status, their surviving dependents shall be allowed to retain their dependents' coverage, provided that the dependents elect COBRA coverage and pay their applicable premiums by the due date.

2.4 Dental Insurance

The County shall provide an option for dental insurance coverage, to include orthodontia coverage, for eligible employees and dependents in one or more dental insurance plans (currently Delta Dental and United Health Care Dental). Such plans may be fully insured or self-insured by the County. Employees will receive the employee-only tier coverage at 100% for all dental plans, excluding the buy-up options. Employees will be responsible for the difference between the standard/core option of any plan and the buy-up option. The County shall pay for the employee-only premiums and any increases thereof for the term of the memorandum. Dependent dental coverage is available in any offered plan at the employee's expense. A list of current County plan offerings is available on the County's website (www.sjgov.org) under the Human Resources Benefits section.

For plans with orthodontia benefits, the plan pays 50% of actual costs. The maximum amount of orthodontia coverage for dependents is \$1200, lifetime, per enrollee.

The maximum annual dental benefit per person in the self-funded plans shall be \$3,000. United Health Care Dental has no maximum.

The side letter entered into by the parties on September 19, 2019, is terminated (see Attachment A).

2.5 Vision Insurance

The County shall provide one or more options for vision insurance coverage for eligible employees. Employees will receive the employee-only tier coverage at 100% for all vision plans, excluding the buy-up option. Employees will be responsible for the difference between the standard plan and the buy-up option. The County shall pay the employee-only premium and any increases thereof for the term of this memorandum. Dependent coverage is available at the employee's expense. A list of current County plan offerings is available on the County's website (www.sjgov.org) under the Human Resources Benefits section.

The side letter entered into by the parties on September 19, 2019, is terminated (see Attachment A).

2.6 Life Insurance

The County shall provide each eligible employee with life insurance coverage as follows:

- (a) At least one but less than three continuous years of service -- \$1,000.
- (b) Three but less than five continuous years of service -- \$3,000.
- (c) Five but less than ten continuous years of service -- \$5,000.
- (d) Ten continuous years of service or more -- \$10,000.

For the purposes of this subsection only, a year is defined as twelve (12) consecutive calendar months of employment.

2.6.1 Additional Life Insurance

Regular employees in this unit shall be provided with a County-paid term life insurance policy with a face value equal to 100% of the employee's annual salary rounded to the nearest \$1,000, up to \$50,000. The policy shall include a double indemnity accidental death and dismemberment provision.

If an employee separates from employment with a service or disability retirement, this policy shall continue through the first twelve (12) months following such separation and thereafter the face value of coverage to 100% shall be reduced at a rate of 20% per year so that such benefit would terminate at the end of sixty (60) months after separation.

Members of this unit may also purchase additional term life insurance to a maximum of \$200,000 in increments offered by the County's carrier and approved by the Board of Supervisors.

2.7 State Disability Insurance

Unit members have elected to participate in the State Disability Insurance program. Employees shall purchase State Disability Insurance at their own expense.

2.8 Flexible Benefits

Eligible employees shall have the option to participate in a flexible benefit program (as allowed and prescribed by Section 125 of the Internal Revenue Code (IRC) and applicable IRC sections and regulations) which permits the pre-taxing of insurance premiums, reimbursement of eligible dependent care costs, and un-reimbursed healthcare expenses with pre-tax dollars.

Employees who are enrolled in a high-deductible health plan with an accompanying health savings account, are not eligible to enroll in the flexible benefit program under this section. See Section 2.8.1.

2.8.1 Health Savings Account

For employees who are enrolled in a Health Savings Account (HSA)-Qualified High-Deductible Health Plan (HDHP), the County will contribute \$700/year for Employee Only and \$1,400/year for Employee plus dependent(s) to an HSA. Funds will be deposited through the County's payroll process and sent directly to the County's approved third party administrator (TPA), prorated over 26 pay periods. Employees can elect to make additional HSA contributions up to the IRS total combined (employer and employee contributions) HSA maximum contributions for single or family coverage. It is recommended that individuals limit the combined HSA contribution to stay within IRS requirements for prorating based on a partial calendar year HDHP enrollment in order to avoid tax penalties.

Employees who are not enrolled in an HSA-Qualified HDHP or who participate in a flexible spending account as provided in Section 2.8 are not eligible for participation in an HSA under this section.

2.9 Continuation of Insurance Benefits While On Leave of Absence

When an employee is on an authorized leave of absence without pay, the employee shall be allowed, at the employee's own expense, to remain under the health, dental, vision, and life insurance coverage for up to twenty-six (26) bi-weekly pay periods provided that such employee shall pay the applicable premiums no later than the Monday of the County's pay week. Specific arrangements for such coverage shall be made with the County Human Resources Division.

Employees in this unit who are on a protected leave of absence (Family Medical Leave Act, California Family Rights Act, Pregnancy Disability Leave) retain eligibility for health, dental, vision, and life insurance coverage during the time of protected leave regardless of the number of hours of paid time. To maintain benefits, an employee must pay the employee contribution of the premium.

Employees in this unit who are on an approved unprotected leave of absence retain eligibility for the employer-paid premium amount during the time of unprotected leave so long as they have at least 41 hours of paid time per pay period.

The employee's share of premiums shall be deducted from the employee's paycheck, or must be paid directly to the County's Benefit office no later than the Monday of the County's pay week.

2.10 Insurance Reopener

Either party may request to reopen this section of the MOU in December of any calendar year for the purpose of discussing the current insurance provisions or to propose new insurance provisions. Any modifications to current insurance provisions or any new provisions will be effective no earlier than July 1 of the succeeding calendar year, unless agreed to otherwise by the parties.

3 LEAVES FROM EMPLOYMENT

3.1 Vacation

Except as specified below, regular employees in this unit shall accrue and accumulate vacation according to the following schedule:

(a) hours on payroll equal to # of full continuous bi-weekly payroll periods	(b) hourly accrual rate	(c) maximum bi-weekly accrual hours	(d) approx. hours annual accrual	(e) maximum accumul. hours
less than 78	.0385	3.080	80	160
78, but less than 260	.0577	4.616	120	240
260, but less than 520	.0770	6.160	160	320
520 or more	.0885	7.080	184	368

Employees in the classification of Nursing Department Manager, Pharmacy Manager, Hospital Pharmacy Manager, Therapy Services Manager, Clinical Education Coordinator, and Program Manager-Public Health Nursing shall accrue vacation at the rate of 0.0577 hours for each straight time hour of paid time on payroll until completion of 260 full bi-weekly pay periods. Thereafter, employees in such classifications shall accrue vacation according to the above schedule.

Whenever an employee's accumulation of vacation reaches its maximum as provided above, any further vacation accrual shall be credited to such employee's sick leave accumulation until such

time as the employee's vacation accumulation falls below the maximum allowed.

Leave without pay or disciplinary suspension shall delay the advancement to the next higher accrual rate until the employee has been on payroll the number of pay periods specified above.

Each Department Head shall make every possible effort to ensure that vacation time off requested by an employee is utilized at times which are mutually agreeable to the employee and the department; however, the Department Head has final authority to grant or deny such request.

3.2 Vacation Time for Illness

An employee may choose to use accrued vacation or compensatory time, if any, if the employee is absent beyond the limits of accumulated sick leave for reasons of illness, injury or quarantine, or death in the immediate family as described in Section 3.3.2.

3.3 Sick Leave

3.3.1 Accrual

The granting of sick leave with pay is a privilege and not a right. Regular employees shall accrue .0462 hours of sick leave for each straight-time hour on payroll not to exceed eighty (80) straight-time hours per pay period (annual accrual rate, approximately 96 hours).

3.3.2 Sick Leave Usage

Subject to the conditions specified in this memorandum sick leave may be authorized for any of the following reasons:

- (a) Illness, injury or quarantine of the employee;
- (b) Diagnosis, care, or treatment of an existing health condition of, or preventative care for an employee or an employee's immediate family member;

For the purpose of this Section, "immediate family" means the spouse, registered domestic partner, child, parent, sibling, grandparent, grandchild or great grandchild of the employee; or the child, parent, sibling, grandparent, grandchild or great grandchild of the employee's spouse or registered domestic partner.

- (c) Illness, injury or quarantine during an authorized vacation or on a floating holiday as evidenced by satisfactory proof attesting to the nature and length of disability. Sick leave for non-emergency medical, dental, or optical care during an authorized vacation or on a floating holiday period is not permitted.
- (d) An amount sufficient which, when added to an employee's disability indemnity under Worker's Compensation, will result in a payment to the employee not more than the employee's regular salary.

- (e) An amount sufficient which, when added to an employee's disability indemnity under State Disability Insurance (if applicable), will result in a payment to the employee not more than the employee's regular salary.
- (f) Employees who have sick leave accruals can use up to forty (40) hours of such sick leave time to care for a new or adopted child.
- (g) Sick leave may also be authorized for reasons covered by Labor Code 246.5.

3.3.3 Sick Leave Exclusion

No employee shall be entitled to sick leave because of any of the following:

- (a) Disability arising from any illness or injury purposely self-inflicted or caused by the employee's misconduct;
- (b) Illness, injury, quarantine or disability while on leave without pay;
- (c) An employee who is scheduled to work on a regular holiday who is absent on that holiday due to illness, injury, or quarantine shall not be permitted to use sick leave but shall be deemed to have used the regular holiday.

3.3.4 Sick Leave Verification

Employees absent from work because of illness, injury, or quarantine, or for non-emergency medical, dental or optical care shall be paid only upon furnishing the appointing authority or designee with satisfactory proof as may be required by the appointing authority or designee that the absence was due to such cause. The requirement, need and form for such verification shall be made known to the employee in advance of any absence, but no later than the time the employee calls in sick, provided that the employee has complied with departmental call-in procedures. An appointing authority shall not require "after the fact" verification.

If verification is requested, the requirement and the need for medical verification shall be confirmed to the employee in writing within two weeks after the employee's return, explaining the justification for the request.

3.3.5 Sick Leave Abuse

Upon information and after investigation and the determination of the Director of Human Resources that an employee has abused the privilege of sick leave benefits, the Director may suspend the employee's privilege of sick leave accrual and/or usage with pay for such period as the Director determines necessary to deter the employee from again abusing the privilege.

3.3.6 Sick Leave Conversion

This Article applies to all employees hired on or prior to August 27, 2001.

Employees must have one hundred sixty hours (160) of sick leave remaining on the books at the time of retirement to be eligible for this benefit.

Upon separation from employment and concurrent assumption of a retired status in the San Joaquin County Employees Retirement Association, an employee from this unit will cash out 15% of sick leave upon retirement. The remaining 85% of sick leave will be used to implement Section 8.4. of this Memorandum.

Any amount received from conversion of sick leave under this Section shall not be considered compensation for purposes of contributions to, or benefits from, the San Joaquin County Employees Retirement Association. Such cash conversion amount shall be paid when the employee first receives monetary allowances from such Retirement Association.

3.3.7 Sick Leave Incentive Program

In an effort to reduce the level of sick leave usage, the County agrees to the following sick leave incentive plan.

