



**COWLITZ PUD BOARD OF COMMISSIONERS  
MEETING AGENDA  
February 25, 2025, 2:00 p.m.  
Cowlitz PUD Auditorium & Microsoft Teams**

Board of Commissioners: Dave Quinn, Duane Dalglish, Bruce Pollock

*The Cowlitz PUD Board of Commissioners meets on the 2<sup>nd</sup> and 4<sup>th</sup> Tuesday of every month. Members of the public interested in participating via Microsoft Teams should contact Monica Petterson at [mpetterson@cowlitzpud.org](mailto:mpetterson@cowlitzpud.org) by 5:00 p.m. on Monday, February 24, 2025. To attend by phone, please call 1-323-484-8960 (Conference ID: 490 131 405#) at the time of the meeting. If you require a reasonable accommodation while in attendance at the Cowlitz PUD Board Meeting, please call Monica at (360) 501-9154 at least 72-hours prior to the meeting so that your needs can be addressed.*

***Please note that public comment is limited to three minutes per person.***

1. Call to Order: 2:00 p.m.
2. Changes/Additions to Agenda
3. **Motion to Approve** Today's Board Agenda: Dave Quinn
4. **Motion to Approve** the PUD Board Meeting Minutes of February 11, 2025:  
Dave Quinn
5. Public Comment on Agenda Items and Other District Business
6. **Motion to Ratify** Vouchers & Payroll: Heather Sorensen
7. General Manager Report: Gary Huhta
8. Action Items

8.1 **Motion to Approve** Staff Recommendation No. 4/2/25 – Employee Handbook Update: Marisa Heard

8.2 **Motion to Approve** Resolution No. 2821 – Pole Attachment Rate: Trent Martin

9. Staff Reports and Presentations

9.1 January 2025 Operational Reports

- Power Management
- Accounting & Finance
- Operations
- Engineering
- Customer Service
- Employee Services
- Public Relations & Communications
- Regulatory & Regional Affairs

10. Commissioner Reports & Upcoming Events

11. The Board will convene into Executive Session pursuant to RCW 42.30.110(1)(b) for 30 minutes unless extended by the Presiding Officer. The purpose of the Executive Session is to consider the selection of a site or the acquisition of real estate by lease or purchase when public knowledge regarding such consideration would cause a likelihood of increased price.

12. **Motion to Adjourn** the Meeting

## COWLITZ PUD EXECUTIVE SESSION PROCEDURE

The Board may meet in Executive Session for any reason authorized under the Open Public Meetings Act, RCW 42.30.110 (1), using the following procedure:

### 1. Announce the Executive Session

We will now adjourn into executive session pursuant to RCW 42.30.110 (1) for \_\_\_\_\_ minutes unless extended by the Presiding Officer. The purpose of the executive session is (choose one of the following):

- a. (i) To consider matters affecting national security;  
(ii) To consider, if in compliance with any required data security breach disclosure under RCW [19.255.010](#) and [42.56.590](#), and with legal counsel available, information regarding the infrastructure and security of computer and telecommunications networks, security and service recovery plans, security risk assessments and security test results to the extent that they identify specific system vulnerabilities, and other information that if made public may increase the risk to the confidentiality, integrity, or availability of agency security or to information technology infrastructure or assets;
- b. To consider the selection of a site or the acquisition of real estate by lease or purchase when public knowledge regarding such consideration would cause a likelihood of increased price;
- c. To consider the minimum price at which real estate will be offered for sale or lease when public knowledge regarding such consideration would cause a likelihood of decreased price. However, final action selling or leasing public property shall be taken in a meeting open to the public;
- d. To review negotiations on the performance of publicly bid contracts when public knowledge regarding such consideration would cause a likelihood of increased costs;
- f. To receive and evaluate complaints or charges brought against a public officer or employee. However, upon the request of such officer or employee, a public hearing, or a meeting open to the public shall be conducted upon such complaint or charge;
- g. To evaluate the qualifications of an applicant for public employment or to review the performance of a public employee. However, subject to RCW [42.30.140\(4\)](#), discussion by a governing body of salaries, wages, and other conditions of employment to be generally applied within the agency shall occur in a meeting open to the public, and when a governing body elects to take final action hiring, setting the salary of an individual employee or class of employees, or discharging or disciplining an employee, that action shall be taken in a meeting open to the public;
- i. To discuss with legal counsel representing the agency matters relating to agency enforcement actions, or to discuss with legal counsel representing the agency litigation or potential litigation to which the agency, the governing body, or a member acting in an official capacity is, or is likely to become, a party, when public knowledge regarding the discussion is likely to result in an adverse legal or financial consequence to the agency

### 2. Return to Open Public Meeting

- a. Once the session concludes, the board will return to open meeting.
- b. If any action is taken it must take place in open meeting.
- c. Action may not take place earlier than the time for which the executive session was to conclude, including any extensions announced by the Presiding Officer.

Note: The foregoing is not a complete list of allowed purposes to hold an executive session under RCW 42.30.110 (1) but represents the most likely purposes for Cowlitz PUD.

**PUBLIC UTILITY DISTRICT NO. 1 OF COWLITZ COUNTY, WASHINGTON**

**MINUTES OF BOARD MEETING OF COMMISSIONERS**

Tuesday, February 11, 2025

John Searing Auditorium and Microsoft Teams

**Present:**

**COMMISSIONERS**

Dave Quinn, President

Duane Dalgleish, Vice President

Bruce Pollock, Secretary

**STAFF**

Casey Kalal, Director of Operations

Chris Velat, Director of Power Management

Chris Willie, Operations Superintendent

Gary Huhta, General Manager

Heather Sorensen, Director of Customer Service & Compliance

Lance Larwick, Director of Engineering

Monica Petterson, Executive Assistant/Clerk of the Board

Richard Hughes, General Counsel

Ruben Celaya, Groundman

Steve Taylor, Director of Regulatory & Regional Affairs

Tim Kalimanis, Director of Technology

Trent Martin, Director of Accounting/CFO

**PUBLIC**

None

**1. CALL TO ORDER**

Pursuant to published Notice, Commissioner Quinn called the Regular Board meeting of the Commissioners of Public Utility District No. 1 of Cowlitz County, Washington to order at 2:00 p.m.

**2. CHANGES/ADDITIONS TO BOARD AGENDA**

There were no changes to today's agenda.

**3. APPROVAL OF AGENDA**

It was moved by Commissioner Dalgleish and seconded by Commissioner Pollock to approve the February 11, 2025 Board Agenda.

The motion carried 3 to 0.

**4. APPROVAL OF BOARD MINUTES**

It was moved by Commissioner Dalgleish and seconded by Commissioner Pollock to approve the January 28, 2025 Regular Board Meeting minutes as written.

The motion carried 3 to 0.

## **5. PUBLIC COMMENT ON AGENDA ITEMS AND OTHER DISTRICT BUSINESS**

There was no public comment.

## **6. MOTION TO RATIFY AND APPROVE VOUCHERS/PAYROLL**

Approval of Vouchers in the amount of \$6,195,805.35. The Board reviewed expenditures of the District as required by RCW 42.24.180 for which payments were issued between January 30, 2025 and February 6, 2025, under the provisions of Resolution No. 2762.

It was moved by Commissioner Dalgleish and seconded by Commissioner Pollock to approve the ratification of the vouchers/payroll.

Heather Sorensen, in her role as Auditor for the District, reported the majority of expenses were for power supply and the liability and D&O insurance renewals. She noted that the liability policy renewal came in below the not to exceed amount previously approved by the Board. Other expenses this period included conservation incentives and Warm Neighbor pledges.

The motion carried 3 to 0.

## **7. NEW EMPLOYEE INTRODUCTION**

Chris Willie introduced Groundman Ruben Celaya.

## **8. GENERAL MANAGER REPORT**

**Federal Deferred Resignation Program:** General Manager Gary Huhta reported that BPA is subject to the Fork in the Road order, a deferred resignation program for federal employees recently released by the Trump Administration, though they are funded by ratepayer dollars and not taxpayer dollars. There is uncertainty and concern as to what will happen with BPA's workforce, and it may be difficult for them to deliver on their goals and commitments if they lose key staff. A federal judge ruling to stall the order is on hold for now.

**BPA Rate Case (BP 26):** At the last Board meeting, Mr. Huhta mentioned the potential for settlement on the power rate case. Public power entities put forth an offer to BPA to which BPA countered. However, the public power entities have no interest in settling at BPA's counteroffer and will counter again to BPA this week. This will be the last iteration, and we should know soon if we achieve settlement on this case. For the transmission rate case, BPA has indicated they have interest in settlement, which includes investor owned utilities, independent power producers, and public power. Proposals from the transmission customer group are due to BPA next week.

**BPA Transmission Planning:** BPA has paused their transmission planning due to the overwhelming number of applications in their interconnection queue. They have 65 GW of applications in their queue which exceeds the amount of regional load forecast to be on the system 10 years from now. They may be reinventing the planning process as a result of the large volume.

**Snowpack Update:** The Lewis River basin snowpack is currently at 99% of normal, an increase of 7% since our last meeting. The Canadian snowpack for the Columbia River is at 75% of normal which is an improvement from the 69% we saw at this time last year. The Dalles runoff forecast for January through July is currently at 82%.

**9. ACTION ITEMS**

**9.1.** Motion to Approve Resolution No. 2820 – Purchase and transfer of Lakeview Green Energy, Inc.’s ownership share of the Harvest Wind Project to the District.

It was moved by Commissioner Dalglish and seconded by Commissioner Pollock to approve Resolution No. 2820.

Director of Power Management Chris Velat explained the Board previously approved a staff recommendation authorizing staff to continue its due diligence and to develop the necessary documents for the purchase of Lakeview Green Energy, Inc.’s (LGE) 30% ownership interest in the Harvest Wind Project. Based on analysis of benefits, market conditions, costs, and potential risks, District staff recommends the District complete the transaction with LGE consistent with the terms and conditions of the Tenancy-In-Common Interest Purchase Agreement and all necessary ancillary documents, and authorize the General Manager to execute the documents.

The motion carried 3 to 0.

**10. STAFF REPORTS & PRESENTATIONS**

Director of Accounting/CFO Trent Martin presented information regarding rates charged to other entities for attachment of their equipment to District-owned poles. Staff will bring a recommendation to the next Board meeting to either adopt a full calculated rate, or implement over a two-year period.

**11. COMMISSIONER REPORTS & UPCOMING EVENTS**

Commissioner Pollock will attend WPUA Board meetings this week and the PUD Day on the Hill event Thursday.

**12. EXECUTIVE SESSION**

None needed.

**13. MOTION TO ADJOURN MEETING**

It was moved by Commissioner Dalglish and seconded by Commissioner Pollock to adjourn the Regular Board Meeting at 2:40 p.m.

The motion carried 3 to 0.

Attest:

\_\_\_\_\_  
President

\_\_\_\_\_  
Secretary

\_\_\_\_\_  
Vice President

\_\_\_\_\_  
Prepared by Monica Petterson  
Executive Assistant/Clerk of the Board

**Summary of 2025 Employee Handbook Updates:**

**Policy 101 – Equal Employment Opportunity**

Added required by law language to make it clear that the discrimination protections are those required by law, no more, no less.

**Policy 102 – Business Ethics and Conduct**

Rick clarified the language to make it easier to understand

**Policy 103 – Employment of Relative and Personal Relationships in the Workplace**

**Employment for Relatives:**

Modified the language to cover all the criteria listed. The way it was previously worded, the only exception was (a).

**Relationships in the Workplace:**

Additional language added to cover personal relationships with GM, Director and/or HR with any other employee will not be tolerated within the organization and the GM, Director and/or HR will be terminated from employment with the District.

**Policy 302 – Personal Time Off/EIR/HRA-VEBA – Staff Employees**

Modified the PTO hour accrual limit to 1000 hours for Staff employees

Added RCW reference for Washington State Paid Sick Leave (only affects Interns)

Approval of Vacation-out requests, added verbiage that when the General Manager is the employee requesting, this will be reviewed and approved by the Board president

**Policy 310 – Logo Wear**

Added language that will allow new employees to purchase up to four items when they are first hired on (within the first six months) and then four more items at the next logo wear clothing order

**Policy 508 – Information Technology**

Added language of where to find the IT Acceptable Use policy on the intranet

Added a new section for Hardware

**Policy 601 - Family and Medical Leave (FMLA); Washington Family Leave Act; Human Rights Pregnancy Disability Leave Requirement; Washington Paid Family and Medical Leave**

Updated this section to capture the use of FMLA for qualifying exigency leave (military)

Updated Washington Family and Medical Leave Insurance section with the new average weekly wage and added a section for Notice for Requesting Leave

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### **INTRODUCTION**

Welcome to the Public Utility District #1 of Cowlitz County, Washington. We are pleased to have you on our team. We hope your employment here will be a source of great personal and professional satisfaction. As an employee of Cowlitz PUD, you are part of a team of dedicated and conscientious professionals working for the long-term benefit and service to the residents of Cowlitz County.

Please spend the time necessary to review and understand this Handbook. Your knowledge of the employee expectations set forth herein will be presumed during your employment with Cowlitz PUD. This Handbook should be kept throughout your employment. It sets out the basic guidelines and rules regarding the personnel policies of Cowlitz PUD.

Even though this Handbook is not a contract, it is intended to reduce any confusion which may arise from unwritten or inconsistent policies and supersedes any previous policies or manuals. It is impossible for any handbook to cover all events or circumstances which could ~~arise~~<sup>arise</sup>, and this Handbook does not promise specific treatment in a specific situation. Management may approach a specific situation as it deems in the best interest of Cowlitz PUD, including any situation in which particular action is required to comply with applicable law. If you need additional information, talk to your supervisor or to Human Resources.

The General Manager and/or Board may from time to time make modifications to the Employee Handbook. All approved changes will be reviewed by employees and acknowledged via the Employee Handbook Acknowledgement form, which can be located in Appendix B.

### **A BRIEF HISTORY**

Public Utility District No. 1 of Cowlitz County is a publicly owned municipal corporation of the State of Washington whose purpose is to efficiently generate, transmit and distribute electrical energy. The PUD is owned by the residents of Cowlitz County and operates on revenues from the sales of its services. The PUD has limited statutory authority to levy property taxes but typically elects annually to wave its right to collect such taxes.

Prior to the existence of Public Utility Districts (PUDs) the private utilities of Washington State were very reluctant to extend service into rural areas. Many families cooked on wood stoves and used kerosene lamps for light. An effort to correct this situation resulted in an initiative known as the Grange Power Bill. In 1930 this bill was approved by the voters of Washington State and became the legal basis for our PUDs.

In 1936 the citizens of Cowlitz County voted to create their own PUD and elected three commissioners to accomplish the task. At that time, the county was served by three private utilities. The City of Longview had Washington Gas and Electric Company, the Kelso and Castle Rock areas were served by the Puget Sound Power and Light Company, and the Kalama-Woodland areas received service from the Northwestern Electric Company. By May of 1948, the PUD had, through the sale of Electric Revenue

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

Bonds, not only purchased systems from all three utilities (placing county electric service under one utility) but had also provided for the construction of its first rural water system.

Cowlitz PUD owns a 70-megawatt hydroelectric project (Swift No. 2) on the Lewis River in Southwest Washington. Cowlitz PUD has been at the forefront of wind development in the State of Washington owning 46% of the output from the 205-megawatt White Creek Wind Project, completed in 2007, and 30% of the 100-megawatt Harvest Wind Project, which became operational in 2009. Both wind projects are located in Klickitat County, Washington.

Today Cowlitz PUD has an annual operating budget more than \$250 million and we are approaching the 523,000-customer mark. Among the 21 PUDs that supply electricity to homes and businesses in Washington, Cowlitz is the second largest purchaser of power from the Bonneville Power Administration and is the second largest power retailer, only trailing Snohomish PUD.

### **CUSTOMER RELATIONS**

Every employee represents Cowlitz PUD to our customers and the public. The way we do our jobs presents an image of our entire organization. Customers judge all of us by how they are treated by employees of Cowlitz PUD. Therefore, it is a priority of Cowlitz PUD that you professionally extend the utmost assistance to District customers and potential customers. This includes being courteous, friendly, helpful, and prompt.

### **APPLICATION OF HANDBOOK**

This Handbook applies to all employees of Cowlitz PUD, except where noted otherwise herein. If there is any conflict between the provisions of this Handbook and any collective bargaining agreement to which the PUD is party, such agreement shall control. In the event any collective bargaining agreement provides additional benefits not conferred by this Handbook, those benefits shall supplement this Handbook.

This Handbook is not a contract but is intended to provide employees with a general understanding of our personnel policies. Employees ~~are encouraged to~~ should familiarize themselves with the contents of this Handbook, for it will answer many common questions concerning employment with Cowlitz PUD. Please keep in mind Cowlitz PUD has discretion in deciding whether to apply the Handbook's policies in a particular situation.

The employment relationship is voluntary. That is, either you or Cowlitz PUD has the right to end the employment relationship at any time and for any lawful reason. Unless there is a written agreement to the contrary, all employees of Cowlitz PUD are employed at-will. This Handbook shall not be interpreted as constituting a contract for employment. You are required to acknowledge receipt of this Handbook by signing the attached Employee Acknowledgement Form.

In order to retain necessary flexibility in the administration of policies and procedures, Cowlitz PUD reserves the right to revise or eliminate any of the policies and/or benefits described in this Handbook at any time, except as such right maybe modified by written agreement entered into by the Commission,

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

General Manager or the Collective Bargaining Agreement. ~~No one else~~ [Only the General Manager, or the Board acting collectively](#), is authorized to agree to any terms of employment.

### **MODIFICATION OF EMPLOYEE HANDBOOK**

This Handbook was adopted by Resolution #2727 of the Board of Commissioners on September 27, 2016. Pursuant to the terms of Resolution #2631 the General Manager has authority to modify the terms of this Handbook upon notice to the Board of material modifications.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 101 Equal Employment Opportunity

Effective Date: 6/8/2010

Revision Date: 1/1/2021

**Cowlitz PUD is an Equal Opportunity Employer.** All employees have the right to work in a discrimination-free environment [as required by law](#). Cowlitz PUD will not permit or condone any unlawful discrimination in the workplace. All employment decisions will be made [as required by law](#) without regard to race, color, sex (including pregnancy, gender identity and sexual orientation), creed, religion, age, marital status, national origin, the presence of any sensory, mental or physical disability, genetic information, veteran status, or any other protected characteristic under applicable federal, state or local laws, including but not limited to the Washington Law Against Discrimination, Title VII of the Civil Rights Act of 1964, and the American with Disabilities Act of 1990. Any employee who is experiencing or witnesses conduct that he/she feels is discriminatory, should immediately report this to their supervisor, Human Resources, or the General Manager, so that Cowlitz PUD can take appropriate action. Employees can raise concerns and make reports without the fear of reprisal.

**Commented [RH1]:** Making it clear that the discrimination protections are those required by law, no more or less.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 102 Business Ethics and Conduct

Effective Date: 6/8/2010

Revision Date: 3/14/2023

The successful business operation and reputation of Cowlitz PUD is built upon the principles of fair dealing and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The continued success of Cowlitz PUD is dependent upon our customers' trust, and we are dedicated to preserving that trust. Employees owe a duty to Cowlitz PUD and its customers to act in a way that will merit the continued trust and confidence of the public.

Specifically, employees must abide by the following:

1. No Cowlitz PUD employee may use his or her position to secure special privileges or exemptions for himself, herself, or others.
  2. No employee may, directly or indirectly, give, receive, or agree to give or receive any compensation, gift, reward, or gratuity from a source except Cowlitz PUD, in return for his or her services as an employee. This section does not apply to:
    - (1) ~~in instances where the a gifts, reward, or gratuity may be~~ deemed "de minimis" and does not improperly influence the receiver in carrying out their job responsibilities, as determined by the Auditor and/or CFO, or
    2. ~~(2) where the Auditor is the recipient or giver, by the General Manager and/or CFO, or where the CFO is the recipient or giver, by the General Manager and/or Auditor, pursuant to the standards set forth in the Governance Policy adopted by the Board; and, (2) if such gift, reward, or gratuity does not amount to improper influence of a Cowlitz PUD employee~~ Where the General Manager, Auditor, or CFO receives or provides compensation, or a gift, reward, or gratuity pursuant to a board-approved policy, provided: ~~Where the General Manager is the recipient or giver,~~ only the Board President and the General Counsel may declare an item di minimis. If any gift is received by any employee from other than from Cowlitz PUD, it must be reported by the employee to his or her supervisor, even if the employee believes the gift is likely di minimis. A record will be kept of any items determined to be de minimis. Improper Influence shall not ~~mean~~ result from the receipt of:
- Unsolicited flowers, plants, candy, fruit, and floral arrangements;
  - Unsolicited advertising or promotional items of nominal value, such as pens and note pads;
  - Unsolicited tokens or awards of appreciation in the form of a plaque, trophy, desk item, wall memento, or similar item;

**Commented [RH2]:** This section is hard to follow. Here is my attempt to make it easier to understand.

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## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- Unsolicited items received by an employee for the purpose of evaluation or review, if the employee has no personal beneficial interest in the eventual use or acquisition of the item by Cowlitz PUD;
  - Informational material, publications, or subscriptions related to the recipient's performance of office duties;
  - Food and beverages consumed at hosted receptions where attendance is related to Cowlitz PUD's elected officials or Cowlitz PUD employee's official duties;
  - Travel expenses paid by a trade organization, manufacturers or other parties related to the recipient's performance of official duties;
  - Travel and moving expenses paid to another not employed by Cowlitz PUD for the purposes of recruiting new employees, as may be authorized by separate Cowlitz PUD policy.
  - Other items approved by the General Manager after review by General Counsel or, where the General Manager is the recipient or giver, by the Board President after review by the General Counsel.
3. No employee may accept employment or engage in business or a professional activity that the employee might reasonably expect would require or induce him or her to disclose confidential information acquired by reason of his or her position.
  4. No employee may disclose confidential information gained through employee's position, nor may the employee otherwise use such information for his or her personal gain or benefit.
  5. No employee shall be beneficially interested, directly or indirectly, in any contract which may be made by, through or under the supervision of such employee, in whole or in part, or which may be made for the benefit of his or her office, or accept, directly or indirectly, any compensation, gratuity or reward in connection with such contract from any other person beneficially interested therein, except as provided by law.

Compliance with this policy of business ethics and conduct is the responsibility of every Cowlitz PUD employee. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including ~~possible~~ termination of employment.

### 103 Employment of Relative and Personal Relationships in the Workplace

Effective Date: 6/8/2010

Revision Date: 01/01/2022

#### Employment of Relatives

Hiring of relatives of employees may result in favoritism, reduction in workplace morale, and the public's loss of confidence in the District. As a result, the District limits the hiring of employees as described in this Section.

Doing our best work requires keeping business and professional relationships separate from personal and family relationships. To prevent the appearance of or actual conflicts of interest, the District does not give preferential treatment or special consideration to relatives of the District employees who may apply for positions with the District.

For purposes of this Expectation, "Relative" is defined to include an employee's spouse, domestic partner, parents, siblings, children, aunts, uncles, nephews, nieces, cousins, grandchildren, grandparents, relatives by marriage, step equivalents of all listed and any person with whom the employee lives in a relationship substantially equivalent to marriage.

In the event an employee's relative is considered the most qualified or best candidate for a position, ~~as determined by the General Manager,~~ they may be offered the position **only if the General Manager determines all the following criteria exists:**

- a) Neither employee will supervise, appoint, ~~or~~ direct work ~~of,~~ ~~remove or discipline~~ the other as part of their assigned duties. Limited exceptions ~~to this criteria~~ may be permitted by the General Manager ~~in the event of~~ ~~for the duration of~~ an emergency; and
- b) the employee is not in a Director, Human Resource or General Manager position; and
- c) neither relative will audit or evaluate the work of the ~~other;~~ and
- d) the working relationship will not create a conflict of interest or the opportunity of favoritism, ~~or~~
- e) Notwithstanding the foregoing, the relative may not be offered a position if other circumstances exist that would place the relatives in a situation of actual or reasonably foreseeable conflict between the District's interest and their own as determined by the General Manager.

**When a department wishes to hire an employee's relative, the department director should submit a written request to the General Manager for final approval on the appointment decision.**

**Commented [RH3]:** What the policy is saying is the only exception the GM may approve related to paragraph a, not b, c, or d. Is this the intent?

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

#### Relationships in the Workplace:

When a relationship, as described in this Section, is created by marriage, domestic partnership, or another development, such as a dating relationship, which the District highly discourages, during the time when both involved employees work for the District, the two employees may remain in their existing positions only if they are not in conflict with the restrictions stated in this Policy. If a conflict is created by the new relationship, the District will attempt to arrange a transfer or change in position for one of the employees. If a suitable transfer/change in position is not available, one of the employees will be separated from District service. A reasonable attempt will be made to affect a transfer or separation on the basis of agreement between the involved employees and the District. If a mutual agreement is ~~unattainable~~not practical, the General Manager will determine based on the best interests of the District, which employee will be offered a transfer or separated from service. The General Manager will make the final determination as to whether a situation of conflict exists.

Under no circumstances may the General Manager, a Director or Human Resources staff remain employed with the District if they are in a relationship with another employee, regardless of the other employees' position within the organization. Employees in these sensitive positions (Director, General Manager, Human Resources) acknowledge that such a relationship in the workplace has the potential to substantially affect their ability to perform their job duties.

If the General Manager is in such a relationship, the Board President will oversee the situation in consultation with the General Counsel, with Board action necessary for termination of employment. If a Director or Human Resources personnel is in such a relationship, the General Manager will oversee the situation in consultation with the General Counsel and take action for termination of employment.

The General Manager will make the final determination as to whether a situation of conflict exists.

**Public Utility District No. 1 of Cowlitz County**  
Employee Handbook

**104 Immigration Law Compliance**

Effective Date: 6/8/2010  
Revision Date:

Cowlitz PUD is committed to employing only United States citizens and aliens who are authorized to work in the United States and does not unlawfully discriminate on the basis of citizenship or national origin.

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

Employees with questions or seeking more information on immigration law issues are encouraged to contact Human Resources. Employees may raise questions or complaints about immigration law compliance without fear of reprisal.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **105 Residency/Response time Requirement**

Effective Date: 4/12/2005

Revision Date: 1/23/2024

Cowlitz PUD is a utility district owned and operated for the benefit of our customers. In order to provide the best possible service, it is important for employees in the following positions/departments to be available to serve during emergencies and, as such, the District requires they reside within 40 minutes legal driving time to District headquarters or reside within the boundaries of Cowlitz County: Electric Operations Department, Warehouse, Engineering Planners, Facilities Supervisor, Physical Security Coordinator and the Department Heads of the foregoing employees. The General Manager is required to live within Cowlitz County. With respect to the General Manager, only the Board of Commissioners may waive or modify the Residency Requirement.

“Residency” is established when a dwelling is occupied as a primary residence, mail is received at the residence; the dwelling address is used for driver’s license purposes, the federal tax address and for voter registration.

Those employees in the classifications listed above must also maintain a functioning telephone or cellular telephone at their place of residence.

Employees subject to the residency requirement who, prior to implementation of this Policy, reside outside the 40-minute legal driving time, shall not be required to relocate for purposes of satisfying this

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Policy. However, should the employee decide to take a different position that requires the employee to live within the 40-minute response time or within the boundaries of Cowlitz County, they will be subject to complying with this policy. If the employee decides to relocate after implementation of this Policy, the relocation must be within the 40-minute legal driving time or within the boundaries of Cowlitz County requirement.

New employees [in the applicable positions/departments](#) are required to relocate within 40 minutes legal driving time to District headquarters or reside within the boundaries of Cowlitz County and will have nine (9) months from their hire date to meet the residency requirements. If an employee is unable to relocate within the designated time frame, a committee consisting of Human Resources, department Director and General Manager shall review the circumstances surrounding the employee's inability to relocate when determining whether or not to terminate employment.

In exceptional situations, the General Manager may at his or her sole discretion, waive or modify the Residency Requirement for a particular employee if it serves the best interest of the District to do so. Employees should not rely on the possibility of a waiver or modification in deciding to accept a position that has a residency requirement.

### 106 Conflicts of Interest

Effective Date: 5/13/2008

Revision Date: 3/14/2023

Employees have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. This policy establishes only the framework within which Cowlitz PUD wishes the business to operate. The purpose of these guidelines is to provide general direction so that employees can seek further clarification on issues related to the subject of acceptable standards of operation. Contact the General Manager for more information or questions about conflicts of interest.

Transactions with outside firms must be conducted within a framework established and controlled by the department director level of Cowlitz PUD. Business dealings with outside firms may not result in bribes, product bonuses, special fringe benefits, unusual price breaks, and other similar windfalls designed to ultimately gain unfair favor or advantage that benefits the employer, the employee, or both. Promotional plans that could be interpreted to involve unusual gain require specific department director level approval.

An actual or potential conflict of interest occurs when an employee is in a position to influence a decision that may result in a personal gain for that employee or for a relative as defined in policy 103 of this manual as a result of Cowlitz PUD's business dealings.

## *Public Utility District No. 1 of Cowlitz County*

### Employee Handbook

No “presumption of guilt” is created by the mere existence of a relationship with outside firms. However, if employees have any influence on transactions involving purchases, contracts, or leases, it is imperative that they disclose to the General Manager of Cowlitz PUD as soon as possible the existence of any actual or potential conflict of interest so that safeguards can be established to protect all parties.

Personal gain may result not only in cases where an employee or relative has a significant ownership in a firm with which Cowlitz PUD does business, but also when an employee or relative receives any kickback, bribe, substantial gift, or special consideration as a result of any transaction or business dealings involving Cowlitz PUD.

The successful business operation and reputation of Cowlitz PUD is built upon the principles of fair dealing and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The continued success of Cowlitz PUD is dependent upon our customers’ trust and we are dedicated to preserving that trust. Employees owe a duty to Cowlitz PUD and its customers to act in a way that will merit the continued trust and confidence of the public.

Cowlitz PUD will comply with all applicable laws and regulations and expects its employees to conduct business in accordance with the letter, spirit and intent of all relevant laws and to refrain from any illegal, dishonest, or unethical conduct.

In general, the use of good judgment, based on high ethical principles, will guide you with respect to lines of acceptable conduct. If a situation arises where it is difficult to determine the proper course of action, the matter should be discussed openly with your immediate supervisor and, if necessary, with Human Resources for advice and consultation.

Compliance with this policy of business ethics and conduct is the responsibility of every Cowlitz PUD employee. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including possible termination of employment.

**Public Utility District No. 1 of Cowlitz County**  
Employee Handbook

**107 Outside Employment**

Effective Date: 6/8/2010  
Revision Date: 1/1/2021

Employees may hold outside jobs as long as they meet the performance standards of their job with Cowlitz PUD. All employees will be judged by the same performance standards and will be subject to Cowlitz PUD's scheduling demands, regardless of any existing outside work requirements.

If Cowlitz PUD determines that an employee's outside work interferes with performance or the ability to meet the requirements of Cowlitz PUD as they are modified from time to time, the employee may be asked to terminate the outside employment if he or she wishes to remain employed with Cowlitz PUD.

If an employee is out on family or medical leaves of absence, working for an outside employer is prohibited.

Outside employment that constitutes a conflict of interest is prohibited, unless said conflict is waived by the General Manager in writing. Employees may not use Cowlitz PUD facilities, tools, materials or equipment for outside employment.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 108 Disability Accommodation

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Cowlitz PUD is committed to complying fully with the Americans with Disabilities Act (ADA) and ensuring equal opportunity in employment for qualified persons with disabilities. All employment practices and activities are conducted on a non-discriminatory basis.

Hiring procedures have been reviewed and provide persons with disabilities meaningful employment opportunities. Pre-employment inquiries are made only regarding an applicant's ability to perform the duties of the position.

Post-offer medical examinations are required only for those positions in which there is a bona fide job-related physical requirement. They are given to all persons entering the position only after a conditional job offer. A ~~contingent conditional~~ job offer will be withdrawn following a medical examination only if the applicant cannot perform the essential job functions even with a reasonable accommodation or would pose a significant risk of substantial harm to the health or safety of the applicant or others. Medical records will be kept separate and confidential.

Qualified individuals with disabilities are entitled to equal pay and other forms of compensation (or changes in compensation), benefits, job assignments, classifications, organizational structures, position

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

descriptions, lines of progression and seniority lists. Leave of all types will be available to all employees on an equal basis.

Cowlitz PUD is also committed to not discriminating against any qualified employees or applicants because they are related to or associated with a person with a disability. Cowlitz PUD will follow any applicable state or local law that provides individuals with disabilities greater protection than the ADA.

This policy is neither exhaustive nor exclusive. Cowlitz PUD is committed to taking other actions necessary to ensure equal employment opportunity for persons with disabilities in accordance with the ADA and all other applicable federal, state, and local laws.

## 201 Employment Categories

Effective Date: 6/8/2010

Revision Date: 1/23/2024

At Cowlitz PUD, we want employees to understand how wages, benefits and job duties are affected by employment classification and job description or title. Cowlitz PUD has a classification system that groups positions for compensation purposes based on similar knowledge, complexity, accountability and working conditions. More information about the classification system is available from Human Resources.

Unless otherwise specified in the collective bargaining agreement, the following are the main employee categories used throughout this Handbook. Employees are considered "at will" regardless of the category they are assigned to unless there is a written agreement to the contrary.

**Regular Full-Time Employee:** An employee who is employed to work more than 30 hours per work week on a continuing basis. Please note that only hours worked in excess of 40 hours per week entitles an employee to overtime if categorized in a non-exempt position. Employees in this category are entitled to the full complement of benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

**Regular Part-time Employee:** An employee who is employed to work 30 hours a week or less on a continuing basis. Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Limited Duration Employee:** An employee who is employed to work more than 30 hours per work week for a specified project or a specified amount of time who is entitled to medical, dental, vision, paid holidays and personal leave. Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Temporary Employee:** An employee working a full or part-time schedule for a specified project or a period of less than one year (i.e., on call, seasonal, emergency staff appointment, etc.). Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Intern:** An employee working full time or part time while in school for a short-term period, usually a semester-long (no longer than three months in duration) to gain work experience in their field of study. Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Initial Review Period Employee:** An employee whose performance is being evaluated to determine whether further employment in a specific position or with Cowlitz PUD is appropriate. Employees who satisfactorily complete the initial review period will be categorized as Regular Full-Time or Part-Time Employees. The first 365 calendar days of employment constitute the initial review period [although the employee remains in an at will status unless modified by a written agreement](#). The Department Director along with the Human Resources Manager shall have the ability to either extend or reduce the initial review period for employees who are not covered by a collective bargaining agreement and may have the ability to extend the initial review period for bargaining unit employees with mutual agreement of the Union. Successful completion of initial review period does not confer on the employee any right to continued employment unless required under a collective bargaining agreement or other written agreement.

**Non-exempt Employee:** Non-exempt employees are entitled to overtime and are not exempt from the minimum wage, overtime, and timecard provisions of the wage and hour laws. Such employees may receive an hourly wage or a salary and are eligible for overtime pay at the following rates: for non-represented employees, one and one-half times the regular rate of pay for all hours worked in excess of 40 hours in the workweek; and for union employees, 2 times the regular rate of pay for all hours worked in excess of 10 hours in the workday unless modified in the applicable collective bargaining agreement. As a public employer, Cowlitz PUD may provide compensatory time in lieu of overtime pay at the rate of time and one half for each hour of overtime worked, absent a written agreement to the contrary.

**Exempt Employee:** An employee who is exempt from the minimum wage, overtime and timecard provisions of the wage and hour laws. Exempt employees include supervisory, administrative, and

## **Public Utility District No. 1 of Cowlitz County**

### **Employee Handbook**

professional employees who are paid on a salary basis. Some examples include the General Manager and Department Directors. When employees are hired, they will be informed of exempt status. Any employee who believes their status as exempt is incorrect is required to see Human Resources.

\*At the discretion of the General Manager, Exempt Employees with their Directors permission who are working outside of their job scope and work extraordinary hours outside of their normal work schedule may be entitled to receive overtime pay at one and a half times the regular rate of pay for hours worked. This type of work must be discussed by both the Department Director and General Manager at the earliest opportunity so there is an understanding of the work performed.

### **202 Performance Evaluations/Salary Administration - Staff Employees**

Effective Date: 6/8/2010

Revision Date: 1/1/2021

Unrepresented employees are encouraged to contact Human Resources or the employee's supervisor for detailed information about Compensation Guidelines, Performance Increases, Reclassification, Retention and Recruitment.

Represented employees should generally consult their Collective Bargaining Agreement and union before contacting HR.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 301 Employee Benefits

Effective Date: 6/8/2010

Revision Date: 1/1/2022

**\*The description of the benefits below are by no means an exhaustive list of the benefit. If you have questions on the complete coverage of this benefit or need more information, please see Human Resources\***

Eligible employees at Cowlitz PUD are provided a wide range of benefits. Programs such as Social Security, workers' compensation, state disability, and unemployment insurance cover all employees in the manner prescribed by law.

Human Resources can identify the programs for which employees are eligible. Details of many of these programs can be found elsewhere in the Employee Handbook. Benefits can change from time to time and you are encouraged to contact Human Resources if you have questions regarding benefits.

The following benefit programs are currently available to eligible employees (see appendix A for a complete list of benefits by employee classification):

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- 401(k) Savings Plan
- Roth 401(k) Savings Plan
- [Banked Personal Time Off](#)
- Cowlitz PUD Credit Union
- Deferred Compensation Plan 457
- Dental Insurance
- Tuition Reimbursement
- Employee Assistance Program
- Family Leave
- Health Insurance
- Holidays
- Jury Duty Leave
- Life Insurance
- Additional Life Insurance
- Long Term Care
- Medical Leave
- Sick Leave – Temporary Employees Only
- Military Leave
- Pension Plan through Washington State Department of Retirement Services
- Personal Time Off
- Prescription Drug Benefits
- Short-Term Disability
- VEBA
- Vision Care Insurance

Some benefit programs require contributions from the employee, but most are fully or partially paid by Cowlitz PUD.

#### **401K Retirement – Staff Only**

The District has established 401k retirement accounts for employees. The District matches up to 4% of the gross wages earned by staff employees. The match for union employees is dictated by the match that is negotiated through the collective bargaining agreement.

Other employee plans may be implemented through future Board action.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 302 Personal Time Off/EIR/HRA-VEBA - Staff Employees

Effective Date: 6/8/2010

Revision Date: 1/23/2024

Personal Time Off (“PTO”) combines vacation and sick leave into a single integrated leave plan for Full-Time Employees. PTO accumulates in lieu of vacation and sick leave. The accumulation may be used for vacation, sickness and personal days. PTO accrual is limited to a maximum ~~81000~~ hours at the end of any calendar year. At the end of the calendar year, those employees that have over ~~81000~~ hours in their PTO bank as of December 31<sup>st</sup> will receive a check for all PTO over ~~81000~~ hours on the second pay period in January. Except for the initial hire year, each employee shall use at least ~~five (5) one week days~~ of Personal Leave in each calendar year.

NOTE: The District’s personal leave benefit exceeds the requirement of the Washington State Sick Leave Law, [RCW 49.46.210](#). All accrued personal leave may be used for purposes outlined under the law.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

A new Full-Time Employee's anniversary date for purposes of accruing PTO benefits shall be the first day of the month in which the employee works 92 hours.

Except while receiving Occupational Disability, Washington Paid Family and Medical Leave, Long-Term Disability or leave without pay, employees shall accrue PTO as set forth in this Policy.

In order for the monthly PTO accrual to occur, an employee must have 92 District paid hours in the month. Paid hours can be a combination of worked hours, holiday hours, PTO, floating holidays, EIR, short term disability, paid administrative leave and leave share donations. If employees do not meet the 92-hour requirement by the end of each month, they will not receive that month's accrual.

An employee will be credited with their Personal Leave accrual as it is earned after completing their first thirty (30) days of continuous employment. At the District's discretion, a new employee may ~~be given the right to~~ utilize their PTO prior to their first 30 days of employment if extenuating circumstances occur. While PTO generally accrues according to the following schedule the General Manager may ~~afford~~ approve an increased rate of accrual not to exceed that of an employee of twenty-five (25) years of service, based on an employee's past industry experience.

To avoid unfair treatment of current employees, the General Manager in consultation with General Counsel, has discretion, on a case-by-case basis, to credit current employee PTO account balances to provide "catch-up" Personal Leave based on similar criteria afforded to new employees, provided however, that such adjustments do not cause the District to exceed the overall labor budget amount granted by the Board of Commissioners for the year that such adjustments are granted.

#### **PERSONAL TIME OFF ACCRUAL**

Length of Service	Personal Days Per Year	Monthly Accrual Rate
0 through 4 years	20	16.67 Hours
5 through 9 years	25	20.83 Hours
10 through 14 years	27	22.50 Hours
15 through 19 years	31	25.83 Hours
20 through 24 years	33	27.50 Hours
25 through 29 years	35	29.17 Hours

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

30 years or more	38	31.67 Hours
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Additionally, full-time active employees and limited duration employees not represented by a bargaining unit who have completed thirty days of continuous employment will be credited with a pro-rated 5 days of PTO dependent on their hire date and then on each succeeding January 1<sup>st</sup> thereafter, they will receive the 5 days of additional PTO. Inactive employees, except those employees on short-term disability, Workers Compensation Leave, military leave of 15 days or less, or as prescribed by law, will not be eligible for the 5 days of PTO. Part time employees, Limited Duration part time employees, Interns and Limited Duration Part Time Interns will not be eligible for the 5 days of PTO. The additional PTO will be combined with each employee's PTO accruals.

Unplanned PTO may be granted for illnesses and qualifying emergencies. A qualifying emergency is an unforeseen combination of circumstances or the resulting state that calls for immediate action. Requests for absence shall be given as early as practicable, but no later than at the start of the regular shift, to either the Department Director or designee. Cowlitz PUD reserves the right to request medical certification from a licensed physician as deemed necessary for short-notice PTO for illness. Medical releases may be requested by Cowlitz PUD prior to an employee's return to work. Excessive use of unplanned PTO, which interferes with job performance or Cowlitz PUD operations, may subject the employee to disciplinary action. **Employees are expected to retain a sufficient amount of PTO to cover periods of illness or accident.**

An employee will be granted access to his/her PTO for circumstances qualifying under Washington Family Care Law, Washington Paid Family and Medical Leave or approved leave under the Federal Family and Medical Leave Act. FMLA or Workers Compensation Leave requests shall take precedence over the seniority of any employee for the purpose of scheduling PTO. PTO shall be used concurrently with time-off requested under the provisions of Law.

Upon approval by Cowlitz PUD, PTO may be granted during the calendar year at such times as requested by the employee, after taking into consideration the operations of Cowlitz PUD and the maintenance of adequate service to its customers. All PTO requests and such approvals will be made through the employee's immediate supervisor. Any request for PTO of which would extend over thirty calendar day period (30) may be denied by Cowlitz PUD if at least six (6) months' notice is not given, must have General Manager approval and then only dependent upon Cowlitz PUD's operational needs.

Any employee who has accumulated PTO time and who is retiring from the District, shall be paid his/her accrued PTO and floating holiday balances consistent with the terms of the employers VEBA agreement. When an employee either voluntarily (other than retirement) or is involuntarily separated or is laid off he/she will receive full payout of any owed PTO and floating holiday balances.

Employees may choose to defer PTO cash out to either 401k or DCP provided they have not reached their annual limit as established by IRS guidelines. If electing to defer PTO cash out to either 401k or

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

DCP, the employee must inform Human Resources and Payroll at least two weeks prior to their final day. Any amount of PTO remaining will be subject to the employee's VEBA agreement if retiring, or will be cashed out on their final paycheck if they voluntarily or involuntarily separate or are laid off from the District.

When a holiday, as provided in this Handbook falls on a regular workday during an employee's PTO, that day shall be considered a holiday and not deducted from the employee's PTO Bank.

#### **PAID SICK LEAVE FOR TEMPORARY EMPLOYEES**

Although temporary employees, including employees hired on a seasonal basis, do not accrue regular Personal Leave, they may be eligible to accrue and use Paid Sick Leave benefits [as provided under RCW 49.46.210](#), depending on the duration of their employment with the District.

#### ***Sick Leave Accrual***

If you are a temporary employee, you will accrue paid Sick Leave benefits at a rate of 1 hour of paid leave for every 40 hours worked. You begin accruing paid Sick Leave on your first day of employment, **but** you are not eligible to use the leave until your 90<sup>th</sup> calendar day of employment.

#### ***Requesting Time Off***

When your need for leave is foreseeable, please provide as much notice as possible of your need for leave and make every effort to schedule outside appointments for times that are least likely to disrupt our business operations. If your need for leave is unexpected, please provide as much notice as possible before your shift begins so that we can arrange for appropriate coverage for your position. If you are out on Sick Leave for 3 or more scheduled workdays, we may require medical documentation prior to your return to work.

Assuming you have been employed with us for at least 90 days, you may use your accrued paid Sick Leave for a number of qualifying purposes relating to your own illness or injury or that of a family member, pregnancy, or to seek assistance for issues associated with domestic violence or crime victim's leave, military spouse deployment, qualifying military emergencies, and even for certain public health emergencies. Human Resources can provide you with more detailed information about Sick Leave accrual, carry over, qualifying events and authorized uses of your Paid Sick Leave.

#### ***Carry Over***

You may carryover a maximum of 40 hours of accrued but unused Sick Leave into the next year.

#### ***Payout Upon Separation***

Accrued but unused Sick Leave for temporary employees will be paid out upon separation from employment under any circumstances.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### **Hired as Full/Part Time Employee:**

If an intern is offered a position with the District that makes them eligible for PTO accrual, any sick time accumulated will be converted to the employee's PTO bank.

### **PERSONAL LEAVE PRIOR TO SEPARATION OF EMPLOYMENT DUE TO RETIREMENT (VACATION-OUT) – STAFF ONLY**

Advance notice of an employee's retirement plans provides considerable value to the District in the area of workforce planning. In an effort to incentivize employees to communicate their retirement plans early, the employee's Director and Human Resources Manager may jointly authorize up to sixty (60) calendar days to vacation-out when the employee has sufficient leave balances (PTO and floating holidays) to cover the workdays. Such approval may be granted when the employee has provided an irrevocable letter indicating their retirement date and the start date of planned leave. Advance notice of the vacation-out period must be provided at least twice as early as the length of the requested leave. For example, the employee is required to provide the following advance notice prior to the planned leave start date:

- Up to 7 calendar day vacation-out period requires 14 calendar day advance notice
- Up to 15 calendar day vacation-out period requires 30 calendar day advance notice
- Up to 30 calendar day vacation-out period requires 60 calendar day advance notice
- Up to 60 calendar day vacation-out period requires 120 calendar day advance notice

Advance notification of the vacation-out request is imperative in order to meet the operational needs of the District and to transition the employee's work duties. Therefore, notifications which do not meet the above required time periods may not be approved.

### **The specific requirements to satisfy vacation-out requests are as follows:**

1. Requests to vacation-out must be submitted in writing to the Department Director and Human Resources Manager; and
2. The request is deemed acceptable by the Director and Human Resources Manager after considering business needs, succession planning, knowledge transfer, budgetary requirements, and other business considerations; and
3. The employee will return to work during the vacation-out period, if requested, to meet business needs; and
4. The employee agrees to provide Human Resources with current contact information at all times during the vacation-out period; and
5. The employee must be eligible for retirement under the Department of Retirement Systems.

### **Continuation of Benefits:**

During the vacation-out period, the employee is considered to be in the regular and active employment of the District and not on a medical leave of absence. The employee is therefore eligible for continued benefit coverage (Medical, Dental, Vision, Life Insurance, Accidental Death and Dismemberment (AD&D)),

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Health Reimbursement Arrangement (HRA VEBA), PERS Retirement, Deferred Compensation plan, 401k, Short Term and Long-Term Disability) to the extent allowed by contract, policy or summary plan description. In the event that an employee becomes eligible for Short Term Disability (STD) during the vacation-out period, STD benefits will cease on the pre-established retirement date. While on vacation-out, the employee remains eligible for open enrollment as applicable to the benefit program.

While the employee is on the vacation-out, the District will continue to pay the employer contribution toward the employee's insurance premiums, HRA VEBA account, PERS retirement plan, group life insurance and AD&D, and 401k. The District will continue to deduct all employee portions of insurance premiums, HRA VEBA account, PERS retirement plan, group life insurance and AD&D, and 401k deductions from the employee's paycheck in the same manner as if the employee was actively working. For the period of the vacation-out, the employee continues to accrue planned leave in accordance with the Personal Leave Policy. Planned leave which is accrued during the vacation-out period cannot be used during that period and will be cashed out during the normal payroll processing cycle as per the employee's VEBA Group Agreement following the employee's last day of employment (the last day of the vacation-out period). It is the employee's responsibility to determine whether vacation-out has any effect on retirement benefits prior to requesting vacation-out.

#### **Approval of Vacation-Out Requests:**

The requesting employee's Director (or the General Manager if the requestor is a Director) and the Human Resources Manager will review the vacation-out request to ensure eligibility criteria are met and jointly make the approval decision. [When the General Manager is the requesting employee, the request will be reviewed by the Board President for approval.](#) When making approval decisions, consideration will be given to the impact of the employee's absence on the department; District and budgeting needs; the value to the District related to the advance planning afforded by the early retirement notice; replacement of departing employee; and other issues related to succession planning and knowledge transfer; and other relevant criteria.

If approved, the employee will be notified by his or her Director.

#### **PERSONAL TIME OFF CASH-OUT**

Employees who have in excess of 80 hours of PTO accrual have the option to cash-out the excess PTO. The cash-out will occur twice per year, in April and October, and will be calculated using current PTO accruals for all Regular Employees. The cash-out will be at the employees' current wage rate at the time of the cash-out. Regular Employees are eligible to cash-out any amount of PTO exceeding the 80 hours. Payment of the PTO cash-out will occur on the second pay period in April and October. Employees are eligible to cash-out their Banked PTO during the April and October cash-out period. EIR and Floating Holidays, are not eligible for cash-out. The General Manager reserves discretion to reduce the aggregate amount that may be cashed out company-wide if he/she determines it would not be in the District's best financial interest to allow full cash-out.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### **EXTENDED ILLNESS RESERVE**

Sick leave accruals prior to the adoption of ~~this PTO (prior, combined vacation and sick leave) Plan~~ constitute an Extended Illness Reserve (EIR) for each employee. Accessing the EIR may, at Cowlitz PUD’s discretion, require medical evidence of disability from a physician. Employees are allowed to access their EIR to cover consecutive scheduled working days missed as a result of illness or accident as well as in circumstances qualifying under Federal or State Law, subject to the following schedule:

#### ***EXTENDED ILLNESS ACCESS***

Extended Illness Reserve	Days from PTO Accrual Required Prior to Accessing EIR
120 or more days	1
90 through 119.9 days	2
60 through 89.9 days	3
24 through 59.9 days	4
0 through 23.9 days	5

An employee returning to work from EIR who experiences a relapse of the same illness or complication of the same accident, including circumstances qualifying under Federal or State Law, within 30 calendar days, as confirmed by a licensed physician, will be allowed to continue to use EIR without re-qualification.

Re-qualification for EIR access within a given 180 calendar-day-period that does not meet the above 30-day requirement may be waived by Cowlitz PUD for a single diagnostic condition involving ongoing and intermittent treatment as confirmed by a licensed medical physician. This policy is not intended to affect leave the employee may otherwise be entitled to under the federal Family and Medical Leave Act, Washington Family Leave Act, Washington Maternity Disability Leave Regulation, Washington State Family Care Act, and other leave laws that may be applicable.

Each employee will be granted additional PTO day(s) from EIR each January 1<sup>st</sup> according to the following schedule:

#### ***EXTENDED ILLNESS RESERVE CONVERSION***

Extended Illness Reserve as of December 31	Extended Illness Reserve Reduced by	Days Converted from Extended Illness Reserve to PTO January 1 <sup>st</sup>

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

24 through 59.9 days	1 day	½ day
60 through 89.9 days	2 days	1 day
90 through 119.9 days	3 days	1½ days
120 or more days	4 days	2 days

EIR is separate from and cannot be used as PTO.