- (1) CONDITIONS OF PARTICIPATION: An employee must be on payroll with the County during the entire calendar year to be eligible for incentive rewards.
- (2) QUALIFICATIONS AND REWARDS: Eight (8) hours of incentive leave will be granted to an employee who, at the end of each calendar year, has a sick leave balance of at least 160 hours and has used less than half of the accrued sick leave for that given year.
- (3) DEFINITIONS: Incentive Leave - For the purposes of this program, incentive leave will be granted at the beginning of the calendar year which follows the year in which it was earned. Furthermore, this leave will have no cash conversion value and can only be taken during the year in which it was granted. Should the leave not be used during that calendar year, it will be lost. Scheduling of this time off shall be consistent with the procedures for scheduling compensatory or vacation time. In all instances, it shall require mutual agreement of the employee and the Department Head or designee.

3.4 Holidays

3.4.1 Regular Holidays

The following days are established as regular holidays for regular employees:

- (a) January 1 - New Year's Day.
- (b) The third Monday in January - Martin Luther King, Jr.'s Birthday.
- (c) The third Monday in February - Washington's Birthday.
- (d) The last Monday in May - Memorial Day.
- (e) July 4 - Independence Day.
- (f) The first Monday in September - Labor Day.
- (g) November 11 - Veteran's Day.
- (h) Any November day designated as Thanksgiving Day.
- (i) The Friday following the day designated as Thanksgiving Day.
- (j) December 25 - Christmas Day.
- (k) All other holidays as may be proclaimed by the Governor of the State of California or the President of the United States and adopted by the Board of Supervisors.

3.4.1.1 Regular Holiday - Weekend Observance

When a regular holiday falls on a Saturday, the preceding Friday shall be observed as a floating holiday.

With the exception of employees who work in a seven (7) day per week work site, when a regular holiday falls on a Sunday, the following Monday shall be observed as the holiday. For employees who work in a seven (7) day per week work site, when a regular holiday falls on a Sunday, the regular holiday shall be observed on Sunday.

Notwithstanding provisions of the County ordinance relating to regular holidays that fall on a Saturday, employees who are scheduled to work and who work on a regular holiday that falls on a Saturday shall be compensated in accordance with Sections 3.4.2.1 of this Memorandum of Understanding. When an employee is scheduled to work and works on a regular holiday that falls on a Saturday, the preceding Friday is not observed as a floating holiday.

3.4.2 Regular Holiday Compensation

3.4.2.1 Regular Holiday Compensation - Regular Employees

Any regular employee whose regularly scheduled day off falls on a regular holiday shall be entitled to accrue eight (8) hours of regular holiday time.

In addition to regular salary, any regular employee who is required to work on a regular holiday shall have the option of being compensated for the hours worked on such holiday by: (1) cash payment at the rate of one and one-half (1-1/2) times such employee's hourly base salary, or (2) the accumulation of regular holiday time at the rate of one and one-half (1-1/2) hours for each hour worked.

3.4.2.2 Regular Holiday Compensation – 24-Hour Work Sites

Employees who work in a seven (7) day per week work site and work only on the Monday following the actual holiday shall receive eight (8) hours of straight time pay plus eight (8) hours accrual of floating holiday time. Employees who work both days shall receive premium compensation for Sunday only.

3.4.2.4 Maximum Regular Holiday Accumulation

The maximum regular holiday time accrual shall be sixty (60) hours. Such regular holiday time off shall be scheduled at a time mutually agreeable to the employee and the Department Head.

3.4.3 Floating Holidays

The following days are established as floating holidays for regular employees:

- (a) Each regular employee's birthday.
- (b) February 12 - Lincoln's Birthday.
- (c) September 9 - Admission Day.
- (d) The second Monday in October - Columbus Day.
- (e) The Friday preceding any regular holiday which falls on a Saturday.

Employees hired after January 6, 2015, shall not be eligible for floating holidays as described above except (e). Employees in any County bargaining unit who are eligible to receive these floating holidays may retain them when they are appointed to a position in this unit.

3.4.3.1 Floating Holiday Observance

Regular employees scheduled to work on the floating holiday may individually, with the approval of the Department Head, take such holiday on the date of the holiday, on the day preceding the holiday in the case of holidays which fall on a Saturday, or the day following the holiday in the case of holidays which fall on a Sunday, or may accumulate up to forty-eight (48) hours of floating holiday time to be used at a deferred date. Such floating holiday time off shall be scheduled at a time mutually agreeable to the employee and the Department Head. County offices and departments shall remain open for business on any day deemed to be a floating holiday and employees who elect to accumulate floating holiday time shall receive their regular compensation for working on the holiday.

Any regular employee whose regularly scheduled day off falls on a floating holiday shall accrue floating holiday time as provided in this Section.

3.4.3.2 Flexible Holidays

Each fiscal year, the following days are established as flexible holidays for regular full-time employees hired after January 6, 2015.

- (a) Each regular employee's birthday
- (b) September 9 – Admission Day
- (c) The second Monday in October – Columbus Day
- (d) February 12 – Lincoln's Birthday

3.4.3.3 Flexible Holiday Observance

Regular full-time employees may individually, with the approval of the department head, take such flexible holiday on the date of the holiday, on the day preceding the holiday in the case of holidays which fall on a Saturday, or the day following the holiday in the case of holidays which fall on Sunday, or may accumulate up to thirty-two (32) hours of flexible holiday time to be used at a deferred date, within the fiscal year. Hours accrued shall not be carried over beyond the end of the fiscal year and have no cash value. Such flexible holiday time off shall be scheduled at a time mutually agreeable to the employee and the department head. County offices and departments shall remain open for business on any day deemed to be a flexible holiday and employees who elect to accumulate flexible holiday time shall receive their regular compensation for working on the holiday.

Any regular full-time employee whose regularly scheduled day off falls on a flexible holiday shall accrue flexible holiday time as provided in this Section.

3.4.3.4 Cesar Chavez's Birthday

Any employee who has at least eight (8) hours of holiday or other vested banked time and

requests Cesar Chavez's birthday (March 31) off shall be granted such time off provided the employee's department or work unit meets its minimum staffing requirements.

3.4.4 Shift Designation

For the purposes of this Section, the night shift of the calendar day preceding the actual date of the regular holiday shall be considered Shift #1, the day shift of the regular holiday shall be Shift #2 and the p.m. shift of the regular holiday shall be Shift #3.

3.5 Bereavement Leave

Employees who suffer a death in their "immediate family" may be allowed to be absent with pay for three (3) scheduled County work days for each family member who dies. Immediate family includes the spouse, registered domestic partner, child, parent, stepchild, stepparent, sibling, grandparent, great grandparent, grandchild or great grandchild of the employee; or child, parent, stepchild, stepparent, sibling, grandparent, great grandparent, grandchild or great grandchild of the employee's spouse or registered domestic partner.

In addition, employees may use an additional two (2) days of accrued leave for the death of the employee's spouse, registered domestic partner, parent or child.

All bereavement leave under this section must be used within 30 days of the death of the eligible family member. The 30 days may be extended under extenuating circumstances as determined by and with the approval of the Department Head, but shall not exceed one year. Proof of death of the eligible family member is required. Acceptable documents include, but are not limited to, death certificates, obituaries or signed verifications from funeral homes/mortuaries, or other documents deemed acceptable by management. Documents may be source verified.

For the term of this agreement only, all bereavement leave under this section must be used within 90 days of the date of death of the eligible family member. The 90 days may be extended under extenuating circumstances as determined by and with the approval of the Department Head but shall not exceed one year.

3.6 Educational Leave

Effective each July 1 of each fiscal year, educational leave shall be credited to employees as follows:

- (a) Employees in classifications that require a Registered Nurse license shall be credited with forty (40) hours.
- (b) Employees in the classifications of Therapy Services Manager, Hospital Pharmacy Manager and Pharmacy Manager, and Chief Mental Health Clinician shall be credited with 24 hours of educational leave.
- (c) Employees in the classifications of Manager of Respiratory Care and Manager of

Diagnostic Imaging who have the education or training as determined by San Joaquin General Hospital to meet the requirements of a critical care and a trauma receiving center shall be allowed twenty-four (24) hours of educational leave to attend courses of instruction designed to meet any further prescribed educational requirements.

- (d) Employees in the classification of Principal Child Support Attorney shall be credited with sixteen (16) hours of educational leave.

If the leave is not used before July 1 of the succeeding fiscal year, the leave is forfeited. This leave has no dollar value at any time.

All the above-listed educational leave shall be scheduled during low patient census times as determined by the Department Head, or on a date agreed to by the employee and the department administration.

Educational leave is paid time off for the purpose of obtaining training and/or education that will qualify towards the employee's continuing educational requirements necessary to maintain licensure or certification for the position, or for the professional development and growth in their career field. Use of education leave is subject to verification of the training taken.

3.7 Military Leave

The following procedures and restrictions shall apply to military leave:

- (a) To be eligible for paid military leave, an employee must have at least twelve (12) months of qualifying service immediately prior to the leave. Qualifying service is continuous and consecutive County service or recognized military service. Recognized military service is defined as full-time service in the armed forces during a national or state emergency. Generally, recognized military service would be that during World War II, the Korean War, the Vietnam Conflict, or any conflict for which an expeditionary medal was awarded. This time requirement does not apply to declared emergency situations. Under such emergencies, any employee ordered to active duty is eligible for paid temporary military leave.
- (b) Temporary military leave with pay can be authorized for eligible employees only when they are ordered to active duty.
- (c) Weekend drills are not active duty. Departments will make reasonable attempts to change an employee's schedule to allow for off-duty attendance at monthly drills. If such accommodation is not possible, the employee may use leave as specified in (k).
- (d) A copy of the employee's order to active duty must accompany any military leave with pay.
- (e) Paid temporary military leave can be authorized for a maximum of thirty (30) calendar days in each fiscal year pursuant to Military & Veterans Code §395.01, et

seq.

- (f) Upon expiration of the thirty (30) calendar days of paid military leave as set forth in subsection (e), the County shall pay the difference between the eligible employee's regular County salary, if the employee's military pay is less than the employee's regular salary.
- (g) The County shall continue to provide employee and dependent medical, dental and vision benefits, if applicable, consistent with regular employment and subject to payment of employee premiums, if any, of such coverage.
- (h) The eligible employee's military service shall be considered as paid employment for purposes of benefits under the County's retirement system subject to the payment of the employee contribution for periods of continuous military leave.
- (i) In calculating leave, holidays (floating, flexible or regular) which occur during an employee's military leave will be charged as holidays used rather than military leave.
- (j) All other calendar days encompassed by the order will be counted as military leave whether normally scheduled days or days off.
- (k) Employees will not be denied the right to use leave to attend active or inactive military duty. If the employee is not eligible for temporary military leave with pay, the employee may request a leave of absence without pay or use accrued vacation, holiday, or compensatory time off.

3.8 Leave of Absence Without Pay

In accordance with Civil Service Rule 12, leaves of absence may be granted to regular employees for any of the following reasons:

- 1) Medical illness or disability not covered by accrued leave.
- 2) Maternity/Pregnancy.
- 3) Personal reasons.
- 4) Education or training.

3.8.1 Medical Leave without Pay

Medical Leave without Pay may be granted to probationary or permanent employees by the Department Head. Requests must be submitted with a statement from a California licensed physician stating the nature of the disability and the estimated duration of the disability. A medical leave may be granted for a maximum of one (1) year; (extensions may be possible, usually pending disability retirement). A leave of over 30 days must be approved by the Director of Human Resources.

3.8.2 Pregnancy Disability Leave

Pregnancy disability leave without pay shall be granted to employees in accordance with state and federal laws. Leave for medical reasons shall be granted with a physician's statement, and employees may use sick leave or other accrued leave in accordance with Section 3 of this Memorandum.

Current law provides up to four (4) months of leave for pregnancy disability. Employees may also be eligible for an additional 12 weeks of leave under CFRA Section 3.9.1 of this Memorandum. The County will comply with any state or federal law and reserves any rights of restrictions.

3.8.3 Educational Leave of Absence

Educational Leave of Absence without pay may be granted to permanent employees by the department if the leave furthers the department's goals and the employee's last performance evaluation was at least satisfactory. Initially, leave of up to one (1) year may be granted and may be extended up to an additional year.

3.8.4 Personal Leave of Absence

Personal Leave of Absence may be granted to a permanent employee by the Department Head for reasons acceptable to the Department Head. The employee's last performance evaluation must be at least satisfactory. Leave may initially be granted for up to one (1) year and may be extended up to an additional year.

Forms for request of leave of absence are maintained in each department. Requests for leave of absence shall be submitted sufficiently in advance of the proposed effective date to permit the Department Head and the Director of Human Resources to take action prior to that date.

3.8.5 Effect of Unpaid Leave of Absence on Other Leaves

No employee who has been granted a leave of absence without pay shall accrue any vacation, sick leave or holiday during the time of such leave nor shall such time count toward gaining permanent status.

3.9 Family Leave

3.9.1 State Family Leave

In accordance with State law, any employee with more than 12 months of service with the County and who has worked a minimum of 1250 hours in the 12 months prior to the start date of the leave, may take a family care leave of up to twelve (12) weeks in a 12-month period. An employee who takes such family care leave shall be returned to employment in the same or comparable position upon return from said leave.

San Joaquin County will comply with the California Family Rights Act maintaining all rights and provisions that are permitted by State law.

Family care leave may be utilized in conjunction with the birth of a child of the employee, the placement of a child with an employee in connection with the adoption or foster care placement of the child, for the serious medical condition or illness of the employee, or to allow the employee to care for a parent, spouse, registered domestic partner, grandparent, grandchild, sibling, or child who has a serious health condition.

For the purposes of this Section, the terms "employment in the same or a comparable position", "child", "parent", and "serious health condition" are as defined in Section 12945.2 of the Government Code.

The reasonable advanced notice, scheduling and certification requirements of 12945.2 (h), (i), (j), and (k) shall also apply.

An employee who takes family care leave shall be required to use accrued vacation, compensatory time, floating holiday and regular holiday time during such leave. In accordance with County regulations governing the use of sick leave, the employee may also use accrued sick leave time. An employee receiving wage replacement benefits such as State Disability Insurance (SDI) shall not be required to use more leave accruals than is necessary, in conjunction with the wage replacement benefits, to receive a full paycheck.

For issues related to illness, this section applies to medical leaves of absence that meet the definition of a "serious health condition" as defined in Section 12945.2 of the Government Code or Section 29 CFR 825.113 of the federal Family and Medical Leave Act.

3.9.2 Federal Family and Medical Leave Act

San Joaquin County will comply with the federal Family and Medical Leave Act, maintaining all rights and provisions that are permitted by the federal Family and Medical Leave Act.

3.9.3 Child-Related Activities

The County of San Joaquin shall comply with any federal or state law (California Labor Code 230.8) requiring an employer to grant time off to participate in a child-related activity. Current state law provides that parents, guardians, stepparents, foster parents, grandparent or person who stands in loco parentis to a child may take up to 40 hours per year, but not more than 8 hours per month, to participate in their children's school or licensed child care provider activities. Employees working a shift greater than 8 hours per day may take one full shift per month, subject to the 40 hour maximum. An employee may take unpaid leave or may use accrued vacation, compensatory, floating holiday, flexible holiday or regular holiday time.

3.10 Catastrophic Leave Program

3.10.1 Conditions of Participation

Applications for receipt of catastrophic leave donations will be processed by the San Joaquin County Management Association.

- (a) A County employee becomes eligible to receive catastrophic leave donations when the following two (2) conditions both occur:
 - (1) The employee has exhausted, or will soon exhaust all his/her accrued leave, as a result of a verifiable long-term illness or injury suffered by either the employee or an immediate family member, as defined in San Joaquin County Ordinance Code Section 2-5230.
 - (2) The employee has received approval for an unpaid leave of absence from his/her Department Head.
- (b) Employees may donate accrued vacation, compensatory time or holiday time; sick leave may not be donated.
- (c) Donations may be made in whole hour increments from a minimum of four (4) to a maximum of sixteen (16) hours per donor in each donation period.
- (d) Donors must have an overall leave balance of 80 hours remaining after donated time has been deducted.
- (e) Once donated to an individual, donated leave cannot be reclaimed by the donor.

3.10.2 Processing of Donations

Upon receipt of donation authorizations, the Auditor-Controller shall take the following actions:

- (a) Verify that donating employee has minimum required leave balance required for the donation and convert donated time to dollars at the hourly rate of the donor and subtract from the designated leave category. Pay supplements which are a percentage of base salary (except above class pay and special assignment pay) shall be added to the base salary prior to converting the value of the donated time to the recipient.
- (b) Convert donated dollars as computed above to hours at the hourly rate of the recipient, and add to recipient's sick leave balance.
- (c) Notify departments of changes in leave balances by noting Auditor adjustments on the payroll certs for the next payday.

- (d) Retain a confidential file of donation authorizations.

3.10.3 Treatment of Donated Time

Donated time is treated as sick leave accrued by the recipient of the donation.

Donated time does not alter the employment rights of the County or the recipient, nor extend or alter limitations otherwise applicable to Leaves of Absence or Sick Leave, except as noted in this Memorandum.

Employees who are utilizing donated sick leave hours will continue to accrue vacation and sick leave in accordance with the provisions of this Memorandum of Understanding.

3.11 Leave for Promotional Examinations

Employees shall be allowed the necessary time off with pay to participate in promotional examinations for the County, which are held during their regular work hours.

3.12 Effect of Re-Employment or Reinstatement on Leave Accrual Rates

A former employee who returns to County service shall not be entitled to accumulate sick leave benefits unless the return to County service is the result of reinstatement within one (1) year of termination of employment OR is a result of re-employment after a layoff due to lack of work, lack of funds, or in the interest of economy.

Employees who are reinstated to County service within one (1) year of termination of employment will be returned to the same vacation accrual rate and salary grade step that was held at the time of separation.

4 COMPENSATION

4.1 Salaries

Each job classification will be assigned an individual salary grade. Each salary grade will identify the bi-weekly five-step salary range as the established compensation for that class. The current Step 1 salary established for each class will remain the Step 1 salary of the new salary range. Each subsequent step in the new salary range will be 5% more than the preceding step, through Step 5. Any negotiated salary adjustments will be made to the first step in the salary range. Once adjusted, each subsequent step will be 5% more than the preceding step, through Step 5.

a. Cost of Living Adjustments

- 1) Effective July 5, 2021, all employees shall receive a 2% cost of living adjustment to the base salary.

- 2) Effective July 4, 2022, all employees shall receive a 1% cost of living adjustment to base salary.

b. Equity Adjustments

Effective July 5, 2021, employees in the following classifications shall receive an adjustment to base salary as described:

Accounting Manager	3.5%
Chief Mental Health Clinician	6.75%
Department IS Manager	1.0%
EEDD Division Manager	2.0%
Management Services Administrator	1.5%
Management Analyst III	1.5%
Principal Business Analyst	1.5%
Therapy Services Manager	1.5%

c. One-time Payment

Effective July 5, 2021, regular employees hired into this unit on or before June 22, 2021, and who are on payroll as of June 22, 2021, will receive a one-time payment of \$700.

d. Benchmark Total Compensation Study

Within six (6) months of the expiration date of this agreement, and upon request by the Association, the parties will meet and confer over a benchmark total compensation study to be used during negotiations for the successor MOU.

4.1.1 Salary Compaction

To ensure that each bargaining unit member covered by this Memorandum receives a salary that is not below the salary of the classification(s) supervised, the County agrees to provide a salary spread between each manager and the highest paid subordinate (for whom the manager prepares the Employee Performance Evaluation) of each manager of no less than seven (7%) percent through one of the following methods:

1. Should the same level of salary compaction be present with all managers in the same classification, the County agrees to provide a salary grade spread between the classifications of the manager(s) and the highest paid subordinate(s) (for whom the manager prepares the Employee Performance Evaluation) of no less than seven (7%) percent.

2. Should salary compaction not impact all managers in a classification at the same level, individual compaction supplements will be utilized in order to maintain a salary spread between a manager and the next highest paid subordinate (for whom the manager prepares the Employee Performance Evaluation) of no less than seven (7%) percent.

The salary spread in both instances will be determined by comparing Step 1 of the manager to Step 1 of the highest paid subordinate (for whom the manager prepares the Employee Performance Evaluation).

Pursuant to (1), effective April 25, 2022, the following classifications will receive adjustments to base salary as described:

Nursing Department Manager - Inpatient	5.0%
Nursing Department Manager - Ambulatory	1.0%
Clinical Education Coordinator	4.0%
Children's Medical Services Manager	2.0%
Program Manager – PH Nursing	2.0%

Pursuant to (2), the following classifications may require compaction supplements in addition to the April 25, 2022 base wage adjustments described above. Human Resources will evaluate to determine if a supplement is required to resolve any remaining compaction, to ensure the minimum seven percent (7%) spread is maintained between the manager and their highest paid subordinate.

Nursing Department Manager - Ambulatory
Program Manager – PH Nursing

4.2 Supplemental Pay

4.2.1 General

No employee shall receive supplemental pay when on vacation, sick leave, sick leave in conjunction with the receipt of State Disability Insurance or Worker's Compensation temporary disability payments, compensatory time off, holiday, or paid military leave unless such employee shall have been performing duties for a period of not less than four (4) full bi-weekly pay periods or such supplemental duties are scheduled, upon assignment, to last not less than four (4) full bi-weekly pay periods. Unless otherwise specified by the appointing authority or the appointing authority's designee, such shift assignment shall be presumed to be scheduled upon assignment for at least four (4) full bi-weekly pay periods.

4.2.2 Special Assignment Supplement

The Director of Human Resources may authorize a 5% salary increase to any employee designated by the County Administrator to be on special assignment.

4.2.3 Shift Differential

With the exception of employees in the classifications of Nursing Department Manager and Clinical Education Coordinator, shift differential shall be \$1.15 per hour for p.m. and split shifts and \$1.45 per hour for night shifts.

The shift differential for employees in the classifications of Nursing Department Manager and Clinical Education Coordinator shall be \$4.50 per hour.

For purposes of payment of shift differential for all employees, except those in the classifications of Nursing Department Manager and Clinical Education Coordinator, the following times shall apply:

DAY:	Any work shift which begins on or after 4:00 a.m. and before 12:00 noon.
P.M.	Any work shift which begins on or after 12:00 noon and before 8:00 p.m.
NIGHT	Any work shift which begins on or after 8:00 p.m. and before 4:00 a.m.

For purposes of payment of shift differential for employees in the classifications of Nursing Department Manager and Clinical Education Coordinator the following times shall apply:

DAY:	Any work shift which begins on or after 7:00 a.m. and before 3:00 p.m.
P.M.	Any work shift which begins on or after 3:00 p.m. and before 11:00 p.m.
NIGHT	Any work shift which begins on or after 11:00 p.m. and before 7:00 a.m.