#### **Health Reimbursement Arrangement/ Voluntary Employee Beneficiary Association (HRA/VEBA) – Staff Employees**

Cowlitz PUD maintains a Health Reimbursement Arrangement/Voluntary Employees' Beneficiary Association (HRA/VEBA) plan. VEBAs are authorized by Internal Revenue Code section 501(c)(9). HRA/VEBA is a tax-free savings account for you and your family's out-of-pocket medical care expenses and premiums. You can begin spending your HRA/VEBA right away and/or save it to use in retirement. HRA/VEBA can even be used to cover Medicare and Medicare supplement premiums.

Contributions will be made for the benefit of Cowlitz PUD employees under seven different HRA/VEBA groups defined by department as follows (subject to IRS guidance):

1. Engineering
2. Technology
3. Administration and Employee Services
4. Accounting
5. Customer Service and Compliance
6. Operations
7. Power Management
8. Commissioners

All employees within their respective HRA/VEBA group will elect the contribution amount and set terms for the percentage of owed PTO and floating holiday balances that is funded to HRA/VEBA at retirement for the group by an absolute majority (50% + 1) vote of group members. Said contributions and terms may be adjusted from time-to-time, but no more frequently than once every 12 months (set either calendar year or fiscal year).

When an employee either voluntarily (other than retirement) or involuntarily separates or is laid off he/she will receive full payout of any owed PTO and floating holiday balances. No amount will be funded to HRA/VEBA.

For all groups, when an employee retires from Cowlitz PUD, 20% of their remaining Extended Illness Reserve (EIR) at their current wage will be transferred into the employee's HRA/VEBA account. The

## **Public Utility District No. 1 of Cowlitz County**

### **Employee Handbook**

remaining balance will be lost. When an employee separates their employment with Cowlitz PUD for any other reason, the employee will lose their full remaining Extended Illness Reserve (EIR) balance.

In addition to the group contribution, each pay period, Cowlitz PUD shall contribute \$.30 per straight-time hour worked for each Full-Time Employee.

### **303 Retiree Medical Benefits - Staff Employees**

Effective Date: 4/17/2015

Revision Date: 9/27/2016

**\*The description of the benefits below are by no means an exhaustive list of the benefit. If you have questions on the complete coverage of this benefit or need more information, please see Human Resources\***

This policy, from the date of adoption going forward, shall apply to staff employees who voluntarily retire as outlined herein.

Employees will be provided District-paid group medical insurance subject to the following:

#### **Eligibility:**

- Voluntarily retire – not required to draw PERS, **and**

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- Age 55 or older at the time of retirement, **and**
- Have been employed with the District full-time for at least ten consecutive years, **and**
- Not eligible to receive medical insurance coverage through another employer (even if coverage is declined)

#### Conditions:

- This benefit is a one-time election at the time of retirement.
- If coverage is dropped as a result of eligibility provisions or conditions noted herein, it cannot be renewed.
- The amount of coverage shall not exceed that afforded to active employees.
- In order to continue receiving the benefit, the retired employee is responsible to file an annual declaration (subject to confirmation) affirming he/she is not eligible for medical insurance coverage by another employer. If he/she fails to file the annual declaration by November 30<sup>th</sup> of the current year, he/she will be dropped from Cowlitz PUD's medical plan effective January 1 of the next year.
- This benefit shall continue until the first day of the month that he/she turns 65 years of age or is eligible for Medicare, whichever occurs first.

#### OR

#### Eligibility:

- Voluntarily retire – drawing PERS benefit, **and**
- Age 55 or older at the time of retirement

#### Conditions:

- This benefit is a one-time election at the time of retirement.
- If coverage is dropped as a result of eligibility provisions or conditions noted herein, it cannot be renewed.
- The amount of coverage shall not exceed that afforded to active employees as determined by Cowlitz PUD.
- Limited to payments for the number of months not to exceed the number of months the employee has actually worked for the District; provided, however such employee may pay their own premiums for the balance of time up to age 65 or when they become eligible for Medicare, whichever comes first.
- This benefit shall continue until the first day of the month that he/she turns 65 years of age or is eligible for Medicare, whichever occurs first.

Subject to the eligibility provisions and conditions stated above, as long as the retired employee is afforded District-provided coverage, group medical insurance will be made available for the retired

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

employees' eligible spouse. However, the monthly premium (subject to change) for such additional coverage must be paid, in total, by the retired employee one month in advance.

This policy is subject to change through future Board action. Staff employees that have previously retired utilizing this clause shall be given grandfathered status, all others not retiring under this specific policy shall not be entitled to this benefit should the Board take action to make changes to the policy.

### **304 Banked Personal Time Off (PTO)**

Effective Date: 6/8/2010

Revision Date: 2/1/2018

Beginning October 1, 2016, Cowlitz PUD will allow employees to cash out their balances of their Banked PTO. Balances can be cashed out during the normal cash-out period under policy 302.

As of February 1, 2018 no new monies will be allowed to be placed into Banked PTO. Monies that remain in the Banked PTO fund will continue to be invested and reinvested by Cowlitz PUD's Treasurer in any investment which is authorized by the laws governing Municipal Corporations of the State of Washington. Income from the monies invested and reinvested, less investment costs, if any, shall accrue and be deposited by the Treasurer in the Banked PTO Fund and shall be credited pro rata to the account of each participating employee.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Monies remaining in an employee's Banked PTO account will be paid as per the employees VEBA agreement upon retirement or voluntary separation of employment. When an employee is involuntarily separated or laid off, he/she may receive full payout of any owed banked personal leave balance and will not be subject to the established VEBA agreement for his/her respective group. An employee's banked PTO may not be accessed in any other manner than described in this policy.

### 305 Short Term and Long-Term Disability – Staff Employees

Effective Date: 6/8/2010

Revision Date: 1/23/2024

**\*The description of the benefits below are by no means an exhaustive list of the benefit. If you have questions on the complete coverage of this benefit or need more information, please see Human Resources\***

#### Short Term Disability:

Cowlitz PUD provides a voluntary medical Short-Term Disability (STD) program for all employees including regular full time, part time and temporary employees who:

- Have worked at least 820 hours in the qualifying period (hours can be worked at any Washington employer); and
- Have worked 340 hours for the District; or

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- Were covered by an approved voluntary plan by their previous employer, shall be eligible to apply for STD benefits.

The District will use a Third-Party Administrator to operate our voluntary plan. An employee would apply for medical leave through the Third-Party Administrator and subsequently be approved by the Third Party. The Third-Party Administrator will follow Washington State Paid Family and Medical Leave RCW 50A and WAC 192.

For determining eligibility of benefits, the Third-Party Administrator will follow the definition of Serious Health Condition under RCW 50A.05.010 (20).

The *qualifying period* is the first four of the last five completed calendar quarters or, if eligibility is not established, the last four completed calendar quarters immediately preceding the application for leave.

#### **Benefit Duration:**

All employees who are unable to work due to illness or injury as certified by a licensed, competent medical authority and approved by the District's third-party administrator, would be required to wait up to one week called the "waiting week" before beginning to receive benefits under this policy. The waiting weeks and all subsequent weeks begin on Sunday 12:00 a.m. and run through Saturday 11:59 p.m.

#### **Example:**

If an employee began their medical leave on a Wednesday, the waiting week would have begun on Sunday at 12:00 a.m. In this example with the leave beginning on Wednesday and the waiting week ending on Saturday at 11:59 p.m., the waiting period would be 3 days long (Thursday, Friday and Saturday).

If the employee's application is approved through by the third-party administrator for short-term disability payments under the plan, the employee would be eligible to begin to receive benefits at the end of their waiting week (Saturday 11:59 p.m.) until they recover and are authorized by a licensed medical physician to return to work (in limited and/or full capacity), up to a maximum of 180 calendar days.

Intermittent leave is available under the plan. Need for intermittent leave is determined upon the employee's medical certification as provided by a licensed, competent medical authority and approved through the Third-Party Administrator.

#### **Salary Replacement Amount:**

Eligible employees shall be eligible to receive the greater of:

- Seventy percent (70%) of their current regular straight time base pay; **OR**

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- An amount equal to the State's PFML insurance benefit, calculated in the same manner as the State's PFML plan.

#### **Return to Work:**

Return to work from coverage by the STD benefit is conditional upon certification by a licensed, competent medical authority that the employee is able to fully perform the duties of the job and is otherwise fit to return to work. Absent a full return to work authorization, the District shall determine whether reasonable accommodation of the employee's condition and restrictions can be made.

#### **Job and Health Benefits Protection:**

Employees who have worked for the District for at least 965 hours within the 12 months prior to the commencement of an STD-covered absence, will have the right to return to their same position, or an equivalent position with equivalent employment benefits, pay, and other terms and conditions of employment, upon return from coverage by the STD benefit.

During an STD-covered absence and in accordance with the Federal Family and Medical Leave Act (FMLA), the District will continue to pay the District's portion of premiums for medical, dental, vision, life, AD&D, short term and long-term disability insurance coverage as if the employee was an active worker. The District will continue collecting the employee's appropriate share of the benefit premiums through payroll deduction. For the medical, dental and vision benefits the deduction is a 90/10 split with the 10% being paid by the employee and for life insurance and AD&D this is a 50/50 cost share between the District and the Employee. The employee's premiums will be deducted from their paycheck, if they are unable to pay the entire amount of the benefits, the District will bill the employee the remaining amount. The District covers 100% of the premium for short-term and long-term disability insurance.

The District will begin paying the Short-Term Disability Benefits once the Advice to Pay Service has approved the Short-Term Disability claim and the waiting week has been met. If available, accrued PTO hours, Floating Holiday hours (in increments of less than 10 hours), Extended Illness Reserve (EIR) hours and funds allocated to the employee in the Banked PTO Plan, in the order determined by the District, may be used to make up the difference between STD and 100% of the employee's straight time pay, the employee cannot exceed 100% of their regular straight time pay. Employees may also use EIR in accordance with the Extended Illness Reserve table, PTO, Floating Holiday, and Cowlitz PUD's Banked PTO Plan to satisfy the waiting week.

A disabled employee unable to return to work after 180 calendar days will be allowed to use accrued PTO, EIR, Floating Holidays, Leave Share Donations and Banked PTO allocated to the employee before being eligible for long-term disability provided a licensed physician and Cowlitz PUD's Advice to Pay provider has determined that the employee is not permanently disabled and will be able to return to their regular position prior to the expiration of such leaves.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

***\*For a complete summary of the District's Short Term Disability plan, please see Human Resources and ask for a copy of the Short-Term Disability Summary Plan Description.***

#### **Long Term Disability (LTD):**

Cowlitz PUD provides a Long-Term Disability (LTD) program for Full-Time Employees having completed six months of continuous employment.

All full-time employees of the District will be enrolled in the Long-Term Disability Plan. Long-term disability has a 180-calendar-day waiting period until benefits may be paid. A disabled full-time employee unable to return to work after 180 calendar days will be allowed to use, if available, accrued PTO hours, Extended Illness Reserve Hours (EIR), and funds allocated to the employee in the Banked PTO Plan, in the order determined by the District, before being eligible for long-term disability provided a licensed medical physician has determined that the employee is not permanently disabled and will be able to return to their regular position prior to the expiration of such leaves, and the Long-Term Disability Plan allows such a delay in benefits. Once the eligibility requirements of the insurer are met and the employee applies for benefits under the Long-Term Disability Plan, a disabled employee may receive 60% of their straight-time base rate up to \$8,000 per month up to age 65. LTD benefits are reduced by other sources of income (please see Human Resources for more information). Premiums for LTD coverage will be District-paid.

#### **306 Holidays**

Effective Date: 6/8/2010

Revision Date: 1/23/2024

Cowlitz PUD will grant paid holiday time off to all employees on the holidays listed below:

- New Year's Day (January 1)
- President's Day (third Monday in February)
- Memorial Day (last Monday in May)
- Independence Day (July 4)
- Labor Day (first Monday in September)
- Veteran's Day (November 11)
- Thanksgiving Day (fourth Thursday in November)
- Christmas Day (December 25)

## **Public Utility District No. 1 of Cowlitz County**

### **Employee Handbook**

- 2 Floating Holidays

Cowlitz PUD grants paid holiday time off to all eligible employees. Holiday pay will be calculated based on the employee's straight-time rate of pay (as of the date of the holiday) times the number of hours the employee would otherwise have worked on that day. Exempt employees will receive their regular pay for the pay period in which any holiday falls. Eligible employee's classification(s) are the following:

- Initial Review Period Employees
- Limited Duration Employees
- Regular Full-Time Employees
- Regular Part-Time Employees (pro-rated)

A recognized holiday that falls on a Friday or Saturday will be observed on the preceding Thursday. A recognized holiday that falls on a Sunday will be observed on the following Monday. Eligible employees also receive two 10 hour paid "Floating Holidays," each fiscal year, which is August 1<sup>st</sup> through July 31<sup>st</sup> annually. Floating Holidays may be used at any approved time in 10-hour increments. Floating Holidays must be used by the end of the fiscal year (July 31<sup>st</sup>) or they are lost.

Part-time staff employees will be eligible for pro-rated holiday pay as long as they either work the workday prior to the holiday and the first work day following the holiday, or they meet their part time required hours for the week.

As an additional benefit to employees, at the General Manager's sole discretion, employees may be authorized paid early release of up to an annual limit of four hours on New Year's Eve and Christmas Eve for those employees actually working those days. The General Manager's authorization may occur at any time prior to 5:30 p.m. the day before the early release is to occur and must be in writing, signed by the General Manager and the Human Resources Manager. The General Manager may require designated employees to remain working for operational purposes for as long as needed. Employees not working the same workday as the early release period are not eligible for this benefit.

Employees in leave without pay status or unpaid administration leave are ineligible to receive any holiday compensation unless the leave without pay is classified as Military Leave (see policy 603 of the personnel policies and procedures handbook) or under the employees' approved Washington State Paid Family and Medical Leave Act claim (see policy 601 of the personnel policies and procedures handbook). Employees must be on paid status the day before a holiday in order to receive holiday compensation.

#### **Religious Holidays**

Employees may observe religious holidays by using their accrued PTO and/or Floating Holiday, time (with supervisor approval) or as an approved absence without pay. Please schedule time off for religious observance well in advance with the assigned supervisor so that Cowlitz PUD can avoid any disruption in its services that an absence may create.

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

Cowlitz PUD may grant two unpaid holidays per calendar year to any employees to use for a reason of faith or conscience or an organized activity conducted under the auspices of a religious denomination, church or religious organization. Cowlitz PUD management holds the right to deny the unpaid time off request if the employee's absence would impose an undue hardship on the employer or the employee's position is necessary to maintain public safety.

### **307 Catastrophic Leave Sharing Program**

Effective Date: 6/8/2010

Revision Date: 3/14/2023

The District understands that employees may have family health emergencies or personal injury that results in a need for time off beyond available paid time off. This policy establishes a Catastrophic Leave Sharing Program that will allow eligible employees to donate PTO from their unused balance to a fellow employee in need.

The program permits District employees to voluntarily donate accumulated PTO and/or Floating Holidays to another employee who exhausts, or is likely to exhaust, accumulated PTO and Floating Holidays due to a non-occupational FMLA, Washington Paid Family and Medical Leave, ADA and Washington Family Leave

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Act qualifying catastrophic medical condition of the employee or an immediate household member that is reasonably expected to last 30 days or longer and that would otherwise likely cause the employee to take unpaid leave or terminate employment.

#### Eligibility:

Any District employee, who has worked at least six (6) months and has a qualifying catastrophic leave event that is reasonably expected to last 30 consecutive days or longer is eligible to apply as a recipient.

Any employee who has PTO time available over 80 hours may participate in the program as a donor.

Employees are eligible to receive and use Catastrophic Leave Donations for a maximum of 180 calendar days per rolling 12-month period. Program eligibility is evaluated by Human Resources. Notification of application approval or denial will be confirmed by Human Resources.

#### Leave Donations

Employees may voluntarily donate hours of accumulated PTO or floating holiday for use by a specified recipient employee. No other type of leave may be donated:

- Donated hours must be in whole hour increments only, and the minimum allowable donation of PTO shall be four (5) hours. The minimum allowable donation of Floating Holidays shall be ten (10) hours (Floating Holiday donations used by Human Resource on behalf of the employee can be used in any increment);
- The recipient employee must be eligible for the donation as defined in the "Eligibility" section of this policy at the time the donation is made;
- The donating employee may donate any amount of PTO in excess of the minimum provided the donation does not cause the employee's PTO balance to fall below eighty (80) hours.
- All forms of paid leave available for use by the recipient must be used prior to using shared leave. This includes PTO, Floating Holidays, Banked Leave and EIR. Any PTO and/or Floating Holidays that accrues during the leave share request shall be used prior to any donated leave.
- Retroactive application for and use of donated leave time will not be allowed under this policy.

#### Use of Donated Leave

Employees may use donated leave in the following circumstances:

- The employee has exhausted his or her accrued PTO, floating holidays, banked leave or EIR.
- The employee is not receiving any other income from any other State or external agency.
- The recipient of the PTO is responsible for any taxes associated with its use.
- The recipient understands that donated leave is not considered DRS pensionable.
- Human Resources shall have authority and discretion to determine whether the receiving employee may use the donated PTO. This determination shall be made based on the consideration of the facts and circumstances of the particular situation.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- PTO from a donating employee shall only be removed from his or her PTO bank on a “first donated, first used basis” as the recipient actually utilizes the donated PTO on an actual need basis. Any donated PTO may only be used by the recipient for the purposes specified in this program until the employee is medically certified to return to work; or the employee’s family members medical certification no longer indicates a need for the employee’s assistance with care that impacts being at work.

#### Intermittent Leave

Recipient employees who have been on approved catastrophic leave, and who are able to return to work on a part-time basis while continuing to receive medical treatments on an intermittent basis for their catastrophic medical condition, may continue to participate in the program after they return to work. Catastrophic leave may only be solicited and used to the extent it is needed to cover unpaid leave for continuing treatments involving absences related to the condition for which catastrophic leave was initially approved. The recipient must continue to meet the eligibility requirements as stated and must be below the 180-day threshold.

#### Application for Donated Leave

An employee who wishes to receive donated leave must complete and submit an application to Human Resources. The application will be on a specified form and will include a statement, signed in good faith by the employee, of qualification for donated leave under the eligibility criteria. The District may require that the health certification be on a form it provides to certify the initial or continued need for family medical leave under FMLA, ADA, Washington Family Leave Act and/or Washington Paid Family and Medical Leave. It is highly recommended that application for leave sharing shall be made prior to the employee exhausting his or her Personal Leave benefits or, as soon as the serious injury or illness occurs. Leave sharing requests affecting prior pay periods will not be approved.

#### Solicitation of Donations

Solicitation for leave donations will be sent via email by Human Resources to all employees. A request to donate Personal Leave shall be made by completing the Catastrophic Leave Request Donation Form.

#### Value of Donated Leave

Donated hours are converted to a dollar value calculated on the donor’s base hourly pay, and the dollar value is converted to hours based on the recipient’s base rate of pay.

Example: Employee A, who earns \$10 per hour, donates 10 hours of PTO to Employee B. The value of the hours is \$100 (10 hours x \$10). Employee B earns \$5 per hour, so the \$100 converts to 20 hours of PTO (\$100 / 5).

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

All donated PTO shall be given voluntarily. No employee shall be coerced, threatened, intimidated, or financially induced into donating PTO for purposes of this program. All donations of PTO shall be kept confidential by Cowlitz PUD.

### **308 Civic Responsibilities**

Effective Date: 6/8/2010

Revision Date: 9/27/2016

#### **Time off to Vote**

Cowlitz PUD encourages employees to fulfill their civic responsibilities by participating in elections. Generally, employees are able to find time to vote either before or after their regular work schedule. If employees are unable to vote in an election during their non-working hours, Cowlitz PUD will consider granting up to 1 hour of unpaid time off to vote.

Employees should request time off to vote from their supervisor at least two (2) working days prior to the Election Day. Advance notice is required so that the necessary time off can be scheduled at the beginning or end of the work shift, whichever provides the least disruption to the normal work schedule. Although

## **Public Utility District No. 1 of Cowlitz County**

### **Employee Handbook**

Cowlitz PUD will make reasonable efforts to accommodate the request for time off, operational requirements will sometimes take precedence over such a request.

#### **Jury Duty**

Serving on a jury is a fundamental responsibility of citizenship, and Cowlitz PUD supports this important role in our society. However, to ensure that we can provide proper service to the public, if a notice for jury duty service is received, please contact the Department Director as soon as possible so that appropriate scheduling needs can be met. Cowlitz PUD will pay employees their regular rate of pay for time served during normally scheduled working hours for a period of up to two weeks. Any pay for time served beyond two weeks will be at the discretion of the General Manager. Any jury duty compensation is considered de minimis and need not be turned over to Cowlitz PUD. Employees on paid Jury Duty may be asked to remain in reasonable contact with Cowlitz PUD in the event information is needed to fill their job responsibilities. Employees are expected to report to work on any day that service is no longer required and there are four (4) or more hours left in the employee's regular shift.

#### **Witness Duty**

Current employees who are subpoenaed to testify in a legal proceeding must immediately notify their supervisor so that operating requirements can be adjusted as needed. When the expected testimony pertains to knowledge the employee has obtained through employment by Cowlitz PUD, the employee's pay will not be reduced as a result of providing the required testimony. The employee is required to return to work during their regular shift whenever the legal proceeding permits, unless excused by their supervisor in writing. Per diem for public officers under RCW 42.16.020 is not allowed; for other employees per diem is allowed only where such qualifies under Cowlitz PUD procurement policy or is required by written agreement.

### **309 Employee Wellness Program**

Effective Date: 6/8/2010

Revision Date: 4/17/2015

Cowlitz PUD strives to promote an environment that is supportive of employees' health needs and that offers opportunities for employees to participate in wellness related events. The Wellness Program is a voluntary program open to all Cowlitz PUD employees that has been developed to assist employees in the prevention of illness. The purpose of the Wellness Program is to educate and increase health awareness by providing programs and information that will benefit the employees, as well as Cowlitz PUD as an employer, through better employee fitness, improved morale and productivity, and more prudent use of health care benefits.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 310 Logo Wear

Effective Date: 6/8/2010  
Revision Date: 2/1/2019

Cowlitz PUD recognizes that our employees are ambassadors in our communities and has determined this is a significant value by allowing employees to proudly display the Cowlitz PUD logo. By adhering to design standards, employees will present a unified identity that communicates a strong, singular image for Cowlitz PUD. Employees will be reimbursed one-half the cost of the clothing up to \$60 per item to a maximum of four (4) items per calendar year. New employees hired to the District will be allowed to purchase up to four additional items within the first six months of their hire date at the same reimbursement level. Applicable taxes will be charged to the employee. Cowlitz PUD will reimburse for approved logo wear only.

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

Employee name, department name, reference to safety or other identification information will not be available for this program as an identifying logo. Employees must continually present a professional image and must dress appropriately for their work area and any other time they are wearing Cowlitz PUD clothing.

Old logo wear clothing should be destroyed and not given away.

### **401 Paydays & Pay Deductions**

Effective Date: 6/8/2010

Revision Date: 8/23/2022

Cowlitz PUD shall use its best efforts to ensure that employees are paid biweekly on every other Thursday, unless payday falls on a financial institution-observed holiday, in which case payday will be the day before the financial institution-observed holiday. Each paycheck will include earnings for all work performed

## **Public Utility District No. 1 of Cowlitz County**

### **Employee Handbook**

through the end of the previous payroll period. Provided, however, no unforeseen circumstances such as, software malfunctions, outages, or other events beyond the control of staff prevent such payment. In the event that all time is not captured before payroll is processed in the pay period, any additional time owed will be paid out promptly in the following pay period. All employees are required to sign up for direct deposit of their paychecks during new employee orientation. By submitting their timesheets, employees are representing that they worked all of the hours reflected and have brought to the District's attention any hours they worked in prior pay periods for which they believe they have not been fully compensated.

Deductions from your paychecks are those required by law (*e.g.*, Tax withholding, FICA, Medicare, workers' compensation premiums, court-ordered garnishments, etc.) or those approved by the employee in writing (*e.g.*, VEBA contributions, 401k contributions, insurance premiums, etc.).

If an employee passes away while employed at the District, their final paycheck will be processed as usual, including any authorized or legally allowed deductions, and payment for any outstanding paid leave, and direct deposited into the employee's usual bank account for inclusion in the employee's estate.

Cowlitz PUD offers programs and benefits beyond those required by law. Eligible employees may voluntarily authorize deductions from their paychecks to cover the costs of participation in these programs.

### **501 Safety**

Effective Date: 6/8/2010

Revision Date: 1/1/2021

Cowlitz PUD takes every reasonable precaution to preventing accidents and providing a safe, healthful work environment for all employees. It is also the District's intent to properly manage any incident that

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

occurs so as to minimize injury and other forms of loss for all parties. A well-managed workplace safety program can benefit the District and its employees in countless ways.

In order to achieve these goals, the District has a Safety Manual outlining the policies and procedures regarding employee health and safety, which apply to Main Office and Operations employees. Each and every employee must become familiar with ~~these~~ this manuals and become an active participant in the workplace safety program.

To encourage and reward workplace safety the District has an Employee Safety Policy and Safety Award Program. Safety incentives will be awarded as outlined in the Safety Award Program. Employees at every level are encouraged to actively participate in the Safety program in order to promote a safe work environment.

**Management:** Management is accountable for preventing workplace incidents, injuries and illnesses. Management will provide top-level support of safety program initiatives. Management will consider all employee suggestions for achieving a safer, healthier workplace. Management also will keep informed about workplace safety and health hazards, and it will regularly review the company safety and health program. Management includes all directors, superintendents, and department managers responsible for directing employees.

**Supervision:** Supervisors are responsible for supervising and ensuring workers are trained in safe work practices. Supervisors must enforce all applicable safety rules and work to eliminate hazardous conditions. Supervisors shall lead safety by example. Supervision includes all leads, foreman, or as otherwise defined, that is responsible for the direct oversight of employees performing the work.

**Safety Committee:** The safety committee will include an employee representative from each department who is responsible for recommending safety and health improvements in the workplace. The committees ~~is~~ are also responsible for identifying hazards and unsafe work practices, identifying corrective actions, removing obstacles to incident prevention and helping the district evaluate the accident and illness prevention program.

**Employees:** All employees are expected and encouraged to participate in safety and health program activities including the following: reporting hazards, unsafe work practices, and accidents immediately to their supervisor, safety ~~superintendent~~ manager, or safety committee representative no matter how minor; wearing required personal protective equipment as applicable to the task or environment; and participating in and supporting safety committee activities. Employees must maintain their work areas and equipment in a safe and orderly manner. Employees are expected to comply with all applicable federal, state, and Cowlitz PUD safe work rules at all times. Employees shall look out for the safety of their coworkers by being a positive safety leader and providing constructive feedback.

**Public Utility District No. 1 of Cowlitz County**  
Employee Handbook

**502 Work Schedules**

Effective Date: 6/8/2010

Revision Date: 8/23/2022

Unless otherwise specified in any collective bargaining agreement or memorandum of understanding, the following definitions generally shall apply: Cowlitz PUD provides essential services to our customers

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

twenty-four hours a day, seven days a week. This type of service necessitates a variety of shift schedules and flexibility in regular starting times, lunch hours and rest periods.

Cowlitz PUD's formal customer business hours at the Main Office are 7:00 a.m. to 5:30 p.m. Monday through Thursday; and the Operations employees work from 6:00 a.m. to 4:30 p.m. Monday through Thursday. Lunch breaks usually fall within the middle hours of the workday. Main Office employees are entitled to a thirty-minute lunch break and two fifteen-minute rest periods; and most Operations employees are entitled to a thirty-minute lunch and two fifteen-minute breaks. Scheduling of the rest periods are subject to supervisory approval and should not interfere with service to our customers. Notwithstanding the above, employees work hours may be modified by the [General Manager](#), Department Director, or supervisor as long as it is consistent with the Collective Bargaining Agreement.

#### Rest periods/breaks

To the extent possible, rest periods will be provided in the middle of work periods. Since this time is counted and paid as time worked, employees must not be absent from their workstations beyond the allotted rest period time. No employee will be required to work more than three consecutive hours without a rest break unless the nature of the work allows intermittent rest periods as allowed by law, or a written agreement provides otherwise. See Human Resources with any questions in this regard.

#### Lunch (meal) breaks

Supervisors will schedule meal periods to accommodate operating requirements. Meal periods will be scheduled within two to five hours from the beginning of the employee's shift absent a written agreement to the contrary. Most employees will be relieved of all active responsibilities and restrictions during meal periods and will not be compensated for that time. Further clarification on relief from active duty can be obtained from Human Resources.

### 503 Visitors in the Workplace

Effective Date: 6/8/2010

Revision Date: 1/1/2021

## **Public Utility District No. 1 of Cowlitz County**

### **Employee Handbook**

Cowlitz PUD's workplace is a diverse environment of offices, warehouses and job sites where many different activities are performed. Visitors to the workplace are generally welcome, and in some settings even encouraged. However, only visitors who are properly authorized may be on Cowlitz PUD premises. Appropriate precautions and limitations on visitation are necessary to protect health and safety, safeguard employee and customer welfare, protect Cowlitz PUD property and facilities, reduce potential distractions and disturbances, and to maintain productivity and regulatory compliance.

All visitors should enter Cowlitz PUD at the reception area. Authorized visitors will receive a "Visitor Badge," be asked to sign-in, and then, **must be escorted to their destination**. Employees are responsible for the conduct and safety of their visitors. If any unauthorized individual is observed on Cowlitz PUD's premises, employees should immediately direct the individual to the reception area.

#### **Children**

In general, the workplace is not an appropriate place for minor children on a frequent or continuing basis, as children in the workplace create an atmosphere that may not be conducive to achievement of Cowlitz PUD's specific goals and objectives.

Children may be brought to workplaces by parent employees for brief visits or other times when common sense would dictate that it is more efficient for the employee to bring the child into an office (following or before a physician's appointment, for example). The parent employee must supervise the child(ren) on such visits. It is generally not appropriate for children of any age to be in the workplace on a regular basis, such as after school each school day or on regularly scheduled school holidays. Parent employees may not leave such child(ren) in the custody of another Cowlitz PUD employee, even for brief periods of time. Absent extenuating circumstances that do not permit notice, employees should check with their Supervisor before bringing a child to the workplace.

#### **Animals**

With the exception of service dogs or other service animals used to guide or assist persons with disabilities, employees may not bring animals to Cowlitz PUD workplaces. Employees need to contact Human Resources in advance regarding service animals in the workplace.

### **504 Emergencies and Disaster Preparedness**

Effective Date: 6/8/2010

Revision Date: 2/1/2019

## *Public Utility District No. 1 of Cowlitz County*

### Employee Handbook

Knowing what to do in an emergency increases the chances that everyone will come through safely. Employees will be informed of any specific emergency preparedness plans during the new employee orientation, and which may be reviewed from time to time at the discretion of the Safety Superintendent. Additionally, please keep the following in mind:

If advised to evacuate the building, either for a drill or in an actual emergency, do so calmly but swiftly and stay out of the building until advised that it is safe to return.

In case of an earthquake, personnel should drop to the floor; seek protective cover under or near desks, tables or chairs in a kneeling or sitting position with hands holding onto the desk, table or chair legs. Stay there until movement ends, then exit the building and go to the predetermined assembly location.

In case of fire, turn on the alarm and leave the building through the closest available door and go to the predetermined assembly location. Do not try to put out the fire unless professionally trained to do so.

# *Public Utility District No. 1 of Cowlitz County*

Employee Handbook

## **505 Smoking-Free Workplace**

Effective Date: 6/8/2010

Revision Date: 4/17/2015

All Cowlitz PUD buildings and vehicles are non-smoking areas; this includes the use of electronic cigarettes. No smoking will be allowed in buildings or vehicles by employees, citizens and/or other visitors. Smoking is allowed only during break or meal periods in outdoor areas at least 25 feet from any door, window, or air vent unless otherwise posted as “No Smoking”.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 506 Overtime

Effective Date: 6/8/2010

Revision Date: 9/27/2016

When operating requirements or other needs cannot be met during regular working hours, non-exempt and bargaining unit employees will be given the opportunity to volunteer for overtime work assignments or may be assigned overtime when required to meet operational needs. All overtime work must receive the supervisor's prior authorization. It will be at the discretion of the District on how overtime will be allocated among employees. Overtime compensation is paid to all bargaining unit employees at double the rate and time and a half for [non-union](#), non-exempt employees in accordance with federal and state wage and hour restrictions. Overtime compensation rates may be adjusted as specified pursuant to Cowlitz PUD policy, Collective Bargaining Agreement, or Memorandum of Understanding. Cowlitz PUD may provide compensatory time in lieu of overtime pay absent a written agreement to the contrary.

Failure to work scheduled overtime or overtime worked without prior authorization from the supervisor may result in disciplinary action, up to and including possible termination of employment.

Cowlitz PUD recognizes that exempt employees may incur irregular and excessive work hours due to special projects, evening meetings and emergency situations. With approval from the General Manager, exempt employees may be granted time off during regular work hours in recognition of such situations.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **507 Use of Cowlitz PUD Property**

Effective Date: 6/8/2010

Revision Date: 2/1/2019

Unless determined otherwise by a Director or the General Manager of the District, Cowlitz PUD supplies, materials and equipment must be used strictly for business purposes.

If an employee is entrusted with Cowlitz PUD equipment, materials or property, the employee and/or Director is responsible for its proper use and is expected to immediately report any required repair or needed maintenance of such equipment.

In the event it is necessary for an employee to remove equipment from Cowlitz PUD premises, it is expected that the employee shall exercise reasonable care in connection with the offsite use of the equipment. An employee shall receive authorization for removing equipment such as computers from their Department Director or supervisor.

An employee's violation of this policy can result in disciplinary action, including termination.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 508 Information Technology

Effective Date: 6/8/2010

Revision Date: 2/1/2019

The following is a general description and supplements the Information Technology (IT) Security Procedures, located on the Cowlitz PUD Intranet site, which are under separate cover, and which may be modified from time to time. To the extent this general description is in conflict with the IT Security Procedures, the provisions in the IT Security Procedures control. Cowlitz PUD employees may use computers extensively to perform their jobs. A few rules are necessary so that everyone can get the maximum benefit from Cowlitz PUD's investment in technology. [Please reference the IT Acceptable Use Procedure which can be found on the intranet for additional information.](#)

**Use of Technology** is restricted for Cowlitz PUD business use only. Any and all communication made by technology may be subject to disclosure under the Washington Public Records Act; employees should keep this in mind whenever communicating electronically. Further, the General Manager and his or her designee may access such records for legitimate business reasons associated with bona fide Cowlitz PUD matters. This may include, but is not limited to, responding to a request from a supervisor for the purpose of ensuring compliance with employee conduct rules, for investigations, to facilitate responding to public records requests, or any other business purpose in the discretion of the General Manager.

#### Software

In order to protect Cowlitz PUD's computer systems from malware and ensure that the software used is compatible with Cowlitz PUD computers, only software purchased or approved by Cowlitz PUD may be installed on Cowlitz PUD computers. Before installing any software not purchased by Cowlitz PUD, an employee must check with the System Administrator and obtain written approval. In some cases, the System Administrator may want to install the software him/herself. Games and other non-business-related software may not be installed on Cowlitz PUD computers, ~~or used on Cowlitz PUD time. Software purchased by Cowlitz PUD is for legitimate Cowlitz PUD business use only and may not be copied or taken home.~~

#### Hardware

[IT supports a variety of hardware devices which must be purchased and approved by IT. Employees needing computer hardware beyond that which is typically provided, must request such hardware from the IT Department. Each request will be considered on a case-by-case basis. No unapproved equipment may be connected to Cowlitz PUD networks without the IT department's written permission. Hardware and peripherals not purchased through IT are not supported.](#)

#### Changes in Policy

Because changes in technology tend to occur frequently, this Policy may need to change accordingly. Whenever a policy change occurs, it will be disseminated by the Department Director and/or Human

## *Public Utility District No. 1 of Cowlitz County*

### Employee Handbook

Resources and Employees are expected to contact their Supervisor with any questions that may occur. A change in Policy that the Employee was provided but did not make a reasonable effort to understand will not be considered an excuse for violation of the Policy.

### **509 Reporting Improper Governmental Action**

Effective Date: 6/8/2010

Revision Date: 4/17/2015

Cowlitz PUD recognizes and supports the right of every employee to report and to be protected from unlawful forms of retaliation for reporting improper governmental action.

An employee shall not directly or indirectly use or attempt to use the employee's official authority or influence for the purpose of intimidating, threatening, coercing, commanding, influencing, or attempting to intimidate, threaten, coerce, command, or influence any individual for the purpose of interfering with the right of the individual to disclose to a supervisor, Auditor, General Counsel, Human Resources, or General Manager, information concerning improper governmental action.

Nothing in this section authorizes an individual to disclose information otherwise prohibited by law, except to the extent that information is necessary to substantiate the whistleblower complaint, in which case information may be disclosed to a supervisor, Auditor, General Counsel, Human Resources, or General Manager by the whistleblower for the limited purpose of providing information related to the complaint. Any such information provided to an employee's supervisor, Auditor, General Counsel, Human Resources, or General Manager under the authority of this subsection may not be further disclosed, pursuant to RCW 42.41.030.

"Improper governmental action" is action by a local official or employee that is undertaken in the performance of his or her duties that violates law, exceeds his or her authority, is a danger to the public health or safety, or is a gross waste of public funds. It generally does not include management's personnel decisions based on a bona fide business reason or rationale. "Improper governmental action" does not include personnel actions, for which other remedies exist, including but not limited to employee grievances, complaints, appointments, promotions, transfers, assignments, reassignments, reinstatements, restorations, reemployments, performance evaluations, reductions in pay, dismissals, suspensions, demotions, violations of the state civil service law, alleged labor agreement violations, reprimands, claims of discriminatory treatment, or any action which may be taken under chapter 41.06 RCW, or other disciplinary action except as provided in RCW 42.41.030.

## *Public Utility District No. 1 of Cowlitz County*

### *Employee Handbook*

An employee must make a reasonable attempt to ascertain the correctness of the information furnished and may be subject to disciplinary actions, including, but not limited to, suspension or termination, for knowingly furnishing false information.

#### **What Employees Can Do**

If employees suspect improper governmental action, report it immediately, in writing, to a supervisor, Auditor, General Counsel or General Manager. In case of emergency, employees may report directly to outside agencies responsible for investigation and enforcement of the law that is believed to have been violated. Emergency means a circumstance that, if not immediately changed, may cause injury or damage to persons or property. Employees must state all facts upon which they allege improper governmental action.

#### **What Cowlitz PUD Can Do**

The recipient of the factual allegations shall report them promptly to Human Resources. Human Resources shall respond by making a determination based on the alleged facts whether improper governmental action has been established or request additional facts or investigate the factual allegations and the employee will be advised of the result of the investigation. The foregoing shall be performed in consult with the General Counsel. While confidentiality is an important consideration, it cannot be guaranteed.

#### **Non-Retaliation**

Employees will not be retaliated against if they act in good faith and provide information in accordance with this policy. If an employee feels that they have experienced retaliation, please provide written notice of the charge no later than 30 days after the occurrence to Human Resources, General Counsel or General Manager. Cowlitz PUD will respond within 30 days. If an employee is dissatisfied with the response, a hearing may be requested before an administrative law judge.

Cowlitz PUD officials and employees are prohibited from taking retaliatory action against an employee because he or she has, in good faith, reported an improper governmental action in accordance with these policies and procedures.

Employees who believe that they have been retaliated against for reporting an improper governmental action should advise their supervisor, General Counsel or General Manager. Cowlitz PUD officials and supervisors shall take appropriate action to investigate and address complaints of retaliation.

If the employee feels the supervisor, General Counsel or General Manager, has not satisfactorily resolved the employee's complaint that he or she has been retaliated against in violation of this policy, the employee may obtain protection under this policy, and pursuant to state law, may appeal the decision and/or action taken by filing a written notice to the General Manager that, (1) specifies the alleged retaliation action, and (2) specifies the relief requested.

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

Cowlitz PUD employees shall provide a copy of their written charge to the General Manager no later than 30 days after the occurrence of the alleged retaliatory action. Cowlitz PUD shall respond within 30 days to the charge of retaliatory action.

After receiving either the response of Cowlitz PUD, or 30 days after the delivery of the charge to Cowlitz PUD, the employee may request a hearing before a state administrative law judge to establish that a retaliatory action occurred and to obtain appropriate relief provided by law. An employee seeking a hearing should deliver the request for hearing to the General Manager within 15 days of delivery of Cowlitz PUD's response to the charge of retaliatory action, or 45 days of delivery of the charge of retaliation to Cowlitz PUD for response.

Upon the receipt of a request for hearing, Cowlitz PUD shall apply within five working days to the State Office of Administrative Hearings for an adjudicative proceeding before an administrative law judge. Cowlitz PUD will consider all recommendations provided by the administrative law judge and will take the appropriate action with all parties involved.

Cowlitz PUD employees who fail to make a good faith attempt to follow Cowlitz PUD's procedures in reporting improper governmental action shall not receive the protection provided by Cowlitz PUD in these procedures.

#### **For More Information**

For additional information about outside agencies, the hearing process, or any other rights, please consult Human Resources

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 510 Workplace Violence

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Workplace violence is any verbal or physical action that is communicated or perceived as a threat, harassment, abuse, intimidation, or personal contact that produces fear, causes bodily harm, or damage to property. Even joking about violent acts is prohibited. Workplace violence may involve family, friends, strangers, co-workers, elected officials, or members of the public. Cowlitz PUD does not tolerate acts of violence towards Cowlitz PUD employees, the public, or property. All acts of violence are treated seriously, and each act of violence will be dealt with promptly and appropriately using administrative, managerial, legal and disciplinary actions to minimize risk to employees and property.

All employees are responsible for refraining from participating in violent actions and for immediately reporting to their Department Director, Human Resources, Safety ~~Superintendent~~ Manager or Cowlitz PUD General Manager. ~~Any violent actions,~~ threatening or dangerous situations that occur within the workplace or affect their work requirements shall be reported. Employees who feel an immediate threat and cannot reach appropriate personnel should call 911 and leave the area as soon as possible. Unless otherwise provided by law, employees may not bring weapons of any type into the workplace.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 511 Professional Communication

Effective Date: 6/8/2010

Revision Date: 2/1/2018

The success of our working relationship depends on the trust and respect we have for each other. We work very hard to maintain open and honest communications with our employees to ensure they feel valued, appreciated, and respected. To do our best work, communications between employees at all levels are required to be honest, courteous, respectful and professional.

When we are talking to or about each other, our vendors, or our customers, what we say and how we say it matters. Personal attacks, negative or derogatory name-calling, insults, sarcasm, abusive language of any kind, threats of violence, and profanity are examples of inappropriate communication that we consider to be disrespectful and unprofessional under this expectation.

Constructive criticism of employee actions should be directed at the employee or their supervisor as appropriate. Employees should not criticize other employees in front of a customer or any other third party. However, in situations where the Employee does not feel safe communicating through the chain of command, he/she may communicate directly with Human Resources. Failure to follow these common-sense guidelines could result in disciplinary action.

#### ***Gossip-Free Zone***

Sharing or disclosing personal information about other employees that is unrelated to the performance of your job duties may diminish or damage the reputation of the person about whom you are speaking. This type of communication or gossip negatively impacts our team dynamic and is contrary to our standard for professional communication.

Gossip includes sharing or disclosing personal information about one person to another person or other people that is negative, inflammatory, derogatory, embarrassing, demeaning, hurtful, or otherwise would

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

be considered private by the person about whom you are speaking. This type of behavior conflicts with our notions of teamwork, integrity, respect, professionalism and diversity.

### 512 Respectful Workplace Expectations

Effective Date: 12/1/2016

Revision Date: 2/1/2019

Cowlitz PUD is committed to creating a work environment in which all individuals are treated with respect, courtesy and dignity. Harassment and discrimination of any employee on the basis of his or her race, religion, color, disability, national origin, age, gender, gender identity (including gender expression), sexual orientation or preference, pregnancy, injured worker status, marital status/familial status, veteran status, family leave, or any other bases protected by local, state and federal law is strictly prohibited. Bullying behavior, **regardless of protected class status**, that meets the criteria described below is also strictly prohibited.

Conduct prohibited by this policy is not only unacceptable in the workplace but also in any work-related setting outside the workplace, including job sites, field inspection locations, business trips, business meetings, and business-related social events, and District sponsored events. This policy prohibits any unprofessional or disrespectful behavior that the District determines is negatively impacting our employees, our team dynamic, or the ability of our team members to do their best work.

***Violations of this policy will result in discipline up to and including immediate termination.***

#### Examples of Prohibited Protected Class Behavior:

Examples of conduct based on protected class that are prohibited by this policy, regardless of whether sexual or non-sexual in nature, and regardless of protected class status include, but are not limited to:

- Offering or implying an employment-related reward (such as a promotion, raise, training, overtime, assignments, etc.) in exchange for sexual favors, submission to sexual conduct, etc.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- Threatening or taking negative employment action (such as termination, demotion, denial of leave) if sexual conduct or some other action tied to a protected category is rejected or refused.
- Unwelcome verbal or physical conduct that shows hostility toward a person when the conduct has the purpose or effect of substantially interfering with a person's work performance, or creating an intimidating, hostile, or offensive work environment.
- Unwelcome intentional touching of another person or other unwanted intentional physical contact (including patting, pinching, rubbing, brushing against, etc.).
- Unwelcome questions or comments about another person's sexual activities, dating, personal or intimate relationships, appearance, race, religion, age, or any other category protected by law.
- Unwelcome whistling, staring, or leering at another person. Unwelcome sexually suggestive or flirtatious gifts, letters, notes, e-mail, or voice mail. Unwelcome sexual advances or flirtations.
- Conduct or remarks that are sexually suggestive or that otherwise demean or demonstrates hostility toward another person (regardless of whether sexual in nature) for any reason (e.g., jokes, taunts, negative stereotyping, and threats).
- Displaying or circulating pictures, objects, or written materials (e.g., graffiti, cartoons, photographs, pinups, calendars, magazines, figurines, etc.) that are sexually suggestive, demeaning or otherwise demonstrate hostility toward another person (regardless of whether sexual in nature) for any reason.
- Slandering, ridiculing, maligning or spreading negative and derogatory information about a person or his/her family or spreading rumors and gossip about individuals.
- Shouting or yelling at a person in anger or frustration or otherwise behaving in a confrontational or disruptive manner in a public or private setting. Non-verbal gestures, posture or glances that can convey threatening messages.
- Any other unwelcome gestures, symbols, comments, name-calling or behavior that we may deem to be inappropriate in our sole discretion that is directed towards another person, relates to another person, or that negatively impacts another employee's ability to perform his/her job.

### Examples of Prohibited Bullying Behavior

"Bullying" type behavior or conduct that may be prohibited by this policy includes behaviors described in the examples above that, while not necessarily based on a protected class, are nevertheless so severe or pervasive that they would offend a reasonable person in the workplace.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Severe or pervasive behavior that, for example, embarrasses, humiliates, offends or degrades another person may violate this policy. Other examples of behavior that may, in some circumstances, rise to the level of bullying under this policy include severe or pervasive shouting or yelling at a person in anger or frustration or otherwise behaving in a confrontational or disruptive manner in a public or private setting, as well as severe or pervasive non-verbal gestures, posture or glances that convey threatening or intimidating messages or intent. Remember that while you may have a legitimate reason to express your anger, frustration or disappointment about or towards another person, you are still expected to communicate your concerns and feelings in a professional and respectful manner at all times.

Unless knowingly or intentionally disrespectful or aggressive in nature, incidental or insignificant behaviors common among diverse workgroups generally are not considered bullying, even if considered irritating, distracting, disappointing or frustrating, and neither are interpersonal conflicts arising from diverse personality types and/or communication styles. The communication, delivery and provision of non-discriminatory performance-based coaching, discipline, employee reviews and other performance related feedback or decisions, by themselves, are also not considered bullying under this policy.

Although this policy provides examples of harassment and workplace bullying behaviors, it is not intended to be a complete list. Situations may vary, and the District will decide, in its sole discretion, whether behavior meets the severe or pervasive standard of this policy and, if so, what action to take in response. If you have any questions about what constitutes harassing or bullying behavior prohibited under this policy, please speak with your supervisor or Human Resources.

### Prohibitions Apply to Conduct Outside of Work

The prohibitions outlined in this policy extend to behavior, comments and actions occurring at work or work-related sites, **as well as** to similarly inappropriate behavior, comments and actions that are posted on, in or through social media forums or platforms (e.g., twitter, Facebook, Instagram, snapchat, blogs, etc.) directed at or pertaining to another District employee, customer or vendor, **regardless of when the information was posted** (e.g., before or after your scheduled shift, weekends, holidays, etc.). Under no circumstances may you ever post or share customer or confidential company information with persons who are not affiliated with the District.

This policy strictly prohibits the use of social media, regular media, telephone calls, and personal interactions outside of work to:

- Share, post, publish, or otherwise communicate publicly disparaging information about our customers (both internal and external);
- Share, post, or publish information or otherwise **engage in conduct** that rises to the level of harassment, discrimination, bullying or retaliation expressly prohibited by this policy against another employee of the District, regardless of whether directed specifically at the employee or made in direct or indirect reference to the employee;

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- Share, post, publish or otherwise communicate confidential or proprietary District information without prior express written permission;
- Share, post, publish or otherwise communicate information publicly to others that is inconsistent with the District's mission, values and/or the District's commitment to creating a harassment and discrimination-free workplace marked by respect and dignity for all people, cultures and demographics.

For example, social media posts, videos, recordings (audio, visual, digital, etc.) and first-hand observations by others of behavior by an employee that expresses or communicates hate or is intended to disparage or denigrate another religion, race, culture, national origin, gender, gender identity, sexual orientation, or other protected class demographic, may lead to discipline, up to and including termination. Social media posts, videos, recordings (audio, visual, digital, etc.) and first-hand observations by others of an employee threatening violence or inciting others to engage in violence towards another person, group of people or a protected class demographic will similarly be grounds for discipline, up to and including termination.

***The provisions of this policy do not apply to protected concerted activity and will not be implemented or enforced in a manner that would infringe upon an employee's rights under Section 7 of the National Labor Relations Act or, if applicable, freedom of speech protections afforded to public employees.***

### **Reporting an Incident of Harassment, Discrimination, Bullying or Retaliation:**

If at any point you believe you have been subjected to harassment, discrimination, retaliation, bullying or any other conduct prohibited under our policies, you must report the matter immediately to your Supervisor or Human Resources. If you do not feel comfortable making a report to your direct Supervisor, you may bypass him or her and report the complaint directly to Human Resources, the Department Director, or the General Manager.

Nothing in this policy precludes employees from seeking remedies for unlawful conduct through state or federal administrative agencies or the courts. We encourage employees to bring matters to our attention so that we can address and resolve them quickly.

### **Investigation:**

Once the District receives a complaint of harassment, discrimination or retaliation, we will investigate the matter and determine in our sole discretion what, if any, action to take to address the situation. We expect you and all of our employees to cooperate fully with any investigation. Dishonesty or lack of cooperation during an investigation will be grounds for immediate termination.

Confidentiality will be maintained throughout the investigatory process to the extent consistent with an adequate investigation and appropriate corrective action. However, confidentiality cannot be guaranteed. In a similar respect, we may elect, at our discretion, to not disclose or discuss with the employee who made the complaint or other employees the results of our investigation or the actions taken in response to a complaint.