4.2.4 Standby Pay

A Department Head, with the concurrence of the Human Resources Director or designee, may designate employees in certain classes to be in a standby status. An employee who is on standby status must be at a location where the employee can be reached at all times and upon being called shall return to work immediately. An employee who is recalled to work shall be deemed to be off standby status and the employee shall not receive standby pay for the hours the employee is paid to work.

Employees who perform standby duty shall be compensated at 20% of their regular hourly rate. Nursing Department Managers who perform standby duty shall be compensated at one third of their regular hourly rate.

4.2.4.1 Return to Worksite Pay

The following classifications shall be compensated at their regular hourly rate of pay for the actual time worked, but not less than three (3) hours, when an employee who is on approved standby pay pursuant to Section 4.2.4, is required to return to the worksite, or assigned location as designated by the department:

- a. Nursing Department Manager assigned to the SJGH Neonatal Transportation Team
- b. Nursing Department Manager assigned to the SJGH Cardiac Catheter Lab
- c. Victim Witness Program Manager in the District Attorney's Office

An employee who is recalled to work and returns to the worksite shall be deemed off standby status and the employee shall not receive standby pay for the hours the employee is paid to work under this section.

4.2.5 Work Above Class

A Department Head may temporarily assign any employee to perform duties normally assigned to a classification with a higher salary without changing the salary of such employee provided the temporary assignment does not exceed five (5) work days in a thirty (30) calendar day period or twenty (20) work days in a one hundred and eighty (180) calendar period. If an employee is assigned to a classification with a higher salary grade for more than five (5) work days in a thirty (30) calendar day period or twenty (20) work days in a one hundred and eighty (180) calendar period, the employee shall be compensated, beginning with the sixth day of such above-class assignment, at an amount equal to what the employee would receive if promoted to the higher class, or 5% if no class exists. Such assignment must receive approval of the Director of Human Resources. Assignments to cover routine vacation or sick leave absences will not be approved. Vacation or sick leave absences in excess of two (2) weeks shall not be considered routine.

Employees who are being paid for working in a higher classification are not eligible for merit increases in the higher classification. Whenever an employee working in a higher classification receives a merit increase in the employee's regular classification or the employee's regular salary is otherwise increased or decreased, the employee's pay for working above class shall be adjusted so that the employee continues to be compensated at the rate specified above.

4.2.8 Behavioral Health Supplement Pay

All employees of Behavioral Health Services (BHS), in the classification listed below, assigned to direct patient care in the Crisis Stabilization Unit (CSU), Crisis or the Psychiatric Health Facility (PHF) shall receive a supplement of 2.5%.

Chief Mental Health Clinician

4.2.9 Educational Supplement

Nursing Department Managers, Clinical Education Coordinator, Children's Medical Services Manager in Public Health, and Program Manager – Nursing who hold one of the following certificates or degrees will be compensated equal to 5% of the base salary of the employees' current step:

- a) If the Nursing Department Manager has a BSN.
- b) If the classification requires a BSN and the employee obtains an MSN.
- c) National or approved international certification in the specialty area in which the Nursing Department Manager currently is assigned.
- d) CCRN and ACLS certificates.
- e) A critical care class and ACLS certificate.
- f) Oncology certificate and PICC certificate.
- g) Chemotherapy certification and PICC certificate.
- h) Intubation and PICC certificate.

4.2.10 License/Certificate Pay

The County agrees to reimburse the following classifications for fees required to renew required license certification:

- Assistant County Surveyor
- Deputy County Surveyor
- Clinical Education Coordinator
- Hospital Pharmacy Manager
- Pharmacy Manager
- Engineer V
- Environmental Health Program Coordinator
- Therapy Services Manager
- Any person that possesses a LPCC, LCSW or MFT license
- Any person working in a position requiring an RN
- Utilities District Superintendent
- Utilities District Assistant Superintendent
- Medical Staff Coordinator
- Substance Abuse Program Manager

Fees associated with initial certification will not be covered.

4.2.11 Correctional Health Assignment Supplement

Employees in the classifications of Chief Mental Health Clinician and Nursing Department Manager who are regularly assigned to Correctional Health will be entitled to a 5% supplement.

4.2.12 Juvenile Detention Facility – Administrator on Call Stipend

An Assistant Deputy Chief Probation Officer or a Deputy Chief Probation Officer who is assigned to the Juvenile Detention Facility, and assigned as the Administrator on Call who is required to stay available and accessible in an on-call capacity, shall be compensated for this on-call assignment. The employee is deemed “available and accessible” when: they can leave their residence within thirty (30) minutes and return to work in a reasonable time, and there is no impairment. When assigned, the employee shall be compensated \$150.00 per seven (7) day assignment.

4.2.13 Intake and Assessment Supplement

Upon approval by the Human Services Agency (HSA) Director or designee, employees in the Child Welfare Division Chief classification who are assigned to Intake and Assessment (I&A), shall receive a supplement of 7.5% of base salary for all hours worked in the assignment.

4.2.15 Additional Compensation

Employees in the classification of Engineer V who sign plan documents, shall receive a pay supplement of one percent (1%) of their base salary while performing such duties.

Employees in the classification of Chief Deputy Auditor-Controller, Retirement Financial Officer, or Accounting Manager, who possess a Certified Public Accountant (CPA) certificate issued by the National American Institute of Certified Public Accountants and the license issued by the State Department of Consumer Affairs - Board of Accountancy, shall receive a pay supplement of five percent (5%) of their base salary.

Employees in the class of Principal Appraiser, who possess a Certified Residential License or a Certified General License from the State Business Transportation and Housing Agency - Office of Real Estate Appraisers, shall receive a pay supplement of five percent (5%) of their base salary.

Employees in the class of Principal Auditor-Appraiser who possess a Certified Residential License or a Certified General License from the State Business Transportation and Housing Agency – Office of Real Estate Appraisers, or who possess a Certified Public Accountant (CPA) certificate issued by the national American Institute of Certified Public Accountants and the license issued by the State Department of Consumer Affairs – Board of Accountancy, shall receive a pay supplement of five percent (5%) of their base salary. If a Principal Auditor-Appraiser possesses more than one of these licenses, the total pay supplement will be limited to five percent (5%).

4.2.16 Parking Supplement Downtown

The County agrees to contribute the actual cost not to exceed \$17.00 per biweekly pay period, directly to the Central Parking District, for eligible employees who work in the Downtown Core Area as defined in the report on Employee Parking in Downtown Stockton as adopted by the Board of Supervisors February 13, 2001. Eligible employees utilizing parking lots that are not part of the Central Parking District will be reimbursed for the actual amount of their monthly parking receipt to \$36.83 per month as submitted with a County Expense Reimbursement Claim form through their departments normal reimbursement process.

During the term of the agreement the County may explore alternative downtown parking options which will be in lieu of the parking supplement as described above.

The downtown garage parking rate is currently \$75.00 a month. The Call Center facility has garage parking available in the basement and is priced at the same rate as other downtown garage parking. For employees assigned to the Call Center who elect to park in the basement the parking stipend will be increased so that Call Center employees will pay an amount that is tied to the same rate charged to employees who park under the freeway, which is currently \$44.00 per month. Based on this current parking rate, the parking charge that will appear on the Call Center employee's check will be \$34.62 biweekly. The County will pay a total biweekly stipend of \$31.31 and the employee's net deduction will be \$3.31 per pay period which is equal to the rate paid by employees parking under the freeway. Should the rate for parking under the freeway or in downtown garages change, the stipend for basement parking will be changed to maintain the same cost relationship.

4.2.17 Special Assignment Supplement

Correctional Lieutenants assigned to Classification , Discipline and/or Training duties, and for which subordinate Correctional Sergeants are receiving premium pay for the same assignment, will be eligible to receive an equivalent supplement to base salary.

4.3 Paycheck Exceptions

A paycheck exception is defined as the incorrect reporting of payroll or failure to process the following payroll actions, causing an employee to receive less than the pay to which he/she is entitled for that pay period: step increases, supplemental pays. Paycheck exceptions in excess of \$100 in terms of gross pay, if presented by noon on the Friday following payday, shall be paid within two (2) working days of presentation of the claim to the Auditor-Controller.

All payroll errors resulting in gross pay overpayment, net pay overpayment or granting of other compensation or benefits in error must be repaid to the County. Employees shall be allowed, at employee's option, to use accrued annual and holiday leave and compensatory time to repay the County in cases of payroll errors resulting in gross salary overpayment. Such errors may result from use of an incorrect salary rate, reporting the wrong number of hours worked, or misclassification of hours worked.

Accrued annual and holiday leave and compensatory time may not be used to repay the County for net salary overpayments that do not result from gross salary errors. Such errors include, but are not limited to, under withholding of deductions for employee-paid benefits and taxes. Employees may repay a net salary overpayment, due to an under withholding, over the same amount of pay-periods that the under withholding occurred.

4.4 Mileage and Travel Expenses

If it is legally possible to do so, the County shall grant advance travel pay when requested by the employee at such times as the employee is traveling outside the County on County business.

The mileage allowance for use of personal vehicles on County business shall be paid according to the rates allowed by the Internal Revenue Service and shall be adjusted to reflect changes in this rate the beginning of the first full bi-weekly pay period following announcement of the changed rate by the Internal Revenue Service.

Meal and lodging reimbursement shall be authorized and paid in accordance with procedures and requirements listed in Section 3500 of the Administrative Manual of San Joaquin County. Those reimbursement limits shall not be reduced without meeting and conferring with SJCMA.

4.5 Deferred Compensation Contribution

The County of San Joaquin may maintain a Section 457 and/or other Deferred Compensation Plans. The allowable contribution shall be the maximum allowed by the Internal Revenue Code.

The County, at its sole discretion will have the right at any time during the period covered by this Memorandum to develop charges necessary for the administration of the plan or plans, and implement said charges for active and inactive participants, to be paid by active and inactive participants. In any case, the charge will not exceed the actual cost to the County for administration of the plan or plans as computed by the Auditor-Controller under standard accounting practices for cost allocation purposes.

Before implementing a payroll deduction charge, the County will make every effort to negotiate with the plan vendors and/or third party administrator(s) to recoup the County cost from their management fees.

For members of this unit, the County shall make a contribution equal to 1% of the employee's base salary to a deferred compensation plan.

4.7.1 Longevity

Nursing Department Managers, Clinical Education Coordinator, Children's Medical Services Manager, and Program Manager-PH Nursing will receive the highest of the following pay supplements for which they qualify, based on continuous County service as a registered nurse:

1. 20,800 regular paid hours – 7.5% of regular base salary.

2. 31,200 regular paid hours – 10% of regular base salary.

Effective July 5, 2021, employees in the Deputy Chief Probation Officer and Assistant Deputy Chief Probation Officer classifications will receive the highest of the following pay supplements for which they qualify, based on continuous County service:

1. 20,800 regular paid hours – 1.0% of regular base salary
2. 31,200 regular paid hours – 1.5% of regular base salary
3. 41,600 regular paid hours – 2.0% of regular base salary

Effective July 5, 2021, employees in the Correctional Lieutenant and the Correctional Captain classifications will receive the highest of the following pay supplements for which they qualify, based on continuous County service in the Correctional Officers and/or Mid-Management bargaining units:

1. 20,800 regular paid hours – 1.5% of regular base salary
2. 31,200 regular paid hours – 3.0% of regular base salary
3. 41,600 regular paid hours – 6.0% of regular base salary

Effective July 5, 2021, employees in this unit who do not receive a pay supplement as specified above, and who have completed 41,600 hours of regular paid, full-time continuous San Joaquin County service, will receive a pay supplement of 2% of base salary.