## *Public Utility District No. 1 of Cowlitz County*

### Employee Handbook

#### **Retaliation Prohibited:**

The District strictly prohibits retaliation against any individual who reports discrimination, harassment and bullying or who participates in an investigation of such reports. These policies may not be used as a basis for excluding or separating individuals from participating in business or work-related social activities or discussions in order to avoid allegations of harassment.

If you believe you have been retaliated against in violation of this policy, please report it immediately to your Supervisor, Human Resources or the General Manager. Any employee who engages in retaliation or knowingly makes a false report of harassment, discrimination, bullying or retaliation will be subject to discipline, up to and including immediate termination.

#### **513 Political Activity**

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Cowlitz PUD recognizes and fully supports the right of employees to vote, to express their opinions, to hold any political office, and to participate in any political campaign. However, for the good of Cowlitz PUD, and to avoid potential conflict of interest, please keep in mind the following workplace expectations.

- Public facilities or resources may not be used to assist the campaign of a candidate or the promotion or opposition of a ballot proposition. Employees may not participate in political activity during work hours. This includes, but is not limited to, posting campaign signs and literature, and emailing support for a candidate or a position on Twitter, Facebook, or other social networking websites.
- Employees may not wear or display campaign buttons or literature during business hours.
- Employees participating in fund raising or other campaign activities are encouraged to make clear that they do not represent Cowlitz PUD and Cowlitz PUD does not necessarily endorse the candidate or position.
- Employees may not attempt to obtain political contributions from coworkers through threat or promise of differential treatment on the job.
- There may be occasions in which Cowlitz PUD may legally lobby the legislature or take an official position on a proposed law that affects Cowlitz PUD. When this occurs, Employees who support these efforts at the express request of the General Manager, do not violate this policy.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **514 Solicitation**

Effective Date: 6/8/2010

Revision Date: 12/11/2012

We want employees to be able to do their jobs without undue distractions. Therefore, the following guidelines apply to soliciting in the workplace. Except for authorized Cowlitz PUD programs, and with prior Supervisor approval, individuals, whether employed by Cowlitz PUD or not, are not permitted to solicit, survey, petition, or distribute literature on PUD premises, except as specified in this Policy. This restriction includes uninvited charity solicitors, salespersons, questionnaire surveys, union organizers or any form of solicitation or distribution. Employees may only approach each other regarding reasonable forms of solicitation during non-work time (including before and after the start of all involved employees' work periods, and during breaks and meal periods) and in non-work areas.

Limitations on solicitations also apply to Cowlitz PUD bulletin boards. These bulletin boards may only be used to post official Cowlitz PUD notices or notices of other Cowlitz PUD sponsored activities.

**600 Health Insurance Portability and Accountability Act (HIPAA) Security Policy**

Effective Date: 12/1/2016

Revision Date:

**Objective:**

Cowlitz PUD has adopted a policy (please see Human Resources for the complete policy) that protects the privacy and confidentiality of protected health information (PHI) whenever it is used by District representatives. The private and confidential use of such information will be the responsibility of all individuals with job duties requiring access to PHI in the course of their jobs.

**Protected Health Information Defined:**

PHI refers to individually identifiable health information received by the District's group health plans or received by a health care provider, health plan or health care clearinghouse that relates to the past or present health of an individual or to payment of health care claims. PHI information includes medical conditions, health status, claims experience, medical histories, physical examinations, genetic information and evidence of disability.

**The HIPAA Compliance Officer:**

The District has designated the Human Resources Manager as the HIPAA compliance officer (HCO), and any questions or issues regarding PHI should be presented to the HCO for resolution. The HCO is also charged with the responsibility for:

- Issuing procedural guidelines for access for PHI.
- Developing a matrix for personnel who will need access to PHI.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- Developing guidelines for describing how and when PHI will be maintained, used, transferred or transmitted.

#### **Annual Activities Necessitating Use of PHI:**

Annually or more frequently as necessary, Cowlitz PUD performs enrollment, changes in enrollment and payroll deductions; provides assistance in claims problem resolution and explanation of benefits issues; and assists in coordination of benefits with other providers. Some or all of these activities may require the use or transmission of PHI. Thus, all information related to these processes will be maintained in confidence, and employees will not disclose PHI from these processes for employment-related actions, except as provided by administrative procedures approved by the HCO. General rules follow:

- Disclosures that do not qualify as PHI-protected disclosures include:
  - Disclosure of PHI to the individual to whom the PHI belongs.
  - Requests by providers for treatment or payment.
  - Disclosures requested to be made to authorized parties by the individual PHI holder.
  - Disclosures to government agencies for reporting or enforcement purposes.
  - Disclosures to workers' compensation providers and those authorized by the workers' compensation providers.
- Information regarding whether an individual is covered by a plan for claims processing purposes may be disclosed.
- Information external to the health plan is not considered PHI if the information is being furnished for claims processing purposes involving workers' compensation or short- or long-term disability and medical information received to verify Americans with Disabilities Act (ADA) or Family and Medical Leave Act (FMLA) status.

#### **Records Retention:**

Personnel records and disclosures of PHI will be maintained for a period of six years as required by federal law, unless a state law requires a longer retention period. Records that have been maintained for the maximum interval will be destroyed in a manner to ensure that such data are not compromised in the future in accordance with the company record destruction policy.

**601 Family and Medical Leave (FMLA); Washington Family Leave Act; Human Rights Pregnancy Disability Leave Requirement; Washington Paid Family and Medical Leave**

Effective Date: 6/8/2010  
Revision Date: 1/23/2024

Both State and Federal leave laws may apply to an Employee depending on their particular situation. Sometimes legally required leave runs concurrently; sometimes it does not run concurrently. What is considered a qualifying disability or event, how leave is tracked, the extent to which confirmation of a qualifying disability or event must be documented, and notice requirements can be complicated. The following is considered a guideline to assist employees and notify them of benefits they might otherwise not be aware of and is not intended to be comprehensive of all the potentially applicable laws related to disability leave, and how they may interact with each other. Employees should check with Human Resources for clarification of their eligibility to take leave so that there are no misunderstandings. Cowlitz PUD will provide any and all leave an employee is legally entitled to receive.

The following process is used to request FMLA:

**FMLA Eligibility for Leave**

Employees, who have been employed for at least 12 months and have worked for Cowlitz PUD for at least 1250 hours during the previous 12-month period, may receive up to 12 workweeks of leave every 12-month period to care for:

- Birth of a newborn child, or placement of a newly adopted child, or foster care child;
- Care of a family member with a serious health condition, which encompasses both physical and psychological care; [☞](#)

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- The Employee's own serious health condition that makes the employee unable to perform his or her job functions. An employee is unable to perform their job functions if the employee is unable to work at all or is unable to perform at least one of their essential job functions; [or](#)
- [Any qualifying exigency arising out of the fact that the employee's spouse, son, daughter, or parent is a military member on covered active duty or call to covered active duty status.](#)

FMLA leave begins with the first day of the leave, regardless of whether it is paid or unpaid. The entitlement of 12 workweeks of leave within 12 months will be determined by a "rolling" 12-month period measured backward from the date the employee takes leave. Each time leave is taken, the remaining leave entitlement will consist of any balance of the 12 weeks that has not been used during the immediately preceding 12 months. For Injured Service Member Leave, the "single 12-month period" begins on the first day the eligible employee takes FMLA leave to care for the injured service member.

#### Example 1:

Joe requests three weeks of FMLA leave to begin on July 31<sup>st</sup>. The District looks back 12 months (from July 31<sup>st</sup> back to the previous August 1<sup>st</sup>) to see if any FMLA leave has been used. Joe has not taken any previous FMLA leave, so he is entitled to the three weeks he requested and has nine more weeks available.

#### Example 2:

Sally requests two weeks of FMLA leave to begin November 1<sup>st</sup>. The District looks back 12 months (from November 1<sup>st</sup> back to the previous November 2<sup>nd</sup>) and sees that Sally had taken four weeks of FMLA leave beginning January 1<sup>st</sup>, four weeks beginning March 1<sup>st</sup>, and three weeks beginning June 1<sup>st</sup>. Sally has taken 11 weeks of FMLA leave in the 12-month period and only has one week of FMLA-protected leave available. After Sally takes the one week in November, she can next take FMLA leave beginning January 1<sup>st</sup> as the days of her previous January leave "roll off" the leave year.

Parental leave taken to care for a newborn or newly adopted child must be completed within 12 months of the child's birth or placement for adoption.

Pursuant to the Washington Family Medical Leave Act, RCW 49.78, leave provided for the birth and care of a child or for placement for adoption or foster care shall be in addition to any leave used by the mother for sickness or temporary disability because of pregnancy or childbirth. The law provides that:

The family leave shall be in addition to any leave for sickness or temporary disability because of pregnancy or childbirth.

Under Washington State Human Rights Commission regulations, a female employee has a right to take an unpaid leave of absence the entire time she is disabled due to pregnancy or childbirth.

Leave under the Family Medical Leave Act runs concurrently with both the Washington Family Leave Act and the state maternity disability leave. However, leave under the Washington Family Leave Act and state

## *Public Utility District No. 1 of Cowlitz County*

### *Employee Handbook*

maternity disability leave does not run concurrently. Therefore, a female employee is entitled to 12 weeks of leave for care and bonding with her newborn after pregnancy disability leave ends.

#### **Notice and Confirmation of Leave**

If employees have a need to take an extended absence from the job for any of the above reasons, they must inform Human Resources, in writing, of the specific reasons for the leave at least 30 days prior to the anticipated date of delivery or placement for adoption or 30 days prior to pre-scheduled medical treatment for the employee or sick family member. If circumstances do not allow giving the required notice, notice must be given as soon as possible.

Prior to approving the request for medical leave, Cowlitz PUD may require certification from a health care provider of the need for and probable duration of the leave requested for a serious health care condition. Such notice must be provided within 15 days of the date it is requested by Cowlitz PUD. Recertification may be requested as often as needed depending on need for continued leave. If planned medical treatment is required, please make a reasonable effort to schedule treatment so as not to unduly disrupt Cowlitz PUD operations.

A return-to-work authorization must be submitted to Human Resources prior to returning to work for an employee who has been out on medical leave for their own medical condition.

#### **Duration of Leave and Methods of Taking Leave**

An eligible employee may take 12 workweeks of leave, which can be taken continuously, intermittently, or on a reduced work schedule, depending on what is medically necessary.

While on family leave, Cowlitz PUD may require employees to periodically report regarding medical status and intention to return to work. Cowlitz PUD may also require employees to obtain subsequent re-certification of the need for continued leave.

#### **Benefits While on Leave**

Employees will be allowed to have the same insurance benefits under the same conditions as before the leave commenced. Employees are required to pay for the portion of the health care and other benefit premiums during the FMLA leave of absence that they were paying prior to the FMLA request. During paid leave, Cowlitz PUD will continue to make payroll deductions for the employee's share of the health care and other premiums. During unpaid leave, employees must continue to make these payments and prior arrangements must be made with Human Resources to the extent possible to avoid delays in benefit continuation.

Cowlitz PUD's payment of the employer-paid portion of premiums is conditioned upon return to work. Except in certain circumstances, if an employee does not return from a family leave, Cowlitz PUD may recover from the employee all insurance premiums paid to continue coverage during the period of leave.

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

Cowlitz PUD requires that employees exhaust accrued PTO, Extended Illness Reserve, Banked Personal Leave, Floating Holidays (can be used in less than 10-hour increments), Leave Sharing Compensation and Compensatory Time during their FMLA leave prior to using leave without pay.

Taking a family leave will not cause an employee to lose any employment benefits which accrued before the start of the leave (e.g., seniority). However, these benefits will not accrue during the family leave period.

The use of any paid or unpaid leave (including leave for a compensable work-related illness or injury, but excluding compensatory time earned under the Fair Labor Standard Act) for a FMLA qualifying event will run concurrently with, and not in addition to, the use of FMLA for that event.

#### **Return from Leave**

Upon returning from a family leave, employees will generally be assigned the same position held when the leave commenced or to a position with equivalent pay, benefits, and other conditions of employment.

A return-to-work authorization must be submitted to Human Resources for an employee who has been out for their own medical condition prior to returning to work.

#### **Caregiver Leave for an Injured Service Member**

FMLA-eligible employees are entitled to FMLA leave to permit a “spouse, son, daughter, parent, or next of kin” to take up to 26 workweeks of leave to care for a “member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness.”

#### **Family Leave Due to a Call to Active Duty**

This benefit provides 12 weeks of FMLA leave for “any qualifying exigency (as the Secretary [of Labor] shall, by regulation, determine) arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.”

#### **Washington Family and Medical Leave Insurance**

Washington’s Paid Family and Medical Leave mandatory insurance program under RCW 50A.04, requires both employees and employers pay premiums beginning January 1, 2019. Employees’ premiums are established by law and will be paid through payroll deduction. Beginning January 1, 2020, qualified employees will then be eligible to receive benefits under the new insurance program if they miss work due to health-related reasons related to themselves, a family member, or certain military connected events, as more fully described in RCW 50A.04. Please see Human Resources if you have questions about this program.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

**Note, as of January 1, 2021 the District is no longer participating in the State's Medical Leave Insurance program and such, no deductions will be payroll deducted from employee's paychecks for the medical leave portion. The District provides an employer-run voluntary plan as allowed by law. The District is still required to payroll deduct the premium for the Family Leave Insurance.**

#### **Patient Protection and Affordable Care Act (PPACA)**

Cowlitz PUD recognizes its obligations under the PPACA. Cowlitz PUD shall furnish its nursing mother employees "reasonable" breaks to express milk for their infants. Cowlitz PUD shall provide:

- 1) A reasonable break time for an employee to express breast milk for her nursing child for one year after the child's birth; and,
- 2) A place, other than a bathroom, that is shielded from view and free from intrusion from co-workers and the public, which may be used by an employee to express breast milk.

#### **Domestic Violence Leave**

Cowlitz PUD provides leave to victims of domestic violence, sexual assault, or stalking ("domestic violence" or "abuse") and their qualifying family members to the extent provided by law. Leave is available to victims of domestic violence, sexual assault, or stalking, or employees with family members (spouse, children, parents, parents-in-law, grandparents, and "a person with whom the employee has a dating relationship") who are victims of such abuse. Employees are entitled to take "reasonable" leave, including leave on an intermittent or reduced-schedule basis, to engage in specified remedial activities relating to the abuse, including participating in legal proceedings; seeking medical treatment or mental health counseling; obtaining social services; or taking other actions to increase the safety of the employee and his/her family members.

Employees must give advance notice of intent to take leave, consistent with Cowlitz PUD's policy for requesting leave. If advance notice cannot be given due to emergency or unforeseen circumstances, notice must be provided no later than the end of the first day leave is taken. Employees may elect to use Personal Leave or Compensatory Time, or other paid time off, or may take unpaid leave. To the extent allowed by law, Cowlitz PUD will maintain health care coverage as if the employee had not taken leave.

Cowlitz PUD may request verification that the employee or family member is a victim of abuse, and that the leave is for one of the covered remedial activities. Verification is satisfied by one or more of the following: (1) a police report indicating that the employee or a family member was a victim of abuse; (2) a court order protecting the employee or a family member; (3) documentation from an attorney, clergy member, medical provider, or other professional from whom assistance was sought; or (4) employee's own credible written statement that he/she or a family member is a victim and needs the leave to seek assistance. Cowlitz PUD will keep the provided information as confidential and will not require disclosure of information beyond the verification material listed above.

#### **Washington Paid Family and Medical Leave**

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Washington Paid Family and Medical Leave is administered by the Washington State Employment Security Department (“ESD”). Employees should contact the Human Resources Department and ESD for more information.

Paid Family and Medical Leave is a mandatory statewide insurance program. If you qualify, this program will allow you to take up to 12 weeks, as needed, if you:

- Welcome a child into your family (through birth, adoption or foster placement);
- Need to care for a seriously ill or injured relative; or
- Need time to prepare for a family member’s pre- and post-deployment activities, as well as time for childcare issues related to a family member’s military deployment.
- Experience the loss of a child.

If you face multiple events in a year, you might be eligible to receive up to 16 weeks.

***Please note, the District is no longer part of the State plan for the medical portion of this program. Employees looking to apply for medical leave due to their own serious health condition, please see Policy 305 – Short Term Disability.***

The State’s family leave program is funded by premiums paid by employees. It is administered by ESD, and all determinations of eligibility are made by ESD, not the District. Employees should contact ESD directly if they have questions about how ESD administers and determines eligibility under the Paid Family Medical Leave program for the Family leave portion. Any differences between this policy and the Paid Family and Medical Leave law now or in the future will be decided by applicable legal requirements.

#### **Taking Leave for Family Leave**

Starting January 1, 2020, employees who have worked 820 hours in the qualifying period (equal to 16 hours a week for a year) can apply to take paid family leave. The 820 hours are cumulative, regardless of the number of employers or jobs someone has during a year. All paid work over the course of the year counts toward the 820 hours, including part-time, seasonal and temporary work.

If ESD grants your application, ESD may give you partial wage replacement as determined by ESD. That means you may receive from ESD a portion of your average weekly pay. The benefit is generally up to 90 percent of your weekly wage, with a minimum of \$100 per week and a maximum of \$1,456-542 per week. If you receive this benefit, you will receive it from ESD rather than your employer.

The District will allow the use of supplemental leave (PTO) while on the Paid Family Leave. You will need to coordinate your use of PTO with Human Resources. If the decision is made to use PTO either in your waiting period or as a supplement to the State paid benefit, the District will not go back in time and adjust your use of PTO once the determination of your State paid benefit is made. Any changes to using PTO must be made by 3pm on Thursday of each week.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

You can keep your health insurance while on protected leave. If you currently contribute to the cost of your health insurance, you must continue to pay your portion of the premium cost while on leave.

The District will not discriminate or retaliate against you for requesting or taking paid leave.

### Notice for Requesting Leave

An employee must provide written notice to Human Resources of the intent to take WashingtonA Paid Family Leave. If the need for leave is foreseeable, notice must be given at least 30 days in advance of the leave. For unforeseeable leave, notice must be given as soon as practicable. The employee's written notice must include the anticipated timing and duration of leave, including which days the employee plans to be on PFML, if intermittent. ESD may temporarily deny or delay benefits if an employee could have given at least 30 days' notice and chose not to do so. After receiving the employee's notice of the need for leave, Human Resources will advise the employee whether the employee is eligible for job protection under PFML or FMLA or both.

The employee must make a reasonable effort to schedule the treatment so as not to unduly disrupt District operations.

If taking leave intermittently, an employee must notify their supervisor and Human Resources at least 30 days in advance or as soon as practicable each time WashingtonA Paid Family Leave is taken so that the District may properly update payroll records and track leave use.

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## 602 Leave Without Pay (LWOP)

Effective Date: 6/8/2010

Revision Date: 1/23/2024

Occasionally, employees may need time off from work for personal reasons that are not covered by any other benefit or leave of absence. In those circumstances, Cowlitz PUD may grant a leave without pay for a specified period, generally up to two (2) months. Requests for leave without pay must be submitted to the employee's Department Director in writing. The Director will review the request with the employee and forward the request to Human Resources with comments for a final decision. Leave without pay will be granted at the sole discretion of the General Manager or designee. The circumstances provided in the

## **Public Utility District No. 1 of Cowlitz County**

### **Employee Handbook**

request for LWOP will determine the length of leave granted. Accrued Personal Leave, Banked Personal Leave, EIR, floating holidays and compensatory time must be exhausted before an unpaid leave is granted. Any employee who goes on LWOP without prior authorization will be subject to disciplinary action up to and including termination. Further, granting of LWOP does not change an at will employee's status or affect the applicability of any Cowlitz PUD policy to the employee.

An employee on leave without pay status shall not by virtue of such status continue to accrue continuous service credits, does not accrue personal leave, and will not be paid for holidays. Health and life insurance coverage will cease unless the employee prepays the premiums. During unpaid leave, employees must continue to make these payments and prior arrangements must be made with Human Resources to the extent possible to avoid delays in benefit continuation. Cowlitz PUD will discontinue health insurance and other insurance coverage for employees and their dependents if the employee does not return to work after the agreed upon end of the leave of absence.

Notwithstanding the foregoing, employees who are on LWOP status due to military leave and FMLA leave may be exempt from this policy and are more specifically addressed in policy #601 and #605 in the Employee Handbook.

### **603 Military Leave**

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Cowlitz PUD recognizes the importance of enabling employees to serve in the military without adverse consequences on their jobs. Leave laws pertaining to military service may apply to an employee member of the military or to the employee who is a spouse or other family member to the person on military service. Determining the applicability of leave laws and their effect on pay and benefits should be determined in consultation with Human Resources.

## *Public Utility District No. 1 of Cowlitz County*

### Employee Handbook

Employees are entitled under Washington Law to take leave of up to 21 days each year, from October 1 through September 30. During military leave employees are entitled to receive their regular pay, regardless of whether they were ordered to military service or volunteered.

Under the federal Uniformed Services Employment and Reemployment Rights Act (USERRA) employees may take leave for military duty or training. Employees on military duty are entitled to continued health insurance coverage for themselves and their dependents up to 24 months while on military leave under terms similar to COBRA. An employee's pension benefits protections are also applicable under USERRA.

Leave for military spouses and other family members may be available under the federal Family and Medical Leave Act, the Washington State Military Family Leave Act and the Washington Family Leave Act, depending on the circumstances. There are notice requirements that apply to leave for military service.

### **604 Bereavement and Funeral Leave**

Effective Date: 12/11/2012

Revision Date: 9/27/2016

All employees shall be granted unpaid bereavement leave up to three (3) workdays within a 30-day period upon the time of death of the employee's family member, and up to ten (10) workdays within a reasonable 30-day period upon the death of a spouse or child. Bereavement leave may be used for qualifying family members in the case of imminent death, but the total bereavement leave portion shall not exceed the three or ten workday limitations. For the purposes of this section, the employee's family members are

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

defined as: the spouse, domestic partner, son, daughter, parents, brother, sister (or the step and in-law equivalents), grandparents, grandchildren, or other relatives living in the employee's household.

Cowlitz PUD may require that employees exhaust accrued Personal Leave, Banked Personal Leave, Floating Holidays, and Compensatory Time prior to using leave without pay, if the time exceeds the three (3) or ten (10) workday limitation.

Bereavement leave in excess of the days permitted or for other relatives may be granted with the approval of the supervisor and charged to an employee's bank of other paid leave available.

Time off with pay shall be allowed for purposes of attending the funeral of a District employee.

Notwithstanding the foregoing, employees may choose to use other forms of paid leave in lieu of benefits afforded in this section.

## **701 Standards of Conduct & Discipline**

Effective Date: 6/8/2010

Revision Date: 1/1/2021

We all succeed when we respect the needs and interests of the public, Cowlitz PUD, and our co-workers. Sometimes, however, it is necessary for Cowlitz PUD to discipline employees based on violations of our policies or our reasonable performance and conduct expectations. Consistent with the at-will employment relationship, Cowlitz PUD reserves the right to review each situation independently and to

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

make a decision at its sole and absolute discretion about what it deems to be appropriate discipline in all cases, up to and including immediate discharge.

Employment with Cowlitz PUD is at will unless there is a written agreement that expressly provides to the contrary signed by the General Manager. No employee is entitled to progressive discipline unless there is an express written agreement to the contrary. Instead, progressive discipline is only warranted if the General Manager in his/her sole and absolute discretion determines that it would be appropriate for the situation.

For represented employees, Cowlitz PUD adheres to procedures set forth in the applicable labor agreement but may impose disciplinary action including discharge, for violation of the terms set forth in this Handbook which are consistent with its “management rights” under the collective bargaining agreement.

Some examples of conduct that may lead to immediate discipline or discharge include, but are not limited to the following:

- Insubordination, which shall mean a breach of any reasonable work expectation regardless of whether it is cited in the Handbook;
- Unauthorized release of Cowlitz PUD, customer or coworker information;
- Repeated swearing or verbal abuse toward another while on duty;
- Falsifications of any time records, personnel, or other Cowlitz PUD records;
- Unauthorized taking or removal of Cowlitz PUD funds or property;
- Dishonesty;
- Discrimination against or harassment of coworkers, vendors, or members of the public;
- Possession, consumption, or being under the influence of alcohol or a controlled substance at work or on Cowlitz PUD premises;
- Deliberate damage to or misuse of Cowlitz PUD property;
- Bringing a weapon onto Cowlitz PUD property;
- Fighting or threatening to fight with another employee;
- Serious misconduct of any kind;
- Poor performance;
- Absenteeism, tardiness, unexcused absence, or failure to report when expected;
- Failure to comply with safety or security rules and procedures;
- Violation of any Cowlitz PUD policy;
- Improper handling of cash or other financial transactions;
- Sleeping on the job;
- Failure to report immediately any accident or injury which occurs on the job to the Department Director and/or supervisor;
- Failure to cooperate or be truthful in any lawful internal investigations pursuant to a lawful request to do so;
- Smoking in non-smoking areas or Cowlitz PUD vehicles;
- An employee’s failure to report off duty criminal charges brought against said employee;
- Any conviction and/or no contest plea violating State and/or Federal law that interferes with the business of the District;

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

- Violating a rule pertaining to employee conduct contained in this Employee Handbook or rule under a Collective Bargaining Agreement;
- Engaging in unprotected off duty conduct which tends to expose Cowlitz PUD employees to an unlawful hostile work environment or create a risk that Cowlitz PUD may breach a duty to its employees. Examples include, but are not limited to, allegations of offenses for violence against another, domestic violence, or other offenses the underlying behavior which, if committed in the workplace, may place Cowlitz PUD employees at risk;
- Off-duty and on-duty conduct, which discredits Cowlitz PUD or employee's profession or impairs the employee's on-the-job effectiveness.
- Off duty conduct which causes a reasonable apprehension among Cowlitz PUD employees that the employment environment is unsafe;
- Failure to follow any duty imposed under this Handbook or law which tends to adversely affect Cowlitz PUD;
- Interrupting the work of others or otherwise engaging in conduct which infringes on Cowlitz PUD's ability to effectively manage the employee's work schedule.
- Wasting District resources and District time in pursuit of promoting an employee's own views or agendas.
- Conduct inconsistent with common sense.
- Failure to timely make payment of utility bills owing to Cowlitz PUD.
- Failure to make a reasonable attempt to ascertain the correctness of the information furnished to Cowlitz PUD in connection with alleging improper governmental conduct under Policy 520 in this Handbook.
- Failure to adhere to RCW 46.61.667, using a wireless communication device while driving.

**These examples are not all-inclusive; other behavior may also be grounds for immediate discipline or termination if an employee's conduct is detrimental to Cowlitz PUD.**

### 702 Drug and Alcohol Use

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Cowlitz PUD is committed to maintaining a drug and alcohol-free work environment. Notwithstanding other standards imposed by law which may be more lenient, and, because of nature of the services we provide, the often hazardous work we do, and our strong desire to keep employees and the public safe, Cowlitz PUD employees are held to an even higher standard.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Employees are strictly prohibited from possessing, selling, consuming, or being under the influence of any drug (except as authorized by a physician) or alcohol or any use of marijuana while on Cowlitz PUD property, during work hours, in Cowlitz PUD vehicles or engaged in Cowlitz PUD work.

“Under the Influence” shall include, but is not limited to either or both of the following:

- Any measurable alcohol or drug detected by breath or in the bloodstream. For example, upon a test for alcohol any measurable amount of breath alcohol shall be grounds for disciplinary action including termination. This means a reading of above a 0.00 Breath Alcohol Content or its equivalent. Upon a test for unlawful drugs, any measurement shall also be grounds for disciplinary action including termination.
- Obvious intoxication (by either drug or alcohol) where the employee’s ability to perform his or her job functions are lessened to any appreciable degree **and** there are substantial signs of obvious intoxication such as odor of intoxicants, bloodshot and watery eyes, poor balance, or slurred speech.

If an employee is taking prescription drugs that may cause drowsiness or impair mental functioning, the employee must inform his or her supervisor so that he or she can make sure such drugs will not affect the ability to perform the job safely and effectively. Any violation of this policy will result in discipline, up to and including immediate termination.

As a condition of further employment, each employee shall notify his or her supervisor of any alcohol or drug related convictions. Such notification shall be provided no later than five days after such conviction. "Conviction" is defined as a conviction or guilty plea, including a plea of no contest.

Cowlitz PUD encourages employees with drug or alcohol problems to come forward and seek help. If an employee has a drug or alcohol problem, he/she is encouraged to discuss it with management before it affects his or her performance or is discovered by management, Cowlitz PUD will aid in referral to a treatment program and, if possible, hold the employee’s job for his/her return.

### 703 Attendance, Punctuality and Unavailable for Work

Effective Date: 6/8/2010

Revision Date: 2/1/2018

Each employee plays an important role in getting the day's work done for the team, department and the District, and the District is better able to serve the needs of the community when employees consistently meet and exceed performance expectations. We expect you to arrive to work on time ready to begin

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

work at the start of your shift and to remain engaged and productive giving your best efforts for the duration of the shift until the end of each day.

Regular, consistent and predictable attendance is expected and required for all employees, not only because the tools and equipment you need to perform your duties are available only at the District worksites, but also because your participation in teamwork and face-to-face interactions with customers and/or other employees directly impacts our ability to run operations smoothly. *Unexcused* absenteeism or tardiness is disruptive to operations and interferes with the team's ability to satisfy our customers' needs. *Excessive unexcused absenteeism or tardiness will not be tolerated and will result in discipline, up to and including immediate termination.*

### Medical and Personal Appointments

If possible, medical care and other personal appointments should be made for times other than working hours, or if during working hours, during times that would be least disruptive to your team or department. We understand that this is not always possible, and when it is not, we ask that you give your supervisor or Director as much advance notice as possible so that he or she can arrange coverage of your job. We appreciate your help in assuring customer needs are met.

### Unavailable for Work

If you are delayed or unable to come to work for any reason, you are responsible for notifying your supervisor or designee at the earliest possible time prior to the start of your regular work shift so he or she can reassign your work. Contact your supervisor via phone **before** your scheduled start time on the day of your absence or tardy. If you are unable to speak with your supervisor or designee in person, contact Human Resources and provide notice of your anticipated absence or tardy.

Call in each day that you expect to be absent or tardy *unless* your supervisor or Director directs you to call in on a different schedule. Human Resources may also request a medical release from you prior to your return to work if you miss 3 or more workdays due to illness or injury or when you are returning to work following an on-the-job injury or a medical leave of absence. Failure to call in when instructed to do so or to provide the requested medical information may subject you to discipline.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 704 Dress Code & Grooming Standards

Effective Date: 6/8/2010

Revision Date: 2/1/2018

The District is a professional organization, and we expect all District employees to present a professional appearance to promote a positive image to customers and others with whom we do business. We want customers to know that employees care about the details when it comes to the services the District provides, and employees reinforce that message every day in the way employees carry and present themselves to others. The District expects you to use good judgment and taste in matters of personal grooming and to wear appropriate attire and footwear for the workplace given your specified job duties. Your supervisor will advise you of any differences or variations that may apply to you.

#### Appropriate Attire

Attire should be clean, well-fitting and modest with no visible bare midriffs or under garments, or excessive cleavage or bare skin. Footwear should similarly be clean and in good repair and appropriate for the nature of work you perform. Shorts, workout wear, halter tops, excessively tight fitting or revealing clothing (e.g., low cut tops, short skirts (mid-thigh or higher), sheer or “see-through”, etc.), overly loose garments, casual hats worn indoors, and casual flip-flops are not permitted. Clothing or accessory items that could be deemed harassing or offensive to others are also prohibited. Due to the diverse working conditions at the District, your supervisor will advise you of any differences or variations that may apply to you.

#### Tattoos & Piercings

The District understands that tattoos and piercings are a matter of personal preference. While the District does not prohibit the expression of your personality in this way, the District reserves the right to require you to cover offensive tattoos and/or to remove excessive facial piercings while working. Offensive tattoos include, but are not limited to, vulgar language, racial or other discriminatory slurs, epithets, symbols or images, depictions of violence, pornography, sexually graphic or explicit images, and any other images the District may deem inappropriate for the workplace.

#### Personal Hygiene

Personal hygiene is an essential part of doing business and working with other employees, and strong odors caused by poor hygiene or perfumes, scented hair sprays, aftershave lotions, and heavy cigarette, cigar and pipe odor can be offensive or problematic to employees with allergies or heightened sensitivities to smells. The District expects employees to bathe/shower regularly, maintain appropriate oral hygiene, use perfumes, lotions, scents in moderation, and take appropriate steps to mitigate other strong odors on their person and their clothing (e.g., cigarette odor, strong body odor, etc.).

## *Public Utility District No. 1 of Cowlitz County*

### Employee Handbook

#### **Enforcement & Accommodations**

If the supervisor feels personal appearance of an employee is inappropriate, he or she may be asked to leave the workplace until he or she is properly dressed or groomed. Under such circumstance, employees will not be compensated for the time away from work.

If you have questions about whether your attire, tattoos or personal hygiene complies with this expectation, please speak with your supervisor, Director, or Human Resources. ***If your religious beliefs or medical conditions require deviation from these outlined expectations, please contact Human Resources.***

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 705 Inclement Weather

Effective Date: 6/8/2010

Revision Date: 1/1/2021

The public's need for Cowlitz PUD's services may be especially great during inclement weather. Therefore, it is particularly important for employees to report to work during inclement weather if Cowlitz PUD does not declare an emergency closure. We do not want employees to jeopardize their safety. If unable to get to work or if delayed, each employee should try to reach his or her supervisor, Department Director, or Human Resources as soon as possible to let them know. A non-exempt employee may use accrued personal leave during the authorized absence.

In the event that weather conditions are so severe that offices are officially declared closed by the General Manager, and employees are instructed to arrive late, leave early, or stay home, they will be provided greater flexibility in accounting for and making up their time due to their absences. Under these circumstances, employees may have the option of working with their supervisor to flex their schedule over the workweek in which the absence occurred, at the supervisor's discretion. Additionally, when severe weather is predicted and the employee's work assignments allow, the employee and supervisor may arrange in advance for the employee to work from home, rather than report to the office provided the supervisor determines time spent working from home will be productive. If the employee is not able to flex their schedule as described, the deficit work hours will be charge against the employee's PTO bank, or leave without pay, if inadequate PTO accruals exist.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 706 Separation from Employment

Effective Date: 6/8/2010

Revision Date: 2/1/2019

The employment relationship between Cowlitz PUD and its employees is voluntary for both parties. All employees have the right to end the employment relationship if they deem it appropriate. Likewise, for all employees, except those covered by a written agreement to the contrary, Cowlitz PUD can end the relationship at any time for any reason it deems appropriate, so long as the reason is not illegal. If an employee's status is at-will in nature, nothing other than an express written agreement signed by the General Manager or designee will change the employees at will status.

#### **Resignation**

If an employee decides to leave the employ of Cowlitz PUD, he or she is required to give written notice to his or her supervisor. Supervisory and managerial employees should give four weeks' notice. All other employees should give at least two weeks' notice. Cowlitz PUD reserves the right to accept an employee's resignation and may choose to modify their work assignment and access.

Cowlitz PUD reserves the right to accept an employee's resignation to be effective on a date specified upon written submission by the employee. Cowlitz PUD may require the employee enter into a written agreement regarding the conditions under which it would accept such a resignation.

#### **Retirement**

Employees who are retiring from the District are required to give written notice to his or her supervisor, Department Director or Human Resources. Supervisor and managerial employees should give eight weeks' notice. All other employees should give at least four weeks' notice.

#### **Separation-related Procedures**

Separating and laid off employees are ~~required~~ asked to participate in an exit interview with a member of Cowlitz PUD management staff upon request on or before their last day of work to explore such issues as the reasons for the separation, the employee's suggestions for improving working conditions, any benefits issues, and to collect Cowlitz PUD property. Separating employees who desire Cowlitz PUD to provide references on their employment will be asked to sign an authorization and release form for that purpose. References other than job title and dates of employment will not be given without such a release. Final paychecks are available no later than the next regular pay day.

#### **Abandonment of Position**

An employee who is absent from his/her position for two (2) consecutive workdays without prior authorization from the supervisor or designee shall be considered to have abandoned his/her position, unless in the opinion of the supervisor the failure to notify was clearly beyond the employee's control. Under such circumstances the employee shall be deemed to have voluntarily resigned from their position.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 707 Pre-Employment Drug Screening

Effective Date: 12/1/2016

Revision Date: 1/23/2024

It is the policy of Cowlitz County PUD to make sure that persons hired into positions with safety sensitive functions successfully pass a drug screen prior to employment. All job offers made to persons entering such positions shall be contingent upon the results of said drug screen. This policy applies to both positions covered under DOT regulations (positions requiring a CDL) and other District identified positions with safety sensitive duties.

#### Procedure:

The following are a list of current DOT (positions requiring a CDL) which will be subject to pre-employment drug screens, this list may be subject to change as job titles and job descriptions are added or modified. All DOT drug screens will be handled according to current DOT regulations. DOT drug screens are to be scheduled with our current pre-employment drug screen provider.

Heavy Crew Foreman	Meter Tester
Line Foreman	Meterman Helper/Installer
Working Foreman	Utilityman
Brushing Foreman	Operations Superintendent
Journeyman Lineman	Substation Working Foreman
Service Lineman	Substation Lineman
Apprentice Lineman	Substation Wireman
Head Groundman Class A	Wireman
Groundman	Wireman Dispatcher
Service Lineman Helper	Transformer Maintenance Spill Response Coordinator
Heavy Equipment Operator	Asst. Transformer Maintenance Spill Response Helper
Transformer Maintenceman	Transformer Maintenceman Helper
General Foreman Fleet	Fleet Mechanic Foreman
Lead Fleet Mechanic/Fabricator	Fleet Mechanic
Line Inspector	

The following are a list of current Non-DOT (safety sensitive positions) which will be subject to pre-employment drug screens, this list may be subject to change as job titles and job descriptions are added or modified. Non-DOT drug screens are to be scheduled with our current pre-employment drug screen provider.

Meter Reader	General Manager
Meter Service Representative	Facilities Manager
Meter Service Coordinator	Director of Engineering
Manager System Engineering	Operations Engineer Superintendent
Senior Engineer (Electrical and T&D)	Engineer I, II, III (Electrical and T&D)
Engineering Area Planner I, II & Senior Flagger	Energy Efficiency Specialist/Energy Efficiency Spec. Sr.
	Heavy Equipment Operator Helper

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

Locator	Utility Helper
Landscaper	Relay Department Foreman
Substation Wireman Relay Tech	Storekeeper
Assistant Storekeeper	Warehouseman Helper
Director of Operations	Dispatcher (including NERC Certified)
Distribution Designer	Senior Distribution Designer
Safety Manager	Operations Superintendent (non-DOT holder)
Meter Department Foreman	Meter & Relay Tech
Power & Demand Meterman	Meterman
Apprentice Meterman	Physical Security Coordinator
Director of Power Management	Power Resource Engineer
Senior Power Resource Engineer	Power Resource Analyst
Engineering Drafting Technician I and II	

When a job offer is made to an applicant out of the area, Human Resources personnel will work in coordination with our current pre-employment drug screen provider to find a facility closest to the applicant to complete the drug screening if the applicant is unable to complete the screening through the District approved facility.

## Public Utility District No. 1 of Cowlitz County

### Employee Handbook

#### 708 Drug Testing - CDL Card Holders

Effective Date: 6/8/2010

Revision Date: 3/14/2023

Cowlitz PUD has a significant interest in the health and safety of its employees and its customers. In furtherance of that interest, all employees whose job duties require them to maintain a commercial driver's license ("CDL employees") shall be subject to Cowlitz PUD's drug and alcohol testing policy. If, during testing and enforcement of this policy concerning CDL employees, Cowlitz PUD determines an employee has violated the terms of the *Drug Testing Policy – CDL Card Holder*, the employee shall be subject to disciplinary action including termination.

This policy outlines the following requirements for CDL employees.

- 1) All CDL employees who are using, manufacturing, dispensing or distributing, or who are in the possession of, or impaired by drugs and/or alcohol when reporting for duty, while on duty, when on a Cowlitz PUD job site or on Cowlitz PUD premises constitute a threat to the health, safety and security of themselves, their coworkers and members of the public and shall be removed from duty and shall be subject to disciplinary action up to and including termination. Such behavior is prohibited.
- 2) All CDL employees shall be subject to specific drug and/or alcohol testing as required by federal law through an independent third party. Testing shall be conducted in a manner that assures accuracy, reliability and privacy.
- 3) All CDL employees who are reasonably suspected of not being fit for duty due to drug and/or alcohol use or misuse shall be suspended from job duties with pay pending an investigation and verification of their condition. All CDL employees who test positive for drugs and/or alcohol above 0.00 shall be removed from duty and shall be subject to disciplinary action up to and including termination.
- 4) Confidentiality shall be maintained throughout the drug/alcohol testing process conducted by an independent third party. All positive drug/alcohol test results shall be forwarded to a Medical Review Officer (MRO) for review. The MRO shall review the individual's medical history and shall afford the employee an opportunity to offer any clarifying information that would explain a positive test result. Human Resources will maintain results of such tests in a separate file from the employee's general personnel file until such time as the test results may be used in a disciplinary action. In cases where disciplinary action results from a positive test result, such information will be shared only with those in a supervisory capacity and/or in a collective bargaining unit representation capacity involved in that action.
- 5) Analytical urine testing will be conducted in accordance with Federal guidelines addressing Commercial Driver's License certifications. An initial drug screen will be conducted on each specimen after a split sample is provided to the laboratory. For those specimens that are positive, a confirmation Gas Chromatography/Mass Spectrometry shall be performed. A positive test result, above the minimum thresholds set by the Federal regulation and verified by the MRO, will be considered a violation of this policy.

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

- 6) Tests for alcohol concentration will be conducted by using the National Highway Traffic Safety Administration approved evidential breath testing devices operated by trained technicians/professionals. An employee who tests above 0.00 will be re-tested within 15 to 20 minutes of the first test. The second test is considered a confirmatory test. A confirmatory alcohol level above 0.00 will be considered a positive test and a violation of this policy.
- 7) Any CDL employees who refuse to comply with a request for testing, who provides false information in connection with a test or who attempts to falsify test results through tampering, manipulation, contamination, adulteration or substitution shall be removed from duty immediately. A refusal shall be treated as insubordination and shall be recorded as a positive test with the employee subject to disciplinary action up to and including termination.

#### **Pre-Employment Federal Motor Carrier Safety Administration Clearinghouse Queries**

Applicants considered for a position requiring a CDL shall register and give consent to the District and the District's Third-Party Consortia in the Federal Motor Carrier Safety Administration (FMCSA) Clearinghouse. The District and/or the Third-Party Consortia will run a full query to determine if any violations exist.

#### **Pre-Employment Drug Testing**

All applicants considered for a position requiring a CDL or a safety sensitive position, or both, shall undergo drug testing prior to employment. Receipt by Cowlitz PUD of a negative drug test result prior to employment will disqualify an applicant.

#### **Reasonable Cause Testing for All Cowlitz PUD Employees**

Any employee, even employees not holding CDLs, are subject to a fitness for duty evaluation including a drug and/or alcohol test when there is reasonable suspicion of impairment immediately prior, during or immediately after performing job duties or while on Cowlitz PUD job sites or Cowlitz PUD premises. A referral for testing will be made on the basis of specific, reasonable and articulable facts. Such referrals will be made by supervisory personnel who are trained to detect the signs and symptoms of drug and/or alcohol use.

Refusal to participate in the test as requested shall constitute insubordination and be deemed a positive test in violation of the policies set forth in this Handbook.

#### **Post-Accident Testing**

All employees are required to be tested if they are involved in an accident involving a Cowlitz PUD vehicle that results in: a fatality; an injury requiring immediate attention at a medical facility, with the employee receiving a criminal or traffic citation under state or local law; or a vehicle being towed from the scene and the employee receiving a criminal or traffic citation under state or local law. Following an accident under the above circumstances, employees will be tested as soon as possible, but no later than eight (8) hours after the accident for alcohol testing and thirty-two (32) hours for drug testing. Employees involved in accidents must refrain from alcohol use for eight hours following the accident or until a drug/alcohol

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

test is administered. Employees who leave the scene of an accident without proper authorization prior to testing will be considered to have refused the test and will be subject to discipline up to and including discharge.

#### **Random Testing**

All CDL employees will be subject to random, unannounced drug and/or alcohol testing. CDL employees' names will be selected by a computer-generated list supplied by an outside company. Every CDL employee has an equal chance of being chosen when the random list is generated regardless of whether they have been tested previously.

If an employee sent in for a random drug and/or alcohol testing receives a negative inconclusive test result, a negative unreadable test result or a negative diluted test result, the employee will be required to go back into the testing facility immediately for an additional test.

#### **Return-to-Duty Testing**

All CDL employees who previously tested positive on a drug and/or alcohol test and who, under the disciplinary policy, are allowed to return to work must test negative prior to being released by a Substance Abuse Professional for duty. Such employees shall be required to undergo frequent random drug and/or alcohol testing at their own expense during the period of re-entry as part of their return-to-work agreement.

#### **Federal Motor Carrier Safety Administration Clearinghouse Queries**

Annually beginning January 6, 2020, the District is required by the Federal Motor Carrier Safety Administration (FMCSA) to complete annual limited queries on each of our CDL drivers. If there is a record that exists in the FMCSA, within 24 hours, the driver will be required to create an account with the FMCSA and the District or Third-Party Consortia must run a full query on the employee. It is required that all CDL drivers sign an authorization form, giving the District and Third-Party Consortia the ability to run limited queries.

#### **Notification of Drug and Alcohol Violation**

Employers are required to report the following drug and alcohol violations to the Federal Motor Carrier Safety Administration (FMCSA):

- An alcohol confirmation test result with an alcohol concentration of 0.04 or greater.
- A CDL driver's refusal to submit a DOT test for drug or alcohol use.
- Actual knowledge, as defined in 382.107.
- Negative return to duty test results.
- The date the driver successfully completed all follow-up tests as ordered by a substance abuse professional.

## ***Public Utility District No. 1 of Cowlitz County***

### **Employee Handbook**

#### **Notification of Criminal or Driving Convictions**

All CDL employees are required to notify Cowlitz PUD of any convictions under a criminal drug statute or driving while under the influence of intoxicants statute within five (5) days of conviction. Failure to report such a conviction or to report any moving violation involving drugs or alcohol causing the loss of a driver's license by state or local law enforcement will result in discipline up to and including discharge.

Any CDL employee who tests positive for drugs may request a test of the split sample within seventy-two (72) hours of notification. The cost of the split sample test will be borne by the employee making the request.

#### **Legal Use of Prescription Drugs**

The use of any legally prescribed drug and/or non-prescription medication which carries a warning label indicating that mental functioning, motor skills or judgment will be adversely affected must be reported to supervisory personnel prior to operating equipment requiring a CDL. It is the CDL employee's responsibility to remove him/her from service if he/she is experiencing any adverse effects from medication.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### Appendix A – Benefits

BENEFITS	Full-Time Employee	Part-Time Employee*	Limited Duration Employee	Temporary Employee	Intern
Medical	X	X	X		
Dental	X	X	X		
Vision	X	X	X		
Prescription Drug Benefits	X	X	X		
Pension Plan through DRS**	X	X	X	X	
Deferred Compensation Plan (457)**	X	X	X	X	
401(k) Savings Plan**	X	X			
Roth 401(k) Savings Plan**	X	X			
VEBA**	X	X			
Washington Paid Family and Medical Leave	X	X	X	X	X
Short Term Disability	X	X	X	X	
Long Term Disability	X				
Group Life Insurance**	X	X	X		
Additional Life Insurance**	X	X	X		
Employee Assistance Program**	X	X	X	X	X
<a href="#">District Wellness Program</a>	<a href="#">X</a>	<a href="#">X</a>	<a href="#">X</a>	<a href="#">X</a>	<a href="#">X</a>
Holidays	X	X	X		
Early Holiday Release***	X	X	X	X	X
Personal Time Off	X	X	X		
Sick Leave				X	X
Family Leave	X	X	X		
Medical Leave	X	X	X		
Military Leave	X	X	X		
Jury Duty Leave	X	X	X		
Cowlitz PUD Credit Union**	X	X	X	X	X
Tuition Reimbursement	X				

\*Benefits for Part-time employees are at a pro-rated amount. Please see Human Resources for more information.

\*\*Benefits are effective the first day of employment with the District.

\*\*\*Early Holiday Release may not be applicable to all employees due to the nature of their jobs.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### Appendix B – Policies outside of the Employee Handbook

The District has a number of Board approved policies that lie outside of the Employee Handbook that pertain to your employment at the District. Below is a list of policies and where to locate them.

#### **Administrative Policies:**

- Compensation Policy
- Records Management Policy
- Cyber Security Policy
- Communications Policy
- Workplace Violence Policy

#### **Business Operation Policies:**

- Procurement and Purchasing Policy
- Employee Safety Policy
- Educational Assistance Policy
- Travel and Other Expenses Reimbursement Policy
- Mobile Phone or Device Stipend Policy
- Vehicle Use Policy

Policy volumes can be located on the Cowlitz PUD intranet at: <http://mypud/policies.php>.

**Public Utility District No. 1 of Cowlitz County**  
Employee Handbook

**Appendix C – Employee Handbook Acknowledgement Form**

**EMPLOYEE ACKNOWLEDGEMENT FORM**

I acknowledge that I have been informed of where to locate the Employee Handbook, and I understand that it is my responsibility to read and comply with the policies contained in this Handbook and any revisions made to it. I have also had the opportunity to ask Human Resources questions on matters I did not initially understand. If I receive a new or updated section of this Handbook, I will ask Human Resources to explain anything I do not understand. **I agree that this Handbook is not an employment agreement or contract for employment.**

I understand that this Handbook, approved by the Board on ~~January 23, 2024~~ February 25, 2025, supersedes any prior handbooks or policy manuals regarding employment with Cowlitz PUD and that Cowlitz PUD may add to, modify, or delete any of the policies and procedures in this Handbook.

I agree to act in a manner consistent with the general guidelines as stated in this handbook.

**Non-Represented Employee’s Only:**

I have been told, and understand, that my employment is “at will” which means it may be terminated at any time, with or without cause or notice. I understand that I may be demoted, my job responsibilities may change, or my salary and/or benefits altered after I accept employment with Cowlitz PUD, with or without cause or notice.

**Represented Employee’s Only:**

If I am subject to a collective bargaining agreement, and this handbook conflicts with the collective bargaining agreement, it is that agreement that will control.

EMPLOYEE’S NAME (printed): \_\_\_\_\_

EMPLOYEE’S SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **INTRODUCTION**

Welcome to the Public Utility District #1 of Cowlitz County, Washington. We are pleased to have you on our team. We hope your employment here will be a source of great personal and professional satisfaction. As an employee of Cowlitz PUD, you are part of a team of dedicated and conscientious professionals working for the long-term benefit and service to the residents of Cowlitz County.

Please spend the time necessary to review and understand this Handbook. Your knowledge of the employee expectations set forth herein will be presumed during your employment with Cowlitz PUD. This Handbook should be kept throughout your employment. It sets out the basic guidelines and rules regarding the personnel policies of Cowlitz PUD.

Even though this Handbook is not a contract, it is intended to reduce any confusion which may arise from unwritten or inconsistent policies and supersedes any previous policies or manuals. It is impossible for any handbook to cover all events or circumstances which could arise, and this Handbook does not promise specific treatment in a specific situation. Management may approach a specific situation as it deems in the best interest of Cowlitz PUD, including any situation in which particular action is required to comply with applicable law. If you need additional information, talk to your supervisor or to Human Resources.

The General Manager and/or Board may from time to time make modifications to the Employee Handbook. All approved changes will be reviewed by employees and acknowledged via the Employee Handbook Acknowledgement form, which can be located in Appendix B.

### **A BRIEF HISTORY**

Public Utility District No. 1 of Cowlitz County is a publicly owned municipal corporation of the State of Washington whose purpose is to efficiently generate, transmit and distribute electrical energy. The PUD is owned by the residents of Cowlitz County and operates on revenues from the sales of its services. The PUD has limited statutory authority to levy property taxes but typically elects annually to waive its right to collect such taxes.

Prior to the existence of Public Utility Districts (PUDs) the private utilities of Washington State were very reluctant to extend service into rural areas. Many families cooked on wood stoves and used kerosene lamps for light. An effort to correct this situation resulted in an initiative known as the Grange Power Bill. In 1930 this bill was approved by the voters of Washington State and became the legal basis for our PUDs.

In 1936 the citizens of Cowlitz County voted to create their own PUD and elected three commissioners to accomplish the task. At that time, the county was served by three private utilities. The City of Longview had Washington Gas and Electric Company, the Kelso and Castle Rock areas were served by the Puget Sound Power and Light Company, and the Kalama-Woodland areas received service from the Northwestern Electric Company. By May of 1948, the PUD had, through the sale of Electric Revenue Bonds, not only purchased systems from all three utilities (placing county electric service under one utility) but had also provided for the construction of its first rural water system.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

Cowlitz PUD owns a 70-megawatt hydroelectric project (Swift No. 2) on the Lewis River in Southwest Washington. Cowlitz PUD has been at the forefront of wind development in the State of Washington owning 46% of the output from the 205-megawatt White Creek Wind Project, completed in 2007, and 30% of the 100-megawatt Harvest Wind Project, which became operational in 2009. Both wind projects are located in Klickitat County, Washington.

Today Cowlitz PUD has an annual operating budget of more than \$250 million and we are approaching the 53,000-customer mark. Among the 21 PUDs that supply electricity to homes and businesses in Washington, Cowlitz is the second largest purchaser of power from the Bonneville Power Administration and is the second largest power retailer, only trailing Snohomish PUD.

### **CUSTOMER RELATIONS**

Every employee represents Cowlitz PUD to our customers and the public. The way we do our jobs presents an image of our entire organization. Customers judge all of us by how they are treated by employees of Cowlitz PUD. Therefore, it is a priority of Cowlitz PUD that you professionally extend the utmost assistance to District customers and potential customers. This includes being courteous, friendly, helpful, and prompt.

### **APPLICATION OF HANDBOOK**

This Handbook applies to all employees of Cowlitz PUD, except where noted otherwise herein. If there is any conflict between the provisions of this Handbook and any collective bargaining agreement to which the PUD is party, such agreement shall control. In the event any collective bargaining agreement provides additional benefits not conferred by this Handbook, those benefits shall supplement this Handbook.

This Handbook is not a contract but is intended to provide employees with a general understanding of our personnel policies. Employees should familiarize themselves with the contents of this Handbook, for it will answer many common questions concerning employment with Cowlitz PUD. Please keep in mind Cowlitz PUD has discretion in deciding whether to apply the Handbook's policies in a particular situation.

The employment relationship is voluntary. That is, either you or Cowlitz PUD has the right to end the employment relationship at any time and for any lawful reason. Unless there is a written agreement to the contrary, all employees of Cowlitz PUD are employed at-will. This Handbook shall not be interpreted as constituting a contract for employment. You are required to acknowledge receipt of this Handbook by signing the attached Employee Acknowledgement Form.

In order to retain necessary flexibility in the administration of policies and procedures, Cowlitz PUD reserves the right to revise or eliminate any of the policies and/or benefits described in this Handbook at any time, except as such right maybe modified by written agreement entered into by the Commission, General Manager or the Collective Bargaining Agreement. Only the General Manager, or the Board acting collectively, is authorized to agree to any terms of employment.

### **MODIFICATION OF EMPLOYEE HANDBOOK**

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

This Handbook was adopted by Resolution #2727 of the Board of Commissioners on September 27, 2016. Pursuant to the terms of Resolution #2631 the General Manager has authority to modify the terms of this Handbook upon notice to the Board of material modifications.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **101 Equal Employment Opportunity**

Effective Date: 6/8/2010

Revision Date: 2/25/2025

***Cowlitz PUD is an Equal Opportunity Employer.*** All employees have the right to work in a discrimination-free environment as required by law. Cowlitz PUD will not permit or condone any unlawful discrimination in the workplace. All employment decisions will be made as required by law without regard to race, color, sex (including pregnancy, gender identity and sexual orientation), creed, religion, age, marital status, national origin, the presence of any sensory, mental or physical disability, genetic information, veteran status, or any other protected characteristic under applicable federal, state or local laws, including but not limited to the Washington Law Against Discrimination, Title VII of the Civil Rights Act of 1964, and the American with Disabilities Act of 1990. Any employee who is experiencing or witnesses conduct that he/she feels is discriminatory, should immediately report this to their supervisor, Human Resources, or the General Manager, so that Cowlitz PUD can take appropriate action. Employees can raise concerns and make reports without the fear of reprisal.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 102 Business Ethics and Conduct

Effective Date: 6/8/2010

Revision Date: 2/25/2025

The successful business operation and reputation of Cowlitz PUD is built upon the principles of fair dealing and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The continued success of Cowlitz PUD is dependent upon our customers' trust, and we are dedicated to preserving that trust. Employees owe a duty to Cowlitz PUD and its customers to act in a way that will merit the continued trust and confidence of the public.

Specifically, employees must abide by the following:

1. No Cowlitz PUD employee may use his or her position to secure special privileges or exemptions for himself, herself, or others.
2. No employee may, directly or indirectly, give, receive, or agree to give or receive any compensation, gift, reward, or gratuity from a source except Cowlitz PUD, in return for his or her services as an employee. This section does not apply to:
  - (1) instances where a gift, reward, or gratuity is deemed “de minimis” and does not improperly influence the receiver in carrying out their job responsibilities, as determined by the Auditor and/or CFO, or
  - (2) Where the General Manager, Auditor, or CFO receives or provides compensation, or a gift, reward, or gratuity pursuant to a board-approved policy, provided where the General Manager is the recipient, only the Board President and the General Counsel may declare an item di minimis. If any gift is received by any employee from other than from Cowlitz PUD, it must be reported by the employee to his or her supervisor, even if the employee believes the gift is likely di minimis. A record will be kept of any items determined to be de minimis. Improper Influence shall not result from the receipt of:
    - Unsolicited flowers, plants, candy, fruit, and floral arrangements;
    - Unsolicited advertising or promotional items of nominal value, such as pens and note pads;
    - Unsolicited tokens or awards of appreciation in the form of a plaque, trophy, desk item, wall memento, or similar item;
    - Unsolicited items received by an employee for the purpose of evaluation or review, if the employee has no personal beneficial interest in the eventual use or acquisition of the item by Cowlitz PUD;
    - Informational material, publications, or subscriptions related to the recipient’s performance of office duties;
    - Food and beverages consumed at hosted receptions where attendance is related to Cowlitz PUD’s elected officials or Cowlitz PUD employee’s official duties;

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

- Travel expenses paid by a trade organization, manufacturers or other parties related to the recipient's performance of official duties;
  - Travel and moving expenses paid to another not employed by Cowlitz PUD for the purposes of recruiting new employees, as may be authorized by separate Cowlitz PUD policy.
  - Other items approved by the General Manager after review by General Counsel or, where the General Manager is the recipient or giver, by the Board President after review by the General Counsel.
3. No employee may accept employment or engage in business or a professional activity that the employee might reasonably expect would require or induce him or her to disclose confidential information acquired by reason of his or her position.
  4. No employee may disclose confidential information gained through employee's position, nor may the employee otherwise use such information for his or her personal gain or benefit.
  5. No employee shall be beneficially interested, directly or indirectly, in any contract which may be made by, through or under the supervision of such employee, in whole or in part, or which may be made for the benefit of his or her office, or accept, directly or indirectly, any compensation, gratuity or reward in connection with such contract from any other person beneficially interested therein, except as provided by law.

Compliance with this policy of business ethics and conduct is the responsibility of every Cowlitz PUD employee. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including termination of employment.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 103 Employment of Relative and Personal Relationships in the Workplace

Effective Date: 6/8/2010

Revision Date: 2/25/2025

#### Employment of Relatives

Hiring of relatives of employees may result in favoritism, reduction in workplace morale, and the public's loss of confidence in the District. As a result, the District limits the hiring of employees as described in this Section.

Doing our best work requires keeping business and professional relationships separate from personal and family relationships. To prevent the appearance of or actual conflicts of interest, the District does not give preferential treatment or special consideration to relatives of the District employees who may apply for positions with the District.

For purposes of this Expectation, "Relative" is defined to include an employee's spouse, domestic partner, parents, siblings, children, aunts, uncles, nephews, nieces, cousins, grandchildren, grandparents, relatives by marriage, step equivalents of all listed and any person with whom the employee lives in a relationship substantially equivalent to marriage.

In the event an employee's relative is considered the most qualified or best candidate for a position, they may be offered the position **only if the General Manager determines all the following criteria exists:**

- a) Neither employee will supervise, appoint, or direct work of, the other as part of their assigned duties. Limited exceptions to this criteria may be permitted by the General Manager for the duration of an emergency; and
- b) the employee is not in a Director, Human Resource or General Manager position; and
- c) neither relative will audit or evaluate the work of the other; and
- d) the working relationship will not create a conflict of interest or the opportunity of favoritism.
- e) Notwithstanding the foregoing, the relative may not be offered a position if other circumstances exist that would place the relatives in a situation of actual or reasonably foreseeable conflict between the District's interest and their own as determined by the General Manager.

**When a department wishes to hire an employee's relative, the department director should submit a written request to the General Manager for final approval on the appointment decision.**

#### Relationships in the Workplace:

When a relationship, as described in this Section, is created by marriage, domestic partnership, or another development, such as a dating relationship, which the District highly discourages, during the time when both involved employees work for the District, the two employees may remain in their existing positions only if they are not in conflict with the restrictions stated in this Policy. If a conflict is created by the new relationship, the District will attempt to arrange a transfer or change in position for one of the employees. If a suitable transfer/change in position is not available, one of the employees will be separated from

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

District service. A reasonable attempt will be made to affect a transfer or separation on the basis of agreement between the involved employees and the District. If a mutual agreement is not practical, the General Manager will determine based on the best interests of the District, which employee will be offered a transfer or separated from service. The General Manager will make the final determination as to whether a situation of conflict exists.

Under no circumstances may the General Manager, a Director or Human Resources staff remain employed with the District if they are in a relationship with another employee, regardless of the other employees' position within the organization. Employees in these sensitive positions (Director, General Manager, Human Resources) acknowledge that such a relationship in the workplace has the potential to substantially affect their ability to perform their job duties.

If the General Manager is in such a relationship, the Board President will oversee the situation in consultation with the General Counsel, with Board action necessary for termination of employment. If a Director or Human Resources personnel is in such a relationship, the General Manager will oversee the situation in consultation with the General Counsel and take action for termination of employment.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **104 Immigration Law Compliance**

Effective Date: 6/8/2010

Revision Date:

Cowlitz PUD is committed to employing only United States citizens and aliens who are authorized to work in the United States and does not unlawfully discriminate on the basis of citizenship or national origin.

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

Employees with questions or seeking more information on immigration law issues are encouraged to contact Human Resources. Employees may raise questions or complaints about immigration law compliance without fear of reprisal.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **105 Residency/Response time Requirement**

Effective Date: 4/12/2005

Revision Date: 1/23/2024

Cowlitz PUD is a utility district owned and operated for the benefit of our customers. In order to provide the best possible service, it is important for employees in the following positions/departments to be available to serve during emergencies and, as such, the District requires they reside within 40 minutes legal driving time to District headquarters or reside within the boundaries of Cowlitz County: Electric Operations Department, Warehouse, Engineering Planners, Facilities Supervisor, Physical Security Coordinator and the Department Heads of the foregoing employees. The General Manager is required to live within Cowlitz County. With respect to the General Manager, only the Board of Commissioners may waive or modify the Residency Requirement.

“Residency” is established when a dwelling is occupied as a primary residence, mail is received at the residence; the dwelling address is used for driver’s license purposes, the federal tax address and for voter registration.

Those employees in the classifications listed above must also maintain a functioning telephone or cellular telephone at their place of residence.

Employees subject to the residency requirement who, prior to implementation of this Policy, reside outside the 40-minute legal driving time, shall not be required to relocate for purposes of satisfying this Policy. However, should the employee decide to take a different position that requires the employee to live within the 40-minute response time or within the boundaries of Cowlitz County, they will be subject to complying with this policy. If the employee decides to relocate after implementation of this Policy, the relocation must be within the 40-minute legal driving time or within the boundaries of Cowlitz County requirement.

New employees in the applicable positions/departments are required to relocate within 40 minutes legal driving time to District headquarters or reside within the boundaries of Cowlitz County and will have nine (9) months from their hire date to meet the residency requirements. If an employee is unable to relocate within the designated time, a committee consisting of Human Resources, department Director and General Manager shall review the circumstances surrounding the employee’s inability to relocate when determining whether or not to terminate employment.

In exceptional situations, the General Manager may at his or her sole discretion, waive or modify the Residency Requirement for a particular employee if it serves the best interest of the District to do so. Employees should not rely on the possibility of a waiver or modification in deciding to accept a position that has a residency requirement.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **106 Conflicts of Interest**

Effective Date: 5/13/2008

Revision Date: 3/14/2023

Employees have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. This policy establishes only the framework within which Cowlitz PUD wishes the business to operate. The purpose of these guidelines is to provide general direction so that employees can seek further clarification on issues related to the subject of acceptable standards of operation. Contact the General Manager for more information or questions about conflicts of interest.

Transactions with outside firms must be conducted within a framework established and controlled by the department director level of Cowlitz PUD. Business dealings with outside firms may not result in bribes, product bonuses, special fringe benefits, unusual price breaks, and other similar windfalls designed to ultimately gain unfair favor or advantage that benefits the employer, the employee, or both. Promotional plans that could be interpreted to involve unusual gain require specific department director level approval.

An actual or potential conflict of interest occurs when an employee is in a position to influence a decision that may result in a personal gain for that employee or for a relative as defined in policy 103 of this manual as a result of Cowlitz PUD's business dealings.

No "presumption of guilt" is created by the mere existence of a relationship with outside firms. However, if employees have any influence on transactions involving purchases, contracts, or leases, it is imperative that they disclose to the General Manager of Cowlitz PUD as soon as possible the existence of any actual or potential conflict of interest so that safeguards can be established to protect all parties.

Personal gain may result not only in cases where an employee or relative has a significant ownership in a firm with which Cowlitz PUD does business, but also when an employee or relative receives any kickback, bribe, substantial gift, or special consideration as a result of any transaction or business dealings involving Cowlitz PUD.

The successful business operation and reputation of Cowlitz PUD is built upon the principles of fair dealing and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The continued success of Cowlitz PUD is dependent upon our customers' trust and we are dedicated to preserving that trust. Employees owe a duty to Cowlitz PUD and its customers to act in a way that will merit the continued trust and confidence of the public.

Cowlitz PUD will comply with all applicable laws and regulations and expects its employees to conduct business in accordance with the letter, spirit, and intent of all relevant laws and to refrain from any illegal, dishonest, or unethical conduct.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

In general, the use of good judgment, based on high ethical principles, will guide you with respect to lines of acceptable conduct. If a situation arises where it is difficult to determine the proper course of action, the matter should be discussed openly with your immediate supervisor and, if necessary, with Human Resources for advice and consultation.

Compliance with this policy of business ethics and conduct is the responsibility of every Cowlitz PUD employee. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including possible termination of employment.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **107 Outside Employment**

Effective Date: 6/8/2010

Revision Date: 1/1/2021

Employees may hold outside jobs as long as they meet the performance standards of their job with Cowlitz PUD. All employees will be judged by the same performance standards and will be subject to Cowlitz PUD's scheduling demands, regardless of any existing outside work requirements.

If Cowlitz PUD determines that an employee's outside work interferes with performance or the ability to meet the requirements of Cowlitz PUD as they are modified from time to time, the employee may be asked to terminate the outside employment if he or she wishes to remain employed with Cowlitz PUD.

If an employee is out on family or medical leaves of absence, working for an outside employer is prohibited.

Outside employment that constitutes a conflict of interest is prohibited, unless said conflict is waived by the General Manager in writing. Employees may not use Cowlitz PUD facilities, tools, materials, or equipment for outside employment.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **108 Disability Accommodation**

Effective Date: 6/8/2010

Revision Date: 2/25/2025

Cowlitz PUD is committed to complying fully with the Americans with Disabilities Act (ADA) and ensuring equal opportunity in employment for qualified persons with disabilities. All employment practices and activities are conducted on a non-discriminatory basis.

Hiring procedures have been reviewed and provide persons with disabilities meaningful employment opportunities. Pre-employment inquiries are made only regarding an applicant's ability to perform the duties of the position.

Post-job offer medical examinations are required only for those positions in which there is a bona fide job-related physical requirement. They are given to all persons entering the position only after a conditional job offer. A conditional job offer will be withdrawn following a medical examination only if the applicant cannot perform the essential job functions even with a reasonable accommodation or would pose a significant risk of substantial harm to the health or safety of the applicant or others. Medical records will be kept separate and confidential.

Qualified individuals with disabilities are entitled to equal pay and other forms of compensation (or changes in compensation), benefits, job assignments, classifications, organizational structures, position descriptions, lines of progression and seniority lists. Leave of all types will be available to all employees on an equal basis.

Cowlitz PUD is also committed to not discriminating against any qualified employees or applicants because they are related to or associated with a person with a disability. Cowlitz PUD will follow any applicable state or local law that provides individuals with disabilities greater protection than the ADA.

This policy is neither exhaustive nor exclusive. Cowlitz PUD is committed to taking other actions necessary to ensure equal employment opportunity for persons with disabilities in accordance with the ADA and all other applicable federal, state, and local laws.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 201 Employment Categories

Effective Date: 6/8/2010

Revision Date: 2/25/2025

At Cowlitz PUD, we want employees to understand how wages, benefits and job duties are affected by employment classification and job description or title. Cowlitz PUD has a classification system that groups positions for compensation purposes based on similar knowledge, complexity, accountability and working conditions. More information about the classification system is available from Human Resources.

Unless otherwise specified in the collective bargaining agreement, the following are the main employee categories used throughout this Handbook. Employees are considered “at will” regardless of the category they are assigned to unless there is a written agreement to the contrary.

**Regular Full-Time Employee:** An employee who is employed to work more than 30 hours per work week on a continuing basis. Please note that only hours worked in excess of 40 hours per week entitles an employee to overtime if categorized in a non-exempt position. Employees in this category are entitled to the full complement of benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Regular Part-time Employee:** An employee who is employed to work 30 hours a week or less on a continuing basis. Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Limited Duration Employee:** An employee who is employed to work more than 30 hours per work week for a specified project or a specified amount of time who is entitled to medical, dental, vision, paid holidays, and personal leave. Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Temporary Employee:** An employee working a full or part-time schedule for a specified project or a period of less than one year (i.e., on call, seasonal, emergency staff appointment, etc.). Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Intern:** An employee working full time or part time while in school for a short-term period, usually a semester-long (no longer than three months in duration) to gain work experience in their field of study. Employees in this category are entitled to limited benefits offered by Cowlitz PUD (please see appendix A for a detailed list of benefits).

**Initial Review Period Employee:** An employee whose performance is being evaluated to determine whether further employment in a specific position or with Cowlitz PUD is appropriate. Employees who satisfactorily complete the initial review period will be categorized as Regular Full-Time or Part-Time Employees. The first 365 calendar days of employment constitute the initial review period although the employee remains in an at will status unless modified by a written agreement. The Department

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

Director along with the Human Resources Manager shall have the ability to either extend or reduce the initial review period for employees who are not covered by a collective bargaining agreement and may have the ability to extend the initial review period for bargaining unit employees with mutual agreement of the Union. Successful completion of initial review period does not confer on the employee any right to continued employment unless required under a collective bargaining agreement or other written agreement.

**Non-exempt Employee:** Non-exempt employees are entitled to overtime and are not exempt from the minimum wage, overtime, and timecard provisions of the wage and hour laws. Such employees may receive an hourly wage or a salary and are eligible for overtime pay at the following rates: for non-represented employees, one and one-half times the regular rate of pay for all hours worked in excess of 40 hours in the workweek; and for union employees, 2 times the regular rate of pay for all hours worked in excess of 10 hours in the workday unless modified in the applicable collective bargaining agreement. As a public employer, Cowlitz PUD may provide compensatory time in lieu of overtime pay at the rate of time and one half for each hour of overtime worked, absent a written agreement to the contrary.

**Exempt Employee:** An employee who is exempt from the minimum wage, overtime and timecard provisions of the wage and hour laws. Exempt employees include supervisory, administrative, and professional employees who are paid on a salary basis. Some examples include the General Manager and Department Directors. When employees are hired, they will be informed of exempt status. Any employee who believes their status as exempt is incorrect is required to see Human Resources.

\*At the discretion of the General Manager, Exempt Employees with their Directors permission who are working outside of their job scope and work extraordinary hours outside of their normal work schedule may be entitled to receive overtime pay at one and a half times the regular rate of pay for hours worked. This type of work must be discussed by both the Department Director and General Manager at the earliest opportunity so there is an understanding of the work performed.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **202 Performance Evaluations/Salary Administration - Staff Employees**

Effective Date: 6/8/2010

Revision Date: 1/1/2021

Unrepresented employees are encouraged to contact Human Resources or the employee's supervisor for detailed information about Compensation Guidelines, Performance Increases, Reclassification, Retention and Recruitment.

Represented employees should generally consult their Collective Bargaining Agreement and union before contacting HR.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 301 Employee Benefits

Effective Date: 6/8/2010

Revision Date: 2/25/2025

**\*The description of the benefits below are by no means an exhaustive list of the benefit. If you have questions on the complete coverage of this benefit or need more information, please see Human Resources\***

Eligible employees at Cowlitz PUD are provided a wide range of benefits. Programs such as Social Security, workers' compensation, state disability, and unemployment insurance cover all employees in the manner prescribed by law.

Human Resources can identify the programs for which employees are eligible. Details of many of these programs can be found elsewhere in the Employee Handbook. Benefits can change from time to time, and you are encouraged to contact Human Resources if you have questions regarding benefits.

The following benefit programs are currently available to eligible employees (see appendix A for a complete list of benefits by employee classification):

- 401(k) Savings Plan
- Roth 401(k) Savings Plan
- Cowlitz PUD Credit Union
- Deferred Compensation Plan 457
- Dental Insurance
- Tuition Reimbursement
- Employee Assistance Program
- Family Leave
- Health Insurance
- Holidays
- Jury Duty Leave
- Life Insurance
- Additional Life Insurance
- Long Term Care
- Medical Leave
- Sick Leave – Temporary Employees Only
- Military Leave
- Pension Plan through Washington State Department of Retirement Services
- Personal Time Off
- Prescription Drug Benefits
- Short-Term Disability
- VEBA
- Vision Care Insurance

Some benefit programs require contributions from the employee, but most are fully or partially paid by Cowlitz PUD.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **401K Retirement – Staff Only**

The District has established 401k retirement accounts for employees. The District matches up to 4% of the gross wages earned by staff employees. The match for union employees is dictated by the match that is negotiated through the collective bargaining agreement.

Other employee plans may be implemented through future Board action.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 302 Personal Time Off/EIR/HRA-VEBA - Staff Employees

Effective Date: 6/8/2010

Revision Date: 2/25/2025

Personal Time Off (“PTO”) combines vacation and sick leave into a single integrated leave plan for Full-Time Employees. PTO accumulates in lieu of vacation and sick leave. The accumulation may be used for vacation, sickness, and personal days. PTO accrual is limited to a maximum 1,000 hours at the end of any calendar year. At the end of the calendar year, those employees that have over 1,000 hours in their PTO bank as of December 31<sup>st</sup> will receive a check for all PTO over 1,000 hours on the second pay period in January. Except for the initial hire year, each employee shall use at least one week of Personal Leave in each calendar year.

NOTE: The District’s personal leave benefit exceeds the requirement of the Washington State Sick Leave Law, RCW 49.46.210. All accrued personal leave may be used for purposes outlined under the law.

A new Full-Time Employee’s anniversary date for purposes of accruing PTO benefits shall be the first day of the month in which the employee works 92 hours.

Except while receiving Occupational Disability, Washington Paid Family and Medical Leave, Long-Term Disability or leave without pay, employees shall accrue PTO as set forth in this Policy.

In order for the monthly PTO accrual to occur, an employee must have 92 District paid hours in the month. Paid hours can be a combination of worked hours, holiday hours, PTO, floating holidays, EIR, short term disability, paid administrative leave and leave share donations. If employees do not meet the 92-hour requirement by the end of each month, they will not receive that month’s accrual.

An employee will be credited with their Personal Leave accrual as it is earned after completing their first thirty (30) days of continuous employment. At the District’s discretion, a new employee may utilize their PTO prior to their first 30 days of employment if extenuating circumstances occur. While PTO generally accrues according to the following schedule the General Manager may approve an increased rate of accrual not to exceed that of an employee of twenty-five (25) years of service, based on an employee’s past industry experience.

To avoid unfair treatment of current employees, the General Manager in consultation with General Counsel, has discretion, on a case-by-case basis, to credit current employee PTO account balances to provide “catch-up” Personal Leave based on similar criteria afforded to new employees, provided however, that such adjustments do not cause the District to exceed the overall labor budget amount granted by the Board of Commissioners for the year that such adjustments are granted.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### PERSONAL TIME OFF ACCRUAL

Length of Service	Personal Days Per Year	Monthly Accrual Rate
0 through 4 years	20	16.67 Hours
5 through 9 years	25	20.83 Hours
10 through 14 years	27	22.50 Hours
15 through 19 years	31	25.83 Hours
20 through 24 years	33	27.50 Hours
25 through 29 years	35	29.17 Hours
30 years or more	38	31.67 Hours

Additionally, full-time active employees and limited duration employees not represented by a bargaining unit who have completed thirty days of continuous employment will be credited with a pro-rated 5 days of PTO dependent on their hire date and then on each succeeding January 1<sup>st</sup> thereafter, they will receive the 5 days of additional PTO. Inactive employees, except those employees on short-term disability, Workers Compensation Leave, military leave of 15 days or less, or as prescribed by law, will not be eligible for the 5 days of PTO. Part time employees, Limited Duration part time employees, Interns and Limited Duration Part Time Interns will not be eligible for the 5 days of PTO. The additional PTO will be combined with each employee's PTO accruals.

Unplanned PTO may be granted for illnesses and qualifying emergencies. A qualifying emergency is an unforeseen combination of circumstances or the resulting state that calls for immediate action. Requests for absence shall be given as early as practicable, but no later than at the start of the regular shift, to either the Department Director or designee. Cowlitz PUD reserves the right to request medical certification from a licensed physician as deemed necessary for short-notice PTO for illness. Medical releases may be requested by Cowlitz PUD prior to an employee's return to work. Excessive use of unplanned PTO, which interferes with job performance or Cowlitz PUD operations, may subject the employee to disciplinary action. **Employees are expected to retain a sufficient amount of PTO to cover periods of illness or accident.**

An employee will be granted access to his/her PTO for circumstances qualifying under Washington Family Care Law, Washington Paid Family and Medical Leave or approved leave under the Federal Family and Medical Leave Act. FMLA or Workers Compensation Leave requests shall take precedence over the seniority of any employee for the purpose of scheduling PTO. PTO shall be used concurrently with time-off requested under the provisions of Law.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

Upon approval by Cowlitz PUD, PTO may be granted during the calendar year at such times as requested by the employee, after taking into consideration the operations of Cowlitz PUD and the maintenance of adequate service to its customers. All PTO requests and such approvals will be made through the employee's immediate supervisor. Any request for PTO of which would extend over thirty calendar day period (30) may be denied by Cowlitz PUD if at least six (6) months' notice is not given, must have General Manager approval and then only dependent upon Cowlitz PUD's operational needs.

Any employee who has accumulated PTO time and who is retiring from the District, shall be paid his/her accrued PTO and floating holiday balances consistent with the terms of the employers VEBA agreement. When an employee either voluntarily (other than retirement) or is involuntarily separated or is laid off he/she will receive full payout of any owed PTO and floating holiday balances.

Employees may choose to defer PTO cash out to either 401k or DCP provided they have not reached their annual limit as established by IRS guidelines. If electing to defer PTO cash out to either 401k or DCP, the employee must inform Human Resources and Payroll at least two weeks prior to their final day. Any amount of PTO remaining will be subject to the employee's VEBA agreement if retiring or will be cashed out on their final paycheck if they voluntarily or involuntarily separate or are laid off from the District.

When a holiday, as provided in this Handbook falls on a regular workday during an employee's PTO, that day shall be considered a holiday and not deducted from the employee's PTO Bank.

### **PAID SICK LEAVE FOR TEMPORARY EMPLOYEES**

Although temporary employees, including employees hired on a seasonal basis, do not accrue regular Personal Leave, they may be eligible to accrue and use Paid Sick Leave benefits as provided under RCW 49.46.210, depending on the duration of their employment with the District.

#### ***Sick Leave Accrual***

If you are a temporary employee, you will accrue paid Sick Leave benefits at a rate of 1 hour of paid leave for every 40 hours worked. You begin accruing paid Sick Leave on your first day of employment, **but** you are not eligible to use the leave until your 90<sup>th</sup> calendar day of employment.

#### ***Requesting Time Off***

When your need for leave is foreseeable, please provide as much notice as possible of your need for leave and make every effort to schedule outside appointments for times that are least likely to disrupt our business operations. If your need for leave is unexpected, please provide as much notice as possible before your shift begins so that we can arrange for appropriate coverage for your position. If you are out on Sick Leave for 3 or more scheduled workdays, we may require medical documentation prior to your return to work.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

Assuming you have been employed with us for at least 90 days, you may use your accrued paid Sick Leave for a number of qualifying purposes relating to your own illness or injury or that of a family member, pregnancy, or to seek assistance for issues associated with domestic violence or crime victim's leave, military spouse deployment, qualifying military emergencies, and even for certain public health emergencies. Human Resources can provide you with more detailed information about Sick Leave accrual, carry over, qualifying events and authorized uses of your Paid Sick Leave.

### ***Carry Over***

You may carryover a maximum of 40 hours of accrued but unused Sick Leave into the next year.

### ***Payout Upon Separation***

Accrued but unused Sick Leave for temporary employees will be paid out upon separation from employment under any circumstances.

### **Hired as Full/Part Time Employee:**

If an intern is offered a position with the District that makes them eligible for PTO accrual, any sick time accumulated will be converted to the employee's PTO bank.

### **PERSONAL LEAVE PRIOR TO SEPARATION OF EMPLOYMENT DUE TO RETIREMENT (VACATION-OUT) – STAFF ONLY**

Advance notice of an employee's retirement plans provides considerable value to the District in the area of workforce planning. In an effort to incentivize employees to communicate their retirement plans early, the employee's Director and Human Resources Manager may jointly authorize up to sixty (60) calendar days to vacation-out when the employee has sufficient leave balances (PTO and floating holidays) to cover the workdays. Such approval may be granted when the employee has provided an irrevocable letter indicating their retirement date and the start date of planned leave. Advance notice of the vacation-out period must be provided at least twice as early as the length of the requested leave. For example, the employee is required to provide the following advance notice prior to the planned leave start date:

- Up to 7 calendar day vacation-out period requires 14 calendar day advance notice
- Up to 15 calendar day vacation-out period requires 30 calendar day advance notice
- Up to 30 calendar day vacation-out period requires 60 calendar day advance notice
- Up to 60 calendar day vacation-out period requires 120 calendar day advance notice

Advance notification of the vacation-out request is imperative in order to meet the operational needs of the District and to transition the employee's work duties. Therefore, notifications which do not meet the above required time periods may not be approved.

**The specific requirements to satisfy vacation-out requests are as follows:**

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

1. Requests to vacation-out must be submitted in writing to the Department Director and Human Resources Manager; and
2. The request is deemed acceptable by the Director and Human Resources Manager after considering business needs, succession planning, knowledge transfer, budgetary requirements, and other business considerations; and
3. The employee will return to work during the vacation-out period, if requested, to meet business needs; and
4. The employee agrees to provide Human Resources with current contact information at all times during the vacation-out period; and
5. The employee must be eligible for retirement under the Department of Retirement Systems.

### **Continuation of Benefits:**

During the vacation-out period, the employee is considered to be in the regular and active employment of the District and not on a medical leave of absence. The employee is therefore eligible for continued benefit coverage (Medical, Dental, Vision, Life Insurance, Accidental Death, and Dismemberment (AD&D), Health Reimbursement Arrangement (HRA VEBA), PERS Retirement, Deferred Compensation plan, 401k, Short Term and Long-Term Disability) to the extent allowed by contract, policy, or summary plan description. In the event that an employee becomes eligible for Short Term Disability (STD) during the vacation-out period, STD benefits will cease on the pre-established retirement date. While on vacation-out, the employee remains eligible for open enrollment as applicable to the benefit program.

While the employee is on the vacation-out, the District will continue to pay the employer contribution toward the employee's insurance premiums, HRA VEBA account, PERS retirement plan, group life insurance and AD&D, and 401k. The District will continue to deduct all employee portions of insurance premiums, HRA VEBA account, PERS retirement plan, group life insurance and AD&D, and 401k deductions from the employee's paycheck in the same manner as if the employee was actively working. For the period of the vacation-out, the employee continues to accrue planned leave in accordance with the Personal Leave Policy. Planned leave which is accrued during the vacation-out period cannot be used during that period and will be cashed out during the normal payroll processing cycle as per the employee's VEBA Group Agreement following the employee's last day of employment (the last day of the vacation-out period). It is the employee's responsibility to determine whether vacation-out has any effect on retirement benefits prior to requesting vacation-out.

### **Approval of Vacation-Out Requests:**

The requesting employee's Director (or the General Manager if the requestor is a Director) and the Human Resources Manager will review the vacation-out request to ensure eligibility criteria are met and jointly make the approval decision. When the General Manager is the requesting employee, the request will be reviewed by the Board President for approval. When making approval decisions, consideration will be given to the impact of the employee's absence on the department; District and budgeting needs; the value to the District related to the advance planning afforded by the early retirement notice; replacement of

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

departing employee; and other issues related to succession planning and knowledge transfer; and other relevant criteria.

If approved, the employee will be notified by his or her Director.

### **PERSONAL TIME OFF CASH-OUT**

Employees who have in excess of 80 hours of PTO accrual have the option to cash-out the excess PTO. The cash-out will occur twice per year, in April and October, and will be calculated using current PTO accruals for all Regular Employees. The cash-out will be at the employees' current wage rate at the time of the cash-out. Regular Employees are eligible to cash-out any amount of PTO exceeding the 80 hours. Payment of the PTO cash-out will occur on the second pay period in April and October. Employees are eligible to cash-out their Banked PTO during the April and October cash-out period. EIR and Floating Holidays are not eligible for cash-out. The General Manager reserves discretion to reduce the aggregate amount that may be cashed out company-wide if he/she determines it would not be in the District's best financial interest to allow full cash-out.

### **EXTENDED ILLNESS RESERVE**

Sick leave accruals prior to the adoption of PTO (prior, combined vacation and sick leave) constitute an Extended Illness Reserve (EIR) for each employee. Accessing the EIR may, at Cowlitz PUD's discretion, require medical evidence of disability from a physician. Employees are allowed to access their EIR to cover consecutive scheduled working days missed as a result of illness or accident as well as in circumstances qualifying under Federal or State Law, subject to the following schedule:

#### ***EXTENDED ILLNESS ACCESS***

Extended Illness Reserve	Days from PTO Accrual Required Prior to Accessing EIR
120 or more days	1
90 through 119.9 days	2
60 through 89.9 days	3
24 through 59.9 days	4
0 through 23.9 days	5

An employee returning to work from EIR who experiences a relapse of the same illness or complication of the same accident, including circumstances qualifying under Federal or State Law, within 30 calendar days, as confirmed by a licensed physician, will be allowed to continue to use EIR without re-qualification.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

Re-qualification for EIR access within a given 180 calendar-day-period that does not meet the above 30-day requirement may be waived by Cowlitz PUD for a single diagnostic condition involving ongoing and intermittent treatment as confirmed by a licensed medical physician. This policy is not intended to affect leave the employee may otherwise be entitled to under the federal Family and Medical Leave Act, Washington Family Leave Act, Washington Maternity Disability Leave Regulation, Washington State Family Care Act, and other leave laws that may be applicable.

Each employee will be granted additional PTO day(s) from EIR each January 1<sup>st</sup> according to the following schedule:

### **EXTENDED ILLNESS RESERVE CONVERSION**

Extended Illness Reserve as of December 31	Extended Illness Reserve Reduced by	Days Converted from Extended Illness Reserve to PTO January 1 <sup>st</sup>
24 through 59.9 days	1 day	½ day
60 through 89.9 days	2 days	1 day
90 through 119.9 days	3 days	1½ days
120 or more days	4 days	2 days

EIR is separate from and cannot be used as PTO.

### **Health Reimbursement Arrangement/ Voluntary Employee Beneficiary Association (HRA/VEBA) – Staff Employees**

Cowlitz PUD maintains a Health Reimbursement Arrangement/Voluntary Employees' Beneficiary Association (HRA/VEBA) plan. VEBAs are authorized by Internal Revenue Code section 501(c)(9). HRA/VEBA is a tax-free savings account for you and your family's out-of-pocket medical care expenses and premiums. You can begin spending your HRA/VEBA right away and/or save it to use in retirement. HRA/VEBA can even be used to cover Medicare and Medicare supplement premiums.

Contributions will be made for the benefit of Cowlitz PUD employees under seven different HRA/VEBA groups defined by department as follows (subject to IRS guidance):

1. Engineering
2. Technology
3. Administration and Employee Services
4. Accounting
5. Customer Service and Compliance
6. Operations

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

7. Power Management
8. Commissioners

All employees within their respective HRA/VEBA group will elect the contribution amount and set terms for the percentage of owed PTO and floating holiday balances that is funded to HRA/VEBA at retirement for the group by an absolute majority (50% + 1) vote of group members. Said contributions and terms may be adjusted from time-to-time, but no more frequently than once every 12 months (set either calendar year or fiscal year).

When an employee either voluntarily (other than retirement) or involuntarily separates or is laid off he/she will receive full payout of any owed PTO and floating holiday balances. No amount will be funded to HRA/VEBA.

For all groups, when an employee retires from Cowlitz PUD, 20% of their remaining Extended Illness Reserve (EIR) at their current wage will be transferred into the employee's HRA/VEBA account. The remaining balance will be lost. When an employee separates their employment with Cowlitz PUD for any other reason, the employee will lose their full remaining Extended Illness Reserve (EIR) balance.

In addition to the group contribution, each pay period, Cowlitz PUD shall contribute \$.30 per straight-time hour worked for each Full-Time Employee.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 303 Retiree Medical Benefits - Staff Employees

Effective Date: 4/17/2015

Revision Date: 9/27/2016

**\*The description of the benefits below are by no means an exhaustive list of the benefit. If you have questions on the complete coverage of this benefit or need more information, please see Human Resources\***

This policy, from the date of adoption going forward, shall apply to staff employees who voluntarily retire as outlined herein.

Employees will be provided District-paid group medical insurance subject to the following:

#### **Eligibility:**

- Voluntarily retire – not required to draw PERS, **and**
- Age 55 or older at the time of retirement, **and**
- Have been employed with the District full-time for at least ten consecutive years, **and**
- Not eligible to receive medical insurance coverage through another employer (even if coverage is declined)

#### **Conditions:**

- This benefit is a one-time election at the time of retirement.
- If coverage is dropped as a result of eligibility provisions or conditions noted herein, it cannot be renewed.
- The amount of coverage shall not exceed that afforded to active employees.
- In order to continue receiving the benefit, the retired employee is responsible to file an annual declaration (subject to confirmation) affirming he/she is not eligible for medical insurance coverage by another employer. If he/she fails to file the annual declaration by November 30<sup>th</sup> of the current year, he/she will be dropped from Cowlitz PUD's medical plan effective January 1 of the next year.
- This benefit shall continue until the first day of the month that he/she turns 65 years of age or is eligible for Medicare, whichever occurs first.

**OR**

#### **Eligibility:**

- Voluntarily retire – drawing PERS benefit, **and**
- Age 55 or older at the time of retirement

#### **Conditions:**

- This benefit is a one-time election at the time of retirement.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

- If coverage is dropped as a result of eligibility provisions or conditions noted herein, it cannot be renewed.
- The amount of coverage shall not exceed that afforded to active employees as determined by Cowlitz PUD.
- Limited to payments for the number of months not to exceed the number of months the employee has actually worked for the District; provided, however such employee may pay their own premiums for the balance of time up to age 65 or when they become eligible for Medicare, whichever comes first.
- This benefit shall continue until the first day of the month that he/she turns 65 years of age or is eligible for Medicare, whichever occurs first.

Subject to the eligibility provisions and conditions stated above, as long as the retired employee is afforded District-provided coverage, group medical insurance will be made available for the retired employees' eligible spouse. However, the monthly premium (subject to change) for such additional coverage must be paid, in total, by the retired employee one month in advance.

This policy is subject to change through future Board action. Staff employees that have previously retired utilizing this clause shall be given grandfathered status, all others not retiring under this specific policy shall not be entitled to this benefit should the Board take action to make changes to the policy.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **304 Banked Personal Time Off (PTO)**

Effective Date: 6/8/2010

Revision Date: 2/1/2018

Beginning October 1, 2016, Cowlitz PUD will allow employees to cash out their balances of their Banked PTO. Balances can be cashed out during the normal cash-out period under policy 302.

As of February 1, 2018, no new monies will be allowed to be placed into Banked PTO. Monies that remain in the Banked PTO fund will continue to be invested and reinvested by Cowlitz PUD's Treasurer in any investment which is authorized by the laws governing Municipal Corporations of the State of Washington. Income from the monies invested and reinvested, less investment costs, if any, shall accrue and be deposited by the Treasurer in the Banked PTO Fund and shall be credited pro rata to the account of each participating employee.

Monies remaining in an employee's Banked PTO account will be paid as per the employees VEBA agreement upon retirement or voluntary separation of employment. When an employee is involuntarily separated or laid off, he/she may receive full payout of any owed banked personal leave balance and will not be subject to the established VEBA agreement for his/her respective group. An employee's banked PTO may not be accessed in any other manner than described in this policy.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 305 Short Term and Long-Term Disability – Staff Employees

Effective Date: 6/8/2010

Revision Date: 1/23/2024

**\*The description of the benefits below are by no means an exhaustive list of the benefit. If you have questions on the complete coverage of this benefit or need more information, please see Human Resources\***

#### Short Term Disability:

Cowlitz PUD provides a voluntary medical Short-Term Disability (STD) program for all employees including regular full time, part time and temporary employees who:

- Have worked at least 820 hours in the qualifying period (hours can be worked at any Washington employer); and
- Have worked 340 hours for the District; or
- Were covered by an approved voluntary plan by their previous employer, shall be eligible to apply for STD benefits.

The District will use a Third-Party Administrator to operate our voluntary plan. An employee would apply for medical leave through the Third-Party Administrator and subsequently be approved by the Third Party. The Third-Party Administrator will follow Washington State Paid Family and Medical Leave RCW 50A and WAC 192.

For determining eligibility of benefits, the Third-Party Administrator will follow the definition of Serious Health Condition under RCW 50A.05.010 (20).

The qualifying period is the first four of the last five completed calendar quarters or, if eligibility is not established, the last four completed calendar quarters immediately preceding the application for leave.

#### Benefit Duration:

All employees who are unable to work due to illness or injury as certified by a licensed, competent medical authority and approved by the District's third-party administrator, would be required to wait up to one week called the "waiting week" before beginning to receive benefits under this policy. The waiting weeks and all subsequent weeks begin on Sunday 12:00 a.m. and run through Saturday 11:59 p.m.

#### Example:

If an employee began their medical leave on a Wednesday, the waiting week would have begun on Sunday at 12:00 a.m. In this example with the leave beginning on Wednesday and the waiting week ending on Saturday at 11:59 p.m., the waiting period would be 3 days long (Thursday, Friday, and Saturday).

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

If the employee's application is approved through by the third-party administrator for short-term disability payments under the plan, the employee would be eligible to begin to receive benefits at the end of their waiting week (Saturday 11:59 p.m.) until they recover and are authorized by a licensed medical physician to return to work (in limited and/or full capacity), up to a maximum of 180 calendar days.

Intermittent leave is available under the plan. Need for intermittent leave is determined upon the employee's medical certification as provided by a licensed, competent medical authority and approved through the Third-Party Administrator.

### **Salary Replacement Amount:**

Eligible employees shall be eligible to receive the greater of:

- Seventy percent (70%) of their current regular straight time base pay; **OR**
- An amount equal to the State's PFML insurance benefit, calculated in the same manner as the State's PFML plan.

### **Return to Work:**

Return to work from coverage by the STD benefit is conditional upon certification by a licensed, competent medical authority that the employee is able to fully perform the duties of the job and is otherwise fit to return to work. Absent a full return to work authorization, the District shall determine whether reasonable accommodation of the employee's condition and restrictions can be made.

### **Job and Health Benefits Protection:**

Employees who have worked for the District for at least 965 hours within the 12 months prior to the commencement of an STD-covered absence, will have the right to return to their same position, or an equivalent position with equivalent employment benefits, pay, and other terms and conditions of employment, upon return from coverage by the STD benefit.

During an STD-covered absence and in accordance with the Federal Family and Medical Leave Act (FMLA), the District will continue to pay the District's portion of premiums for medical, dental, vision, life, AD&D, short term, and long-term disability insurance coverage as if the employee was an active worker. The District will continue collecting the employee's appropriate share of the benefit premiums through payroll deduction. For the medical, dental and vision benefits the deduction is a 90/10 split with the 10% being paid by the employee and for life insurance and AD&D this is a 50/50 cost share between the District and the Employee. The employee's premiums will be deducted from their paycheck, if they are unable to pay the entire amount of the benefits, the District will bill the employee the remaining amount. The District covers 100% of the premium for short-term and long-term disability insurance.

The District will begin paying the Short-Term Disability Benefits once the Advice to Pay Service has approved the Short-Term Disability claim and the waiting week has been met. If available, accrued PTO

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

hours, Floating Holiday hours (in increments of less than 10 hours), Extended Illness Reserve (EIR) hours and funds allocated to the employee in the Banked PTO Plan, in the order determined by the District, may be used to make up the difference between STD and 100% of the employee's straight time pay, the employee cannot exceed 100% of their regular straight time pay. Employees may also use EIR in accordance with the Extended Illness Reserve table, PTO, Floating Holiday, and Cowlitz PUD's Banked PTO Plan to satisfy the waiting week.

A disabled employee unable to return to work after 180 calendar days will be allowed to use accrued PTO, EIR, Floating Holidays, Leave Share Donations and Banked PTO allocated to the employee before being eligible for long-term disability provided a licensed physician and Cowlitz PUD's Advice to Pay provider has determined that the employee is not permanently disabled and will be able to return to their regular position prior to the expiration of such leaves.

***\*For a complete summary of the District's Short Term Disability plan, please see Human Resources and ask for a copy of the Short-Term Disability Summary Plan Description.***

### **Long Term Disability (LTD):**

Cowlitz PUD provides a Long-Term Disability (LTD) program for Full-Time Employees having completed six months of continuous employment.

All full-time employees of the District will be enrolled in the Long-Term Disability Plan. Long-term disability has a 180-calendar-day waiting period until benefits may be paid. A disabled full-time employee unable to return to work after 180 calendar days will be allowed to use, if available, accrued PTO hours, Extended Illness Reserve Hours (EIR), and funds allocated to the employee in the Banked PTO Plan, in the order determined by the District, before being eligible for long-term disability provided a licensed medical physician has determined that the employee is not permanently disabled and will be able to return to their regular position prior to the expiration of such leaves, and the Long-Term Disability Plan allows such a delay in benefits. Once the eligibility requirements of the insurer are met and the employee applies for benefits under the Long-Term Disability Plan, a disabled employee may receive 60% of their straight-time base rate up to \$8,000 per month up to age 65. LTD benefits are reduced by other sources of income (please see Human Resources for more information). Premiums for LTD coverage will be District-paid.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 306 Holidays

Effective Date: 6/8/2010

Revision Date: 1/23/2024

Cowlitz PUD will grant paid holiday time off to all employees on the holidays listed below:

- New Year's Day (January 1)
- President's Day (third Monday in February)
- Memorial Day (last Monday in May)
- Independence Day (July 4)
- Labor Day (first Monday in September)
- Veteran's Day (November 11)
- Thanksgiving Day (fourth Thursday in November)
- Christmas Day (December 25)
- 2 Floating Holidays

Cowlitz PUD grants paid holiday time off to all eligible employees. Holiday pay will be calculated based on the employee's straight-time rate of pay (as of the date of the holiday) times the number of hours the employee would otherwise have worked on that day. Exempt employees will receive their regular pay for the pay period in which any holiday falls. Eligible employee's classification(s) are the following:

- Initial Review Period Employees
- Limited Duration Employees
- Regular Full-Time Employees
- Regular Part-Time Employees (pro-rated)

A recognized holiday that falls on a Friday or Saturday will be observed on the preceding Thursday. A recognized holiday that falls on a Sunday will be observed on the following Monday. Eligible employees also receive two 10 hour paid "Floating Holidays," each fiscal year, which is August 1<sup>st</sup> through July 31<sup>st</sup> annually. Floating Holidays may be used at any approved time in 10-hour increments. Floating Holidays must be used by the end of the fiscal year (July 31<sup>st</sup>) or they are lost.

Part-time staff employees will be eligible for pro-rated holiday pay as long as they either work the workday prior to the holiday and the first workday following the holiday, or they meet their part time required hours for the week.

As an additional benefit to employees, at the General Manager's sole discretion, employees may be authorized paid early release of up to an annual limit of four hours on New Year's Eve and Christmas Eve for those employees actually working those days. The General Manager's authorization may occur at any time prior to 5:30 p.m. the day before the early release is to occur and must be in writing, signed by the General Manager and the Human Resources Manager. The General Manager may require designated employees to remain working for operational purposes for as long as needed. Employees not working the same workday as the early release period are not eligible for this benefit.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

Employees in leave without pay status or unpaid administration leave are ineligible to receive any holiday compensation unless the leave without pay is classified as Military Leave (see policy 603 of the personnel policies and procedures handbook) or under the employees' approved Washington State Paid Family and Medical Leave Act claim (see policy 601 of the personnel policies and procedures handbook). Employees must be on paid status the day before a holiday in order to receive holiday compensation.

### **Religious Holidays**

Employees may observe religious holidays by using their accrued PTO and/or Floating Holiday, time (with supervisor approval) or as an approved absence without pay. Please schedule time off for religious observance well in advance with the assigned supervisor so that Cowlitz PUD can avoid any disruption in its services that an absence may create.

Cowlitz PUD may grant two unpaid holidays per calendar year to any employees to use for a reason of faith or conscience or an organized activity conducted under the auspices of a religious denomination, church, or religious organization. Cowlitz PUD management holds the right to deny the unpaid time off request if the employee's absence would impose an undue hardship on the employer or the employee's position is necessary to maintain public safety.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 307 Catastrophic Leave Sharing Program

Effective Date: 6/8/2010

Revision Date: 3/14/2023

The District understands that employees may have family health emergencies or personal injury that results in a need for time off beyond available paid time off. This policy establishes a Catastrophic Leave Sharing Program that will allow eligible employees to donate PTO from their unused balance to a fellow employee in need.

The program permits District employees to voluntarily donate accumulated PTO and/or Floating Holidays to another employee who exhausts, or is likely to exhaust, accumulated PTO and Floating Holidays due to a non-occupational FMLA, Washington Paid Family and Medical Leave, ADA and Washington Family Leave Act qualifying catastrophic medical condition of the employee or an immediate household member that is reasonably expected to last 30 days or longer and that would otherwise likely cause the employee to take unpaid leave or terminate employment.