5 DAYS AND HOURS OF WORK - OVERTIME

5.1 Work Week

Unless otherwise provided for in this Memorandum or in any Resolution or Board Order, the base compensation for employees shall be deemed to be compensation per bi-weekly pay period and is predicated upon a forty (40) hour work week. A bi-weekly pay period shall consist of eighty (80) working hours and the base compensation provided shall be payment in full for all services rendered to the county except as otherwise provided

5.2 Working Hours

In accordance with the Board of Supervisors' policy, a Department Head may change the working hours of individual employees to accommodate functional needs of the department so long as no change is made in the regular hours of the department.

5.3 Overtime

Employees in this unit are eligible for exemption from the overtime provisions of the Fair Labor Standards Act (FLSA), are designated by the Board of Supervisors to be salaried and, are

therefore, exempt from the overtime provisions of the FLSA.

5.6 Compensation for Overtime

Employees in this unit are designated as Group 1 employees.

Group 1 employees are those employed in classifications eligible for exemption from the overtime provisions of the Fair Labor Standards Act (FLSA) and designated by the Board of Supervisors to be salaried and, therefore, exempt from the overtime provisions of the FLSA. These employees may be required to periodically or routinely work long or irregular hours to fulfill the responsibilities of their positions. These employees are not eligible to receive overtime compensation or compensatory time off. However, in recognition of the sometimes long and irregular hours which these employees are required to work to accomplish program objectives, the County will provide paid administrative leave as follows:

- (1) Each fiscal year, the Department Head shall grant ten days of administrative leave to eligible salaried employees.
- (2) The benefits provided by this program are not related to hours worked nor subject to accrual, and under normal circumstances may not be carried over beyond the end of the fiscal year.

5.7 Rest Periods

To promote maximum productivity and morale, it is the policy of San Joaquin County that, when County operations permit, each employee shall be entitled to two (2) rest periods not exceeding fifteen (15) minutes each, during a regular eight (8) hour shift. When County operations permit, such rest periods are to be taken as nearly as possible in the middle of each four (4) hour segment of each employee's work day. Time allowed for rest periods may not be accumulated from one half (½) of the workday to another, nor may rest periods be used to alter an employee's normal work hours and meal periods.

5.8 Flex Hours

Upon approval by the Department Head, employees may be assigned to flex time schedules.

Flex time schedules are those alternate work schedules, including but not limited to a "4-10" plan, "9-80" plan, or a 12 hour shift plan which do not violate the Fair Labor Standards Act.

The County and SJCMA agree that when a written request for flexible work schedules is denied, the Appointing Authority or designee shall respond to the request in writing (within 14 days) stating the reasons for the denial.

5.8.1 Alternate Work Schedule—Correctional Lieutenants

1. Work Schedule. The Sheriff's Department may assign employees in the

Correctional Lieutenant classification to work 12-hour shifts (12 schedule).

2. Overtime. Assignment to the 12 schedule does not change the FLSA exempt status of Correctional Lieutenants.
3. Holidays. Employees on the 12 schedule shall receive eight (8) hours of holiday time for a holiday they do not work and are entitled to work on holidays that fall on their regularly scheduled work day.
4. Sick Leave. Employees on the 12 schedule are exempt from Section 2-5231(d) of the Ordinance Code.
5. Shift Differential. Assignment to the 12 schedule does not change any rights to shift differential compensation for Correctional Lieutenants.
6. Shift Rotation. Correctional Lieutenants will be assigned to the 12 schedule on a three-month rotation, subject to change based on operational needs.
7. Back Filling. The County represents that it does not intend to back fill absences of Correctional Lieutenants on the evening shift with Correctional Lieutenants. This representation is not a waiver of this management right.

5.9 Effect of Schedule Changes - SJGH

5.9.1 Operating Room

Employees working in surgery and anesthesia shall be insured eighty (80) hours of pay for eighty (80) hours of work in each bi-weekly pay period.

5.10 Jury and Witness Duty

5.10.1 Jury Duty

Any regular employee who is summoned for attendance to any court for jury duty shall be deemed to be on duty and there shall be no loss of pay, however any jury fees (excluding payment for mileage) received by the employee shall be paid to the County.

5.10.2 Witness Duty

Any employee who shall be called as a witness in a case arising out of and in the course of the employee's County employment shall be deemed to be on duty and there shall be no loss of pay. Any witness fees received by the employee shall be paid to the County together with any mileage allowed if the employee uses County-provided transportation. An employee called as a witness in any other matter shall be deemed off duty.

5.11 Reassignment

The County and SJCMA agree that one of the factors to be assessed when involuntarily reassigning an employee shall be the seniority of the qualified employees.

Any employee who is involuntarily transferred may request a written statement from the appointing authority as to the reasons for the reassignment. This written response shall be issued within fourteen (14) calendar days from the date of the request.

6 SALARY ADMINISTRATION

6.1 Salary upon Appointment

New employees shall be appointed at the first step of the salary grade adopted for the particular class of position to which the appointment is made. The Board of Supervisors or such individual as the Board may designate, upon certification of the Director of Human Resources that recruiting difficulties exist, may provide that a particular allocated position be filled at a step above the minimum of the grade commensurate with the qualifications of the prospective appointee which are above the minimum requirements set forth in the class specifications.

Whenever such allocated position is filled in this manner, all incumbents of allocated positions who have qualifications above the minimum set forth in the class specification in the same class earning less than the step in the particular salary grade at which the new employee enters may be raised to that step or to a lower step in the grade upon the request of an appointing authority and the recommendation of the Director of Human Resources and subject to approval of the County Administrator.

Notwithstanding other provisions of this Memorandum regarding merit advancement days, the merit advancement of all employees in that class of position may be changed in order to retain equitable relationships as recommended by the Director of Human Resources and approved by the County Administrator.

6.2 Step Increases

6.2.1 Regular Employees

A regular employee shall be required to serve a merit advancement period of twenty-six (26) bi-weekly pay periods on each step of the salary grade assigned to the classification of which the employee is an incumbent before becoming eligible for advancement to the next higher step. An employee shall not advance to the next higher step until the employee receives the affirmative recommendation from his/her Department Head and the employee's eligibility for advancement has been verified by the Director of Human Resources. An employee shall not advance to the next higher step if his/her overall performance is evaluated as less than satisfactory. Nothing in this Memorandum shall be construed to provide that step increases are automatic.

Advancement within a salary grade shall not be made more frequently than once in any period

of twenty-six (26) consecutive pay periods nor shall any employee advance more than one (1) step within a salary grade at one time except as provided in Section 6.1 above.

6.3 Step Increases Withheld

Any step increase withheld because of administrative oversight or inadvertence shall be made retroactive to the normal effective date of the step increase.

Any step increase withheld for cause but, upon appeal, adjudicated in favor of the employee, shall be made retroactive to the normal effective date of the step increase or some intervening date determined by the adjudicating party. If the step increase is made retroactive to the normal effective date of the step increase, the employee shall retain the employee's current anniversary date. If some intervening date is determined by the adjudicating party, the employee shall not be eligible for the employee's next merit advancement for twenty-six (26) bi-weekly pay periods from the intervening date.

6.4 Salary Step on Promotion

An employee appointed to a position with a higher salary grade shall have his/her salary adjusted to the first step of the new grade or to the step in the new grade which is at least 5% higher than the salary the employee was receiving prior to the promotion, whichever is greater, provided that the new salary is within the new grade. For the purposes of this Section, pay supplements which are a percentage of base salary (except above-class pay, special assignment pay, or supplemental pays that carry over to the promotion class) shall be added to the pre-promotion base salary prior to determining the appropriate step in the new grade. The effective date of the promotion shall become the new merit advancement date for the employee and he/she shall not be eligible to receive a merit step increase until fifty-two (52) weeks after such date.

6.5 Order of Adjustments

Whenever an employee is promoted and receives a grade change or the employee's position is reclassified to a class having a higher salary grade, on the employee's merit anniversary day the employee shall first receive the merit advancement increase to which he/she may be entitled and then receive such increases to which he/she may be entitled in the following order: salary adjustment, reclassification, promotion.

6.6 Salary Step on Demotion

If an employee is demoted to a position having a lower salary grade because of lack of work or funds, or in the interests of economy, or for any reason other than discipline, the employee so demoted shall receive the next lower salary in the grade assigned to the new position. The employee's merit anniversary date shall remain the same.

If an employee voluntarily demotes to a position having a lower salary grade, the employee shall receive the salary in the new grade which is equal to the salary in the prior position or, if none, the next lower salary in the grade assigned to the new position.

6.7 "Y"-Rates

Whenever an incumbent of a Civil Service exempt position accepts a demotion for reasons other than a disciplinary action to a class or position having a lower salary grade, the Board of Supervisors may direct that the capital letter "Y" be set opposite the position to which the incumbent was demoted in the department budget and all payroll and other personnel records.

Whenever the effect of a reclassification is to place the incumbent in a Civil Service classified position having a lower salary grade, the Board of Supervisors, upon the recommendation of the Civil Service Commission, may direct that the capital letter "Y" be set opposite the reclassified position in the department budget and all payroll and other personnel records.

Whenever the "Y" is set opposite a position, the incumbent shall continue to receive his/her previously authorized salary until termination of employment in the position, or until a higher rate of pay may be authorized, whichever comes first.

8 RETIREMENT

Unless otherwise stated, all statutory references in this section "8. Retirement" of this Memorandum of Understanding are to the California Government Code.

8.0 Benefit Tiers and Eligibility

SJCERA Tier 1 - Employees who established and maintain membership in the San Joaquin County Employees' Retirement Association (SJCERA) prior to January 1, 2013, and other eligible employees as defined by law, participate in the defined benefit formula that was in place before January 1, 2013, hereinafter "SJCERA Tier I."

SJCERA Tier II - Employees who establish membership in SJCERA on or after January 1, 2013, who are subject to the provisions of the Public Employees' Pension Reform Act of 2013 (Article 4 (commencing with Section 7522) of Chapter 21 of Division 7 of Title 1 of the Government Code), hereinafter "PEPRA", participate in the defined benefit formula prescribed by PEPRA, hereinafter "SJCERA Tier II."

8.1 Retirement Formula

The County shall maintain the defined benefit retirement formula specified in Section 31676.14 (2% at age 55 ½) for General Members of SJCERA Tier I and in Section 31664.1 (3% at age 50) for Safety Members of SJCERA Tier I.

General Members of SJCERA Tier II participate in the defined benefit formula prescribed by Section 7522.20 of PEPRA (2.0% at age 62). Safety Members of SJCERA Tier II participate in the defined benefit formula prescribed by Section 7522.25(d) of PEPRA (2.7% at age 57).

An annual cost of living adjustment of up to three percent (3%) shall be maintained in

accordance with Section 31870.1 for monthly benefits payable by SJCERA to retired members of SJCERA (Tiers I and II) or their beneficiaries.

8.2 Retirement Age and Service

The provisions of Section 31672 permitting service retirement for members of SJCERA Tier I at age fifty (50) years with the completion of ten (10) years of service, as adopted by County Resolution R-72-1245, shall be maintained for employees who are members of SJCERA Tier I.

Section 7522.20 permits service retirement for General Members of SJCERA Tier II after five (5) years of service and upon reaching fifty-two (52) years of age. Section 7522.25 permits service retirement for Safety Members of SJCERA Tier II after five (5) years of service and upon reaching fifty (50) years of age.

8.2.1 Final Compensation Calculation

For employees who are members of SJCERA Tier I, final compensation shall, as authorized by County Resolution R-71-2161 pursuant to Section 31462.1, be the average annual compensation earnable by the member in the twelve consecutive months elected by the member or, if no election is made, immediately preceding the member's retirement.

As required by Section 7522.32, for employees who are members of SJCERA Tier II, final compensation shall mean the highest average annual pensionable compensation earned by the member during a period of 36 consecutive months designated by the member or, if not designated, immediately preceding the member's retirement or last separation from service if earlier.

8.3 Retirement Contributions

Employees' retirement contributions to SJCERA shall be made on a pre-tax basis.

Tier I members contributions as determined annually by the plan actuary pursuant to Section 31621.3 for General Members of SJCERA Tier I, and pursuant to Section 31639.5 for Safety Members of SJCERA Tier I, and expressed as a percentage of payroll shall be known as the "Basic Member Contribution Rate." Employees who are members of SJCERA Tier I pay, the Basic Member Contribution Rate calculated by the plan's actuary for that year applicable to their member category plus, the increase in that rate as specified in Government Code Section 31631.5 (a) (1), not to exceed 50% of the normal cost of benefits. The rate specified in Section 31631.5 (a) (1) that is applicable to county peace officers is the rate applicable to all Safety Members of SJCERA Tier I.

Tier II members pay member contributions pursuant to Government Code Section 7522.30, which is at least 50% of normal cost as determined annually by the plan actuary and expressed as a percentage of payroll. The County shall not pay any of the required member contribution.

Employees who are Safety Members of SJCERA Tier I and employees who were General Members of SJCERA on March 7, 1973, and remained continuously in membership until having

credit for thirty (30) or more years of service who, for that reason, are not making contributions to SJCERA, shall receive, in addition to their regular rate of pay, an amount equal to what their retirement contributions would be if they were still making such contributions. (Government Code Sections 31625.2 and 31664.1)

8.3.1 Retirement COLA Cost Share

Effective January 1, 2012, the County modified Resolution R-75-1592 whereby it agreed to pay the costs of the contributions which would otherwise be assessed to individual members of SJCERA for their cost of living contributions. In accordance with Section 31873, the contributions required for the normal cost of post-retirement cost-of-living adjustments shall be shared equally between the County and employees who are members of SJCERA.

The County shall post on the HR website the upcoming year's COLA cost share no later than December 15 of the prior calendar year.

8.4 Retirement - Sick Leave Conversion

For employees who were employed on or before August 27, 2001, a sick leave credit account, also commonly referred to as a "sick leave bank," shall be established for each employee who: (1) separates from employment and concurrently assumes a retired status, either deferred, service, or disability, in SJCERA; (2) continues or defers such employee's coverage under a County-sponsored group health, dental, or vision insurance plan; and (3) has at least one hundred and sixty (160) hours of accumulated sick leave as of the date of separation.

The account shall be credited upon the employee's separation with a dollar value based on the total accumulated sick leave hours to be converted to sick leave bank. For purposes of this Section, each eight (8) hours of sick leave is equal to one (1) day. The conversion rate is and shall not exceed \$221.24 for each eight (8) hours of accumulated sick leave.

As of the effective date the retired employee is first paid a retirement allowance by SJCERA, the retired employee may use the account to pay monthly premiums for County-sponsored health, dental, or vision plans in which the retired employee and/or his or her eligible dependents are enrolled, and shall continue until such account is fully depleted, the employee ceases to be a member of SJCERA, or the retired employee and all of his or her dependents cease to be enrolled in the plan(s), whichever first occurs.

Employees who separate from employment and assume a deferred retirement status are eligible to enroll in County-sponsored group health, dental, or vision plans, but may not utilize their sick leave credit account to pay for monthly premiums unless and until they retire and receive a monthly retirement allowance from SJCERA.

Pursuant to San Joaquin County Ordinance No. 4122, employees eligible for sick leave credit accounts under this section who so elected will receive additional retirement service credit pursuant to Section 31641.03 for their accumulated sick leave at retirement in lieu of a sick leave credit account.

Any employee hired after August 27, 2001 shall not be eligible for sick leave conversion under this Section.

8.5 Retirement Death Benefits

The death benefits provisions of Section 31789.3 shall be maintained for employees who are members of SJCERA.

8.6 Retirement Information

Employees nearing retirement age who desire to discuss their retirement with SJCERA shall be allowed to do so on County time.

8.6.1 Purchase of Additional Retirement Service Credit

Any employee who is a member of SJCERA and eligible to purchase additional retirement service credit may elect to purchase such service credit in accordance with the provisions of the County Employees Retirement Law, the SJCERA Bylaws, and the policies and procedures applicable to SJCERA members. Any required contributions paid by a member of SJCERA for additional service credit shall become part of the member's accumulated contributions with SJCERA. Any additional liability assumed by or contributions paid by the County because of an employee's purchase of additional service credit shall not become part of the employee's accumulated contributions and shall not be considered compensation for purposes of contributions to or benefits from SJCERA.

8.7 Safety Member Retirement

- a. Employees in the classifications of Deputy Chief Probation Officer and Assistant Deputy Chief Probation Officer who elected safety membership in SJCERA on or before December 30, 1990 are excluded from Social Security effective December 31, 1990, for their subsequent County service and are not eligible for disability benefits pursuant to Section 4850 of the California Labor Code. All employees hired into these classifications on or after December 31, 1990, are Safety Members of SJCERA.
- b. Correctional Lieutenants and Correctional Captains are Safety Members of SJCERA.

9 TRAINING AND EDUCATION

9.1 In-Service and Job Related Training

Employees who participate in County-mandated supplemental education programs shall generally be assigned to such programs during their regular working hours.

Upon the request of an employee, at the time the employee is originally appointed or promoted, the County shall make every effort to provide intensified orientation on specific job

functions.

9.2 Driver Training

When requested, all County employees will participate in the County Driver's Training Program as a mandatory requirement of being an employee of the County.

9.3 Educational Reimbursement Program

In accordance with the County's Educational Reimbursement Program, eligible employees may be reimbursed for career-related course work taken on the employee's own time. The minimum amount of reimbursement is \$10.00 and the maximum is \$850 per fiscal year; however, an employee enrolled in an approved degree program may be reimbursed up to \$800 per semester for a maximum of \$1600 per fiscal year and may include reimbursement for educational materials.

The Educational Reimbursement Fund is \$125,000 per fiscal year.

Specific details and conditions of participation are included in Section 1700 of the County's Administrative Manual.

9.4 Professional Expense Reimbursement

Attorney members assigned to this unit shall be reimbursed 100% of their California Bar Association annual dues per fiscal year, limited to the basic dues and not to include optional contributions, and upon the discretion of the Department Head, the minimum base dues for membership in the San Joaquin County Bar Association.

10 WORKER'S COMPENSATION AND EMPLOYEE SAFETY

10.1 Worker's Compensation

In accordance with California Labor Code 4652, the waiting period for employees disabled in the course of employment is three (3) days. After completion of the three (3) day waiting period, the employee may begin collecting temporary disability (TD) payments. Such days shall be charged against sick leave or other applicable accrued leave time unless the employee is hospitalized as a result of the disability or the disability lasts seven (7) or more days.

Employees who have an approved claim, and are receiving temporary disability (TD) indemnity payments under Division 4 or Division 4.5 of the Labor Code, shall accumulate vacation (including seniority credit for the purposes of vacation accrual under Section 3.1), holidays and sick leave during such period of time that they are drawing such temporary disability indemnity. The County shall continue to provide the employer contribution towards health, dental, vision, and life insurance plan coverage for such employees.

10.2 Worker's Compensation Leave

Notwithstanding other provisions of this Section, an employee who is disabled as a result of an injury or illness arising in the course of employment and has been approved to receive Temporary Disability (TD) benefits, shall be eligible for an approved leave of absence until the employee is deemed medically able to return to work. In such case, further interactive review is needed should permanent disability be established. The employee shall be considered on leave and not considered to be scheduled to work.

10.3 Safety Equipment

The County shall provide employees with safety prescription glasses (glasses only, not prescription examination) whenever safety glasses are required by the CAL/OSHA or other State or Federal regulation. The County will not provide replacements for broken lenses or frames unless such breakage is the result of an on-the-job accident.

10.4 Physical Examinations

Employees required to take physical examinations to maintain licenses or employment with San Joaquin County shall be given physical examinations at no cost to the employee. The County will pay for the physical examination.

10.5 Disputes Involving Safety Issues

STEP 1. When an employee or SJCMA in good faith believes that an employee or employees are being required to work where a clear and present danger exists, the immediate supervisor will be notified within one (1) day. The supervisor will immediately investigate the allegation. The supervisor may check with a higher level of management or a departmental safety coordinator and thereafter direct the employee to either temporarily perform other duties or proclaim the situation safe and direct the employee to proceed with assigned duties.

If the employee or SJCMA continues to believe the condition presents a clear and present danger, the employee or SJCMA may proceed to STEP 2. If the employee believes there is an imminent danger the employee may proceed directly to STEP 3.

STEP 2. When an employee or SJCMA is not satisfied with the decision at STEP 1, the employee or SJCMA may submit the issues to the Department Head. The Department Head or designee shall issue a written response to the alleged clear and present danger within five (5) calendar days after receipt of the request to review the issue.

STEP 3. If the employee or SJCMA is not satisfied with the decision rendered by the Department Head or designee, or where the employee believes there is an imminent danger, the issues may be submitted to the County Risk Manager. Within five (5) calendar days the County Risk Manager shall respond in writing to the issue.

STEP 4. If the issue is not resolved at the third level of this procedure, the employee or

SJCMA may appeal to the Board of Supervisors who may hold a hearing in accordance with the Complaint Procedure STEP 4 (Section 17) of this memorandum.

The parties shall endeavor to expedite this process. With the mutual consent of the parties, any step of this process may be waived or time extended.

11 EVALUATIONS AND PERSONNEL FILES

11.1 Employee Performance Evaluations

Any employee performance evaluation shall be prepared by the employee's supervisor who has the responsibility and authority to prepare such reports.

Employee performance evaluation reports shall be discussed with the employee prior to finalization of each category of the report.

An employee will receive an appointment with his/her department's reviewing officer to discuss the evaluation by signing the evaluation form in the space provided. Each department shall make a reasonable effort to ensure that the reviewing officer for this purpose has not been a party to the preparation of the evaluation. In no case shall the reviewing officer sign the evaluation form until a review has occurred.

Any regular or special evaluation with a rating of "unsatisfactory" shall include plans for employee development. Except in cases of termination, release from probation, or leave of absence, employees who receive an unsatisfactory performance evaluation must receive a follow-up evaluation. The follow-up evaluation shall cover a period of time no greater than ninety (90) calendar days from the date of the final review of the initial unsatisfactory evaluation.

An employee shall have the right to submit written comments regarding any evaluation and to have such comments included in his/her personnel file along with the evaluation.

11.1.1 Performance Evaluations and Workload

The County and SJCMA agree that one of the factors to be considered when completing Employee Evaluations will be increased workload given to the employee since the last evaluation.

11.2 Probationary Evaluations - Notice

For the purposes of the initial probationary period only, an employee who fails to complete probation and is released from probationary status within two (2) weeks of the end of the probationary period shall be paid regular salary for the hours the employee would have been scheduled between the release date and the end of the probationary period.