#### **Eligibility:**

Any District employee, who has worked at least six (6) months and has a qualifying catastrophic leave event that is reasonably expected to last 30 consecutive days or longer is eligible to apply as a recipient.

Any employee who has PTO time available over 80 hours may participate in the program as a donor.

Employees are eligible to receive and use Catastrophic Leave Donations for a maximum of 180 calendar days per rolling 12-month period. Program eligibility is evaluated by Human Resources. Notification of application approval or denial will be confirmed by Human Resources.

#### **Leave Donations**

Employees may voluntarily donate hours of accumulated PTO or floating holiday for use by a specified recipient employee. No other type of leave may be donated:

- Donated hours must be in whole hour increments only, and the minimum allowable donation of PTO shall be four (5) hours. The minimum allowable donation of Floating Holidays shall be ten (10) hours (Floating Holiday donations used by Human Resource on behalf of the employee can be used in any increment);
- The recipient employee must be eligible for the donation as defined in the “Eligibility” section of this policy at the time the donation is made;
- The donating employee may donate any amount of PTO in excess of the minimum provided the donation does not cause the employee’s PTO balance to fall below eighty (80) hours.
- All forms of paid leave available for use by the recipient must be used prior to using shared leave. This includes PTO, Floating Holidays, Banked Leave and EIR. Any PTO and/or Floating Holidays that accrues during the leave share request shall be used prior to any donated leave.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

- Retroactive application for and use of donated leave time will not be allowed under this policy.

### Use of Donated Leave

Employees may use donated leave in the following circumstances:

- The employee has exhausted his or her accrued PTO, floating holidays, banked leave, or EIR.
- The employee is not receiving any other income from any other State or external agency.
- The recipient of the PTO is responsible for any taxes associated with its use.
- The recipient understands that donated leave is not considered DRS pensionable.
- Human Resources shall have authority and discretion to determine whether the receiving employee may use the donated PTO. This determination shall be made based on the consideration of the facts and circumstances of the particular situation.
- PTO from a donating employee shall only be removed from his or her PTO bank on a “first donated, first used basis” as the recipient actually utilizes the donated PTO on an actual need basis. Any donated PTO may only be used by the recipient for the purposes specified in this program until the employee is medically certified to return to work; or the employee’s family members medical certification no longer indicates a need for the employee’s assistance with care that impacts being at work.

### Intermittent Leave

Recipient employees who have been on approved catastrophic leave, and who are able to return to work on a part-time basis while continuing to receive medical treatments on an intermittent basis for their catastrophic medical condition, may continue to participate in the program after they return to work. Catastrophic leave may only be solicited and used to the extent it is needed to cover unpaid leave for continuing treatments involving absences related to the condition for which catastrophic leave was initially approved. The recipient must continue to meet the eligibility requirements as stated and must be below the 180-day threshold.

### Application for Donated Leave

An employee who wishes to receive donated leave must complete and submit an application to Human Resources. The application will be on a specified form and will include a statement, signed in good faith by the employee, of qualification for donated leave under the eligibility criteria. The District may require that the health certification be on a form it provides to certify the initial or continued need for family medical leave under FMLA, ADA, Washington Family Leave Act, and/or Washington Paid Family and Medical Leave. It is highly recommended that application for leave sharing shall be made prior to the employee exhausting his or her Personal Leave benefits or as soon as the serious injury or illness occurs. Leave sharing requests affecting prior pay periods will not be approved.

### Solicitation of Donations

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

Solicitation for leave donations will be sent via email by Human Resources to all employees. A request to donate Personal Leave shall be made by completing the Catastrophic Leave Request Donation Form.

### **Value of Donated Leave**

Donated hours are converted to a dollar value calculated on the donor's base hourly pay, and the dollar value is converted to hours based on the recipient's base rate of pay.

Example: Employee A, who earns \$10 per hour, donates 10 hours of PTO to Employee B. The value of the hours is \$100 (10 hours x \$10). Employee B earns \$5 per hour, so the \$100 converts to 20 hours of PTO ( $\$100 / 5$ ).

All donated PTO shall be given voluntarily. No employee shall be coerced, threatened, intimidated, or financially induced into donating PTO for purposes of this program. All donations of PTO shall be kept confidential by Cowlitz PUD.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **308 Civic Responsibilities**

Effective Date: 6/8/2010

Revision Date: 9/27/2016

#### **Time off to Vote**

Cowlitz PUD encourages employees to fulfill their civic responsibilities by participating in elections. Generally, employees are able to find time to vote either before or after their regular work schedule. If employees are unable to vote in an election during their non-working hours, Cowlitz PUD will consider granting up to 1 hour of unpaid time off to vote.

Employees should request time off to vote from their supervisor at least two (2) working days prior to the Election Day. Advance notice is required so that the necessary time off can be scheduled at the beginning or end of the work shift, whichever provides the least disruption to the normal work schedule. Although Cowlitz PUD will make reasonable efforts to accommodate the request for time off, operational requirements will sometimes take precedence over such a request.

#### **Jury Duty**

Serving on a jury is a fundamental responsibility of citizenship, and Cowlitz PUD supports this important role in our society. However, to ensure that we can provide proper service to the public, if a notice for jury duty service is received, please contact the Department Director as soon as possible so that appropriate scheduling needs can be met. Cowlitz PUD will pay employees their regular rate of pay for time served during normally scheduled working hours for a period of up to two weeks. Any pay for time served beyond two weeks will be at the discretion of the General Manager. Any jury duty compensation is considered de minimis and need not be turned over to Cowlitz PUD. Employees on paid Jury Duty may be asked to remain in reasonable contact with Cowlitz PUD in the event information is needed to fill their job responsibilities. Employees are expected to report to work on any day that service is no longer required and there are four (4) or more hours left in the employee's regular shift.

#### **Witness Duty**

Current employees who are subpoenaed to testify in a legal proceeding must immediately notify their supervisor so that operating requirements can be adjusted as needed. When the expected testimony pertains to knowledge the employee has obtained through employment by Cowlitz PUD, the employee's pay will not be reduced as a result of providing the required testimony. The employee is required to return to work during their regular shift whenever the legal proceeding permits, unless excused by their supervisor in writing. Per diem for public officers under RCW 42.16.020 is not allowed; for other employees per diem is allowed only where such qualifies under Cowlitz PUD procurement policy or is required by written agreement.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **309 Employee Wellness Program**

Effective Date: 6/8/2010

Revision Date: 4/17/2015

Cowlitz PUD strives to promote an environment that is supportive of employees' health needs and that offers opportunities for employees to participate in wellness related events. The Wellness Program is a voluntary program open to all Cowlitz PUD employees that has been developed to assist employees in the prevention of illness. The purpose of the Wellness Program is to educate and increase health awareness by providing programs and information that will benefit the employees, as well as Cowlitz PUD as an employer, through better employee fitness, improved morale and productivity, and more prudent use of health care benefits.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **310 Logo Wear**

Effective Date: 6/8/2010

Revision Date: 2/25/2025

Cowlitz PUD recognizes that our employees are ambassadors in our communities and has determined this is a significant value by allowing employees to proudly display the Cowlitz PUD logo. By adhering to design standards, employees will present a unified identity that communicates a strong, singular image for Cowlitz PUD. Employees will be reimbursed one-half the cost of the clothing up to \$60 per item to a maximum of four (4) items per calendar year. New employees hired to the District will be allowed to purchase up to four additional items within the first six months of their hire date at the same reimbursement level. Applicable taxes will be charged to the employee. Cowlitz PUD will reimburse for approved logo wear only.

Employee name, department name, reference to safety or other identification information will not be available for this program as an identifying logo. Employees must continually present a professional image and must dress appropriately for their work area and any other time they are wearing Cowlitz PUD clothing.

Old logo wear clothing should be destroyed and not given away.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 401 Paydays & Pay Deductions

Effective Date: 6/8/2010

Revision Date: 8/23/2022

Cowlitz PUD shall use its best efforts to ensure that employees are paid biweekly on every other Thursday, unless payday falls on a financial institution-observed holiday, in which case payday will be the day before the financial institution-observed holiday. Each paycheck will include earnings for all work performed through the end of the previous payroll period. Provided, however, no unforeseen circumstances such as, software malfunctions, outages, or other events beyond the control of staff prevent such payment. In the event that all time is not captured before payroll is processed in the pay period, any additional time owed will be paid out promptly in the following pay period. All employees are required to sign up for direct deposit of their paychecks during new employee orientation. By submitting their timesheets, employees are representing that they worked all of the hours reflected and have brought to the District's attention any hours they worked in prior pay periods for which they believe they have not been fully compensated.

Deductions from your paychecks are those required by law (*e.g.*, Tax withholding, FICA, Medicare, workers' compensation premiums, court-ordered garnishments, etc.) or those approved by the employee in writing (*e.g.*, VEBA contributions, 401k contributions, insurance premiums, etc.).

If an employee passes away while employed at the District, their final paycheck will be processed as usual, including any authorized or legally allowed deductions, and payment for any outstanding paid leave, and direct deposited into the employee's usual bank account for inclusion in the employee's estate.

Cowlitz PUD offers programs and benefits beyond those required by law. Eligible employees may voluntarily authorize deductions from their paychecks to cover the costs of participation in these programs.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 501 Safety

Effective Date: 6/8/2010

Revision Date: 2/25/2025

Cowlitz PUD takes every reasonable precaution to preventing accidents and providing a safe, healthful work environment for all employees. It is also the District's intent to properly manage any incident that occurs so as to minimize injury and other forms of loss for all parties. A well-managed workplace safety program can benefit the District and its employees in countless ways.

In order to achieve these goals, the District has a Safety Manual outlining the policies and procedures regarding employee health and safety, which apply to Main Office and Operations employees. Each and every employee must become familiar with this manual and become an active participant in the workplace safety program.

To encourage and reward workplace safety the District has an Employee Safety Policy and Safety Award Program. Safety incentives will be awarded as outlined in the Safety Award Program. Employees at every level are encouraged to actively participate in the Safety program in order to promote a safe work environment.

**Management: Management** is accountable for preventing workplace incidents, injuries, and illnesses. Management will provide top-level support of safety program initiatives. Management will consider all employee suggestions for achieving a safer, healthier workplace. Management also will keep informed about workplace safety and health hazards, and it will regularly review the company safety and health program. Management includes all directors, superintendents, and department managers responsible for directing employees.

**Supervision: Supervisors** are responsible for supervising and ensuring workers are trained in safe work practices. Supervisors must enforce all applicable safety rules and work to eliminate hazardous conditions. Supervisors shall lead safety by example. Supervision includes all leads, foreman, or as otherwise defined, that is responsible for the direct oversight of employees performing the work.

**Safety Committee: The** safety committee will include an employee representative from each department who is responsible for recommending safety and health improvements in the workplace. The committees are also responsible for identifying hazards and unsafe work practices, identifying corrective actions, removing obstacles to incident prevention and helping the district evaluate the accident and illness prevention program.

**Employees:** All employees are expected and encouraged to participate in safety and health program activities including the following: reporting hazards, unsafe work practices, and accidents immediately to their supervisor, safety manager, or safety committee representative no matter how minor; wearing required personal protective equipment as applicable to the task or environment; and participating in and supporting safety committee activities. Employees must maintain their work areas and equipment in a

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

safe and orderly manner. Employees are expected to comply with all applicable federal, state, and Cowlitz PUD safe work rules at all times. Employees shall look out for the safety of their coworkers by being a positive safety leader and providing constructive feedback.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **502 Work Schedules**

Effective Date: 6/8/2010

Revision Date: 8/23/2022

Unless otherwise specified in any collective bargaining agreement or memorandum of understanding, the following definitions generally shall apply: Cowlitz PUD provides essential services to our customers twenty-four hours a day, seven days a week. This type of service necessitates a variety of shift schedules and flexibility in regular starting times, lunch hours and rest periods.

Cowlitz PUD's formal customer business hours at the Main Office are 7:00 a.m. to 5:30 p.m. Monday through Thursday; and the Operations employees work from 6:00 a.m. to 4:30 p.m. Monday through Thursday. Lunch breaks usually fall within the middle hours of the workday. Main Office employees are entitled to a thirty-minute lunch break and two fifteen-minute rest periods; and most Operations employees are entitled to a thirty-minute lunch and two fifteen-minute breaks. Scheduling of the rest periods are subject to supervisory approval and should not interfere with service to our customers. Notwithstanding the above, employees work hours may be modified by the General Manager, Department Director, or supervisor as long as it is consistent with the Collective Bargaining Agreement.

#### **Rest periods/breaks**

To the extent possible, rest periods will be provided in the middle of work periods. Since this time is counted and paid as time worked, employees must not be absent from their workstations beyond the allotted rest period time. No employee will be required to work more than three consecutive hours without a rest break unless the nature of the work allows intermittent rest periods as allowed by law, or a written agreement provides otherwise. See Human Resources with any questions in this regard.

#### **Lunch (meal) breaks**

Supervisors will schedule meal periods to accommodate operating requirements. Meal periods will be scheduled within two to five hours from the beginning of the employee's shift absent a written agreement to the contrary. Most employees will be relieved of all active responsibilities and restrictions during meal periods and will not be compensated for that time. Further clarification on relief from active duty can be obtained from Human Resources.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 503 Visitors in the Workplace

Effective Date: 6/8/2010

Revision Date: 1/1/2021

Cowlitz PUD's workplace is a diverse environment of offices, warehouses, and job sites where many different activities are performed. Visitors to the workplace are generally welcome, and in some settings even encouraged. However, only visitors who are properly authorized may be on Cowlitz PUD premises. Appropriate precautions and limitations on visitation are necessary to protect health and safety, safeguard employee and customer welfare, protect Cowlitz PUD property and facilities, reduce potential distractions and disturbances, and to maintain productivity and regulatory compliance.

All visitors should enter Cowlitz PUD at the reception area. Authorized visitors will receive a "Visitor Badge," be asked to sign-in, and then, **must be escorted to their destination**. Employees are responsible for the conduct and safety of their visitors. If any unauthorized individual is observed on Cowlitz PUD's premises, employees should immediately direct the individual to the reception area.

#### **Children**

In general, the workplace is not an appropriate place for minor children on a frequent or continuing basis, as children in the workplace create an atmosphere that may not be conducive to achievement of Cowlitz PUD's specific goals and objectives.

Children may be brought to workplaces by parent employees for brief visits or other times when common sense would dictate that it is more efficient for the employee to bring the child into an office (following or before a physician's appointment, for example). The parent employee must supervise the child(ren) on such visits. It is generally not appropriate for children of any age to be in the workplace on a regular basis, such as after school each school day or on regularly scheduled school holidays. Parent employees may not leave such child(ren) in the custody of another Cowlitz PUD employee, even for brief periods of time. Absent extenuating circumstances that do not permit notice, employees should check with their Supervisor before bringing a child to the workplace.

#### **Animals**

With the exception of service dogs or other service animals used to guide or assist persons with disabilities, employees may not bring animals to Cowlitz PUD workplaces. Employees need to contact Human Resources in advance regarding service animals in the workplace.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **504 Emergencies and Disaster Preparedness**

Effective Date: 6/8/2010

Revision Date: 2/1/2019

Knowing what to do in an emergency increases the chances that everyone will come through safely. Employees will be informed of any specific emergency preparedness plans during the new employee orientation, and which may be reviewed from time to time at the discretion of the Safety Superintendent. Additionally, please keep the following in mind:

If advised to evacuate the building, either for a drill or in an actual emergency, do so calmly but swiftly and stay out of the building until advised that it is safe to return.

In case of an earthquake, personnel should drop to the floor; seek protective cover under or near desks, tables or chairs in a kneeling or sitting position with hands holding onto the desk, table, or chair legs. Stay there until movement ends, then exit the building and go to the predetermined assembly location.

In case of fire, turn on the alarm and leave the building through the closest available door and go to the predetermined assembly location. Do not try to put out the fire unless professionally trained to do so.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **505 Smoking-Free Workplace**

Effective Date: 6/8/2010

Revision Date: 4/17/2015

All Cowlitz PUD buildings and vehicles are non-smoking areas; this includes the use of electronic cigarettes. No smoking will be allowed in buildings or vehicles by employees, citizens, and/or other visitors. Smoking is allowed only during break or meal periods in outdoor areas at least 25 feet from any door, window, or air vent unless otherwise posted as “No Smoking”.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **506 Overtime**

Effective Date: 6/8/2010

Revision Date: 9/27/2016

When operating requirements or other needs cannot be met during regular working hours, non-exempt and bargaining unit employees will be given the opportunity to volunteer for overtime work assignments or may be assigned overtime when required to meet operational needs. All overtime work must receive the supervisor's prior authorization. It will be at the discretion of the District on how overtime will be allocated among employees. Overtime compensation is paid to all bargaining unit employees at double the rate and time and a half for non-union, non-exempt employees in accordance with federal and state wage and hour restrictions. Overtime compensation rates may be adjusted as specified pursuant to Cowlitz PUD policy, Collective Bargaining Agreement, or Memorandum of Understanding. Cowlitz PUD may provide compensatory time in lieu of overtime pay absent a written agreement to the contrary.

Failure to work scheduled overtime or overtime worked without prior authorization from the supervisor may result in disciplinary action, up to and including possible termination of employment.

Cowlitz PUD recognizes that exempt employees may incur irregular and excessive work hours due to special projects, evening meetings and emergency situations. With approval from the General Manager, exempt employees may be granted time off during regular work hours in recognition of such situations.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **507 Use of Cowlitz PUD Property**

Effective Date: 6/8/2010

Revision Date: 2/1/2019

Unless determined otherwise by a Director or the General Manager of the District, Cowlitz PUD supplies, materials and equipment must be used strictly for business purposes.

If an employee is entrusted with Cowlitz PUD equipment, materials or property, the employee and/or Director is responsible for its proper use and is expected to immediately report any required repair or needed maintenance of such equipment.

In the event it is necessary for an employee to remove equipment from Cowlitz PUD premises, it is expected that the employee shall exercise reasonable care in connection with the offsite use of the equipment. An employee shall receive authorization for removing equipment such as computers from their Department Director or supervisor.

An employee's violation of this policy can result in disciplinary action, including termination.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 508 Information Technology

Effective Date: 6/8/2010

Revision Date: 2/25/2025

The following is a general description and supplements the Information Technology (IT) Security Procedures, located on the Cowlitz PUD Intranet site, which are under separate cover, and which may be modified from time to time. To the extent this general description is in conflict with the IT Security Procedures, the provisions in the IT Security Procedures control. Cowlitz PUD employees may use computers extensively to perform their jobs. A few rules are necessary so that everyone can get the maximum benefit from Cowlitz PUD's investment in technology. Please reference the IT Acceptable Use Procedure which can be found on the intranet for additional information.

**Use of Technology** is restricted for Cowlitz PUD business use only. Any and all communication made by technology may be subject to disclosure under the Washington Public Records Act; employees should keep this in mind whenever communicating electronically. Further, the General Manager and his or her designee may access such records for legitimate business reasons associated with bona fide Cowlitz PUD matters. This may include, but is not limited to, responding to a request from a supervisor for the purpose of ensuring compliance with employee conduct rules, for investigations, to facilitate responding to public records requests, or any other business purpose in the discretion of the General Manager.

#### **Software**

In order to protect Cowlitz PUD's computer systems from malware and ensure that the software used is compatible with Cowlitz PUD computers, only software purchased or approved by Cowlitz PUD may be installed on Cowlitz PUD computers. Before installing any software not purchased by Cowlitz PUD, an employee must check with the System Administrator and obtain written approval. In some cases, the System Administrator may want to install the software him/herself. Games and other non-business-related software may not be installed on Cowlitz PUD computers.

#### **Hardware**

IT supports a variety of hardware devices which must be purchased and approved by IT. Employees needing computer hardware beyond that which is typically provided, must request such hardware from the IT Department. Each request will be considered on a case-by-case basis. No unapproved equipment may be connected to Cowlitz PUD networks without the IT department's written permission. Hardware and peripherals not purchased through IT are not supported.

#### **Changes in Policy**

Because changes in technology tend to occur frequently, this Policy may need to change accordingly. Whenever a policy change occurs, it will be disseminated by the Department Director and/or Human Resources and Employees are expected to contact their Supervisor with any questions that may occur. A

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

change in Policy that the Employee was provided but did not make a reasonable effort to understand will not be considered an excuse for violation of the Policy.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 509 Reporting Improper Governmental Action

Effective Date: 6/8/2010

Revision Date: 4/17/2015

Cowlitz PUD recognizes and supports the right of every employee to report and to be protected from unlawful forms of retaliation for reporting improper governmental action.

An employee shall not directly or indirectly use or attempt to use the employee's official authority or influence for the purpose of intimidating, threatening, coercing, commanding, influencing, or attempting to intimidate, threaten, coerce, command, or influence any individual for the purpose of interfering with the right of the individual to disclose to a supervisor, Auditor, General Counsel, Human Resources, or General Manager, information concerning improper governmental action.

Nothing in this section authorizes an individual to disclose information otherwise prohibited by law, except to the extent that information is necessary to substantiate the whistleblower complaint, in which case information may be disclosed to a supervisor, Auditor, General Counsel, Human Resources, or General Manager by the whistleblower for the limited purpose of providing information related to the complaint. Any such information provided to an employee's supervisor, Auditor, General Counsel, Human Resources, or General Manager under the authority of this subsection may not be further disclosed, pursuant to RCW 42.41.030.

"Improper governmental action" is action by a local official or employee that is undertaken in the performance of his or her duties that violates law, exceeds his or her authority, is a danger to the public health or safety, or is a gross waste of public funds. It generally does not include management's personnel decisions based on a bona fide business reason or rationale. "Improper governmental action" does not include personnel actions, for which other remedies exist, including but not limited to employee grievances, complaints, appointments, promotions, transfers, assignments, reassignments, reinstatements, restorations, reemployments, performance evaluations, reductions in pay, dismissals, suspensions, demotions, violations of the state civil service law, alleged labor agreement violations, reprimands, claims of discriminatory treatment, or any action which may be taken under chapter 41.06 RCW, or other disciplinary action except as provided in RCW 42.41.030.

An employee must make a reasonable attempt to ascertain the correctness of the information furnished and may be subject to disciplinary actions, including, but not limited to, suspension or termination, for knowingly furnishing false information.

#### **What Employees Can Do**

If employees suspect improper governmental action, report it immediately, in writing, to a supervisor, Auditor, General Counsel or General Manager. In case of emergency, employees may report directly to outside agencies responsible for investigation and enforcement of the law that is believed to have been violated. Emergency means a circumstance that, if not immediately changed, may cause injury or damage

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

to persons or property. Employees must state all facts upon which they allege improper governmental action.

### **What Cowlitz PUD Can Do**

The recipient of the factual allegations shall report them promptly to Human Resources. Human Resources shall respond by making a determination based on the alleged facts whether improper governmental action has been established or request additional facts or investigate the factual allegations and the employee will be advised of the result of the investigation. The foregoing shall be performed in consult with the General Counsel. While confidentiality is an important consideration, it cannot be guaranteed.

### **Non-Retaliation**

Employees will not be retaliated against if they act in good faith and provide information in accordance with this policy. If an employee feels that they have experienced retaliation, please provide written notice of the charge no later than 30 days after the occurrence to Human Resources, General Counsel or General Manager. Cowlitz PUD will respond within 30 days. If an employee is dissatisfied with the response, a hearing may be requested before an administrative law judge.

Cowlitz PUD officials and employees are prohibited from taking retaliatory action against an employee because he or she has, in good faith, reported an improper governmental action in accordance with these policies and procedures.

Employees who believe that they have been retaliated against for reporting an improper governmental action should advise their supervisor, General Counsel or General Manager. Cowlitz PUD officials and supervisors shall take appropriate action to investigate and address complaints of retaliation.

If the employee feels the supervisor, General Counsel or General Manager, has not satisfactorily resolved the employee's complaint that he or she has been retaliated against in violation of this policy, the employee may obtain protection under this policy, and pursuant to state law, may appeal the decision and/or action taken by filing a written notice to the General Manager that, (1) specifies the alleged retaliation action, and (2) specifies the relief requested.

Cowlitz PUD employees shall provide a copy of their written charge to the General Manager no later than 30 days after the occurrence of the alleged retaliatory action. Cowlitz PUD shall respond within 30 days to the charge of retaliatory action.

After receiving either the response of Cowlitz PUD, or 30 days after the delivery of the charge to Cowlitz PUD, the employee may request a hearing before a state administrative law judge to establish that a retaliatory action occurred and to obtain appropriate relief provided by law. An employee seeking a hearing should deliver the request for hearing to the General Manager within 15 days of delivery of Cowlitz PUD's response to the charge of retaliatory action, or 45 days of delivery of the charge of retaliation to Cowlitz PUD for response.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

Upon the receipt of a request for hearing, Cowlitz PUD shall apply within five working days to the State Office of Administrative Hearings for an adjudicative proceeding before an administrative law judge. Cowlitz PUD will consider all recommendations provided by the administrative law judge and will take the appropriate action with all parties involved.

Cowlitz PUD employees who fail to make a good faith attempt to follow Cowlitz PUD's procedures in reporting improper governmental action shall not receive the protection provided by Cowlitz PUD in these procedures.

### **For More Information**

For additional information about outside agencies, the hearing process, or any other rights, please consult Human Resources

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **510 Workplace Violence**

Effective Date: 6/8/2010

Revision Date: 2/25/2025

Workplace violence is any verbal or physical action that is communicated or perceived as a threat, harassment, abuse, intimidation, or personal contact that produces fear, causes bodily harm, or damage to property. Even joking about violent acts is prohibited. Workplace violence may involve family, friends, strangers, co-workers, elected officials, or members of the public. Cowlitz PUD does not tolerate acts of violence towards Cowlitz PUD employees, the public, or property. All acts of violence are treated seriously, and each act of violence will be dealt with promptly and appropriately using administrative, managerial, legal, and disciplinary actions to minimize risk to employees and property.

All employees are responsible for refraining from participating in violent actions and for immediately reporting to their Department Director, Human Resources, Safety Manager or Cowlitz PUD General Manager. Any violent actions, threatening or dangerous situations that occur within the workplace or affect their work requirements shall be reported. Employees who feel an immediate threat and cannot reach appropriate personnel should call 911 and leave the area as soon as possible. Unless otherwise provided by law, employees may not bring weapons of any type into the workplace.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **511 Professional Communication**

Effective Date: 6/8/2010

Revision Date: 2/1/2018

The success of our working relationship depends on the trust and respect we have for each other. We work very hard to maintain open and honest communications with our employees to ensure they feel valued, appreciated, and respected. To do our best work, communications between employees at all levels are required to be honest, courteous, respectful, and professional.

When we are talking to or about each other, our vendors, or our customers, what we say and how we say it matters. Personal attacks, negative or derogatory name-calling, insults, sarcasm, abusive language of any kind, threats of violence, and profanity are examples of inappropriate communication that we consider to be disrespectful and unprofessional under this expectation.

Constructive criticism of employee actions should be directed at the employee or their supervisor as appropriate. Employees should not criticize other employees in front of a customer or any other third party. However, in situations where the Employee does not feel safe communicating through the chain of command, he/she may communicate directly with Human Resources. Failure to follow these common-sense guidelines could result in disciplinary action.

#### ***Gossip-Free Zone***

Sharing or disclosing personal information about other employees that is unrelated to the performance of your job duties may diminish or damage the reputation of the person about whom you are speaking. This type of communication or gossip negatively impacts our team dynamic and is contrary to our standard for professional communication.

Gossip includes sharing or disclosing personal information about one person to another person or other people that is negative, inflammatory, derogatory, embarrassing, demeaning, hurtful, or otherwise would be considered private by the person about whom you are speaking. This type of behavior conflicts with our notions of teamwork, integrity, respect, professionalism, and diversity.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 512 Respectful Workplace Expectations

Effective Date: 12/1/2016

Revision Date: 2/1/2019

Cowlitz PUD is committed to creating a work environment in which all individuals are treated with respect, courtesy, and dignity. Harassment and discrimination of any employee on the basis of his or her race, religion, color, disability, national origin, age, gender, gender identity (including gender expression), sexual orientation or preference, pregnancy, injured worker status, marital status/familial status, veteran status, family leave, or any other bases protected by local, state and federal law is strictly prohibited. Bullying behavior, **regardless of protected class status**, that meets the criteria described below is also strictly prohibited.

Conduct prohibited by this policy is not only unacceptable in the workplace but also in any work-related setting outside the workplace, including job sites, field inspection locations, business trips, business meetings, and business-related social events, and District sponsored events. This policy prohibits any unprofessional or disrespectful behavior that the District determines is negatively impacting our employees, our team dynamic, or the ability of our team members to do their best work.

***Violations of this policy will result in discipline up to and including immediate termination.***

#### **Examples of Prohibited Protected Class Behavior:**

Examples of conduct based on protected class that are prohibited by this policy, regardless of whether sexual or non-sexual in nature, and regardless of protected class status include, but are not limited to:

- Offering or implying an employment-related reward (such as a promotion, raise, training, overtime, assignments, etc.) in exchange for sexual favors, submission to sexual conduct, etc.
- Threatening or taking negative employment action (such as termination, demotion, denial of leave) if sexual conduct or some other action tied to a protected category is rejected or refused.
- Unwelcome verbal or physical conduct that shows hostility toward a person when the conduct has the purpose or effect of substantially interfering with a person's work performance, or creating an intimidating, hostile, or offensive work environment.
- Unwelcome intentional touching of another person or other unwanted intentional physical contact (including patting, pinching, rubbing, brushing against, etc.).
- Unwelcome questions or comments about another person's sexual activities, dating, personal or intimate relationships, appearance, race, religion, age, or any other category protected by law.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

- Unwelcome whistling, staring, or leering at another person. Unwelcome sexually suggestive or flirtatious gifts, letters, notes, e-mail, or voice mail. Unwelcome sexual advances or flirtations.
- Conduct or remarks that are sexually suggestive or that otherwise demean or demonstrates hostility toward another person (regardless of whether sexual in nature) for any reason (e.g., jokes, taunts, negative stereotyping, and threats).
- Displaying or circulating pictures, objects, or written materials (e.g., graffiti, cartoons, photographs, pinups, calendars, magazines, figurines, etc.) that are sexually suggestive, demeaning or otherwise demonstrate hostility toward another person (regardless of whether sexual in nature) for any reason.
- Slandering, ridiculing, maligning, or spreading negative and derogatory information about a person or his/her family or spreading rumors and gossip about individuals.
- Shouting or yelling at a person in anger or frustration or otherwise behaving in a confrontational or disruptive manner in a public or private setting. Non-verbal gestures, posture or glances that can convey threatening messages.
- Any other unwelcome gestures, symbols, comments, name-calling, or behavior that we may deem to be inappropriate in our sole discretion that is directed towards another person, relates to another person, or that negatively impacts another employee's ability to perform his/her job.

### Examples of Prohibited Bullying Behavior

“Bullying” type behavior or conduct that may be prohibited by this policy includes behaviors described in the examples above that, while not necessarily based on a protected class, are nevertheless so severe or pervasive that they would offend a reasonable person in the workplace.

Severe or pervasive behavior that, for example, embarrasses, humiliates, offends, or degrades another person may violate this policy. Other examples of behavior that may, in some circumstances, rise to the level of bullying under this policy include severe or pervasive shouting or yelling at a person in anger or frustration or otherwise behaving in a confrontational or disruptive manner in a public or private setting, as well as severe or pervasive non-verbal gestures, posture or glances that convey threatening or intimidating messages or intent. Remember that while you may have a legitimate reason to express your anger, frustration, or disappointment about or towards another person, you are still expected to communicate your concerns and feelings in a professional and respectful manner at all times.

Unless knowingly or intentionally disrespectful or aggressive in nature, incidental or insignificant behaviors common among diverse workgroups generally are not considered bullying, even if considered irritating, distracting, disappointing or frustrating, and neither are interpersonal conflicts arising from diverse personality types and/or communication styles. The communication, delivery and provision of non-discriminatory performance-based coaching, discipline, employee reviews and other performance related feedback or decisions, by themselves, are also not considered bullying under this policy.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

Although this policy provides examples of harassment and workplace bullying behaviors, it is not intended to be a complete list. Situations may vary, and the District will decide, in its sole discretion, whether behavior meets the severe or pervasive standard of this policy and, if so, what action to take in response. If you have any questions about what constitutes harassing or bullying behavior prohibited under this policy, please speak with your supervisor or Human Resources.

### Prohibitions Apply to Conduct Outside of Work

The prohibitions outlined in this policy extend to behavior, comments and actions occurring at work or work-related sites, **as well as** to similarly inappropriate behavior, comments and actions that are posted on, in or through social media forums or platforms (e.g., twitter, Facebook, Instagram, snapchat, blogs, etc.) directed at or pertaining to another District employee, customer or vendor, **regardless of when the information was posted** (e.g., before or after your scheduled shift, weekends, holidays, etc.). Under no circumstances may you ever post or share customer or confidential company information with persons who are not affiliated with the District.

This policy strictly prohibits the use of social media, regular media, telephone calls, and personal interactions outside of work to:

- Share, post, publish, or otherwise communicate publicly disparaging information about our customers (both internal and external);
- Share, post, or publish information or otherwise **engage in conduct** that rises to the level of harassment, discrimination, bullying or retaliation expressly prohibited by this policy against another employee of the District, regardless of whether directed specifically at the employee or made in direct or indirect reference to the employee;
- Share, post, publish or otherwise communicate confidential or proprietary District information without prior express written permission;
- Share, post, publish or otherwise communicate information publicly to others that is inconsistent with the District's mission, values, and/or the District's commitment to creating a harassment and discrimination-free workplace marked by respect and dignity for all people, cultures, and demographics.

For example, social media posts, videos, recordings (audio, visual, digital, etc.) and first-hand observations by others of behavior by an employee that expresses or communicates hate or is intended to disparage or denigrate another religion, race, culture, national origin, gender, gender identity, sexual orientation, or other protected class demographic, may lead to discipline, up to and including termination. Social media posts, videos, recordings (audio, visual, digital, etc.) and first-hand observations by others of an employee threatening violence or inciting others to engage in violence towards another person, group of people or a protected class demographic will similarly be grounds for discipline, up to and including termination.

***The provisions of this policy do not apply to protected concerted activity and will not be implemented or enforced in a manner that would infringe upon an employee's rights under Section 7 of the National Labor Relations Act or, if applicable, freedom of speech protections afforded to public employees.***

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **Reporting an Incident of Harassment, Discrimination, Bullying or Retaliation:**

If at any point you believe you have been subjected to harassment, discrimination, retaliation, bullying or any other conduct prohibited under our policies, you must report the matter immediately to your Supervisor or Human Resources. If you do not feel comfortable making a report to your direct Supervisor, you may bypass him or her and report the complaint directly to Human Resources, the Department Director, or the General Manager.

Nothing in this policy precludes employees from seeking remedies for unlawful conduct through state or federal administrative agencies or the courts. We encourage employees to bring matters to our attention so that we can address and resolve them quickly.

### **Investigation:**

Once the District receives a complaint of harassment, discrimination, or retaliation, we will investigate the matter and determine in our sole discretion what, if any, action to take to address the situation. We expect you and all of our employees to cooperate fully with any investigation. Dishonesty or lack of cooperation during an investigation will be grounds for immediate termination.

Confidentiality will be maintained throughout the investigatory process to the extent consistent with an adequate investigation and appropriate corrective action. However, confidentiality cannot be guaranteed. In a similar respect, we may elect, at our discretion, to not disclose or discuss with the employee who made the complaint or other employees the results of our investigation or the actions taken in response to a complaint.

### **Retaliation Prohibited:**

The District strictly prohibits retaliation against any individual who reports discrimination, harassment and bullying or who participates in an investigation of such reports. These policies may not be used as a basis for excluding or separating individuals from participating in business or work-related social activities or discussions in order to avoid allegations of harassment.

If you believe you have been retaliated against in violation of this policy, please report it immediately to your Supervisor, Human Resources, or the General Manager. Any employee who engages in retaliation or knowingly makes a false report of harassment, discrimination, bullying or retaliation will be subject to discipline, up to and including immediate termination.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **513 Political Activity**

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Cowlitz PUD recognizes and fully supports the right of employees to vote, to express their opinions, to hold any political office, and to participate in any political campaign. However, for the good of Cowlitz PUD, and to avoid potential conflict of interest, please keep in mind the following workplace expectations.

- Public facilities or resources may not be used to assist the campaign of a candidate or the promotion or opposition of a ballot proposition. Employees may not participate in political activity during work hours. This includes, but is not limited to, posting campaign signs and literature, and emailing support for a candidate or a position on Twitter, Facebook, or other social networking websites.
- Employees may not wear or display campaign buttons or literature during business hours.
- Employees participating in fund raising or other campaign activities are encouraged to make clear that they do not represent Cowlitz PUD and Cowlitz PUD does not necessarily endorse the candidate or position.
- Employees may not attempt to obtain political contributions from coworkers through threat or promise of differential treatment on the job.
- There may be occasions in which Cowlitz PUD may legally lobby the legislature or take an official position on a proposed law that affects Cowlitz PUD. When this occurs, Employees who support these efforts at the express request of the General Manager, do not violate this policy.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **514 Solicitation**

Effective Date: 6/8/2010

Revision Date: 12/11/2012

We want employees to be able to do their jobs without undue distractions. Therefore, the following guidelines apply to soliciting in the workplace. Except for authorized Cowlitz PUD programs, and with prior Supervisor approval, individuals, whether employed by Cowlitz PUD or not, are not permitted to solicit, survey, petition, or distribute literature on PUD premises, except as specified in this Policy. This restriction includes uninvited charity solicitors, salespersons, questionnaire surveys, union organizers or any form of solicitation or distribution. Employees may only approach each other regarding reasonable forms of solicitation during non-work time (including before and after the start of all involved employees' work periods, and during breaks and meal periods) and in non-work areas.

Limitations on solicitations also apply to Cowlitz PUD bulletin boards. These bulletin boards may only be used to post official Cowlitz PUD notices or notices of other Cowlitz PUD sponsored activities.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### **600 Health Insurance Portability and Accountability Act (HIPAA) Security Policy**

Effective Date: 12/1/2016

Revision Date:

#### **Objective:**

Cowlitz PUD has adopted a policy (please see Human Resources for the complete policy) that protects the privacy and confidentiality of protected health information (PHI) whenever it is used by District representatives. The private and confidential use of such information will be the responsibility of all individuals with job duties requiring access to PHI in the course of their jobs.

#### **Protected Health Information Defined:**

PHI refers to individually identifiable health information received by the District's group health plans or received by a health care provider, health plan or health care clearinghouse that relates to the past or present health of an individual or to payment of health care claims. PHI information includes medical conditions, health status, claims experience, medical histories, physical examinations, genetic information, and evidence of disability.

#### **The HIPAA Compliance Officer:**

The District has designated the Human Resources Manager as the HIPAA compliance officer (HCO), and any questions or issues regarding PHI should be presented to the HCO for resolution. The HCO is also charged with the responsibility for:

- Issuing procedural guidelines for access for PHI.
- Developing a matrix for personnel who will need access to PHI.
- Developing guidelines for describing how and when PHI will be maintained, used, transferred, or transmitted.

#### **Annual Activities Necessitating Use of PHI:**

Annually or more frequently as necessary, Cowlitz PUD performs enrollment, changes in enrollment and payroll deductions; provides assistance in claims problem resolution and explanation of benefits issues; and assists in coordination of benefits with other providers. Some or all of these activities may require the use or transmission of PHI. Thus, all information related to these processes will be maintained in confidence, and employees will not disclose PHI from these processes for employment-related actions, except as provided by administrative procedures approved by the HCO. General rules follow:

- Disclosures that do not qualify as PHI-protected disclosures include:
  - Disclosure of PHI to the individual to whom the PHI belongs.
  - Requests by providers for treatment or payment.
  - Disclosures requested to be made to authorized parties by the individual PHI holder.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

- Disclosures to government agencies for reporting or enforcement purposes.
- Disclosures to workers' compensation providers and those authorized by the workers' compensation providers.
  
- Information regarding whether an individual is covered by a plan for claims processing purposes may be disclosed.
- Information external to the health plan is not considered PHI if the information is being furnished for claims processing purposes involving workers' compensation or short- or long-term disability and medical information received to verify Americans with Disabilities Act (ADA) or Family and Medical Leave Act (FMLA) status.

### **Records Retention:**

Personnel records and disclosures of PHI will be maintained for a period of six years as required by federal law unless a state law requires a longer retention period. Records that have been maintained for the maximum interval will be destroyed in a manner to ensure that such data are not compromised in the future in accordance with the company record destruction policy.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### **601 Family and Medical Leave (FMLA); Washington Family Leave Act; Human Rights Pregnancy Disability Leave Requirement; Washington Paid Family and Medical Leave**

Effective Date: 6/8/2010

Revision Date: 2/25/2025

Both State and Federal leave laws may apply to an Employee depending on their particular situation. Sometimes legally required leave runs concurrently; sometimes it does not run concurrently. What is considered a qualifying disability or event, how leave is tracked, the extent to which confirmation of a qualifying disability or event must be documented, and notice requirements can be complicated. The following is considered a guideline to assist employees and notify them of benefits they might otherwise not be aware of and is not intended to be comprehensive of all the potentially applicable laws related to disability leave, and how they may interact with each other. Employees should check with Human Resources for clarification of their eligibility to take leave so that there are no misunderstandings. Cowlitz PUD will provide any and all leave an employee is legally entitled to receive.

The following process is used to request FMLA:

#### **FMLA Eligibility for Leave**

Employees, who have been employed for at least 12 months and have worked for Cowlitz PUD for at least 1250 hours during the previous 12-month period, may receive up to 12 workweeks of leave every 12-month period to care for:

- Birth of a newborn child, or placement of a newly adopted child, or foster care child;
- Care of a family member with a serious health condition, which encompasses both physical and psychological care;
- The Employee's own serious health condition that makes the employee unable to perform his or her job functions. An employee is unable to perform their job functions if the employee is unable to work at all or is unable to perform at least one of their essential job functions; or
- Any qualifying exigency arising out of the fact that the employee's spouse, son, daughter, or parent is a military member on covered active duty or call to covered active duty status.

FMLA leave begins with the first day of the leave, regardless of whether it is paid or unpaid. The entitlement of 12 workweeks of leave within 12 months will be determined by a "rolling" 12-month period measured backward from the date the employee takes leave. Each time leave is taken, the remaining leave entitlement will consist of any balance of the 12 weeks that has not been used during the immediately preceding 12 months. For Injured Service Member Leave, the "single 12-month period" begins on the first day the eligible employee takes FMLA leave to care for the injured service member.

Example 1:

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

Joe requests three weeks of FMLA leave to begin on July 31<sup>st</sup>. The District looks back 12 months (from July 31<sup>st</sup> back to the previous August 1<sup>st</sup>) to see if any FMLA leave has been used. Joe has not taken any previous FMLA leave, so he is entitled to the three weeks he requested and has nine more weeks available.

### Example 2:

Sally requests two weeks of FMLA leave to begin November 1<sup>st</sup>. The District looks back 12 months (from November 1<sup>st</sup> back to the previous November 2<sup>nd</sup>) and sees that Sally had taken four weeks of FMLA leave beginning January 1<sup>st</sup>, four weeks beginning March 1<sup>st</sup>, and three weeks beginning June 1<sup>st</sup>. Sally has taken 11 weeks of FMLA leave in the 12-month period and only has one week of FMLA-protected leave available. After Sally takes the one week in November, she can next take FMLA leave beginning January 1<sup>st</sup> as the days of her previous January leave “roll off” the leave year.

Parental leave taken to care for a newborn or newly adopted child must be completed within 12 months of the child's birth or placement for adoption.

Pursuant to the Washington Family Medical Leave Act, RCW 49.78, leave provided for the birth and care of a child or for placement for adoption or foster care shall be in addition to any leave used by the mother for sickness or temporary disability because of pregnancy or childbirth. The law provides that:

The family leave shall be in addition to any leave for sickness or temporary disability because of pregnancy or childbirth.

Under Washington State Human Rights Commission regulations, a female employee has a right to take an unpaid leave of absence the entire time she is disabled due to pregnancy or childbirth.

Leave under the Family Medical Leave Act runs concurrently with both the Washington Family Leave Act and the state maternity disability leave. However, leave under the Washington Family Leave Act and state maternity disability leave does not run concurrently. Therefore, a female employee is entitled to 12 weeks of leave for care and bonding with her newborn after pregnancy disability leave ends.

### **Notice and Confirmation of Leave**

If employees have a need to take an extended absence from the job for any of the above reasons, they must inform Human Resources, in writing, of the specific reasons for the leave at least 30 days prior to the anticipated date of delivery or placement for adoption or 30 days prior to pre-scheduled medical treatment for the employee or sick family member. If circumstances do not allow giving the required notice, notice must be given as soon as possible.

Prior to approving the request for medical leave, Cowlitz PUD may require certification from a health care provider of the need for and probable duration of the leave requested for a serious health care condition. Such notice must be provided within 15 days of the date it is requested by Cowlitz PUD. Recertification may be requested as often as needed depending on need for continued leave. If planned medical

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

treatment is required, please make a reasonable effort to schedule treatment so as not to unduly disrupt Cowlitz PUD operations.

A return-to-work authorization must be submitted to Human Resources prior to returning to work for an employee who has been out on medical leave for their own medical condition.

### **Duration of Leave and Methods of Taking Leave**

An eligible employee may take 12 workweeks of leave, which can be taken continuously, intermittently, or on a reduced work schedule, depending on what is medically necessary.

While on family leave, Cowlitz PUD may require employees to periodically report regarding medical status and intention to return to work. Cowlitz PUD may also require employees to obtain subsequent re-certification of the need for continued leave.

### **Benefits While on Leave**

Employees will be allowed to have the same insurance benefits under the same conditions as before the leave commenced. Employees are required to pay for the portion of the health care and other benefit premiums during the FMLA leave of absence that they were paying prior to the FMLA request. During paid leave, Cowlitz PUD will continue to make payroll deductions for the employee's share of the health care and other premiums. During unpaid leave, employees must continue to make these payments and prior arrangements must be made with Human Resources to the extent possible to avoid delays in benefit continuation.

Cowlitz PUD's payment of the employer-paid portion of premiums is conditioned upon return to work. Except in certain circumstances, if an employee does not return from a family leave, Cowlitz PUD may recover from the employee all insurance premiums paid to continue coverage during the period of leave.

Cowlitz PUD requires that employees exhaust accrued PTO, Extended Illness Reserve, Banked Personal Leave, Floating Holidays (can be used in less than 10-hour increments), Leave Sharing Compensation and Compensatory Time during their FMLA leave prior to using leave without pay.

Taking a family leave will not cause an employee to lose any employment benefits which accrued before the start of the leave (*e.g.*, seniority). However, these benefits will not accrue during the family leave period.

The use of any paid or unpaid leave (including leave for a compensable work-related illness or injury, but excluding compensatory time earned under the Fair Labor Standard Act) for a FMLA qualifying event will run concurrently with, and not in addition to, the use of FMLA for that event.

### **Return from Leave**

Upon returning from a family leave, employees will generally be assigned the same position held when the leave commenced or to a position with equivalent pay, benefits, and other conditions of employment.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

A return-to-work authorization must be submitted to Human Resources for an employee who has been out for their own medical condition prior to returning to work.

### **Caregiver Leave for an Injured Service Member**

FMLA-eligible employees are entitled to FMLA leave to permit a “spouse, son, daughter, parent, or next of kin” to take up to 26 workweeks of leave to care for a “member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness.”

### **Family Leave Due to a Call to Active Duty**

This benefit provides 12 weeks of FMLA leave for “any qualifying exigency (as the Secretary [of Labor] shall, by regulation, determine) arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.”

### **Washington Family and Medical Leave Insurance**

Washington’s Paid Family and Medical Leave mandatory insurance program under RCW 50A.04, requires both employees and employers pay premiums beginning January 1, 2019. Employees’ premiums are established by law and will be paid through payroll deduction. Beginning January 1, 2020, qualified employees will then be eligible to receive benefits under the new insurance program if they miss work due to health-related reasons related to themselves, a family member, or certain military connected events, as more fully described in RCW 50A.04. Please see Human Resources if you have questions about this program.

***Note, as of January 1, 2021, the District is no longer participating in the State’s Medical Leave Insurance program and such, no deductions will be payroll deducted from employee’s paychecks for the medical leave portion. The District provides an employer-run voluntary plan as allowed by law. The District is still required to payroll deduct the premium for the Family Leave Insurance.***

### **Patient Protection and Affordable Care Act (PPACA)**

Cowlitz PUD recognizes its obligations under the PPACA. Cowlitz PUD shall furnish its nursing mother employees “reasonable” breaks to express milk for their infants. Cowlitz PUD shall provide:

- 1) A reasonable break time for an employee to express breast milk for her nursing child for one year after the child’s birth; and,
- 2) A place, other than a bathroom, that is shielded from view and free from intrusion from co-workers and the public, which may be used by an employee to express breast milk.

### **Domestic Violence Leave**

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

Cowlitz PUD provides leave to victims of domestic violence, sexual assault, or stalking (“domestic violence” or “abuse”) and their qualifying family members to the extent provided by law. Leave is available to victims of domestic violence, sexual assault, or stalking, or employees with family members (spouse, children, parents, parents-in-law, grandparents, and “a person with whom the employee has a dating relationship”) who are victims of such abuse. Employees are entitled to take “reasonable” leave, including leave on an intermittent or reduced-schedule basis, to engage in specified remedial activities relating to the abuse, including participating in legal proceedings; seeking medical treatment or mental health counseling; obtaining social services; or taking other actions to increase the safety of the employee and his/her family members.

Employees must give advance notice of intent to take leave, consistent with Cowlitz PUD’s policy for requesting leave. If advance notice cannot be given due to emergency or unforeseen circumstances, notice must be provided no later than the end of the first day leave is taken. Employees may elect to use Personal Leave or Compensatory Time, or other paid time off, or may take unpaid leave. To the extent allowed by law, Cowlitz PUD will maintain health care coverage as if the employee had not taken leave.

Cowlitz PUD may request verification that the employee or family member is a victim of abuse, and that the leave is for one of the covered remedial activities. Verification is satisfied by one or more of the following: (1) a police report indicating that the employee or a family member was a victim of abuse; (2) a court order protecting the employee or a family member; (3) documentation from an attorney, clergy member, medical provider, or other professional from whom assistance was sought; or (4) employee’s own credible written statement that he/she or a family member is a victim and needs the leave to seek assistance. Cowlitz PUD will keep the provided information as confidential and will not require disclosure of information beyond the verification material listed above.

### **Washington Paid Family and Medical Leave**

Washington Paid Family and Medical Leave is administered by the Washington State Employment Security Department (“ESD”). Employees should contact the Human Resources Department and ESD for more information.

Paid Family and Medical Leave is a mandatory statewide insurance program. If you qualify, this program will allow you to take up to 12 weeks, as needed, if you:

- Welcome a child into your family (through birth, adoption, or foster placement);
- Need to care for a seriously ill or injured relative; or
- Need time to prepare for a family member’s pre- and post-deployment activities, as well as time for childcare issues related to a family member’s military deployment.
- Experience the loss of a child.

If you face multiple events in a year, you might be eligible to receive up to 16 weeks.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

***Please note, the District is no longer part of the State plan for the medical portion of this program. Employees looking to apply for medical leave due to their own serious health condition, please see Policy 305 – Short Term Disability.***

The State's family leave program is funded by premiums paid by employees. It is administered by ESD, and all determinations of eligibility are made by ESD, not the District. Employees should contact ESD directly if they have questions about how ESD administers and determines eligibility under the Paid Family Medical Leave program for the Family leave portion. Any differences between this policy and the Paid Family and Medical Leave law now or in the future will be decided by applicable legal requirements.

### **Taking Leave for Family Leave**

Starting January 1, 2020, employees who have worked 820 hours in the qualifying period (equal to 16 hours a week for a year) can apply to take paid family leave. The 820 hours are cumulative, regardless of the number of employers or jobs someone has during a year. All paid work over the course of the year counts toward the 820 hours, including part-time, seasonal, and temporary work.