11.3 Employee Personnel Files

Employees shall have the right to review and at their own expense obtain copies of their

County personnel files. An employee's representative may inspect the contents of an employee's personnel files upon signed, dated authorization by the employee. Authorization shall be valid for sixty (60) calendar days from the date of signature.

The County reserves the right to withhold from employee review reports of an employee's pre-employment physical examination, records of an employee relating to investigation of possible criminal offense or other legally privileged records.

Employees shall be given an opportunity to read and initial any report to be added to their personnel files, but an employee shall not be required to sign any such report. An employee's signature on a report shall be understood to be acknowledgment of receipt and shall not be construed as agreement or disagreement with its content. If the employee refuses to sign any report, a notation to that effect may be entered on the document. A copy will be provided to the employee upon request.

An employee shall have the right to submit written comments regarding any document in his/her personnel file and to have such comments included in his/her personnel file along with the document.

11.4 Letters of Reprimand

An employee has the right to request in writing that a letter of reprimand be removed from the employee's personnel file if two (2) years have elapsed from the date of reprimand and there has been no recurrence of the issue contained in the reprimand.

If the reprimand is in the department or division personnel file, the request must be directed to the Department Head or designee. If the reprimand is in the central Human Resources Division files, the request must be directed to the Director of Human Resources. The Department Head or designee, or the Director of Human Resources, whichever is appropriate, shall review the request and, within fourteen (14) calendar days render a decision on the request. The decision of any of the above individuals shall be final.

12 EMPLOYEE LIABILITY

A County employee's liability for acts or omissions within the scope of employment is established by Article 3, Division 3 of Title 1 of the Government Code of the State of California. Indemnification and defense of County employees, for claims against them arising out of acts or omissions within the scope of their employment, are set out in Article 4 Division 3.6 of Title 1 of the Government Code of the State of California.

The County and County employees recognize their respective rights and obligations under these provisions of these laws as they exist at this time and as they may be amended or given final, binding judicial interpretation.

13 EMPLOYEE PROPERTY AND EQUIPMENT

13.1 Replacement of Damaged Property

Except for loss or destruction to currency, the County may provide for the payment of the cost of replacing or repairing property or prostheses of an employee, such as eyeglasses, hearing aids, dentures, watches, or articles of clothing necessarily worn or carried by the employee when any such items are lost or damaged in the line of duty without fault of the employee. If the items are damaged beyond repair, the actual value of such items may be paid. The value of such items shall be determined as of the time of the loss or damage. The Board of Supervisors delegates to the County Administrator the authority to grant or deny claims which do not exceed \$500.

13.2 Uniform Allowances

Employees in the classification of Correctional Lieutenant and Correctional Captain shall receive a lump sum of \$1200 on or about the payday nearest December 1 of each year. If an employee in this classification leaves during the year, a pro-rated portion of the uniform allowance shall be paid on or about the last day of employment.

14 LAYOFFS

14.1 Notice

Any permanent County employee who is a member of the County's Merit System and who is to be laid off or dismissed for other than disciplinary reasons shall be given fifteen (15) calendar days notice. This provision does not apply to probationary, provisional, or temporary employees. Nothing contained herein shall be deemed to require the County to pay an employee except for services rendered.

14.2 Short-Term Staff Reductions - SJGH

The need for short-term reductions in temporary or regular staff within San Joaquin General Hospital will be determined by the Hospital Chief Nursing Officer or designee and/or the Deputy Director of Nursing and will be based on patient census/staffing considerations within each division. Within the Nursing Division, such determination will be made in conjunction with discussions with Nursing Administration, including, as appropriate, the Director of Nursing, Deputy Director of Nursing, or Nursing Department Managers responsible for shift management.

For those Nursing Division units listed below, unit staff reductions will not reduce staffing levels below the minimums indicated unless such unit is closed. For all other Nursing Division units, staff reductions will occur as dictated by patient census/staffing needs.

<u>Unit</u>	<u>Minimum Staffing Levels Per Scheduled Shift</u>
ICU/CCU	2 (2 RN)

OR/Recovery	4 (2 RN, 2 OR Tech.)
Anesthesiology	1 (CRNA)
Emergency Room	3 (3 RN)
Intensive Care Nursery	2 (2 RN)
Nursery/Post Partum	3 (3 RN)
Labor and Delivery	2 (2 RN)
Dialysis	3 (2 RN, 1 Dialysis Tech)
Med/Surg (per unit)	3 (2 RN, 1 Nursing Assistant)
All others	10 RN

As necessary, consolidation of Nursing Division units may occur.

For the purposes of short-term staff reductions, individual seniority will be determined on the basis of continuous County service in accordance with Civil Service Rule 17. However, short-term staff reductions shall be determined on a division by division basis except that in the Nursing Service Division, they will be determined on a work-unit by work-unit basis. Reduction in staff in one division or unit shall not affect employees working in another division or unit. If consolidation of units has occurred, seniority lists for those units shall also be consolidated. Any reductions in staff will occur by class and will affect part-time employees first, then regular employees in accordance with seniority criteria spelled out in Civil Service Rule 17, except that employees in a higher class may not displace employees in a lower class. Minimum staff maintained in any one Nursing Division unit (or consolidated unit) will retain their seniority within that unit (even if floated out) and will not cause or be affected by short-term reductions in any other unit.

When the need for a reduction in staff is determined in advance of a shift, affected employees will be so notified as early as possible, but at least within one and one-half (1½) hours prior to their shift start time.

When the need for a reduction in staff occurs between one and one-half (1½) hours prior to an employee's shift or after the employee has started work, the affected employee(s) will be so notified within three (3) hours after starting the shift and will be allowed to work one-half (½) of the shift.

Any employee affected by a short-term layoff may request additional time off in conjunction with the layoff. Such requests will be considered and may be granted subject to staffing considerations.

Employees affected by short-term reductions in staff will be charged with administrative leave

(if applicable) and then, at the employee's option, with accrued compensatory time, holiday time, or vacation time except that any employee affected by short-term reduction in staff may retain up to eighty (80) hours of accrued leave time or enough time to cover a previously approved vacation, whichever is greater.

Employees affected by short-term reductions in staff will be considered laid off until patient census/staffing needs warrant their return to duty. Such employees will be responsible for calling the department on each day they are scheduled to work subsequent to layoff to find out if they are to come back to work. Such call-ins must be made no later than 1½ hours before the scheduled start time for day and p.m. shift employees and no later than six (6) hours before the scheduled start time for night shift employees. Night shift employees who call in on any given date and are advised not to return to work may call again, within 1½ hours of their shift start time to determine if staffing needs have been changed and if they may return to work. In the absence of such requests, the hospital will call people back in reverse order of the reduction to assure appropriate staffing.

14.2.3 Voluntary Furloughs

Employees at San Joaquin General Hospital and Health Care Services who volunteer to accept furloughs shall:

- a) Maintain full seniority for retirement and layoff purposes;
- b) Accrue sick leave and vacation benefits as though the furlough had not occurred; and
- c) Will receive the county contribution to medical, dental and vision as though the employee worked a full schedule and maintain all other benefits. No regular employee in this unit shall be required to accept a furlough.

15 SUBSTANCE ABUSE REFERRALS

San Joaquin Public Employee's Association acknowledges the right of Department Managers (at the Middle Management level and above) to refer employees suspected of being under the influence of alcohol or drugs while on duty to San Joaquin General Hospital (Canlis Clinic or Employee Health Services) or to other physicians to be evaluated as to their ability to perform their job. In acknowledging this right, the Association does not relinquish its right of individual employee representation or to challenge managers who use this provision without direct observable behaviors to support the referral.

The County shall offer training to Department Managers to aid in their detection and evaluation of behaviors which may lead to a referral. The County shall report to SJCMA, on a statistical basis, the results of referrals of employees so long as employee and patient confidentiality are not violated.

The County and SJCMA jointly recognize the value of the County's Employee Assistance Program in the evaluation and resolution of employee problems associated with substance abuse.

16 GRIEVANCE PROCEDURE

16.1 Definitions

Grievance: An alleged violation of a specific rule or regulation contained in the Civil Service Rules of San Joaquin County or in department rules.

Day: Calendar day(s)

Complaint: A dispute concerning the interpretation or application of ordinances, resolutions, policies, procedures or agreements, including memoranda of understanding. See Section 17 of this Memorandum.

Safety Issues: Disputes involving safety violations. See Section 10.5 of this Memorandum.

Disciplinary Actions: See Section 19 of this Memorandum.

16.2 Purpose/Rights

It is the intention of this procedure to resolve all issues at the lowest supervisory level possible. The employee has the right to representation at any and/or all steps of the procedure.

SJCMA may file and process grievances on behalf of employees, but the grievants must be identified by name if necessary to the processing of the grievance.

16.3 Filing Deadline

Grievances filed under this Section should be initiated within thirty (30) days from the time the employee knew or had reason to know of the facts giving rise to the grievance.

16.4 Grievance Processing

STEP 1: Any grievance shall be discussed with the employee's immediate supervisor. If the issue is not resolved at the supervisor's level within fifteen (15) working days from the day of presentation, the issue may be processed to Step 2. If the Department Head is the immediate supervisor, the grievance shall be in writing and contain the information specified in Step 2 below.

STEP 2: If the grievance is not resolved at Step 1 of this procedure, then the grievance may be filed with the appointing authority or designee. The grievance must be in writing and must be filed within twelve (12) days of the response from Step 1 or from the date when such response was due. The grievance must state: (1) the specific rule or regulation which is alleged to have been violated; (2) the statement of facts comprising the violation; (3) the requested remedy. The appointing authority, or designee shall have fifteen (15) working days in which to investigate the issues and respond in writing to the grievance. NOTE: If the immediate supervisor, in Step 1 of this process, is the appointing authority or designee, Step 2 may be bypassed; however, the grievance must be in writing as specified above.

STEP 3: Within twelve (12) days of the receipt of the written response or date when the written response was due from the appointing authority or designee, the employee or representative may file the grievance with the County Administrator or designee. The grievance must be in writing and contain the information specified in Step 2 above. The County Administrator or designee shall have twenty-five (25) days from receipt of the grievance in which to investigate the grievance and issue a written response.

STEP 4: Within twelve (12) days of the Step 3 response, or from the date when written response was due, the grievant or representative may appeal in writing to the Civil Service Commission. The Commission, at its next regular meeting, shall take the request under advisement and may schedule a hearing if requested as soon as practicable. Following any hearing, the Commission shall issue written findings and decisions which shall be final and binding.

All grievances shall be presented and acted upon in a timely manner. However, with the mutual consent of the parties, the time limitation for any step may be extended.

17 COMPLAINT PROCEDURE

17.1 Definitions

Complaint: A dispute concerning the interpretation or application of ordinances, resolutions, policies, procedures or agreements, including Memoranda of Understanding.

Day: Calendar day(s)

Grievance: An alleged violation of a specific rule or regulation contained in the Civil Service Rules of San Joaquin County or in department rules. See Section 16 of this Memorandum.

Safety Issues: Disputes involving safety violations. See Section 10.5 of this Memorandum.

Disciplinary Actions: See Section 19 of this Memorandum.

17.2 Purpose/Rights

It is the intention of this procedure to resolve all issues at the lowest supervisory level possible. The employee has the right to representation at any and/or all steps of the procedure.

SJCMA may file and process complaints on behalf of employees, but the complainants must be identified by name if necessary to the processing of the complaint.

17.3 Filing Deadline

Complaints filed under this Section should be initiated within thirty (30) days from the time

the employee knew or had reason to know of the facts giving rise to the complaint.

17.4 Complaint Processing

STEP 1: Any complaint shall be discussed with the employee's immediate supervisor. If the issue is not resolved at the supervisor's level within fifteen (15) working days from the day of presentation, the issue may be processed to Step 2. If the Department Head is the immediate supervisor, the complaint shall be in writing and contain the information specified in Step 2 below.

STEP 2: If the complaint is not resolved at Step 1 of this procedure, then the complaint may be filed with the appointing authority or designee. The complaint must be in writing and must be filed within twelve (12) days of the response from Step 1 or from the date when such response was due. The complaint must state: (1) the specific policy, ordinance, resolution, procedure, or agreement which is alleged to have been violated; (2) the statement of facts comprising the violation; (3) the requested remedy. The appointing authority, or designee shall have fifteen (15) working days in which to investigate the issues and respond in writing to the complaint. NOTE: If the immediate supervisor, in Step 1 of this process, is the appointing authority or designee, Step 2 may be bypassed; however, the complaint must be in writing as specified above.

STEP 3: Within twelve (12) days of the receipt of the written response or date when the written response was due from the appointing authority or designee, the employee or representative may file the complaint with the County Administrator or designee. The complaint must be in writing and contain the information specified in Step 2 above. The County Administrator or designee shall have twenty-five (25) days from receipt of the complaint in which to investigate the complaint and issue a written response.

STEP 4: Within twelve (12) days of receipt of the Step 3 response, or from the date when written response was due, the complaint may be filed, in writing and containing the information specified in Step 2 above, with the San Joaquin County Board of Supervisors for resolution by means of a hearing, the time and date of which shall be set by mutual agreement of the parties involved. Prior to submission to the Board, the parties may mutually agree to submit the complaint to a third-party intervenor for review and recommendation on the resolution of the complaint, in accordance with Section 6 of the San Joaquin County Employer-Employee Relations Policy. The decision of the Board is final and binding.

All complaints shall be presented and acted upon in a timely manner. However, with the mutual consent of the parties, the time limitation for any step may be extended.

18 ADVISORY ARBITRATION

As an alternative procedure for the resolution of impasses, the County and SJCMA may, upon mutual agreement, including agreement as to procedure, submit matters in dispute in the course of the meet and confer process to advisory arbitration. Further, disputes arising in a context other than the meet and confer process, e.g. disputes relating to administration of this Memorandum, to formal complaints, to interpretations of codes, resolutions, Board Orders, and ordinances dealing with employee rights and benefits shall, upon mutual agreement, be processed through an impasse

procedure. Neither this Section nor the exercise of the option to utilize an impasse procedure shall be deemed as making any matter which is reserved to the County as a right of management in the Employer-Employee Relations Policy a matter subject to the meet and confer process.

19 DISCIPLINARY ACTIONS

19.1 Applicability

These procedures are not applicable to temporary, contract or probationary employees.

To initiate disciplinary action against a permanent, Civil Service employee, the appointing authority must follow the provisions of Civil Service Rule 18. The appointing authority must submit to the employee a written notice of intent to take disciplinary action and file a copy with the Human Resources Division. The notice must state specifically the reason(s) for the action and explain the employee's "Skelly" rights of appeal.

19.2 Request for Hearing

The employee may appeal the proposed action and request a hearing by responding in writing to the appointing authority within seven (7) calendar days of receipt of the notice. Upon receipt of a timely response, the appointing authority shall schedule and conduct a "Skelly" hearing as soon as possible.

19.3 Rights of Access

The employee shall be given access to copies of all materials supporting the proposed action and shall be provided with copies upon request.

19.4 Representation

The employee may be represented at the hearing by a representative of the employee's choice.

19.5 Conduct of Skelly Hearing

The appointing authority, or his/her designee, shall be the hearing officer at the informal "Skelly" hearing. Upon consideration of all materials and discussions presented at the hearing, the appointing authority, or his/her designee, may determine to uphold, modify, or revoke the proposed disciplinary action.

19.6 Order of Disciplinary Action

If the employee does not respond to the notice of intent within the prescribed time limits, or if, after hearing, the appointing authority determines that disciplinary action is appropriate, the appointing authority shall submit to the employee a written order of disciplinary action. The order shall state the proposed action, the reasons for the action, and the employee's rights of appeal.

19.7 Appeal of Order of Disciplinary Action

The employee, within seven (7) calendar days after the order is furnished to the employee, may appeal the order in writing to the Director of Human Resources. The employee, in making the appeal, shall designate in writing whether the matter will be heard by the Civil Service Commission or whether the matter will be submitted to binding arbitration. In accordance with the provisions of Civil Service Rule 18, selection of one appeal method shall exclude the possibility of appeal through the alternate procedure on the same issue.

Appeal and arbitration hearings shall be conducted in accordance with Civil Service Rule 18.

20 Entire Agreement

Except as otherwise specifically provided herein, the Memorandum of Understanding (MOU) fully and completely incorporates the understanding of the parties hereto regarding the provisions contained in this MOU. The parties, for the term of this Agreement, do not waive the obligation to negotiate with respect to any practice, subject, or matter within the scope of bargaining not specifically referred to or covered in this Agreement. In the event the County proposes a change in any practice, subject, or matter which is within the scope of bargaining and is not covered by this Agreement, the County will give the association advance written notice of the proposal and will, upon request of the association, meet and confer with the association concerning the proposal.

No waiver or modification of this Memorandum or any covenant, condition or limitation herein contained shall be valid unless in writing and duly executed by the parties hereto; no officer, employee or agent of the County has any authority to waive or modify this Memorandum or any covenant, condition or limitation herein contained without the express prior approval of the San Joaquin County Board of Supervisors or its designee.

- a) All existing agreements within the scope of representation under the Meyers, Milius-Brown Act, including but not limited to, wages, hours, terms and other conditions of employment as of December 31, 1996, shall remain in effect, except as specifically modified herein.
- b) If any part of this Memorandum is determined to be illegal or inapplicable as the result of changes in State or federal law, or as the result of a court order, the County and SJCMA, upon the request of either party, will meet and confer on the effect of such law or court order on this Memorandum.

MANAGEMENT ASSOCIATION

Date: June 14, 2021

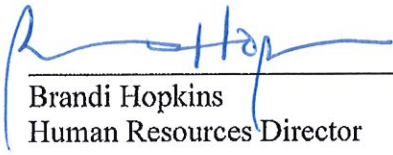
By:

Cheryl Schiele

Cheryl Schiele
Chief Negotiator

SAN JOAQUIN COUNTY

Date: Jun 14, 2021

By: 
Brandi Hopkins
Human Resources Director

Side Letter with San Joaquin Management Association

The County of San Joaquin (County) and the San Joaquin Management Association (Association) hereby agree to amend the existing Memorandum of Understanding to provide for an additional health (medical, dental, and vision) plan offering as set forth below:

1. The current Memorandum of Understanding (MOU), which expires on March 31, 2021, provides for employees to choose among three self-insured plans, Select, Select Exclusive and Premier, as well as a fully insured Kaiser plan.
2. Through actuary findings the three self-insured plans (Plans) had increased premiums by 16% for 2018-2019 fiscal year and 23% for 2019-2020 fiscal year.
3. In an effort to provide an additional health plan as a lower cost option, the County pursued a Request for Proposals process (RFP) and selected a fully insured product known as Sutter Health Plus in 2019.
4. The County also negotiated two additional dental plan options (Core and Buy-up) through Delta Dental, in addition to the current standard plan.
5. The County also negotiated an additional vision plan option (Buy-up) through Vision Service Plan (VSP).
6. The open enrollment period for 2019 closed on May 31, 2019, however, the County will provide an additional Special Open Enrollment period to allow employees represented by the Association to select Sutter Health Plus, and/or select new dental and vision options. This open enrollment period is anticipated to be late September 2019 for a mid-November effective date.
7. The County and the Association agree that employees currently governed by the MOU between the County and the Association will have the opportunity to select the Sutter Health Plus health plan, Delta Dental Core or Buy-up, and the VSP Buy-up plans in the upcoming Special Open Enrollment.
8. Employees in this Association will pay premium rates for SHP, at a rate of 20% for each tier level, and the County shall pay 80% of each tier level.
9. Employees in this Association will receive employee-only tier coverage at 100% for all dental and vision plans, excluding the Buy-up options. Employees will be responsible for the difference between the standard/core plans and the Buy-up plan options. Employees will be responsible for 100% of the dependent coverage for all dental and vision plan options, based on current practice.
10. Employees receiving cafeteria contributions will be responsible for 100% of the health premiums.

San Joaquin County


_____Date: 9/19/19

Association

By: Cheryl JensenDate: 9-18-2019

Side Letter with San Joaquin County Management Association

The County of San Joaquin (County) and the San Joaquin County Management Association (Association) hereby agree to amend the current Memorandum of Understanding to provide for an additional health plan offering of a Health Savings Account-Qualified High Deductible Health Plan with Kaiser Permanente and Sutter Health Plus as set forth below:

1. The current Memorandum of Understanding (MOU), which expires on March 31, 2021, provides for employees to choose among three self-insured plans, Select, Select Exclusive and Premier, as well as a fully insured Kaiser plan.
2. Through actuary findings, the self-insured plans' premiums increased by 16% for the 2018-2019 fiscal year, 23% for the 2019-2020 fiscal year, and 3.5% for the 2020-2021 fiscal year.
3. In an effort to provide an additional health plan as a lower cost option, the County pursued a Request for Proposals process (RFP) and selected a fully insured product known as a Health Savings Account-Qualified High Deductible Health Plan with Kaiser Permanente and Sutter Health Plus effective in July 2020.
4. The County also pursued a RFP and selected Voya as the Third Party Administrator (TPA) to administer the Health Savings Accounts for employees. The Board of Supervisors approved Voya as the Health Savings Account TPA at their May 5, 2020 meeting.
5. At their May 5, 2020 meeting, the Board of Supervisors also approved a County contribution of \$700/year for Employee Only and \$1,400/year for Employee plus dependent(s) to the Health Savings Account (HSA) if the employee is enrolled in a High Deductible Health Plan. Funds will be deposited through the County's payroll process and sent directly to Voya, prorated over 26 pay periods. Employees are permitted to elect additional HSA contributions up to the IRS total combined (employer and employee) HSA contribution maximums of \$3,550 for single coverage or \$7,100 for family coverage. It is recommended that individuals limit the combined HSA contribution to stay within IRS requirements for prorating based on a partial calendar year HDHP enrollment in order to avoid potential tax penalties.
6. The County and the Association agree that employees currently governed by the MOU between the County and the Association will have the opportunity to select the Kaiser Permanente and Sutter Health Plus Health Savings Account-Qualified High Deductible Health Plans during the 2020-2021 Open Enrollment period.
7. Employees selecting the Kaiser Permanente or Sutter Health Plus Health Savings Account-Qualified High Deductible Health Plan who receive cafeteria contributions towards their health benefits, will pay 100% of the premium as provided for in the MOU.
8. Employees selecting the Kaiser Permanente or Sutter Health Plus Health Savings Account-Qualified High Deductible Health Plan who do not receive cafeteria contributions, will pay the premium rates at 20% for each tier level, and the County shall pay 80% of each tier level.

San Joaquin County

Association

Side Letter with San Joaquin County Management Association

By: Brian Chapman

Date: Dec. 10, 2010

By: Jim Miller

Date: 5/17/20