If ESD grants your application, ESD may give you partial wage replacement as determined by ESD. That means you may receive from ESD a portion of your average weekly pay. The benefit is generally up to 90 percent of your weekly wage, with a minimum of \$100 per week and a maximum of \$1,542 per week. If you receive this benefit, you will receive it from ESD rather than your employer.

The District will allow the use of supplemental leave (PTO) while on the Paid Family Leave. You will need to coordinate your use of PTO with Human Resources. If the decision is made to use PTO either in your waiting period or as a supplement to the State paid benefit, the District will not go back in time and adjust your use of PTO once the determination of your State paid benefit is made. Any changes to using PTO must be made by 3pm on Thursday of each week.

You can keep your health insurance while on protected leave. If you currently contribute to the cost of your health insurance, you must continue to pay your portion of the premium cost while on leave.

The District will not discriminate or retaliate against you for requesting or taking paid leave.

### **Notice for Requesting Leave**

An employee must provide written notice to Human Resources of the intent to take Washington Paid Family Leave. If the need for leave is foreseeable, notice must be given at least 30 days in advance of the leave. For unforeseeable leave, notice must be given as soon as practicable. The employee's written notice must include the anticipated timing and duration of leave, including which days the employee plans to be on PFML, if intermittent. ESD may temporarily deny or delay benefits if an employee could have given at least 30 days' notice and chose not to do so. After receiving the employee's notice of the need for leave, Human Resources will advise the employee whether the employee is eligible for job protection under PFML or FMLA or both.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

The employee must make a reasonable effort to schedule the treatment so as not to unduly disrupt District operations.

If taking leave intermittently, an employee must notify their supervisor and Human Resources at least 30 days in advance or as soon as practicable each time Washington Paid Family Leave is taken so that the District may properly update payroll records and track leave use.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **602 Leave Without Pay (LWOP)**

Effective Date: 6/8/2010

Revision Date: 1/23/2024

Occasionally, employees may need time off from work for personal reasons that are not covered by any other benefit or leave of absence. In those circumstances, Cowlitz PUD may grant a leave without pay for a specified period, generally up to two (2) months. Requests for leave without pay must be submitted to the employee's Department Director in writing. The Director will review the request with the employee and forward the request to Human Resources with comments for a final decision. Leave without pay will be granted at the sole discretion of the General Manager or designee. The circumstances provided in the request for LWOP will determine the length of leave granted. Accrued Personal Leave, Banked Personal Leave, EIR, floating holidays, and compensatory time must be exhausted before an unpaid leave is granted. Any employee who goes on LWOP without prior authorization will be subject to disciplinary action up to and including termination. Further, granting of LWOP does not change an at will employee's status or affect the applicability of any Cowlitz PUD policy to the employee.

An employee on leave without pay status shall not by virtue of such status continue to accrue continuous service credits, does not accrue personal leave, and will not be paid for holidays. Health and life insurance coverage will cease unless the employee prepays the premiums. During unpaid leave, employees must continue to make these payments and prior arrangements must be made with Human Resources to the extent possible to avoid delays in benefit continuation. Cowlitz PUD will discontinue health insurance and other insurance coverage for employees and their dependents if the employee does not return to work after the agreed upon end of the leave of absence.

Notwithstanding the foregoing, employees who are on LWOP status due to military leave and FMLA leave may be exempt from this policy and are more specifically addressed in policy #601 and #605 in the Employee Handbook.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **603 Military Leave**

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Cowlitz PUD recognizes the importance of enabling employees to serve in the military without adverse consequences on their jobs. Leave laws pertaining to military service may apply to an employee member of the military or to the employee who is a spouse or other family member to the person on military service. Determining the applicability of leave laws and their effect on pay and benefits should be determined in consultation with Human Resources.

Employees are entitled under Washington Law to take leave of up to 21 days each year, from October 1 through September 30. During military leave employees are entitled to receive their regular pay, regardless of whether they were ordered to military service or volunteered.

Under the federal Uniformed Services Employment and Reemployment Rights Act (USERRA) employees may take leave for military duty or training. Employees on military duty are entitled to continued health insurance coverage for themselves and their dependents up to 24 months while on military leave under terms similar to COBRA. An employee's pension benefits protections are also applicable under USERRA.

Leave for military spouses and other family members may be available under the federal Family and Medical Leave Act, the Washington State Military Family Leave Act, and the Washington Family Leave Act, depending on the circumstances. There are notice requirements that apply to leave for military service.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **604 Bereavement and Funeral Leave**

Effective Date: 12/11/2012

Revision Date: 9/27/2016

All employees shall be granted unpaid bereavement leave up to three (3) workdays within a 30-day period upon the time of death of the employee's family member, and up to ten (10) workdays within a reasonable 30-day period upon the death of a spouse or child. Bereavement leave may be used for qualifying family members in the case of imminent death, but the total bereavement leave portion shall not exceed the three or ten workday limitations. For the purposes of this section, the employee's family members are defined as: the spouse, domestic partner, son, daughter, parents, brother, sister (or the step and in-law equivalents), grandparents, grandchildren, or other relatives living in the employee's household.

Cowlitz PUD may require that employees exhaust accrued Personal Leave, Banked Personal Leave, Floating Holidays, and Compensatory Time prior to using leave without pay, if the time exceeds the three (3) or ten (10) workday limitation.

Bereavement leave in excess of the days permitted or for other relatives may be granted with the approval of the supervisor and charged to an employee's bank of other paid leave available.

Time off with pay shall be allowed for purposes of attending the funeral of a District employee.

Notwithstanding the foregoing, employees may choose to use other forms of paid leave in lieu of benefits afforded in this section.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 701 Standards of Conduct & Discipline

Effective Date: 6/8/2010

Revision Date: 1/1/2021

We all succeed when we respect the needs and interests of the public, Cowlitz PUD, and our co-workers. Sometimes, however, it is necessary for Cowlitz PUD to discipline employees based on violations of our policies or our reasonable performance and conduct expectations. Consistent with the at-will employment relationship, Cowlitz PUD reserves the right to review each situation independently and to make a decision at its sole and absolute discretion about what it deems to be appropriate discipline in all cases, up to and including immediate discharge.

Employment with Cowlitz PUD is at will unless there is a written agreement that expressly provides to the contrary signed by the General Manager. No employee is entitled to progressive discipline unless there is an express written agreement to the contrary. Instead, progressive discipline is only warranted if the General Manager in his/her sole and absolute discretion determines that it would be appropriate for the situation.

For represented employees, Cowlitz PUD adheres to procedures set forth in the applicable labor agreement but may impose disciplinary action including discharge, for violation of the terms set forth in this Handbook which are consistent with its “management rights” under the collective bargaining agreement.

Some examples of conduct that may lead to immediate discipline or discharge include, but are not limited to the following:

- Insubordination, which shall mean a breach of any reasonable work expectation regardless of whether it is cited in the Handbook;
- Unauthorized release of Cowlitz PUD, customer, or coworker information;
- Repeated swearing or verbal abuse toward another while on duty;
- Falsifications of any time records, personnel, or other Cowlitz PUD records;
- Unauthorized taking or removal of Cowlitz PUD funds or property;
- Dishonesty;
- Discrimination against or harassment of coworkers, vendors, or members of the public;
- Possession, consumption, or being under the influence of alcohol or a controlled substance at work or on Cowlitz PUD premises;
- Deliberate damage to or misuse of Cowlitz PUD property;
- Bringing a weapon onto Cowlitz PUD property;
- Fighting or threatening to fight with another employee;
- Serious misconduct of any kind;
- Poor performance;
- Absenteeism, tardiness, unexcused absence, or failure to report when expected;
- Failure to comply with safety or security rules and procedures;
- Violation of any Cowlitz PUD policy;

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

- Improper handling of cash or other financial transactions;
- Sleeping on the job;
- Failure to report immediately any accident or injury which occurs on the job to the Department Director and/or supervisor;
- Failure to cooperate or be truthful in any lawful internal investigations pursuant to a lawful request to do so;
- Smoking in non-smoking areas or Cowlitz PUD vehicles;
- An employee's failure to report off duty criminal charges brought against said employee;
- Any conviction and/or no contest plea violating State and/or Federal law that interferes with the business of the District;
- Violating a rule pertaining to employee conduct contained in this Employee Handbook or rule under a Collective Bargaining Agreement;
- Engaging in unprotected off duty conduct which tends to expose Cowlitz PUD employees to an unlawful hostile work environment or create a risk that Cowlitz PUD may breach a duty to its employees. Examples include, but are not limited to, allegations of offenses for violence against another, domestic violence, or other offenses the underlying behavior which, if committed in the workplace, may place Cowlitz PUD employees at risk;
- Off-duty and on-duty conduct, which discredits Cowlitz PUD or employee's profession or impairs the employee's on-the-job effectiveness.
- Off duty conduct which causes a reasonable apprehension among Cowlitz PUD employees that the employment environment is unsafe;
- Failure to follow any duty imposed under this Handbook or law which tends to adversely affect Cowlitz PUD;
- Interrupting the work of others or otherwise engaging in conduct which infringes on Cowlitz PUD's ability to effectively manage the employee's work schedule.
- Wasting District resources and District time in pursuit of promoting an employee's own views or agendas.
- Conduct inconsistent with common sense.
- Failure to timely make payment of utility bills owing to Cowlitz PUD.
- Failure to make a reasonable attempt to ascertain the correctness of the information furnished to Cowlitz PUD in connection with alleging improper governmental conduct under Policy 520 in this Handbook.
- Failure to adhere to RCW 46.61.667, using a wireless communication device while driving.

**These examples are not all-inclusive; other behavior may also be grounds for immediate discipline or termination if an employee's conduct is detrimental to Cowlitz PUD.**

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 702 Drug and Alcohol Use

Effective Date: 6/8/2010

Revision Date: 9/27/2016

Cowlitz PUD is committed to maintaining a drug and alcohol-free work environment. Notwithstanding other standards imposed by law which may be more lenient, and, because of nature of the services we provide, the often hazardous work we do, and our strong desire to keep employees and the public safe, Cowlitz PUD employees are held to an even higher standard.

Employees are strictly prohibited from possessing, selling, consuming, or being under the influence of any drug (except as authorized by a physician) or alcohol or any use of marijuana while on Cowlitz PUD property, during work hours, in Cowlitz PUD vehicles or engaged in Cowlitz PUD work.

“Under the Influence” shall include, but is not limited to either or both of the following:

- Any measurable alcohol or drug detected by breath or in the bloodstream. For example, upon a test for alcohol any measurable amount of breath alcohol shall be grounds for disciplinary action including termination. This means a reading of above a 0.00 Breath Alcohol Content or its equivalent. Upon a test for unlawful drugs, any measurement shall also be grounds for disciplinary action including termination.
- Obvious intoxication (by either drug or alcohol) where the employee’s ability to perform his or her job functions are lessened to any appreciable degree **and** there are substantial signs of obvious intoxication such as odor of intoxicants, bloodshot and watery eyes, poor balance, or slurred speech.

If an employee is taking prescription drugs that may cause drowsiness or impair mental functioning, the employee must inform his or her supervisor so that he or she can make sure such drugs will not affect the ability to perform the job safely and effectively. Any violation of this policy will result in discipline, up to and including immediate termination.

As a condition of further employment, each employee shall notify his or her supervisor of any alcohol or drug related convictions. Such notification shall be provided no later than five days after such conviction. "Conviction" is defined as a conviction or guilty plea, including a plea of no contest.

Cowlitz PUD encourages employees with drug or alcohol problems to come forward and seek help. If an employee has a drug or alcohol problem, he/she is encouraged to discuss it with management before it affects his or her performance or is discovered by management, Cowlitz PUD will aid in referral to a treatment program and, if possible, hold the employee’s job for his/her return.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 703 Attendance, Punctuality and Unavailable for Work

Effective Date: 6/8/2010

Revision Date: 2/1/2018

Each employee plays an important role in getting the day's work done for the team, department and the District, and the District is better able to serve the needs of the community when employees consistently meet and exceed performance expectations. We expect you to arrive to work on time ready to begin work at the start of your shift and to remain engaged and productive giving your best efforts for the duration of the shift until the end of each day.

Regular, consistent and predictable attendance is expected and required for all employees, not only because the tools and equipment you need to perform your duties are available only at the District worksites, but also because your participation in teamwork and face-to-face interactions with customers and/or other employees directly impacts our ability to run operations smoothly. *Unexcused* absenteeism or tardiness is disruptive to operations and interferes with the team's ability to satisfy our customers' needs. *Excessive unexcused absenteeism or tardiness will not be tolerated and will result in discipline, up to and including immediate termination.*

#### Medical and Personal Appointments

If possible, medical care and other personal appointments should be made for times other than working hours, or if during working hours, during times that would be least disruptive to your team or department. We understand that this is not always possible, and when it is not, we ask that you give your supervisor or Director as much advance notice as possible so that he or she can arrange coverage of your job. We appreciate your help in assuring customer needs are met.

#### Unavailable for Work

If you are delayed or unable to come to work for any reason, you are responsible for notifying your supervisor or designee at the earliest possible time prior to the start of your regular work shift so he or she can reassign your work. Contact your supervisor via phone **before** your scheduled start time on the day of your absence or tardy. If you are unable to speak with your supervisor or designee in person, contact Human Resources and provide notice of your anticipated absence or tardy.

Call in each day that you expect to be absent or tardy *unless* your supervisor or Director directs you to call in on a different schedule. Human Resources may also request a medical release from you prior to your return to work if you miss 3 or more workdays due to illness or injury or when you are returning to work following an on-the-job injury or a medical leave of absence. Failure to call in when instructed to do so or to provide the requested medical information may subject you to discipline.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **704 Dress Code & Grooming Standards**

Effective Date: 6/8/2010

Revision Date: 2/1/2018

The District is a professional organization, and we expect all District employees to present a professional appearance to promote a positive image to customers and others with whom we do business. We want customers to know that employees care about the details when it comes to the services the District provides, and employees reinforce that message every day in the way employees carry and present themselves to others. The District expects you to use good judgment and taste in matters of personal grooming and to wear appropriate attire and footwear for the workplace given your specified job duties. Your supervisor will advise you of any differences or variations that may apply to you.

#### **Appropriate Attire**

Attire should be clean, well-fitting, and modest with no visible bare midriffs or under garments, or excessive cleavage or bare skin. Footwear should similarly be clean and in good repair and appropriate for the nature of work you perform. Shorts, workout wear, halter tops, excessively tight fitting or revealing clothing (e.g., low cut tops, short skirts (mid-thigh or higher), sheer or “see-through,” etc.), overly loose garments, casual hats worn indoors, and casual flip-flops are not permitted. Clothing or accessory items that could be deemed harassing or offensive to others are also prohibited. Due to the diverse working conditions at the District, your supervisor will advise you of any differences or variations that may apply to you.

#### **Tattoos & Piercings**

The District understands that tattoos and piercings are a matter of personal preference. While the District does not prohibit the expression of your personality in this way, the District reserves the right to require you to cover offensive tattoos and/or to remove excessive facial piercings while working. Offensive tattoos include, but are not limited to, vulgar language, racial or other discriminatory slurs, epithets, symbols or images, depictions of violence, pornography, sexually graphic or explicit images, and any other images the District may deem inappropriate for the workplace.

#### **Personal Hygiene**

Personal hygiene is an essential part of doing business and working with other employees, and strong odors caused by poor hygiene or perfumes, scented hair sprays, aftershave lotions, and heavy cigarette, cigar and pipe odor can be offensive or problematic to employees with allergies or heightened sensitivities to smells. The District expects employees to bathe/shower regularly, maintain appropriate oral hygiene, use perfumes, lotions, scents in moderation, and take appropriate steps to mitigate other strong odors on their person and their clothing (e.g., cigarette odor, strong body odor, etc.).

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **Enforcement & Accommodations**

If the supervisor feels personal appearance of an employee is inappropriate, he or she may be asked to leave the workplace until he or she is properly dressed or groomed. Under such circumstance, employees will not be compensated for the time away from work.

If you have questions about whether your attire, tattoos or personal hygiene complies with this expectation, please speak with your supervisor, Director, or Human Resources. ***If your religious beliefs or medical conditions require deviation from these outlined expectations, please contact Human Resources.***

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **705 Inclement Weather**

Effective Date: 6/8/2010

Revision Date: 1/1/2021

The public's need for Cowlitz PUD's services may be especially great during inclement weather. Therefore, it is particularly important for employees to report to work during inclement weather if Cowlitz PUD does not declare an emergency closure. We do not want employees to jeopardize their safety. If unable to get to work or if delayed, each employee should try to reach his or her supervisor, Department Director, or Human Resources as soon as possible to let them know. A non-exempt employee may use accrued personal leave during the authorized absence.

In the event that weather conditions are so severe that offices are officially declared closed by the General Manager, and employees are instructed to arrive late, leave early, or stay home, they will be provided greater flexibility in accounting for and making up their time due to their absences. Under these circumstances, employees may have the option of working with their supervisor to flex their schedule over the workweek in which the absence occurred, at the supervisor's discretion. Additionally, when severe weather is predicted and the employee's work assignments allow, the employee and supervisor may arrange in advance for the employee to work from home, rather than report to the office provided the supervisor determines time spent working from home will be productive. If the employee is not able to flex their schedule as described, the deficit work hours will be charge against the employee's PTO bank, or leave without pay, if inadequate PTO accruals exist.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **706 Separation from Employment**

Effective Date: 6/8/2010

Revision Date: 2/1/2019

The employment relationship between Cowlitz PUD and its employees is voluntary for both parties. All employees have the right to end the employment relationship if they deem it appropriate. Likewise, for all employees, except those covered by a written agreement to the contrary, Cowlitz PUD can end the relationship at any time for any reason it deems appropriate, so long as the reason is not illegal. If an employee's status is at-will in nature, nothing other than an express written agreement signed by the General Manager or designee will change the employees at will status.

#### **Resignation**

If an employee decides to leave the employ of Cowlitz PUD, he or she is required to give written notice to his or her supervisor. Supervisory and managerial employees should give four weeks' notice. All other employees should give at least two weeks' notice. Cowlitz PUD reserves the right to accept an employee's resignation and may choose to modify their work assignment and access. Cowlitz PUD reserves the right to accept an employee's resignation to be effective on a date specified upon written submission by the employee. Cowlitz PUD may require the employee enter into a written agreement regarding the conditions under which it would accept such a resignation.

#### **Retirement**

Employees who are retiring from the District are required to give written notice to his or her supervisor, Department Director, or Human Resources. Supervisor and managerial employees should give eight weeks' notice. All other employees should give at least four weeks' notice.

#### **Separation-related Procedures**

Separating and laid off employees are asked to participate in an exit interview with a member of Cowlitz PUD management staff upon request on or before their last day of work to explore such issues as the reasons for the separation, the employee's suggestions for improving working conditions, any benefits issues, and to collect Cowlitz PUD property. Separating employees who desire Cowlitz PUD to provide references on their employment will be asked to sign an authorization and release form for that purpose. References other than job title and dates of employment will not be given without such a release. Final paychecks are available no later than the next regular pay day.

#### **Abandonment of Position**

An employee who is absent from his/her position for two (2) consecutive workdays without prior authorization from the supervisor or designee shall be considered to have abandoned his/her position, unless in the opinion of the supervisor the failure to notify was clearly beyond the employee's control. Under such circumstances the employee shall be deemed to have voluntarily resigned from their position.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 707 Pre-Employment Drug Screening

Effective Date: 12/1/2016

Revision Date: 1/23/2024

It is the policy of Cowlitz County PUD to make sure that persons hired into positions with safety sensitive functions successfully pass a drug screen prior to employment. All job offers made to persons entering such positions shall be contingent upon the results of said drug screen. This policy applies to both positions covered under DOT regulations (positions requiring a CDL) and other District identified positions with safety sensitive duties.

#### Procedure:

The following are a list of current DOT (positions requiring a CDL) which will be subject to pre-employment drug screens, this list may be subject to change as job titles and job descriptions are added or modified. All DOT drug screens will be handled according to current DOT regulations. DOT drug screens are to be scheduled with our current pre-employment drug screen provider.

Heavy Crew Foreman	Meter Tester
Line Foreman	Meterman Helper/Installer
Working Foreman	Utilityman
Brushing Foreman	Operations Superintendent
Journeyman Lineman	Substation Working Foreman
Service Lineman	Substation Lineman
Apprentice Lineman	Substation Wireman
Head Groundman Class A	Wireman
Groundman	Wireman Dispatcher
Service Lineman Helper	Transformer Maintenance Spill Response Coordinator
Heavy Equipment Operator	Asst. Transformer Maintenance Spill Response Helper
Transformer Maintencenceman	Transformer Maintencenceman Helper
General Foreman Fleet	Fleet Mechanic Foreman
Lead Fleet Mechanic/Fabricator	Fleet Mechanic
Line Inspector	

The following are a list of current Non-DOT (safety sensitive positions) which will be subject to pre-employment drug screens, this list may be subject to change as job titles and job descriptions are added or modified. Non-DOT drug screens are to be scheduled with our current pre-employment drug screen provider.

Meter Reader	General Manager
Meter Service Representative	Facilities Manager
Meter Service Coordinator	Director of Engineering
Manager System Engineering	Operations Engineer Superintendent
Senior Engineer (Electrical and T&D)	Engineer I, II, III (Electrical and T&D)
Engineering Area Planner I, II & Senior	Energy Efficiency Specialist/Energy Efficiency Spec. Sr.
Flagger	Heavy Equipment Operator Helper

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

Locator	Utility Helper
Landscaper	Relay Department Foreman
Substation Wireman Relay Tech	Storekeeper
Assistant Storekeeper	Warehouseman Helper
Director of Operations	Dispatcher (including NERC Certified)
Distribution Designer	Senior Distribution Designer
Safety Manager	Operations Superintendent (non-DOT holder)
Meter Department Foreman	Meter & Relay Tech
Power & Demand Meterman	Meterman
Apprentice Meterman	Physical Security Coordinator
Director of Power Management	Power Resource Engineer
Senior Power Resource Engineer	Power Resource Analyst
Engineering Drafting Technician I and II	

When a job offer is made to an applicant out of the area, Human Resources personnel will work in coordination with our current pre-employment drug screen provider to find a facility closest to the applicant to complete the drug screening if the applicant is unable to complete the screening through the District approved facility.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### 708 Drug Testing - CDL Card Holders

Effective Date: 6/8/2010

Revision Date: 3/14/2023

Cowlitz PUD has a significant interest in the health and safety of its employees and its customers. In furtherance of that interest, all employees whose job duties require them to maintain a commercial driver's license ("CDL employees") shall be subject to Cowlitz PUD's drug and alcohol testing policy. If, during testing and enforcement of this policy concerning CDL employees, Cowlitz PUD determines an employee has violated the terms of the *Drug Testing Policy – CDL Card Holder*, the employee shall be subject to disciplinary action including termination.

This policy outlines the following requirements for CDL employees.

- 1) All CDL employees who are using, manufacturing, dispensing or distributing, or who are in the possession of, or impaired by drugs and/or alcohol when reporting for duty, while on duty, when on a Cowlitz PUD job site or on Cowlitz PUD premises constitute a threat to the health, safety and security of themselves, their coworkers and members of the public and shall be removed from duty and shall be subject to disciplinary action up to and including termination. Such behavior is prohibited.
- 2) All CDL employees shall be subject to specific drug and/or alcohol testing as required by federal law through an independent third party. Testing shall be conducted in a manner that assures accuracy, reliability, and privacy.
- 3) All CDL employees who are reasonably suspected of not being fit for duty due to drug and/or alcohol use or misuse shall be suspended from job duties with pay pending an investigation and verification of their condition. All CDL employees who test positive for drugs and/or alcohol above 0.00 shall be removed from duty and shall be subject to disciplinary action up to and including termination.
- 4) Confidentiality shall be maintained throughout the drug/alcohol testing process conducted by an independent third party. All positive drug/alcohol test results shall be forwarded to a Medical Review Officer (MRO) for review. The MRO shall review the individual's medical history and shall afford the employee an opportunity to offer any clarifying information that would explain a positive test result. Human Resources will maintain results of such tests in a separate file from the employee's general personnel file until such time as the test results may be used in a disciplinary action. In cases where disciplinary action results from a positive test result, such information will be shared only with those in a supervisory capacity and/or in a collective bargaining unit representation capacity involved in that action.
- 5) Analytical urine testing will be conducted in accordance with Federal guidelines addressing Commercial Driver's License certifications. An initial drug screen will be conducted on each specimen after a split sample is provided to the laboratory. For those specimens that are positive, a confirmation Gas Chromatography/Mass Spectrometry shall be performed. A positive test result, above the minimum thresholds set by the Federal regulation and verified by the MRO, will be considered a violation of this policy.

# *Public Utility District No. 1 of Cowlitz County*

## **Employee Handbook**

- 6) Tests for alcohol concentration will be conducted by using the National Highway Traffic Safety Administration approved evidential breath testing devices operated by trained technicians/professionals. An employee who tests above 0.00 will be re-tested within 15 to 20 minutes of the first test. The second test is considered a confirmatory test. A confirmatory alcohol level above 0.00 will be considered a positive test and a violation of this policy.
- 7) Any CDL employees who refuse to comply with a request for testing, who provides false information in connection with a test or who attempts to falsify test results through tampering, manipulation, contamination, adulteration, or substitution shall be removed from duty immediately. A refusal shall be treated as insubordination and shall be recorded as a positive test with the employee subject to disciplinary action up to and including termination.

### **Pre-Employment Federal Motor Carrier Safety Administration Clearinghouse Queries**

Applicants considered for a position requiring a CDL shall register and give consent to the District and the District's Third-Party Consortia in the Federal Motor Carrier Safety Administration (FMCSA) Clearinghouse. The District and/or the Third-Party Consortia will run a full query to determine if any violations exist.

### **Pre-Employment Drug Testing**

All applicants considered for a position requiring a CDL or a safety sensitive position, or both, shall undergo drug testing prior to employment. Receipt by Cowlitz PUD of a negative drug test result prior to employment will disqualify an applicant.

### **Reasonable Cause Testing for All Cowlitz PUD Employees**

Any employee, even employees not holding CDLs, are subject to a fitness for duty evaluation including a drug and/or alcohol test when there is reasonable suspicion of impairment immediately prior, during or immediately after performing job duties or while on Cowlitz PUD job sites or Cowlitz PUD premises. A referral for testing will be made on the basis of specific, reasonable and articulable facts. Such referrals will be made by supervisory personnel who are trained to detect the signs and symptoms of drug and/or alcohol use.

Refusal to participate in the test as requested shall constitute insubordination and be deemed a positive test in violation of the policies set forth in this Handbook.

### **Post-Accident Testing**

All employees are required to be tested if they are involved in an accident involving a Cowlitz PUD vehicle that results in: a fatality; an injury requiring immediate attention at a medical facility, with the employee receiving a criminal or traffic citation under state or local law; or a vehicle being towed from the scene and the employee receiving a criminal or traffic citation under state or local law. Following an accident under the above circumstances, employees will be tested as soon as possible, but no later than eight (8) hours after the accident for alcohol testing and thirty-two (32) hours for drug testing. Employees involved in accidents must refrain from alcohol use for eight hours following the accident or until a drug/alcohol

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

test is administered. Employees who leave the scene of an accident without proper authorization prior to testing will be considered to have refused the test and will be subject to discipline up to and including discharge.

### **Random Testing**

All CDL employees will be subject to random, unannounced drug and/or alcohol testing. CDL employees' names will be selected by a computer-generated list supplied by an outside company. Every CDL employee has an equal chance of being chosen when the random list is generated regardless of whether they have been tested previously.

If an employee sent in for a random drug and/or alcohol testing receives a negative inconclusive test result, a negative unreadable test result or a negative diluted test result, the employee will be required to go back into the testing facility immediately for an additional test.

### **Return-to-Duty Testing**

All CDL employees who previously tested positive on a drug and/or alcohol test and who, under the disciplinary policy, are allowed to return to work must test negative prior to being released by a Substance Abuse Professional for duty. Such employees shall be required to undergo frequent random drug and/or alcohol testing at their own expense during the period of re-entry as part of their return-to-work agreement.

### **Federal Motor Carrier Safety Administration Clearinghouse Queries**

Annually beginning January 6, 2020, the District is required by the Federal Motor Carrier Safety Administration (FMCSA) to complete annual limited queries on each of our CDL drivers. If there is a record that exists in the FMCSA, within 24 hours, the driver will be required to create an account with the FMCSA and the District or Third-Party Consortia must run a full query on the employee. It is required that all CDL drivers sign an authorization form, giving the District and Third-Party Consortia the ability to run limited queries.

### **Notification of Drug and Alcohol Violation**

Employers are required to report the following drug and alcohol violations to the Federal Motor Carrier Safety Administration (FMCSA):

- An alcohol confirmation test result with an alcohol concentration of 0.04 or greater.
- A CDL driver's refusal to submit a DOT test for drug or alcohol use.
- Actual knowledge, as defined in 382.107.
- Negative return to duty test results.
- The date the driver successfully completed all follow-up tests as ordered by a substance abuse professional.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **Notification of Criminal or Driving Convictions**

All CDL employees are required to notify Cowlitz PUD of any convictions under a criminal drug statute or driving while under the influence of intoxicants statute within five (5) days of conviction. Failure to report such a conviction or to report any moving violation involving drugs or alcohol causing the loss of a driver's license by state or local law enforcement will result in discipline up to and including discharge.

Any CDL employee who tests positive for drugs may request a test of the split sample within seventy-two (72) hours of notification. The cost of the split sample test will be borne by the employee making the request.

### **Legal Use of Prescription Drugs**

The use of any legally prescribed drug and/or non-prescription medication which carries a warning label indicating that mental functioning, motor skills or judgment will be adversely affected must be reported to supervisory personnel prior to operating equipment requiring a CDL. It is the CDL employee's responsibility to remove him/her from service if he/she is experiencing any adverse effects from medication.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### Appendix A – Benefits

BENEFITS	Full-Time Employee	Part-Time Employee*	Limited Duration Employee	Temporary Employee	Intern
Medical	X	X	X		
Dental	X	X	X		
Vision	X	X	X		
Prescription Drug Benefits	X	X	X		
Pension Plan through DRS**	X	X	X	X	
Deferred Compensation Plan (457)**	X	X	X	X	
401(k) Savings Plan**	X	X			
Roth 401(k) Savings Plan**	X	X			
VEBA**	X	X			
Washington Paid Family and Medical Leave	X	X	X	X	X
Short Term Disability	X	X	X	X	
Long Term Disability	X				
Group Life Insurance**	X	X	X		
Additional Life Insurance**	X	X	X		
Employee Assistance Program**	X	X	X	X	X
District Wellness Program	X	X	X	X	X
Holidays	X	X	X		
Early Holiday Release***	X	X	X	X	X
Personal Time Off	X	X	X		
Sick Leave				X	X
Family Leave	X	X	X		
Medical Leave	X	X	X		
Military Leave	X	X	X		
Jury Duty Leave	X	X	X		
Cowlitz PUD Credit Union**	X	X	X	X	X
Tuition Reimbursement	X				

\*Benefits for Part-time employees are at a pro-rated amount. Please see Human Resources for more information.

\*\*Benefits are effective the first day of employment with the District.

\*\*\*Early Holiday Release may not be applicable to all employees due to the nature of their jobs.

# *Public Utility District No. 1 of Cowlitz County*

## Employee Handbook

### **Appendix B – Policies outside of the Employee Handbook**

The District has a number of Board approved policies that lie outside of the Employee Handbook that pertain to your employment at the District. Below is a list of policies and where to locate them.

#### **Administrative Policies:**

- Compensation Policy
- Records Management Policy
- Cyber Security Policy
- Communications Policy
- Workplace Violence Policy

#### **Business Operation Policies:**

- Procurement and Purchasing Policy
- Employee Safety Policy
- Educational Assistance Policy
- Travel and Other Expenses Reimbursement Policy
- Mobile Phone or Device Stipend Policy
- Vehicle Use Policy

Policy volumes can be located on the Cowlitz PUD intranet at: <http://mypud/policies.php>.

# Public Utility District No. 1 of Cowlitz County

## Employee Handbook

### Appendix C – Employee Handbook Acknowledgement Form

#### **EMPLOYEE ACKNOWLEDGEMENT FORM**

I acknowledge that I have been informed of where to locate the Employee Handbook, and I understand that it is my responsibility to read and comply with the policies contained in this Handbook and any revisions made to it. I have also had the opportunity to ask Human Resources questions on matters I did not initially understand. If I receive a new or updated section of this Handbook, I will ask Human Resources to explain anything I do not understand. **I agree that this Handbook is not an employment agreement or contract for employment.**

I understand that this Handbook, approved by the Board on February 25, 2025, supersedes any prior handbooks or policy manuals regarding employment with Cowlitz PUD and that Cowlitz PUD may add to, modify, or delete any of the policies and procedures in this Handbook.

I agree to act in a manner consistent with the general guidelines as stated in this handbook.

#### **Non-Represented Employee's Only:**

I have been told, and understand, that my employment is "at will" which means it may be terminated at any time, with or without cause or notice. I understand that I may be demoted, my job responsibilities may change, or my salary and/or benefits altered after I accept employment with Cowlitz PUD, with or without cause or notice.

#### **Represented Employee's Only:**

If I am subject to a collective bargaining agreement, and this handbook conflicts with the collective bargaining agreement, it is that agreement that will control.

EMPLOYEE'S NAME (printed): \_\_\_\_\_

EMPLOYEE'S SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

To: Cowlitz PUD Board of Commissioners  
Gary Huhta, General Manager

From: Trent Martin, Director of Accounting and Finance

Re: Resolution No. 2821 - Cowlitz PUD Pole Attachment Rate

Date: February 25, 2025

Effective June 12, 2008, the Legislature of the state of Washington enacted amendments to RCW 54.04.045, setting forth a specific formula for determining just and reasonable pole attachment rates to be charged by a public utility district like the District.

The formula was challenged by communication companies and a lawsuit followed involving Pacific PUD, Comcast, CenturyLink and Charter.

After years of back and forth, many appellate trials and partial sidings with Pacific PUD, two of the companies, Charter and Comcast, chose to settle in 2019 after the Washington State Appellate Court sided with Pacific PUD on a substantial majority of the case. Centurylink chose to appeal the case to the Washington State Supreme Court who decided not to hear the case.

Using data and inputs from the District's records (in light of the Legislature's statement of its intent in the 2008 amended statute recognizing the value of the District's infrastructure and ensuring that District utility customers do not subsidize attachers on District poles, pursuant to the Court of Appeals decision) and the court-approved model, resulted in a calculated permissible pole attachment rate of \$44.65 per attachment per year. The District's current rate is \$39.77.

Staff is recommending the Board adopt a rate of \$44.65 per attachment per year to be effective January 1, 2025. The pole attachment rate will be calculated every two years.

No 2025 invoicing has occurred so the retroactive date will not cause any billing concerns.

I recommend the Board of Commissioners approve Resolution No. 2821.

## RESOLUTION NO. 2821

### A RESOLUTION of the Board of Commissioners of Public Utility District No. 1 of Cowlitz County, Washington Adopting Pole Attachment Rate

**WHEREAS**, RCW 54.04.045 allows a locally regulated utility, such as Public Utility District No. 1 of Cowlitz County, to set rates charged to other entities for attachment of their wire, cable, or other communications equipment to poles owned by the District; and

**WHEREAS**, the District's current pole attachment rate of \$39.77 per attachment per year was adopted by Resolution No. 2797, and it is in the best interest of the District to evaluate its pole attachment rate every two years; and

**WHEREAS**, effective June 12, 2008, the Legislature of the state of Washington enacted amendments to RCW 54.04.045, setting forth a specific formula for determining just and reasonable pole attachment rates to be charged by a public utility district like the District; and

**WHEREAS**, after two trials and appeals, the Washington Court of Appeals in April 2019 issued a published decision (8 Wn. App. 2d 418) providing the Court's interpretation of the statutory formula and holding that public utility districts retain discretion regarding data, inputs, assumptions and other information used to calculate the rate under the statutory formula and that courts should continue to defer to public utility districts like the District in that regard, and reiterating several times, that the Legislature intended the 2008 amendments to RCW 54.04.045 "to recognize the value of the infrastructure of locally regulated utilities" like the District and "to ensure that locally regulated utility customers do not subsidize licensees"; and

**WHEREAS**, the Washington Supreme Court denied a petition for review of the Court of Appeals decision; and

**WHEREAS**, the District has analyzed and calculated the pole attachment rate the District could set under RCW 54.04.045, as amended, in light of the Court of Appeals decision, and in such analysis, has considered the various data and inputs relevant to such calculation, and, applying such data and inputs to the language of the amended statute, has calculated what the District's pole attachment rate could be and has concluded that the permissible rate is above the District's current rate; and

**WHEREAS**, the data and inputs the District considered in its review of the District's pole attachment rate, are, without limitation, those relating to: number of poles (transmission poles and distribution poles); average pole height; expected useful pole life; determination of average cost of a bare pole; average number of attachments per pole; usable pole space; support and clearance space; safety space as a component of support and clearance space; the share of the costs attachers on District poles should bear; carrying charge (e.g., various expenses and return on investment); and the District has considered these types of inputs and data in light of the Legislature's statement of its intent in the 2008 amended statute recognizing the value of the District's infrastructure and ensuring that District utility customers do not subsidize attachers on District poles, pursuant to the Court of Appeals decision; and

**WHEREAS**, taking all the above into consideration, District staff recommends the District's pole attachment rate be adjusted to \$44.65.

**NOW, THEREFORE BE IT HEREBY RESOLVED AS FOLLOWS:**

- 1) The Commission finds that revising the pole attachment rate is in the best interest of the District and accepts the recommendation.
- 2) The Commission acknowledges the application of the statutory formula in RCW 54.04.045 as amended, with the inputs, data and calculations as presented.
- 3) The Commission finds that a pole attachment rate of \$44.65 is consistent with the permissible rate under RCW 54.04.045, as amended, pursuant to the Court of Appeals decision, and that a rate of \$44.65 is a just and reasonable rate under that statute.
- 4) The Commission approves and adopts a revised pole attachment rate of \$44.65 per attachment per year, effective January 1, 2025.

**APPROVED AND ADOPTED** by the Board of Commissioners of Public Utility District No. 1 of Cowlitz County, Washington, this 25<sup>th</sup> day of February, 2025.

PUBLIC UTILITY DISTRICT NO. 1 OF  
COWLITZ COUNTY, WASHINGTON

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President

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Vice President

ATTEST:

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Secretary

# 1. Power Management

## 1.1 District Load Summary (TRL)

### 1.1.1 Non-Industrial Load

### 1.1.2 Major Industrial Load

## 1.2 Heating Degree Days

## 1.3 Precipitation & Temperature

## 1.4 Runoff Forecast

## 1.5 Regional Snowpack and ENSO Condition Update

## 1.6 Resource Performance

### 1.6.1 BPA Power

### 1.6.2 Swift No.2

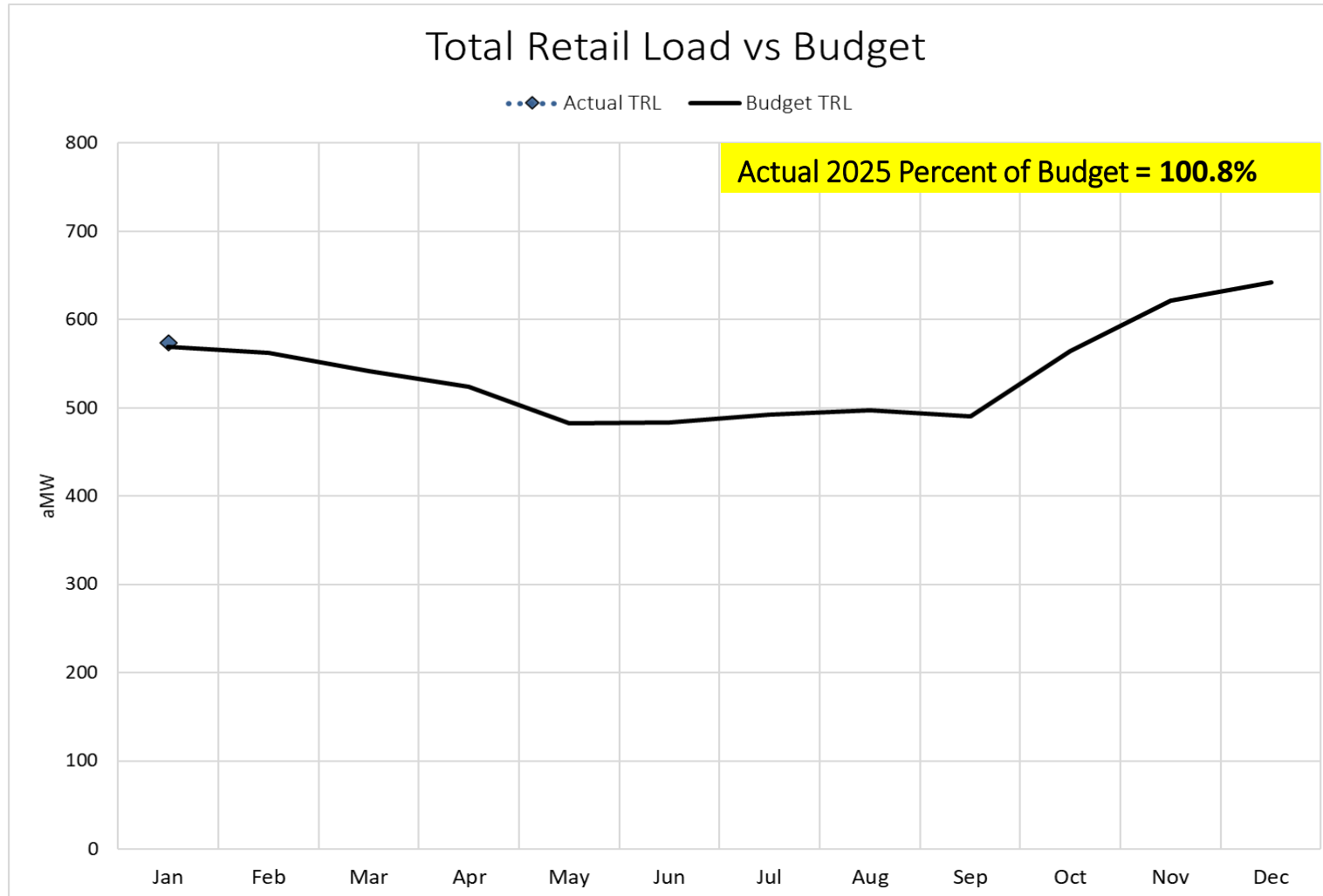
### 1.6.3 Wind (White Creek and Harvest Wind)

## 1.7 Wholesale Market Prices (Power & Natural Gas)

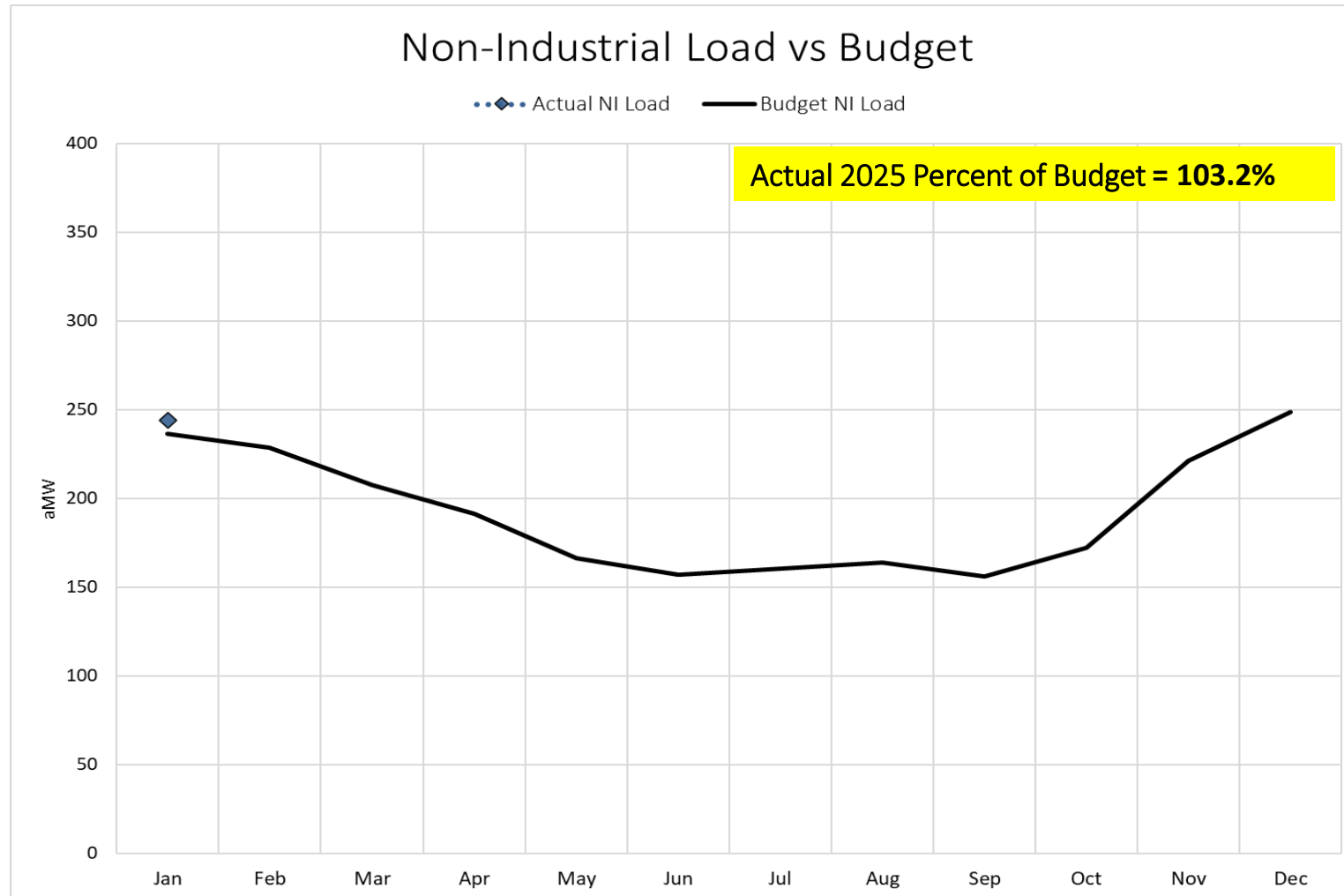
## 1.8 Net Secondary Sales Revenue

## 1.9 Net Power Cost – Non-Schedule 50

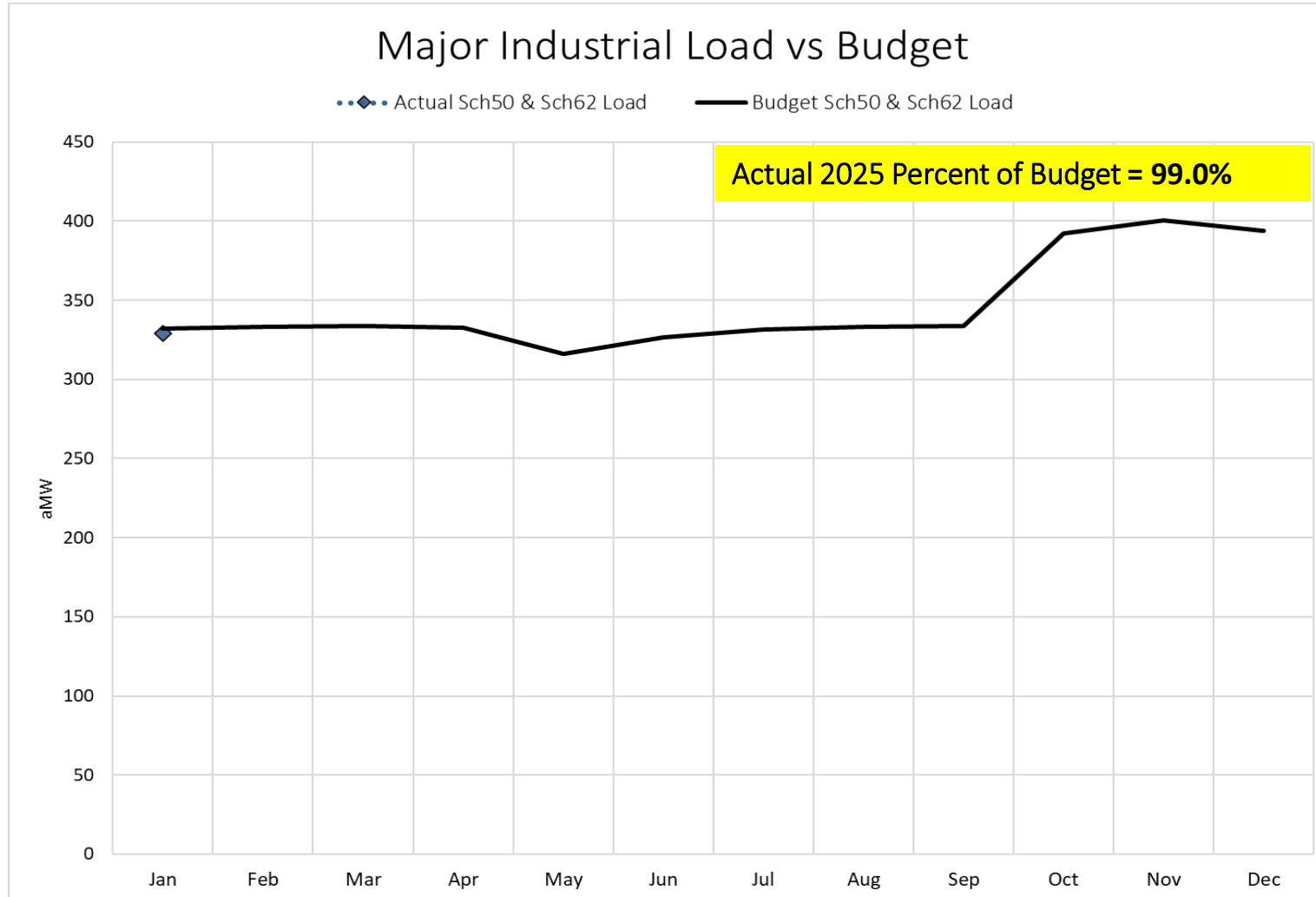
# 1.1 District Load Summary (Total Retail Load )



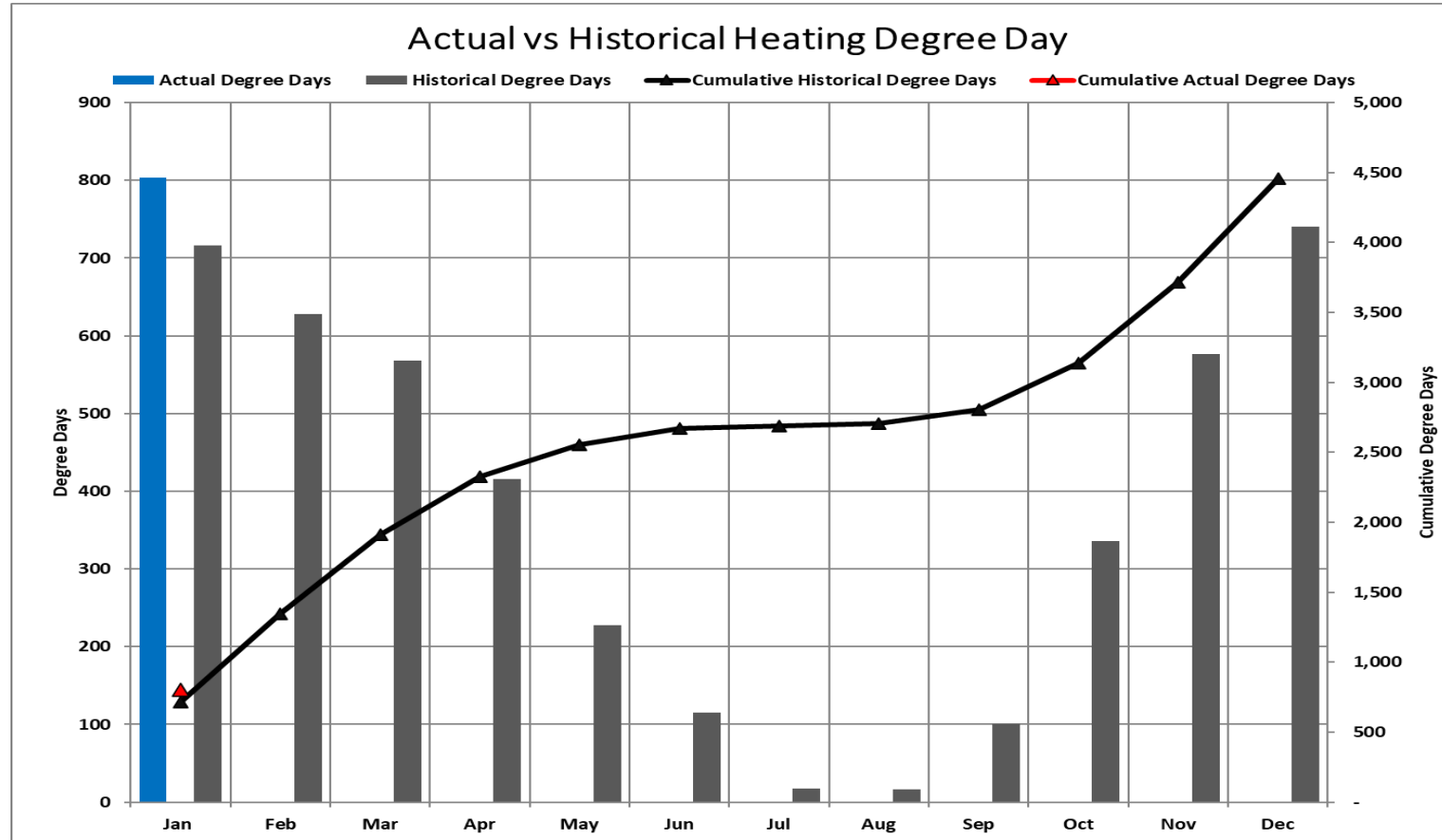
# 1.1.1 Non-Industrial Load Summary



# 1.1.2 Major Industrial Load Summary

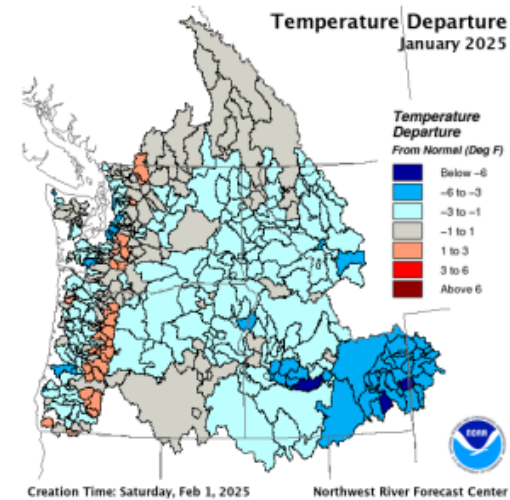
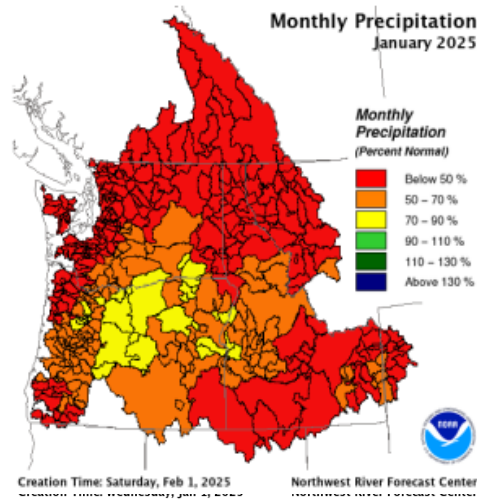
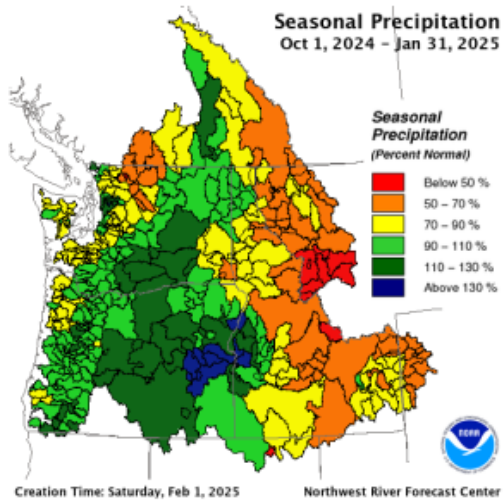


## 1.2 Heating Degree Days



Temperatures in January were below average, finishing at 112% of the historical average Heating Degree Days (HDD) for that month. The highest heating degree days, with temperatures below 30°, were observed from 01/18/2025 – 01/29/2025.

# 1.3 Precipitation & Temperature

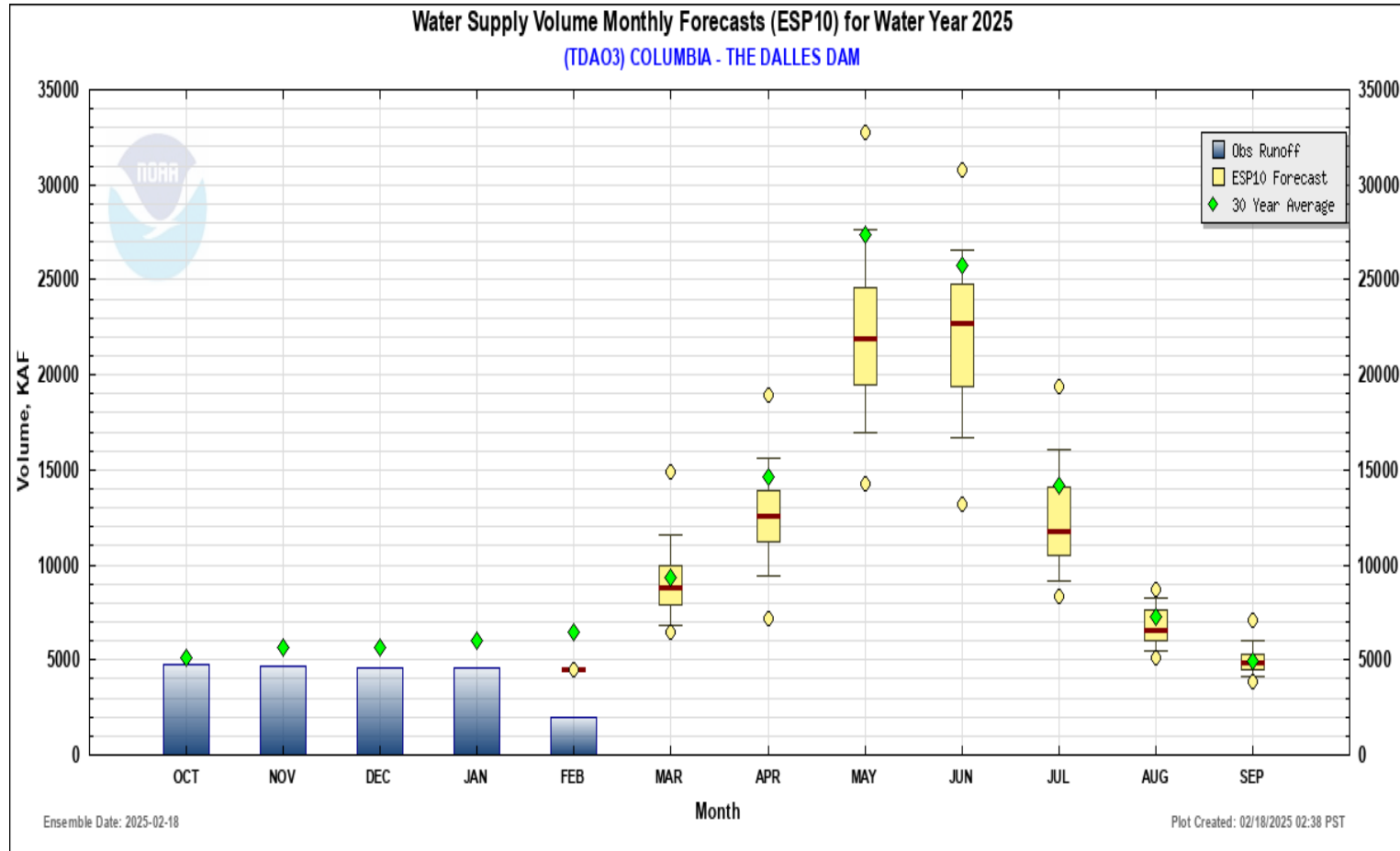


The seasonal precipitation map through January demonstrates a decrease in precipitation across the PNW from the previous month. East of the Cascades continues to experience below average rainfall for the season.

Unlike December, January recorded mostly below average precipitation levels for the region.

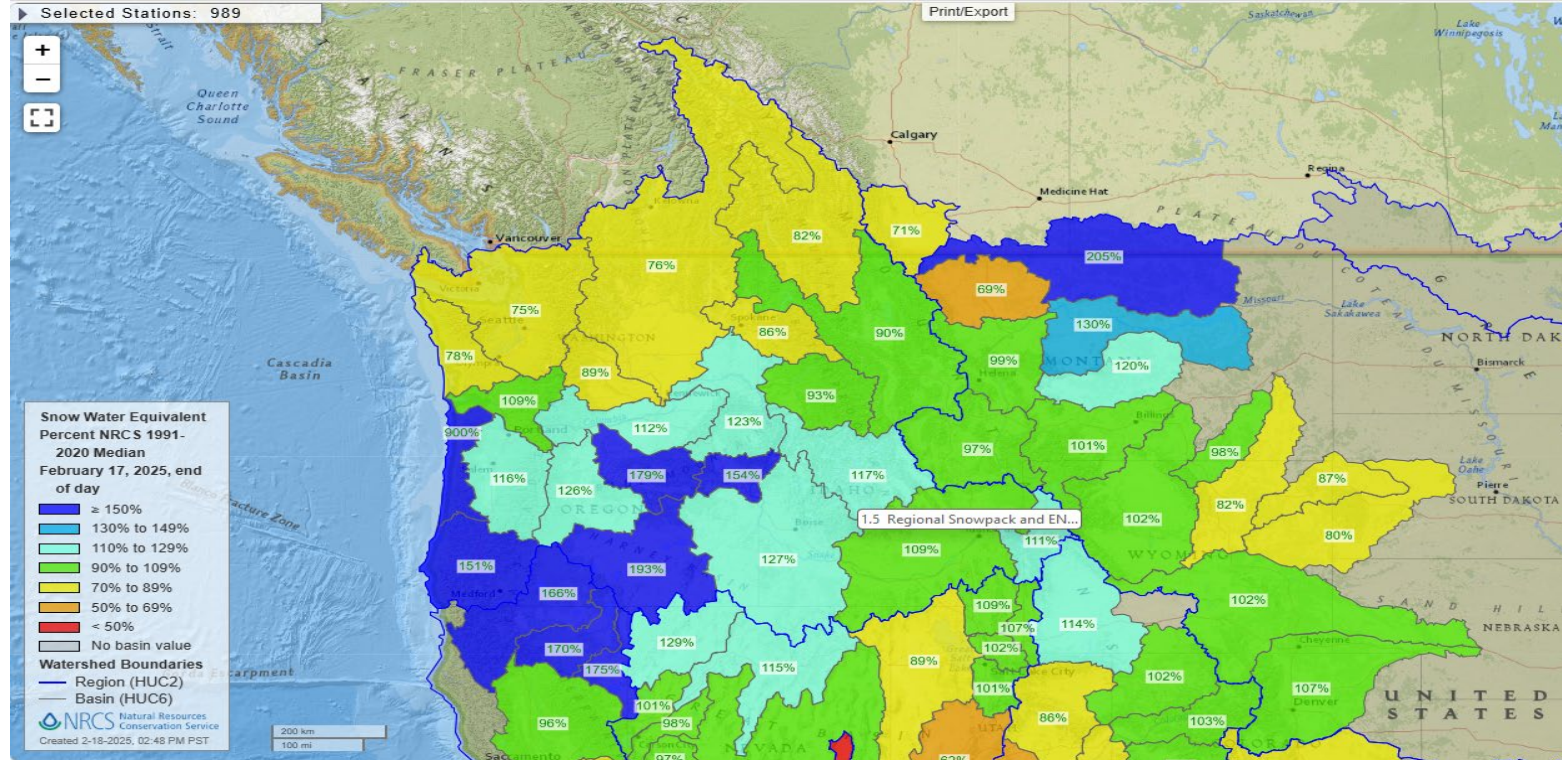
Temperatures in January were average to slightly below average for most of the region. The lower Snake basin saw below average temperature departures for the month.

# 1.4 Runoff Forecast



January's water supply finished at 75.8% of average. February is forecasted to finish at 70% of average. The Water Supply Forecast at the Dalles for Oct-Sep is forecasted to be 86%, which is a 4% increase from the previous month.

# 1.5 Regional Snowpack and ENSO Condition Update



The below average temperatures from the previous month helped maintain average to above average snowpack for most of the PNW region. The northern region did see a reduction in snowpack due to the drier than average conditions of January that carried through the first part of February.

The El Niño Southern Oscillation (ENSO) conditions for the 2025 Water Year are forecast by the NOAA Climate Prediction Center and are expecting weak La Niña conditions to persist in the near-term (February – April) with a likelihood of transitioning into neutral conditions for March – May (66% chance). During La Niña years, the PNW has a bias towards an above average water year, typically accompanied with more precipitation and colder temperatures.

## 1.6 Resource Performance

BPA Federal System Power



Swift No. 2



Harvest & White Creek Wind



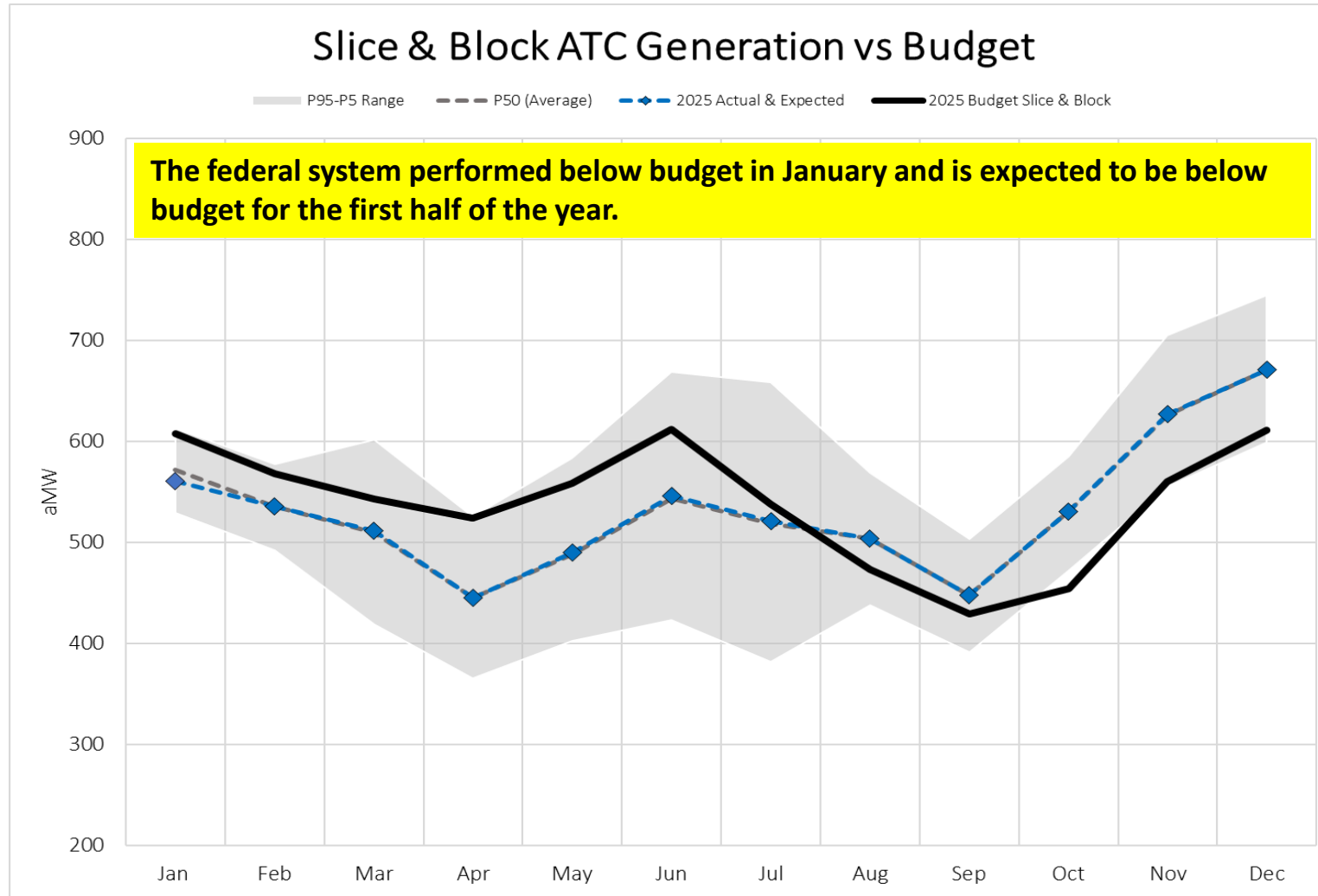
### Annual Resource Projections vs Budget

The BPA Federal System is anticipated to produce 99% of the budgeted expected generation in 2025.

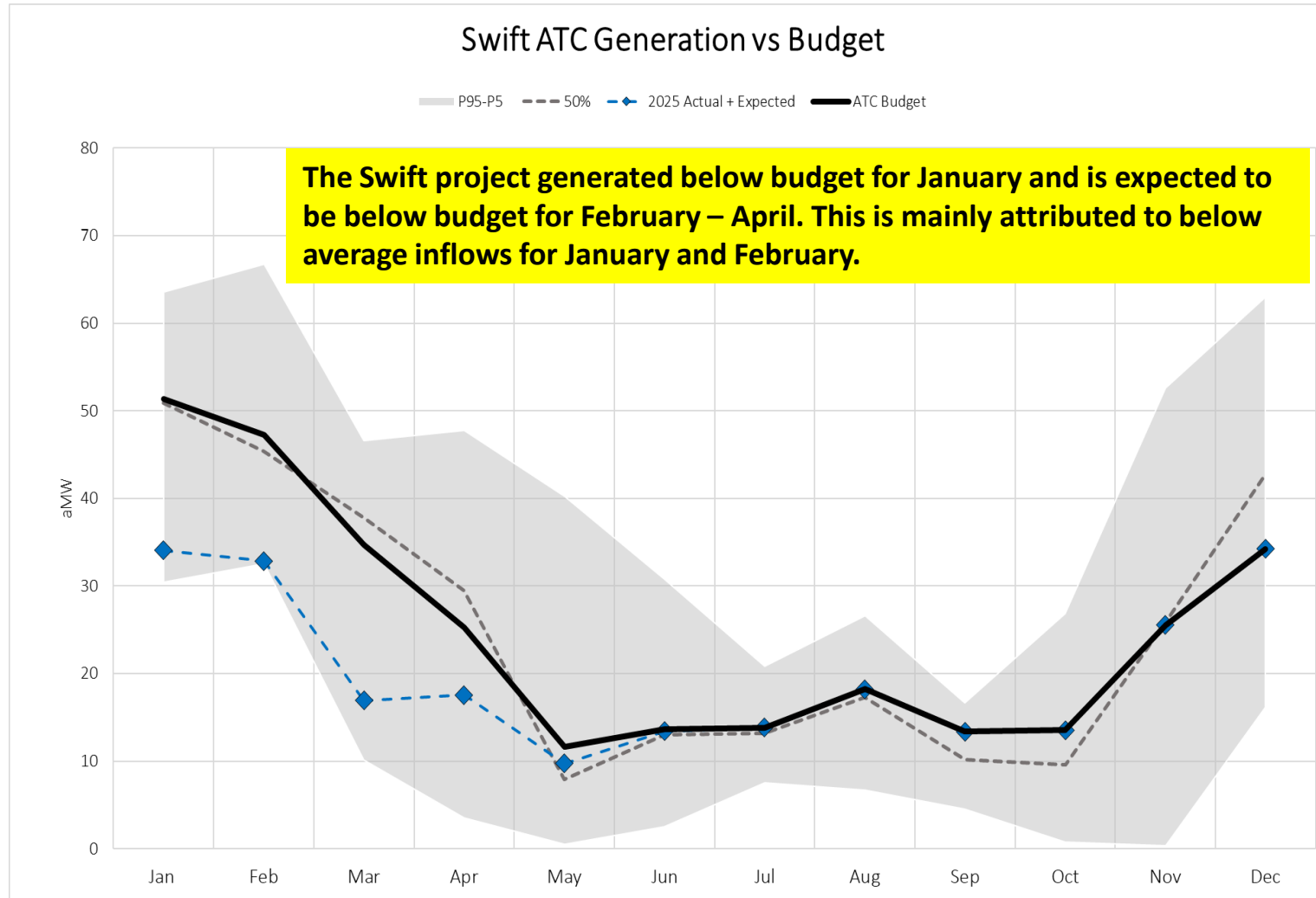
Swift No. 2 is anticipated to produce 80% of the budgeted expected ATC generation in 2025.

HW & WCW are anticipated to produce 96% of the budgeted expected generation in 2025.

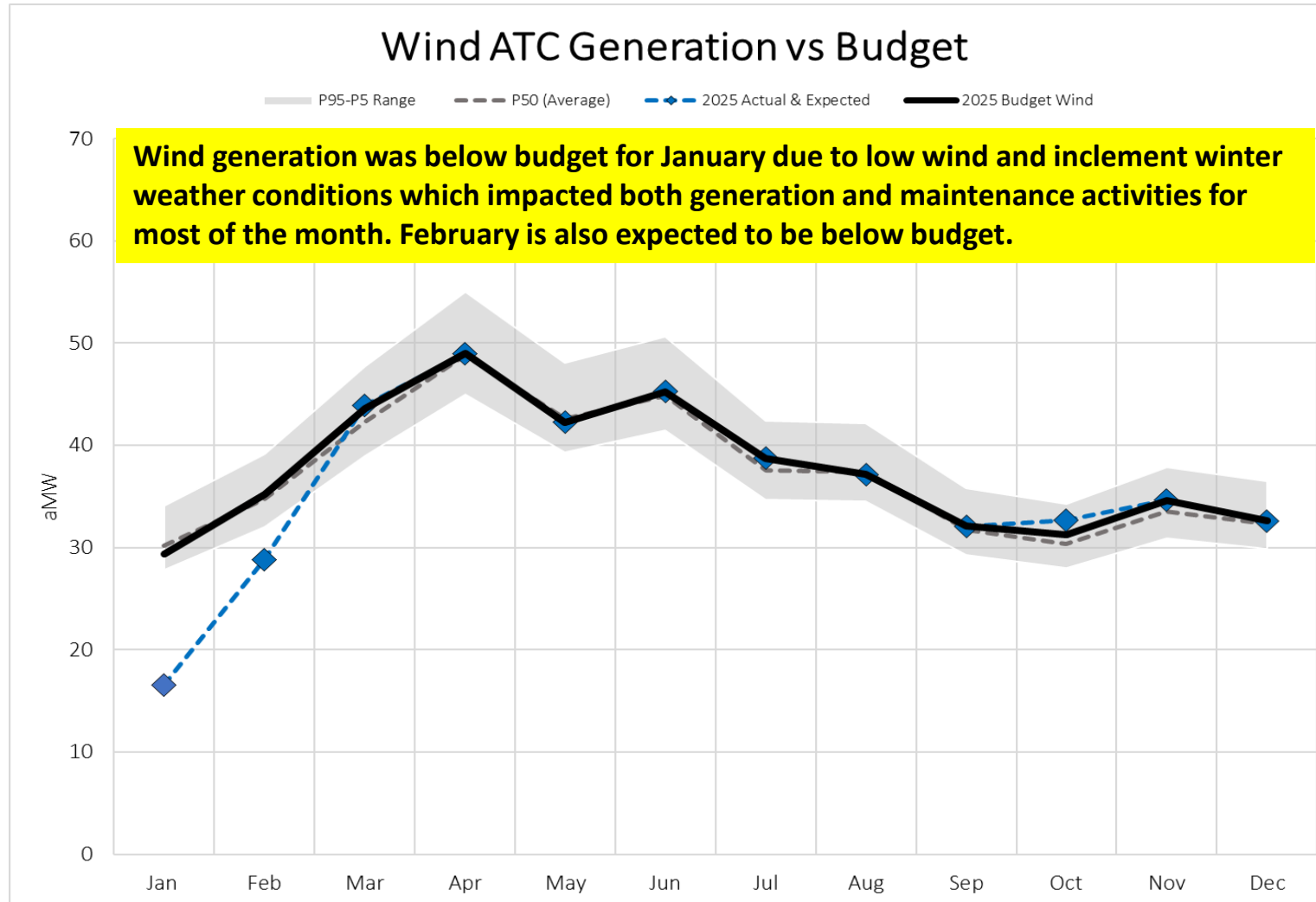
## 1.6.1 BPA Power



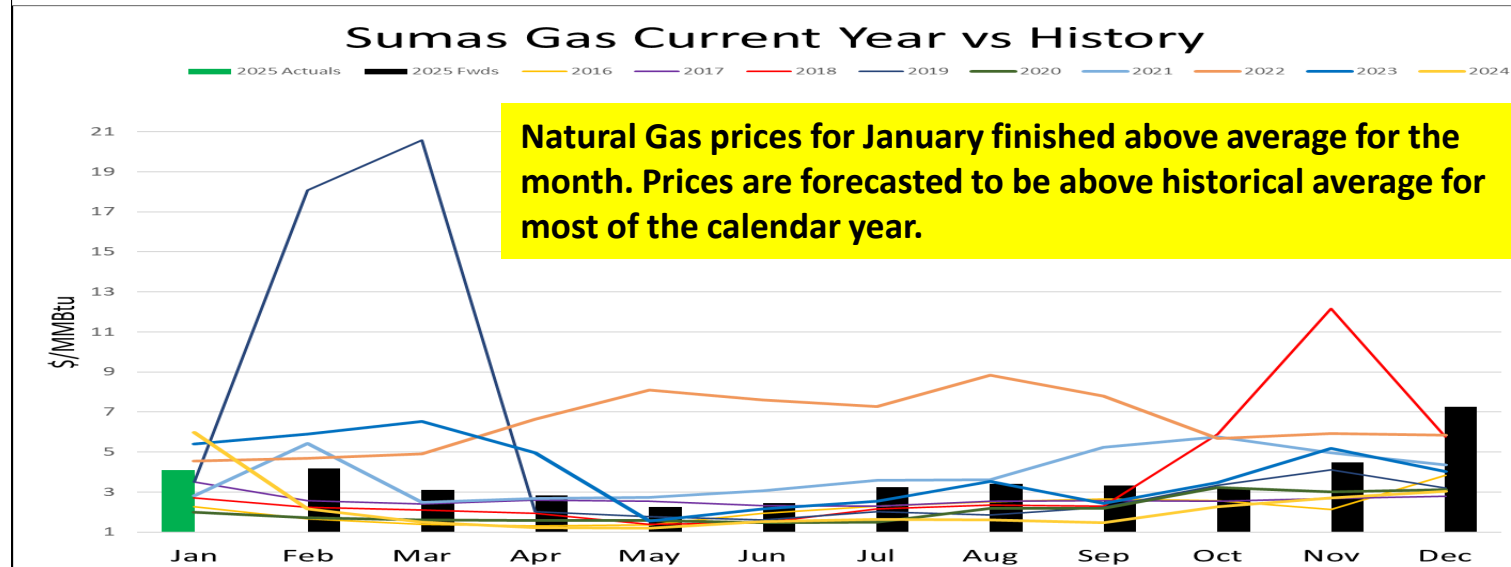
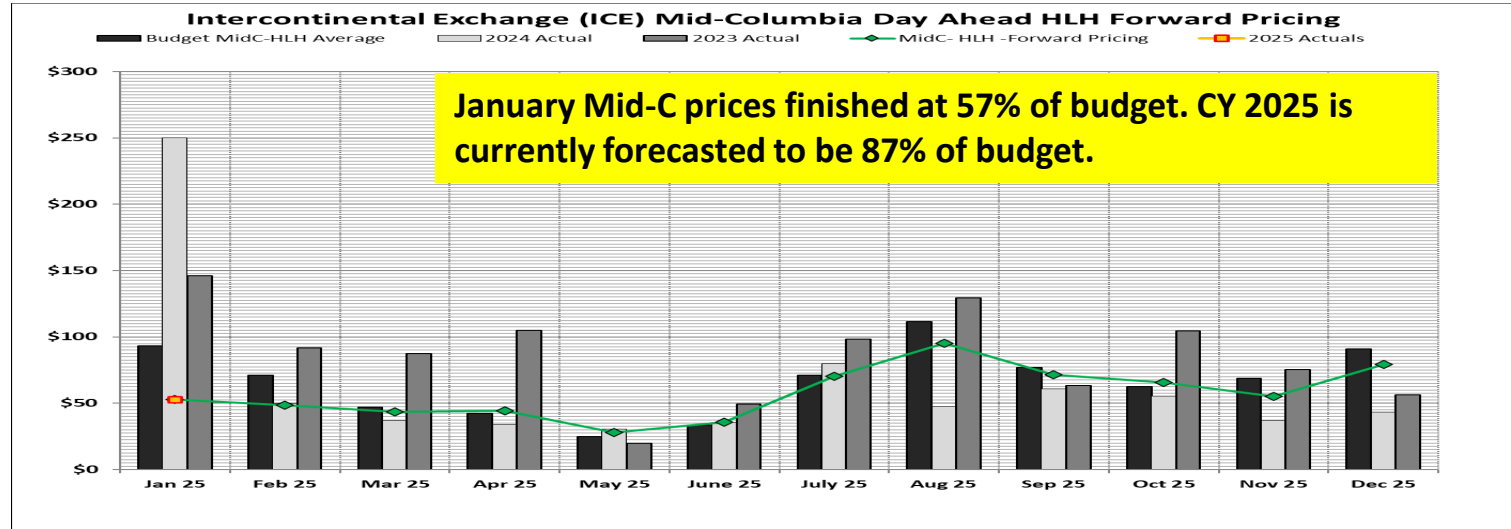
## 1.6.2 Swift No. 2 Generation



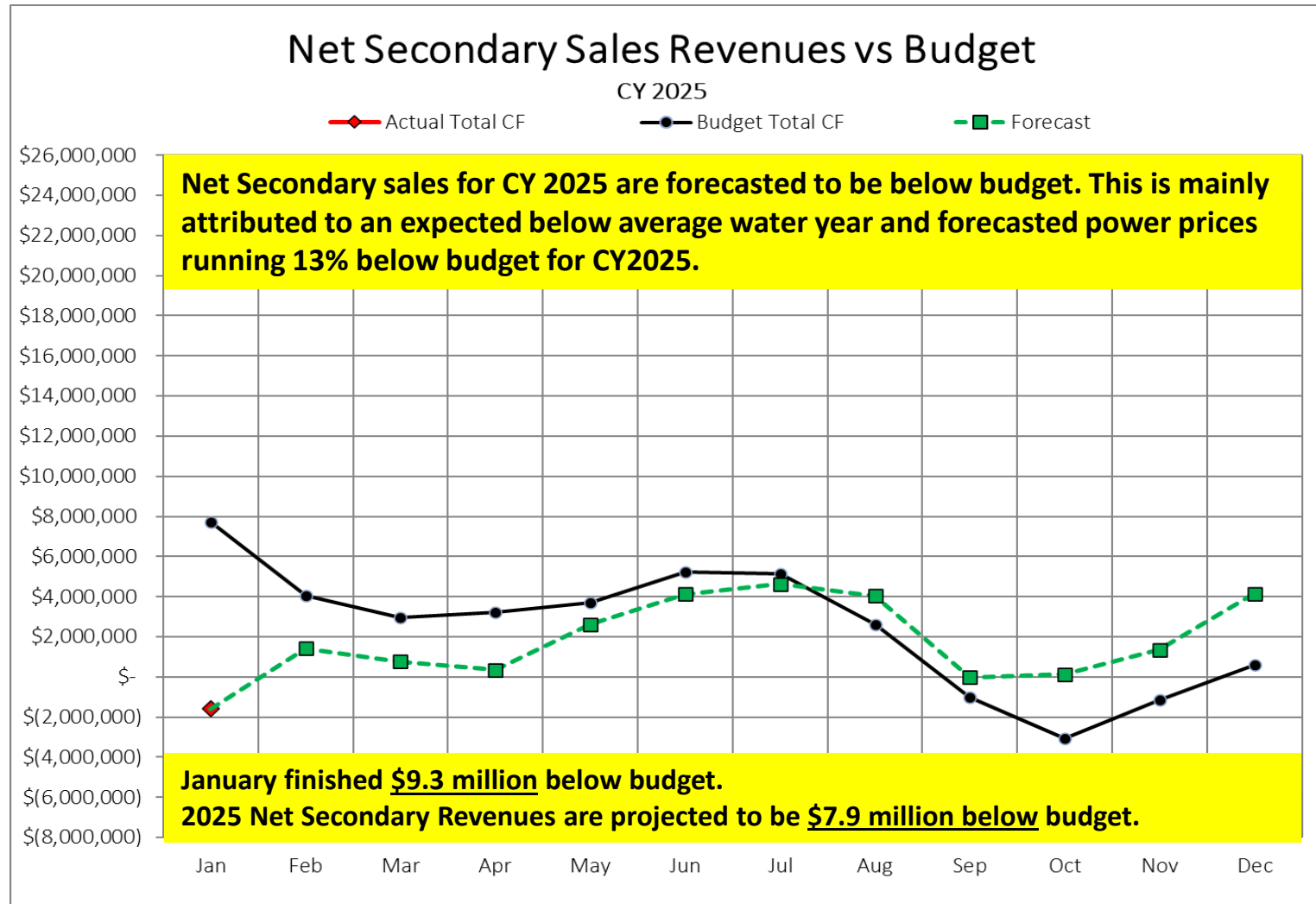
## 1.6.3 Wind (WC & HW)



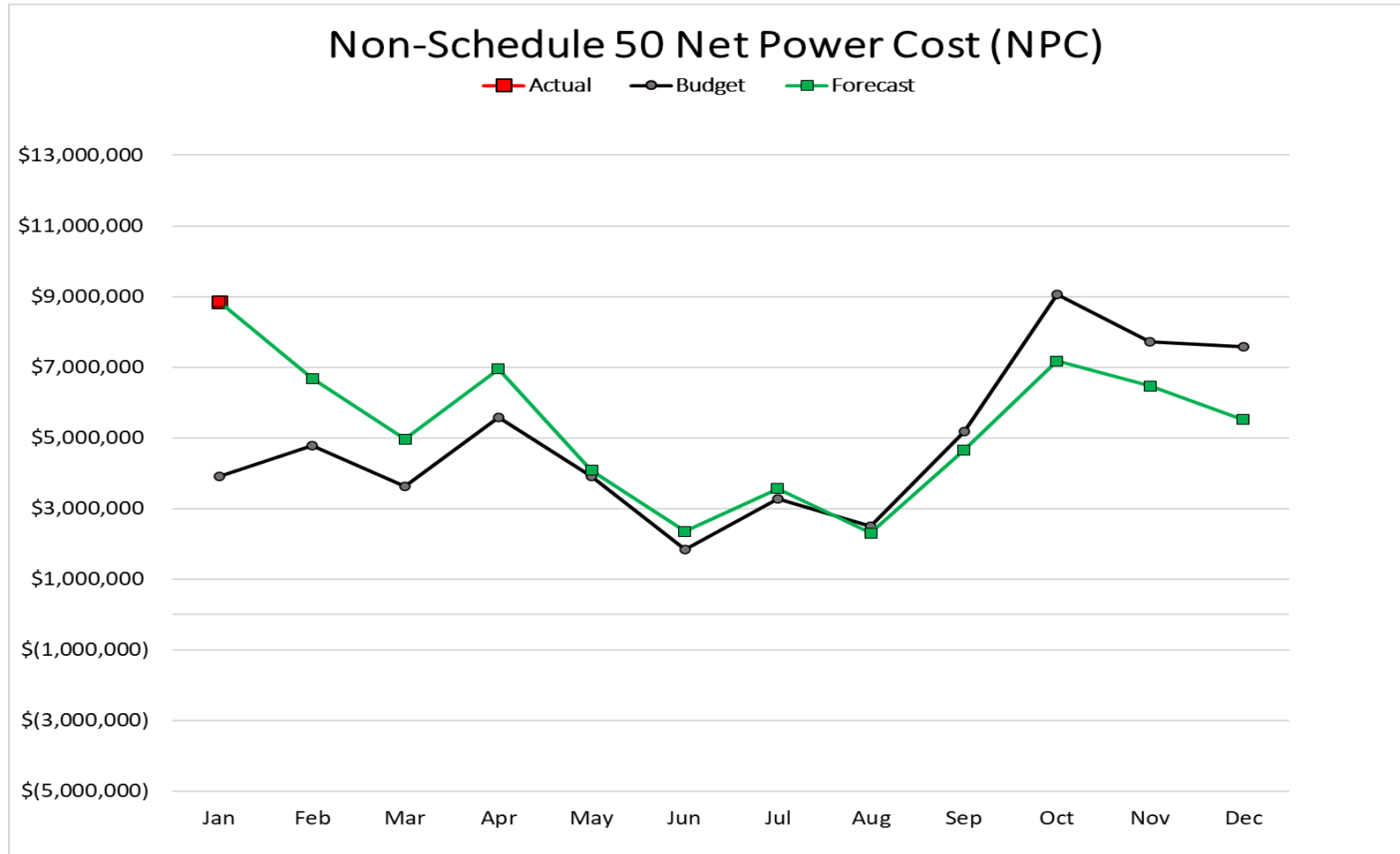
# 1.7 Wholesale Power Market Prices



# 1.8 Net Secondary Sales Revenue



# 1.9 Net Power Cost – Non-Schedule 50



**January's actual Non-Sch50 NPC was \$4.9 million above budget. Annual Non-Schedule 50 NPC is projected to be \$4.6 million above budget, reflecting an annual Non-Schedule 50 NPC of ~ \$63.5 million.**

# 2. Accounting and Finance

2.1 Year-to-Date Operating Results

2.2 Year-to-Date Retail Revenue

2.3 Proforma Year-End Income Statement

2.4 Year-End Cash Projection

2.5 Electric System Debt Service

2.6 Production System Debt Service

## 2.1 - Year-to-Date Operating Results

	Year-to-Date January 2025			
	Actual	Budget	Var \$	Var %
Revenues	\$ 25,157,623	\$ 22,022,032	\$ 3,135,591	14.24%
Expenses	23,662,483	16,113,249	7,549,234	46.85%
Margin	\$ 1,495,140	\$ 5,908,783	\$ (4,413,643)	
Prior Year	\$ 549,896			

Actual revenues reduced by CIAC - \$148,090

Behind budget due to net power supply costs.

## 2.2 - Year-to-Date Retail Revenue

<u>Year-to-Date January 2025</u>	<u>Actual</u>	<u>Budget</u>	<u>Var \$</u>	<u>Var %</u>
Non-Major Industrial	\$ 13,620,449	\$ 13,235,155	\$ 385,294	2.91%
Major Industrial	10,845,221	8,328,544	2,516,677	30.22%
Total Retail Revenue	24,465,670	21,563,699	2,901,971	13.46%
Other Operating Revenue	691,953	458,333	233,620	50.97%
Total Revenues	\$ 25,157,623	\$ 22,022,032	\$ 3,135,591	14.24%

MI revenue impacted by actual costs and loads (pass-through power cost contracts).  
Other is due largely to higher investment earnings.

## 2.3 - Proforma Year-End Income Statement

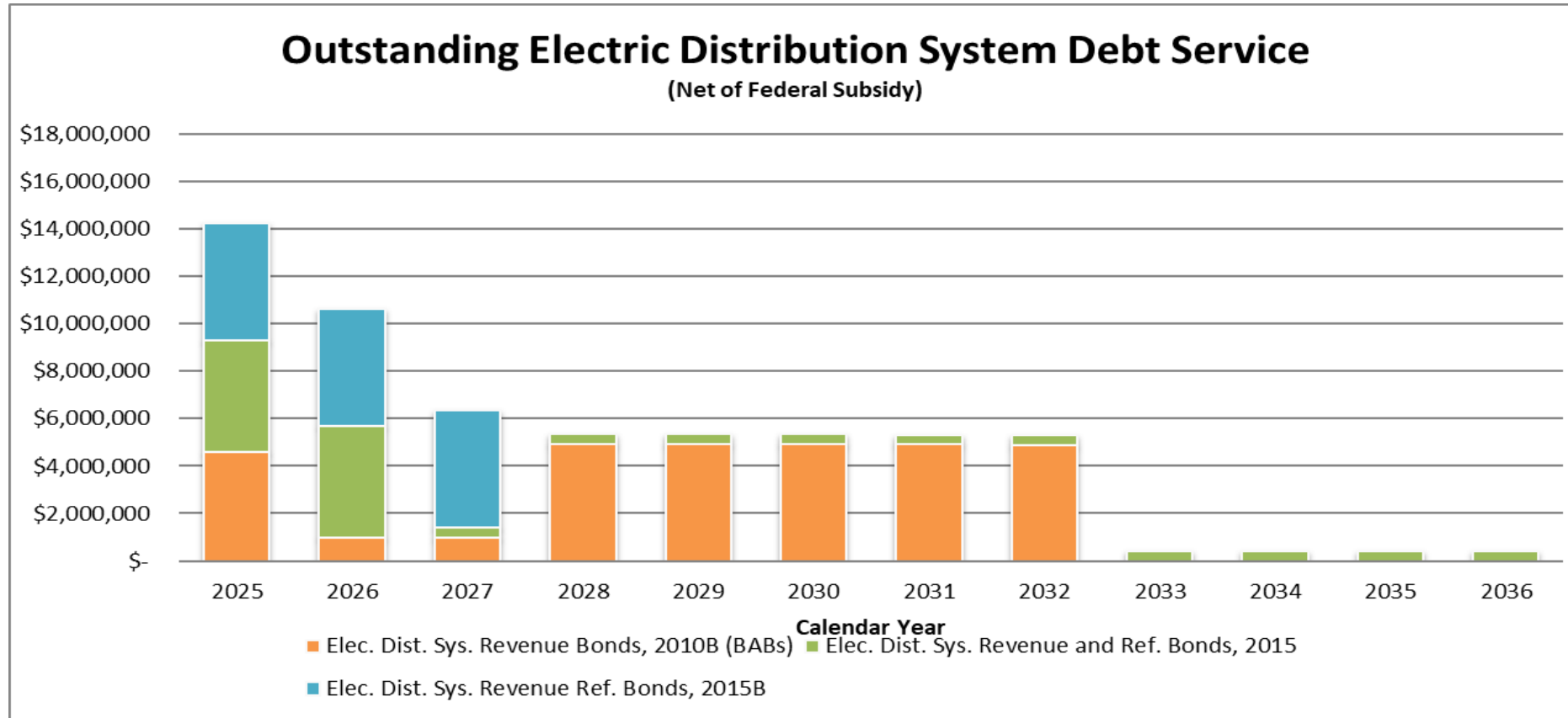
	YTD Actual	Projected	Budget	Var \$	Var %	
<b>Revenues</b>						
Non-MI	\$ 13,620,449	\$ 134,616,234	\$ 128,822,465	\$ 5,793,769	4.50%	October 2024 Rate Increase Loads and Actual Costs
Major Industrial	10,845,221	142,026,626	146,652,648	(4,626,021)	-3.15%	
Other	691,953	5,733,620	5,500,000	233,620	4.25%	
	<u>25,157,623</u>	<u>282,376,480</u>	<u>280,975,113</u>	<u>1,401,367</u>	<u>0.50%</u>	
<b>Expenses</b>						
Power Supply	17,009,906	197,115,483	197,064,258	51,225	0.03%	Low Generation & Soft Prices
Other Operating	4,081,643	43,876,271	43,876,271	-	0.00%	
Taxes	1,418,559	16,106,473	15,906,821	199,651	1.26%	
Depreciation	985,949	13,360,949	13,500,000	(139,051)	-1.03%	
Interest	166,426	2,331,841	2,362,271	(30,430)	-1.29%	
	<u>23,662,483</u>	<u>272,791,017</u>	<u>272,709,622</u>	<u>81,395</u>	<u>0.03%</u>	
<b>Margin</b>	<u>\$ 1,495,140</u>	<u>\$ 9,585,463</u>	<u>\$ 8,265,491</u>	<u>\$ 1,319,972</u>	<u>15.97%</u>	

**Projected results are heavily impacted by current forward market prices and anticipated volumes.**

## 2.4 - Year-End Cash Projection - Electric System

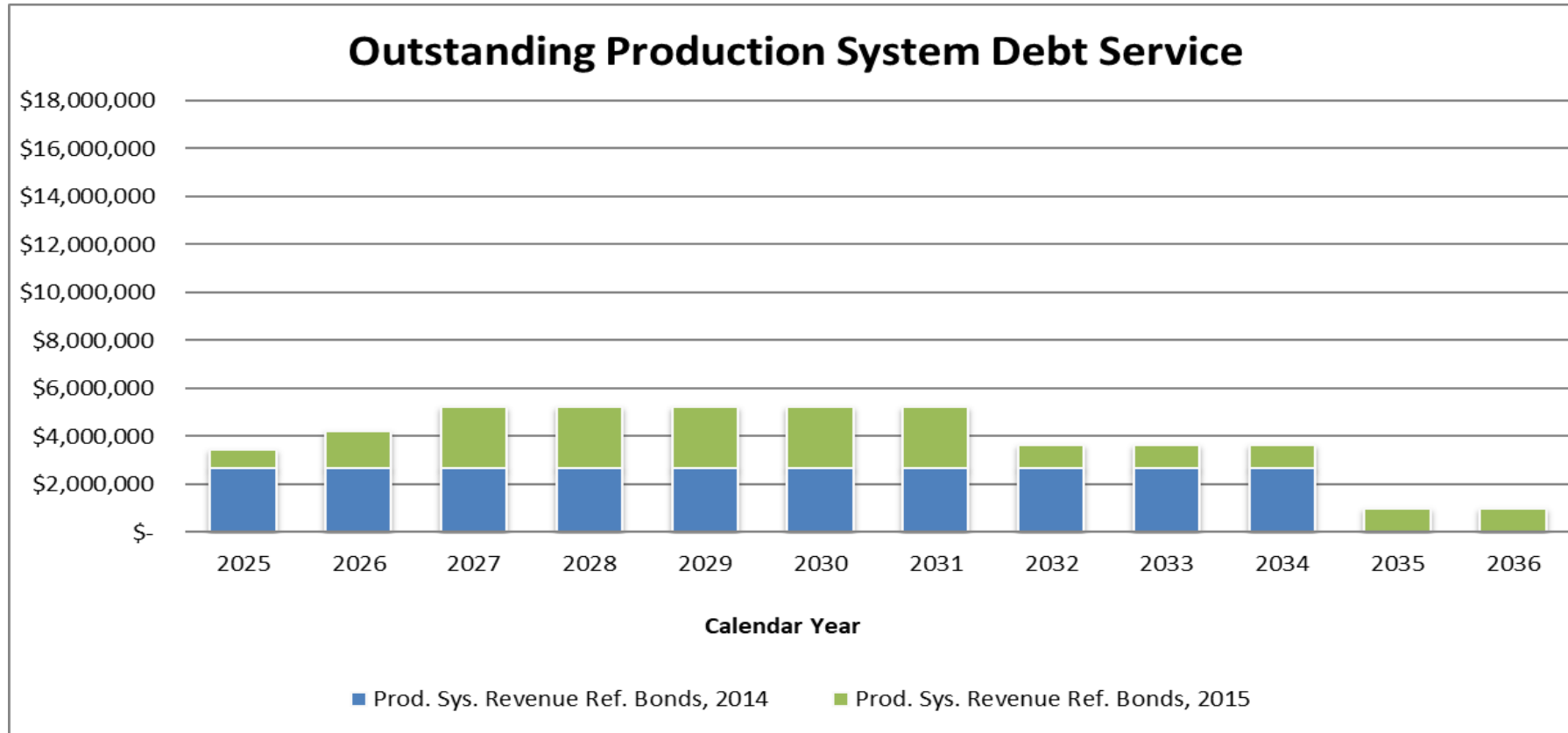
Margin	\$ 9,585,463
Non-Cash Items	17,680,949
Capital	(30,915,528)
Principal Debt	<u>(13,096,538)</u>
<b>Projected Cash Surplus (Deficit)</b>	<b>(16,745,654)</b>
<b>Budgeted Surplus</b>	<b><u><u>\$ (17,926,575)</u></u></b>

# 2.5 – Electric System Debt Service



**The above represents principal and interest.  
Total principal for the Electric System -  
\$50,525,000**

## 2.6 – Production System Debt Service



**The above represents principal and interest.  
Total principal for the Production System -  
\$36,335,000**

## 3. Operations

3.1 Outage Reports

3.2 Department Monthly Summaries

3.3 Safety

3.4 Wildfire projects

# 3.1.1 Outage Summary - January

Actual (Based on Date Slicer)

Events	Customers Out	SAIDI	Minutes
31	1,394	3	156,185

Previous 6 Periods Avg (Based on Date Slicer)

Events	Avg Cust Out	Avg SAIDI	Avg Minutes
38	4,073	10	520,207

### Causes (Non-Storm Related)

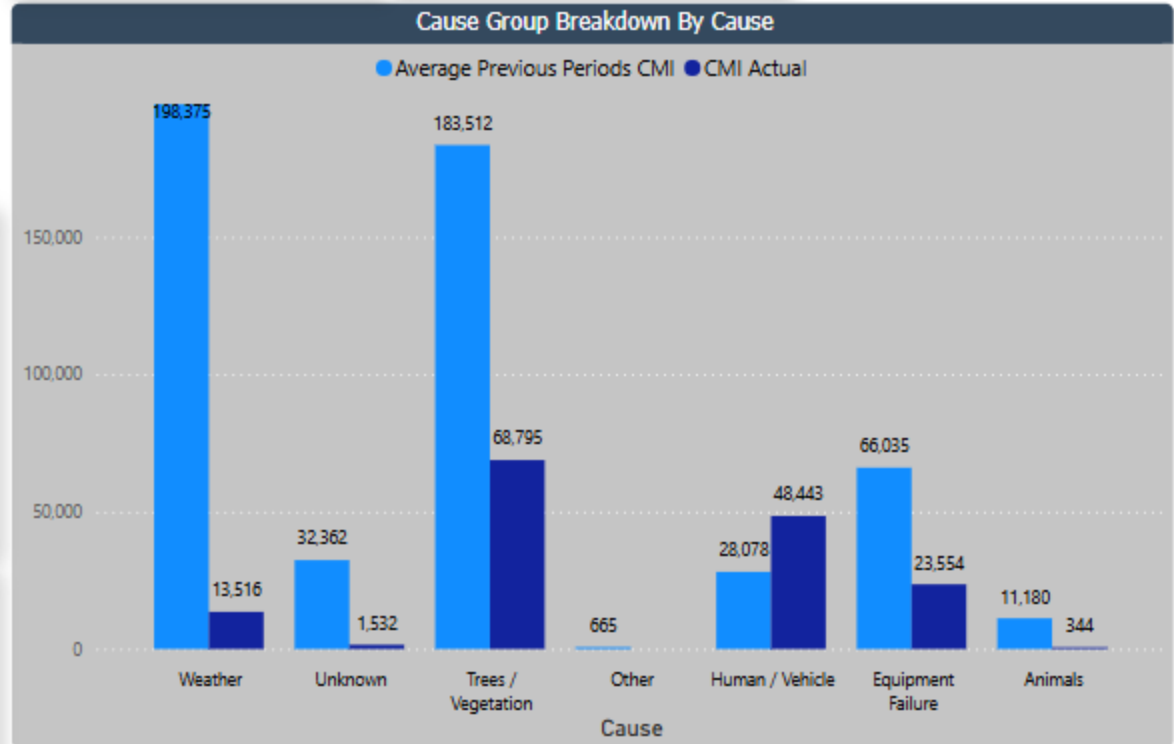
Outage Cause	Events	Customers Out	SAIDI	CMI	% CMI
Trees / Vegetation	2	650	1	68,795	44.05%
Human / Vehicle	1	316	1	48,443	31.02%
Equipment Failure	21	185	0	23,554	15.08%
Weather	1	215	0	13,516	8.65%
Unknown	4	22	0	1,532	0.98%
Animals	2	6	0	344	0.22%
Other	0				
<b>Total</b>	<b>31</b>	<b>1,394</b>	<b>3</b>	<b>156,185</b>	<b>100.00%</b>

### Top Events (CMI)

Outage Cause	Feeder	Line Section	CMI	Customers Out	Time Off	First Restore	Longest Duration
Veg: Tree or Branch - No Wind	12Y4	BRK12Y4	68,345	647	1/14/25 8:03 AM		1.8
Public: Motor vehicle	12F1	Recloser719	48,443	316	1/7/25 1:32 PM		2.6
Weather: Wind with trees	12Q3	FUS090N20W 170016	13,516	215	1/2/25 11:11 AM		1.0
Equip: Material or	12OR3	FUS080N20W	10,007	85	1/18/25		2.0

Date: 1/1/2025 to 1/31/2025

Storm Related?: Non-Storm Related



CMI Customers Out Outages SAIDI

Good month for outages compared to 6-year average.

# 3.1.2 Outage Summary - YTD

Actual (Based on Date Slicer)

Events	Customers Out	SAIDI	Minutes
31	1,394	3	156,185

Previous 6 Periods Avg (Based on Date Slicer)

Events	Avg Cust Out	Avg SAIDI	Avg Minutes
80	10,156	48	2,522,982

Causes (Non-Storm Related)

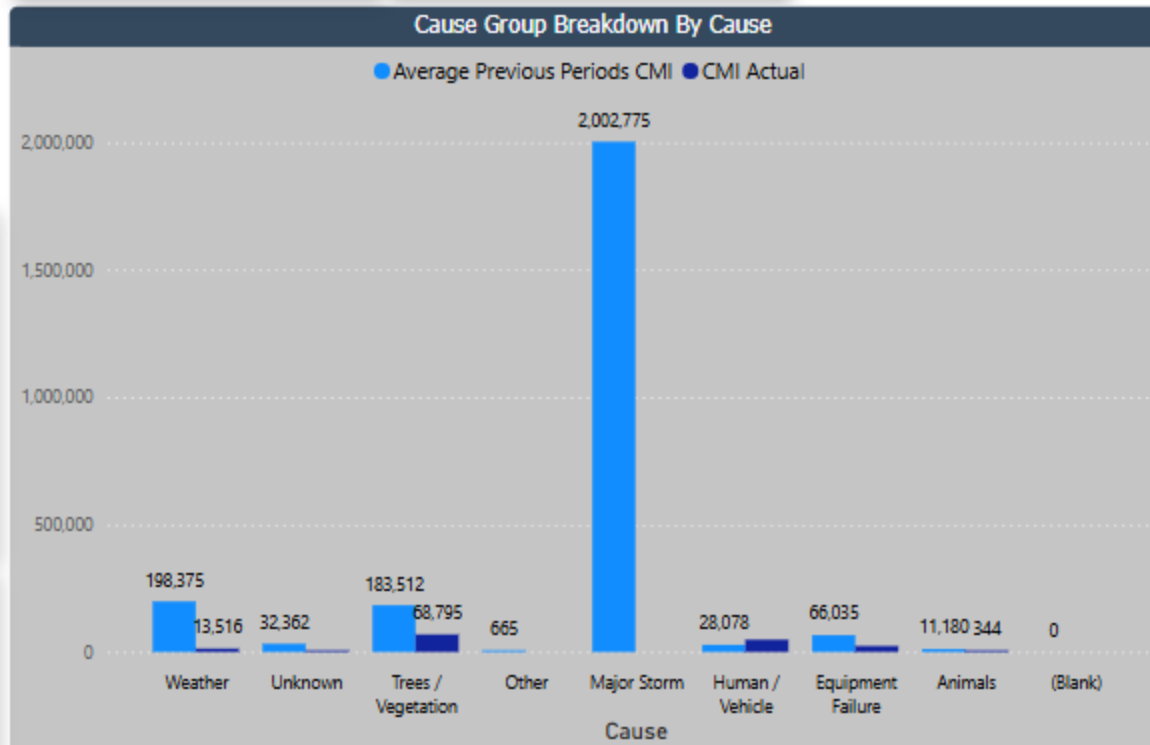
Outage Cause	Events	Customers Out	SAIDI	CMI	% CMI
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Unknown	4	22	0	1,532	0.98%
Animals	2	6	0	344	0.22%
Other	0				
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<b>Total</b>	<b>31</b>	<b>1,394</b>	<b>3</b>	<b>156,185</b>	<b>100.00%</b>

Top Events (CMI)

Outage Cause	Feeder	Line Section	CMI	Customers Out	Time Off	First Restore	Longest Duration
Veg: Tree or Branch - No Wind	12Y4	BRK12Y4	68,345	647	1/14/25 8:03 AM		1.8
Public: Motor vehicle	12F1	Recloser719	48,443	316	1/7/25 1:32 PM		2.6
Weather: Wind with trees	12Q3	FUS090N20W 170016	13,516	215	1/2/25 11:11 AM		1.0
Equip: Material or	12OR3	FUS080N20W	10,007	85	1/18/25		2.0

Date: 1/1/2025 to 1/31/2025

Storm Related?: All

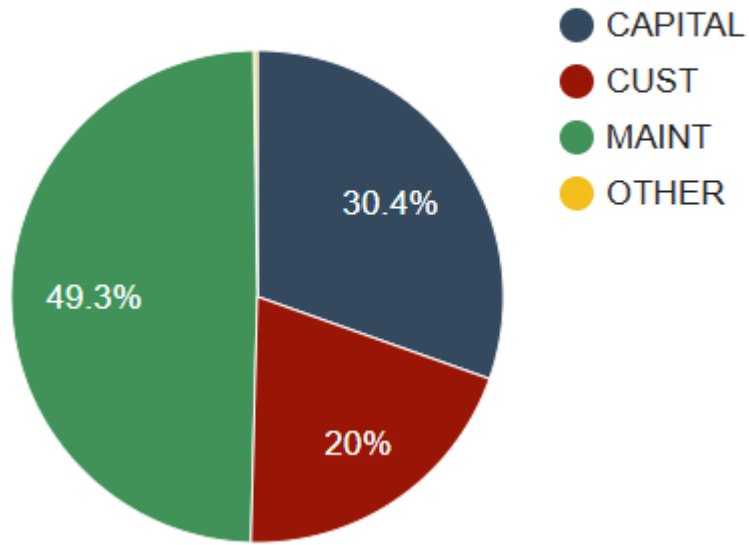


CMI	Customers Out	Outages	SAIDI
-----	---------------	---------	-------

No storms YTD.

# 3.2.1 Line Crew

Straight Time  
3925.5 Hours



## Customer Work

60 WO's completed

## LINE CREW SERVICE ORDERS

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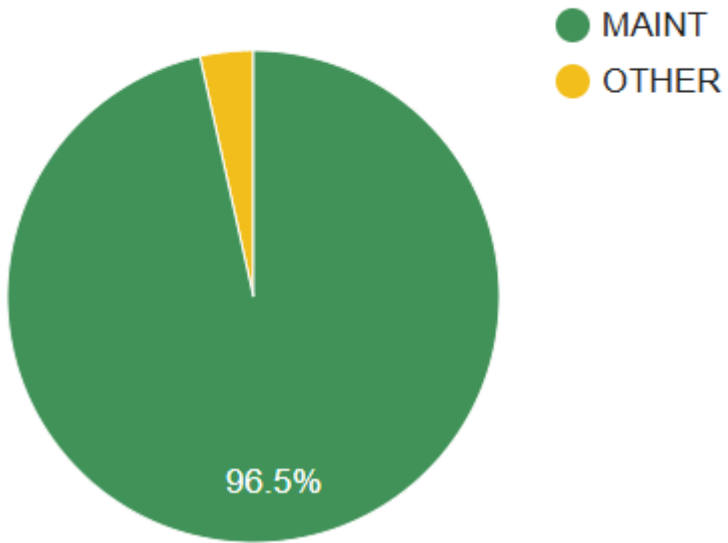
74	HAZARD/TT/POWER QUALITY
73	TRANSFORMERS
72	FIP-LINE
52	DISCONNECT
39	PERM METER
27	RECONNECT/NEW/TEMP/BACKBONE
25	MISC
19	INFO
15	STREET LIGHTS
10	FLUP
9	TPERM
5	POLE REPL
4	LT EXCHGE
2	CUTOFF
1	MREADY-MNT
1	APP TLINE
1	SH TREE TR
1	METER EXCHANGE/REMOVE

---

430	TOTAL
-----	-------

## 3.2.2 Relay/Substation

Straight Time  
944.75 Hours

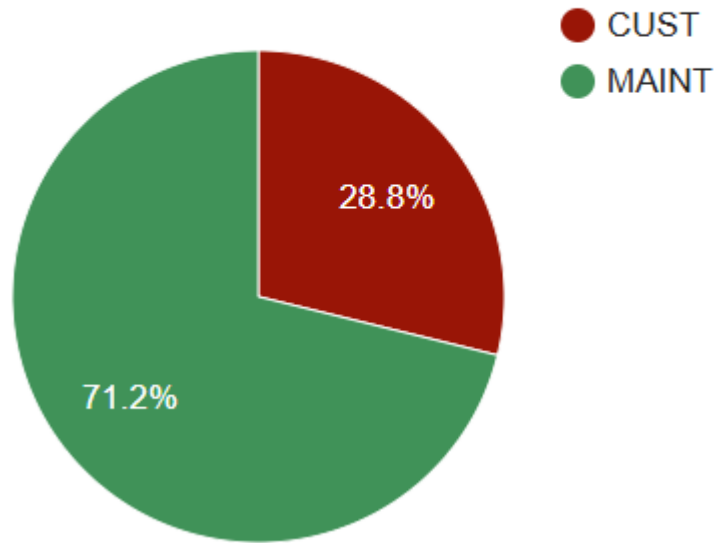


### Maintenance Work

- Yearly personal protective ground testing and repairs
- Relay firmware updates
- Misc maintenance and repairs at substations
- Relay testing started for 2025
- Safety watch for North Woodland substation fence upgrade

# 3.2.3 Meter and FSRs

Straight Time  
1197 Hours



## Service Orders

### METER DEPARTMENT

58	DISCONNECT
49	METER INVESTIGATION
18	FIP-METER
13	PERM METER
12	MTR-CT/PT
10	MISC
9	MASSMTRXC
7	METER EXCHANGE/REMOVE
6	RECONNECT/NEW/TEMP
1	CUTOFF
1	COMMER CST
1	TPERM
1	TT-METER
186	TOTAL

### FIELD SERVICE REPS

46	OFFICE
37	READ OPTOT
33	METER READ
6	CUTOFF
5	METER EXCHANGE/REMOVE
4	METER INVESTIGATION
1	LT-REMOVE
1	RECONNECT/NEW/TEMP
1	DISCONNECT
134	TOTAL

## 3.2.4 On-Going District Work

Group	Budget	YTD	YTD/Budget
2.1 - Transmission On-Going Pole Replacement	\$310,000	\$318	0%
2.3 - Transmission On-Going System Improvement	\$95,000		
2.5 - Transmission Unplanned System Improvemen	\$410,000	\$13,137	3%
3.1 - Distribution On-Going System Improvement	\$3,950,000	\$194,575	5%
3.11 - Transformer O/H & U/G Failure	\$270,000	\$9,436	3%
3.12 - Distribution On-Going Wildfire Protectio	\$220,000	\$150	0%
3.18 - Distribution Unplanned System Improvemen	\$760,000	\$-704	-0%
3.19 - Distribution On-Going U/G Line Cable Rep	\$8,750,000	\$134,632	2%
3.26 - Transformer PCB Replacement	\$170,000	\$1,716	1%
3.5 - Distribution On-Going Pole Replacement	\$1,690,000	\$37,365	2%
3.52 - Substation Unplanned System Improvement			
3.54 - Substation On-Going System Improvement	\$443,500	\$121,198	27%
TR2.1 - Small Capital	\$39,000		
<b>TOTAL</b>	<b>\$17,107,500</b>	<b>\$511,821</b>	<b>3%</b>

## 3.2.5 On-Going Customer Work

Group	Design	Completed	YTD
3.13 - Cust OnGoin Lighting	3	1	\$1,679
3.14 - Cust Secondary Ln Extention	184	40	\$53,125
3.16 - Cust Pri Ln Ext. Residential	102	25	\$110,453
3.17 - Cust Pri Ln Ext. Commercial	68	7	\$135,396
3.29 - Cust Mke Redy for Telco	41	1	\$58
3.9 - Cust Ln Reloct Dist/TX	13	1	\$151,713
3.99 - Cust Solar	8	0	\$176
<b>TOTAL</b>	<b>419</b>	<b>75</b>	<b>\$452,600</b>

## 3.2.6 Tree-Trimming

### Contractor Tree Crew #1

Substation feeders trimmed: Carrolls (12S2, 12S3), Ariel (12AR1, 12AR2)

Total line miles trimmed: **8.9**

506 manhours spent on circuit trimming

100 manhours spent on trouble-tickets

### Contractor Tree Crew #2

Substation feeders trimmed: Pacific Way (12PW3), Gardners Corner

Total line miles trimmed: **1.6**

581 manhours spent on circuit trimming

### Contractor Tree Crew #3

Substation feeders trimmed: Green Mountain (12GM1, 12GM2)

Total line miles trimmed: **6.7**

524 manhours spent on circuit trimming, trouble-tickets, hot spots, etc...

66 manhours spent on trouble-tickets

### Contractor Tree Crew #4

Main focus on cycle busters, hot spots, hazard trees, and trouble tickets

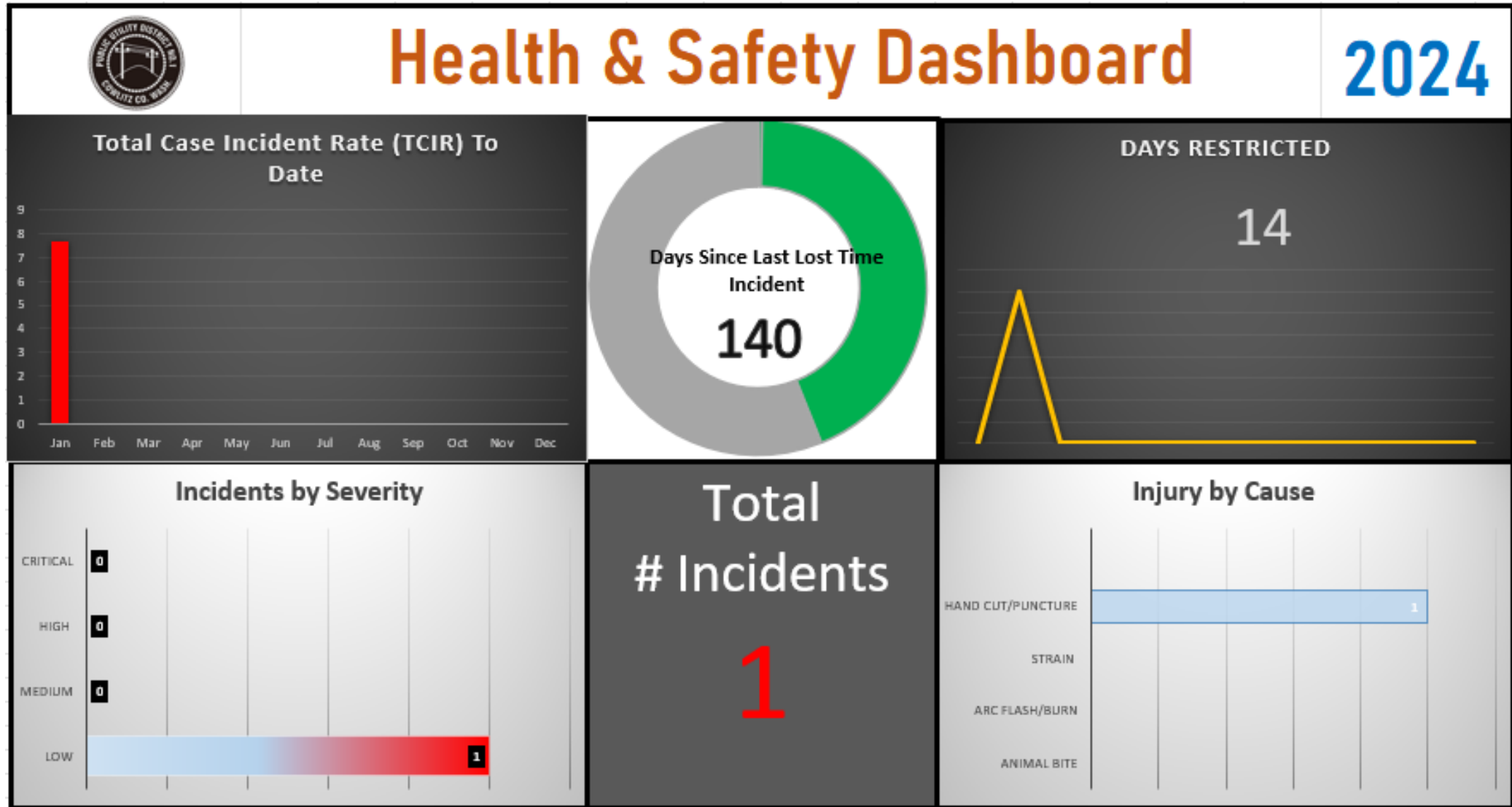
12 Trouble tickets completed

367 manhours

**Total miles trimmed: 17.2**

**Yearly goal ~ 200 miles/year**

# 3.3 Safety



One low severity incident in January. (Hand puncture)

# 3.4 Wildfire Projects

## **Early Fault Detection (EFD) (07/01/25 Go-Live)**

Pilot Project

Detect anomalies on overhead lines prior to failure

Line sensors installed on distribution and transmission

### **Progress**

Kickoff meeting 01/29/25

Material Ordered

Site selection and specific location review

Cellular communication testing at selected sites

Mock installations scheduled March 3-6 on downtown Longview circuit

## **Fire Weather Monitoring and PSPS Software (06/01/25 Go-Live)**

Analyze current and predicted weather patterns

Compare historical outage data

Provide ignition and consequence modeling and fire risk zones based on consequence data

Recommendations for PSPS

### **Progress**

Historical District outage data submitted

Initial ignition/consequence modeling (timber, fire size, structure impacts)

Development of draft fire risk tiers

# 4. Engineering

4.1 System Metrics

4.2 Underground Primary Outages

4.3 New Service Requests

4.4 Locates

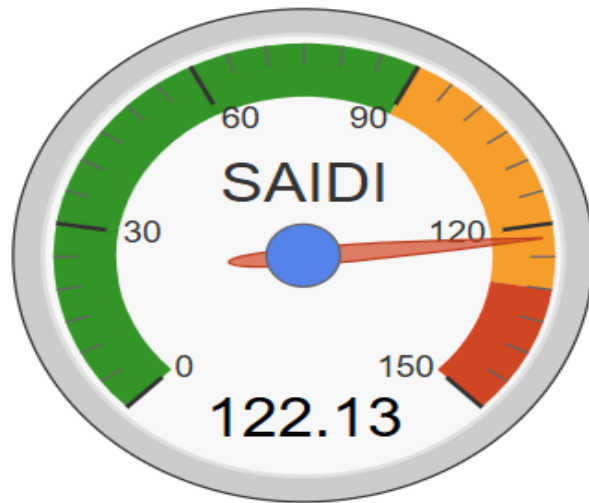
4.5 Substation Outages (exclusive of storms)

4.6 Feeder Outages and Causes (exclusive of storms)

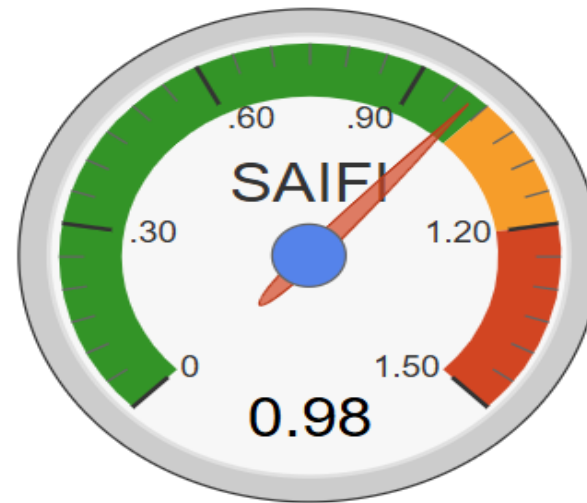
# 4.1 System Metrics

Indices (rolling 12 months)

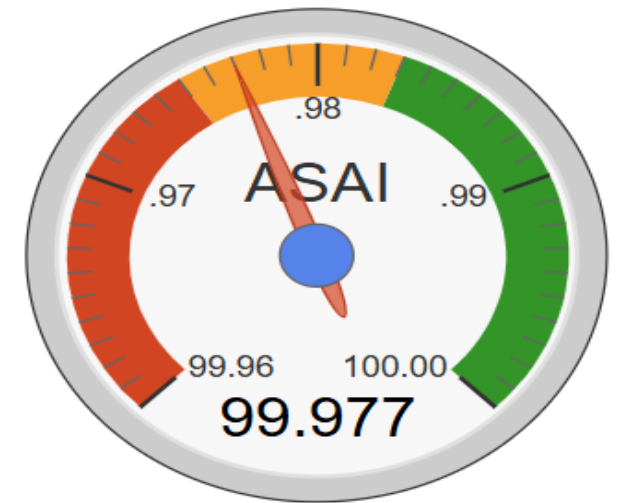
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System Average Interruption Duration Index  
(Average Outage Duration in Minutes)



System Average Interruption Frequency Index  
(Average Customer Interruptions per year)



Average Service Availability Index  
(Percent of Time Average Customer has Power)

Green indicates system performing within PUD set goals. Total January customer minutes 156,185.  
10-year January monthly avg is 436,657 therefore Customer Minutes are 35% of average.

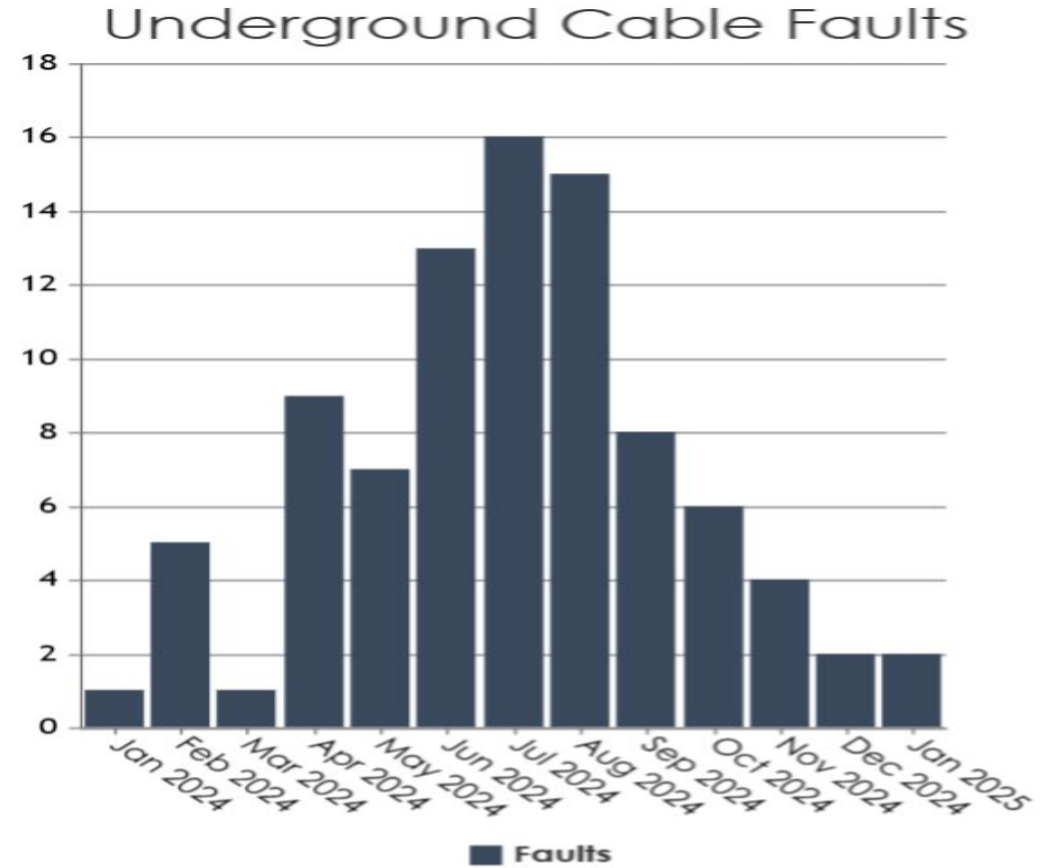
# 4.2 Underground Primary Outages

## Underground Cable Faults

**January**  
**Minutes Out: 5798 Incidents: 2 Customers: 15**



## Underground Faults (13 Months)

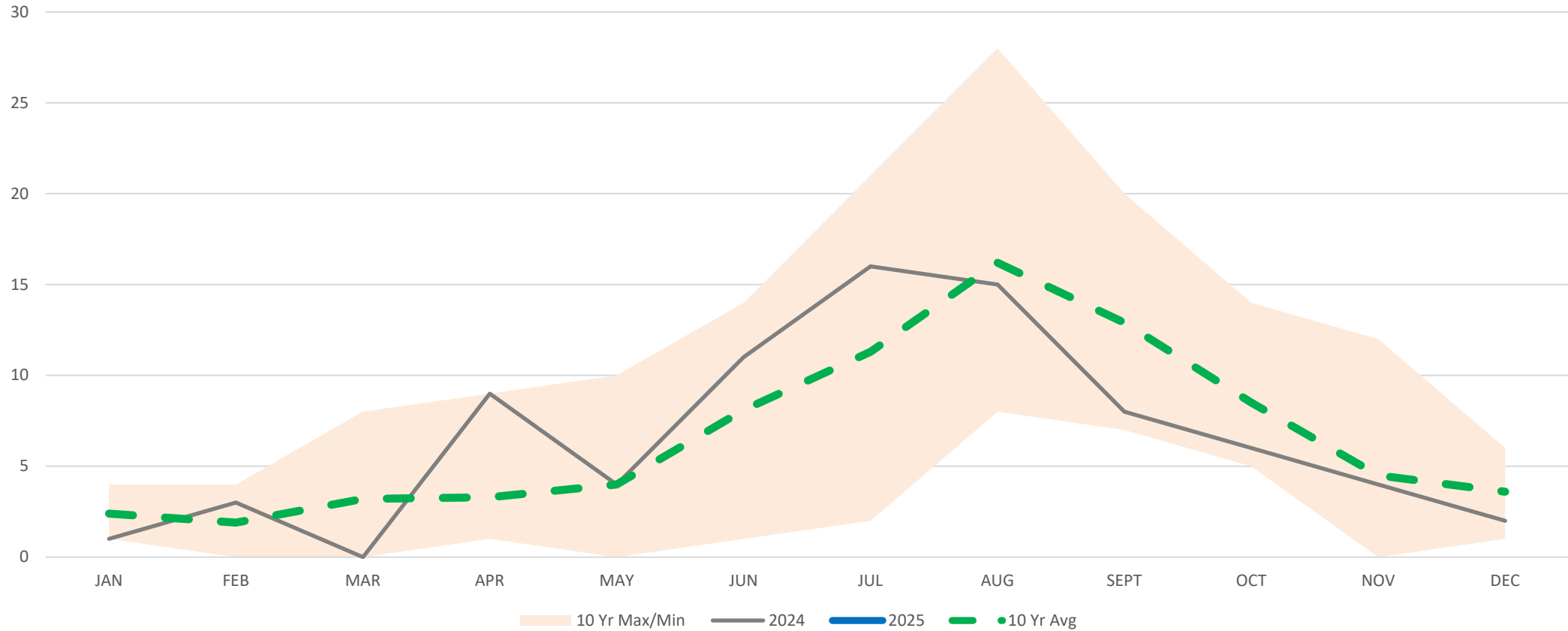


Cable Faults YTD (January): 2025 = 2

Total Faults YTD are 50% more than the previous year and 17% less than the 10-year average.

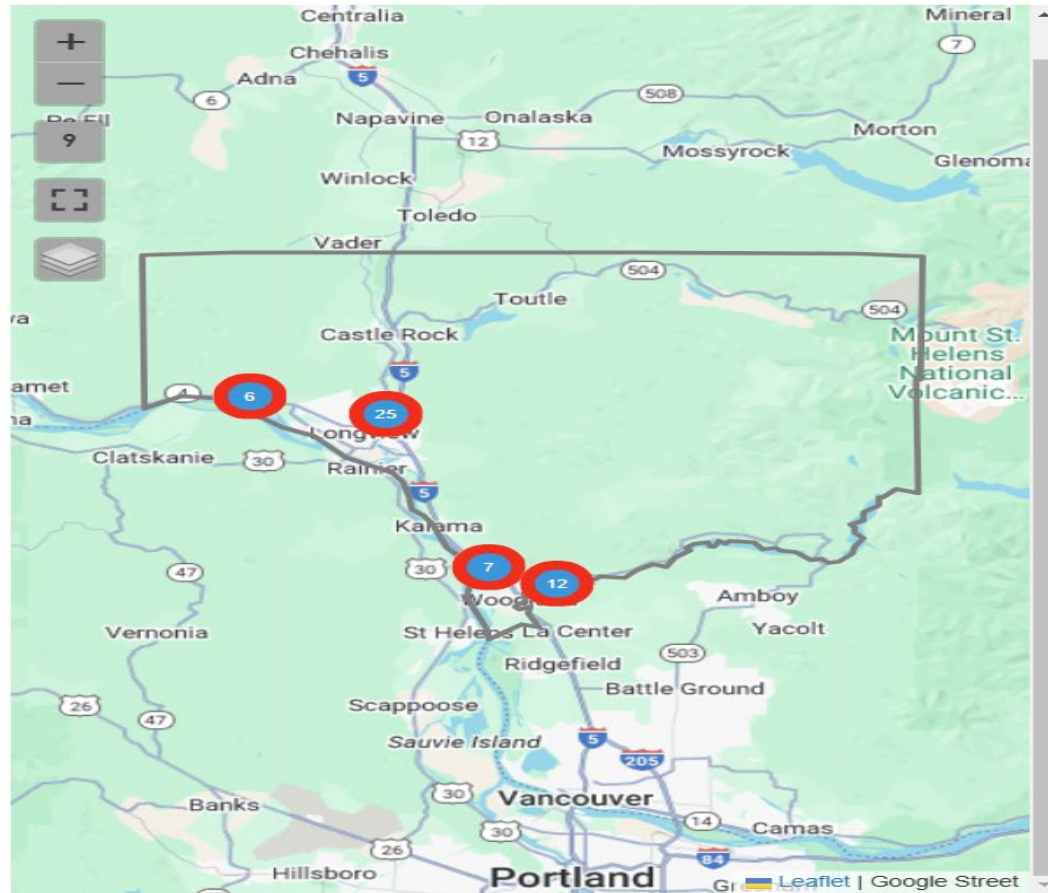
# 4.2 Underground Primary Continued

Underground Faults by Month 10-Year Average



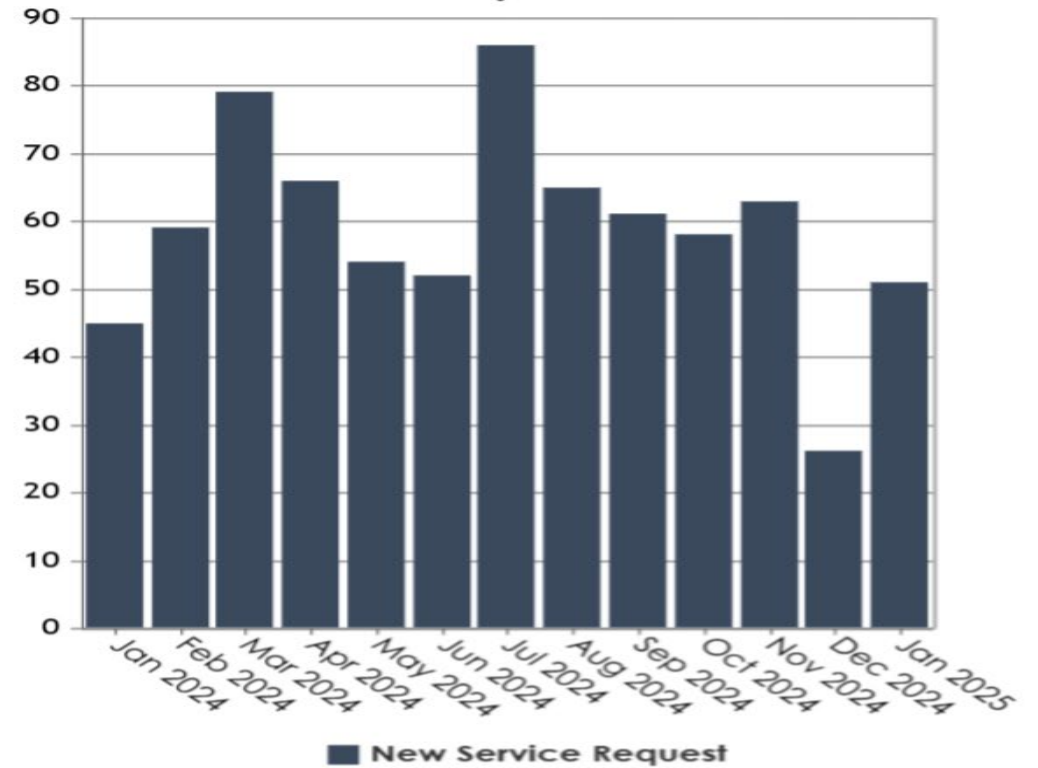
# 4.3 New Service Requests

## New Service Requests



## New Constructions

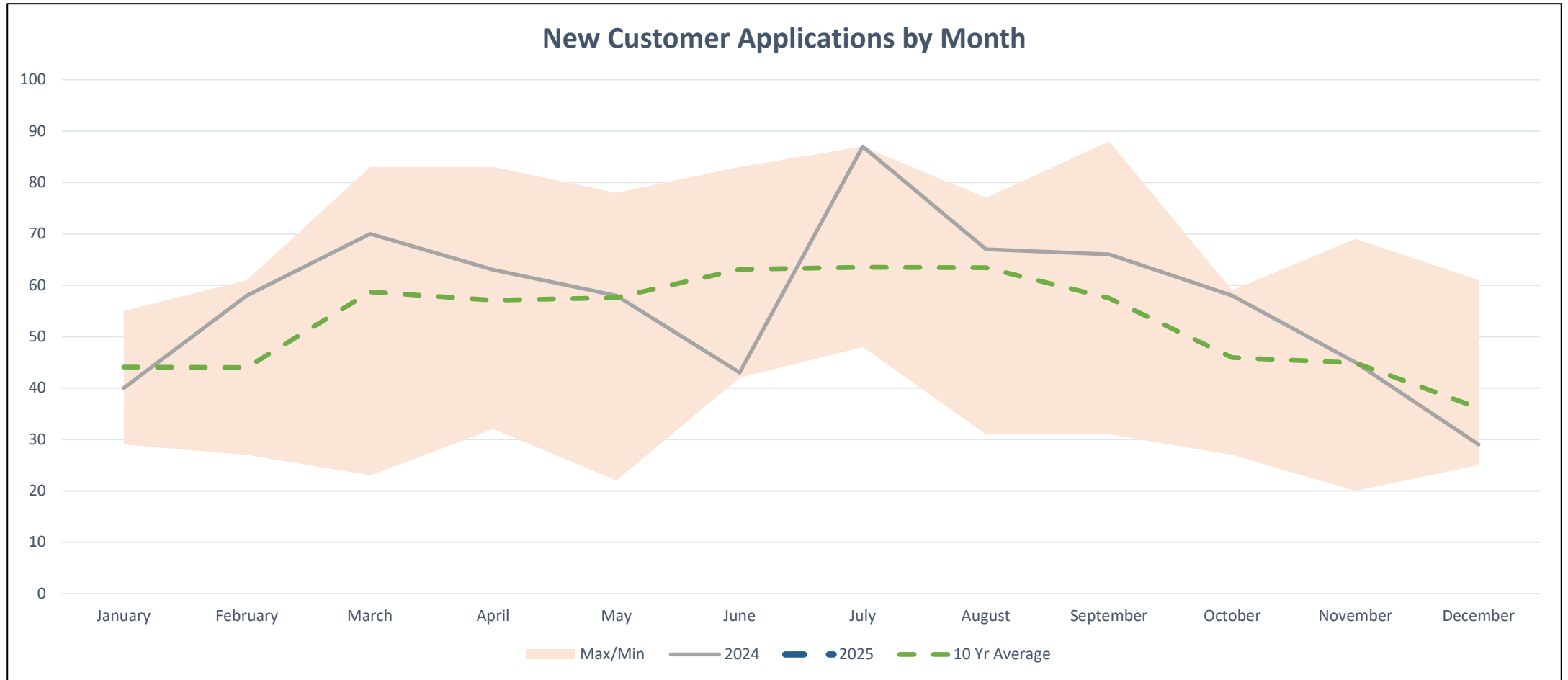
### New Construction Service Requests



New Service Requests YTD (January): 2025 = 47

Total New Service Requests YTD are 17% more than the previous year and 7% more than the 10-year average.

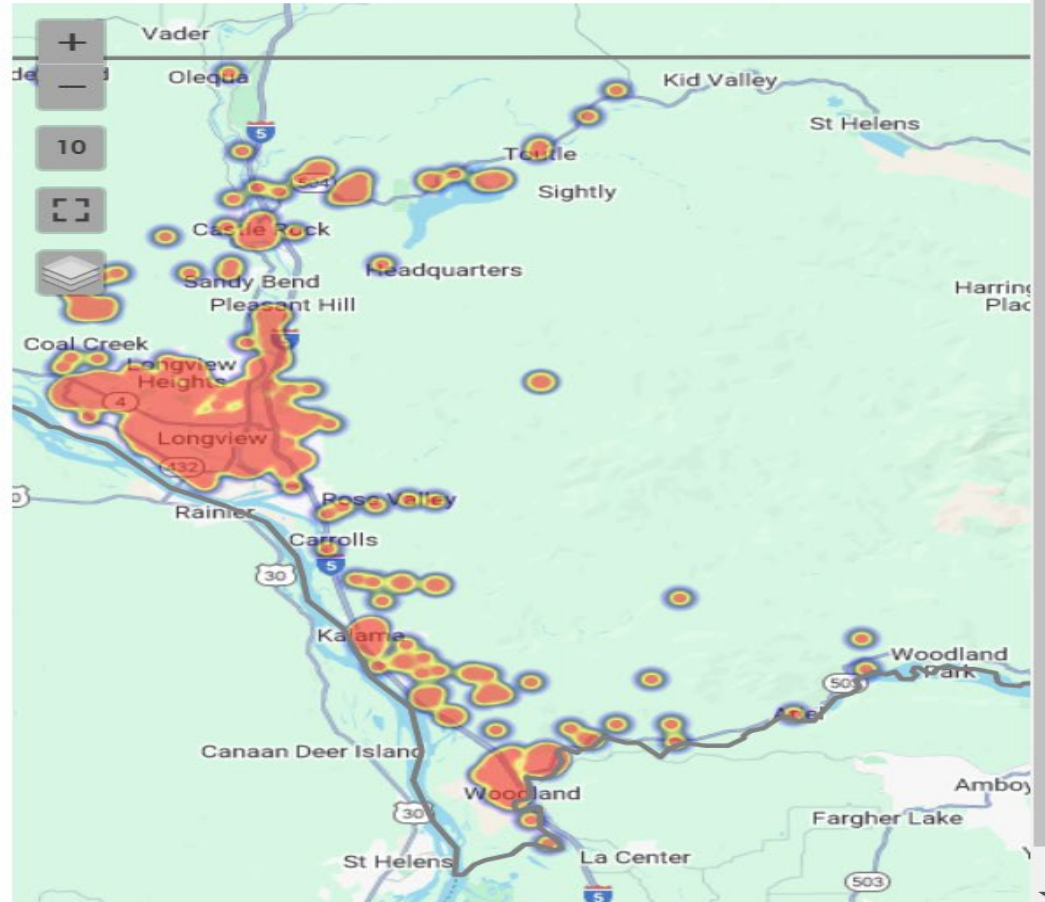
# 4.3 New Service Requests Continued



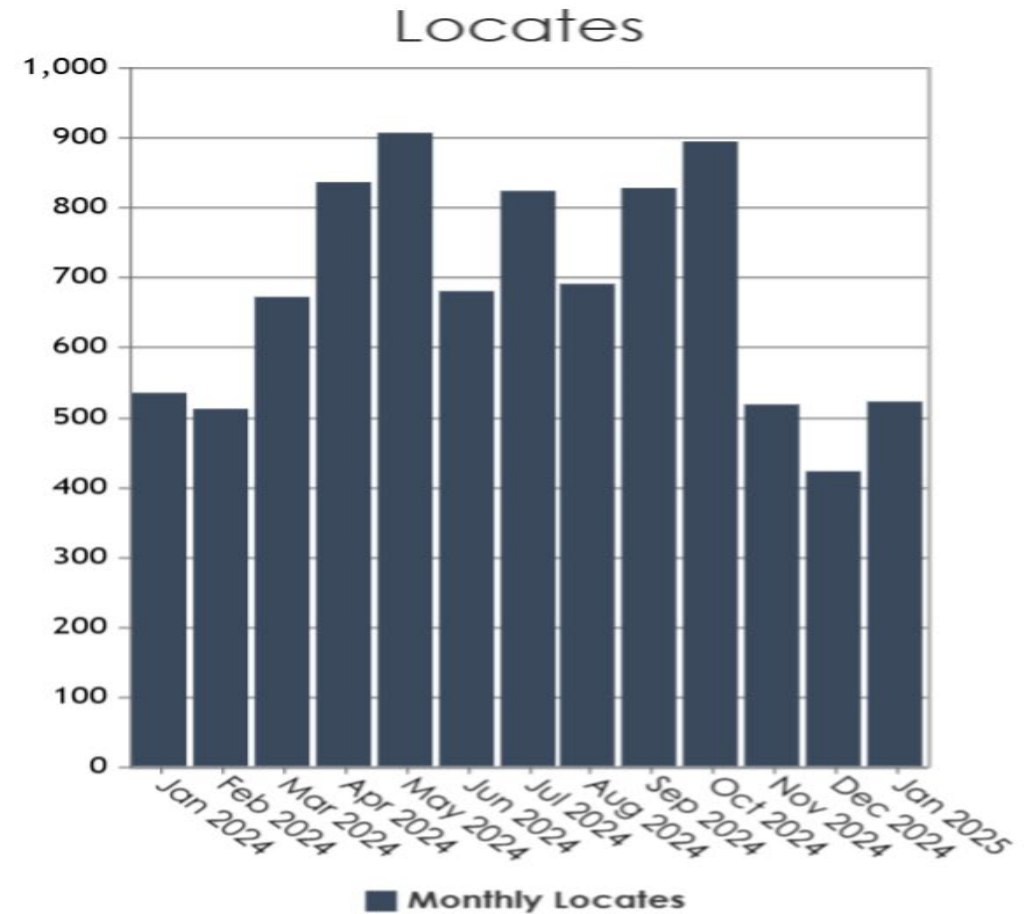
# 4.4 Locates

## Monthly Locates

Total Locates: 521



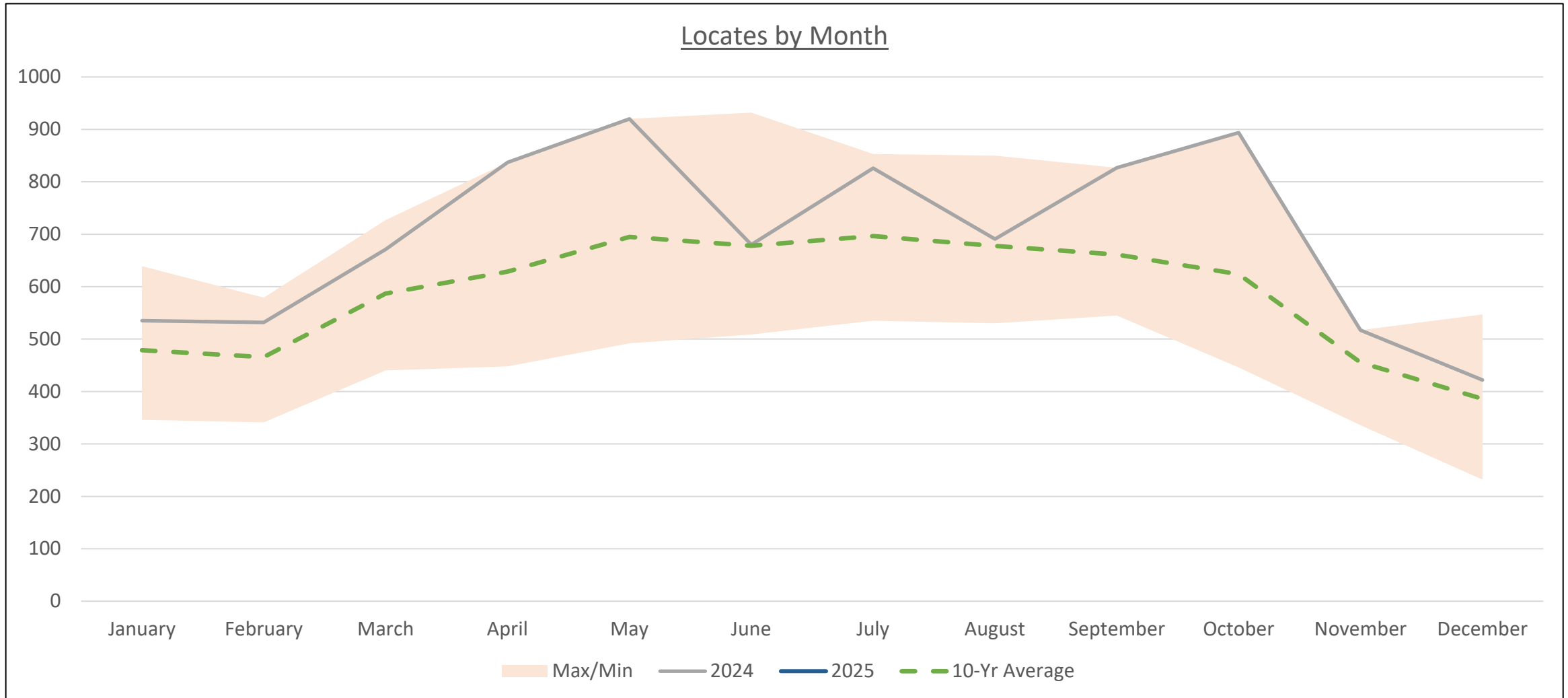
## Locates



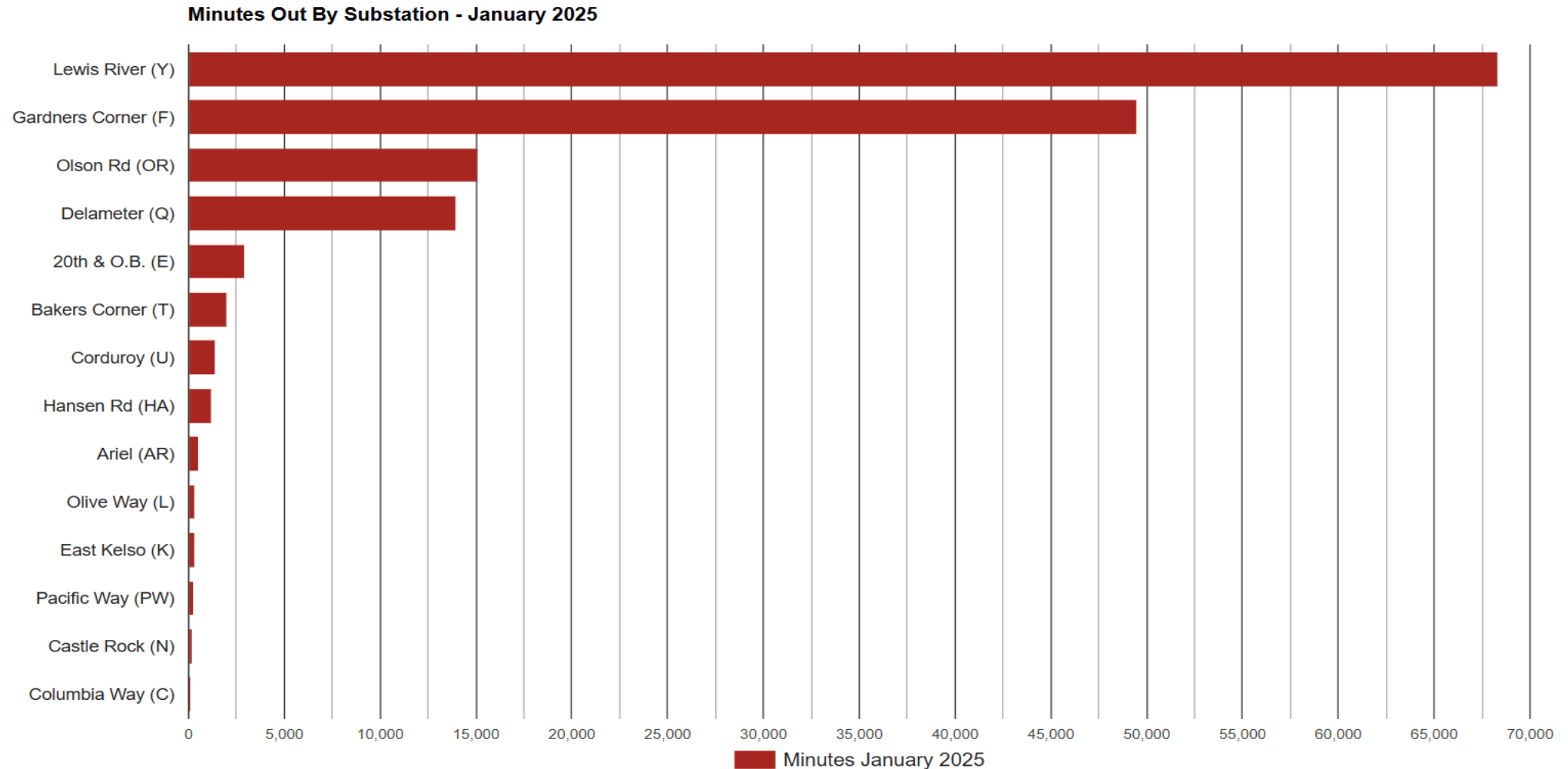
Locate Requests YTD (January): 2024 = 521

Total Locate Requests YTD are 3% less than the previous year and 9% more than the 10-year average.

# 4.4 Locates Continued

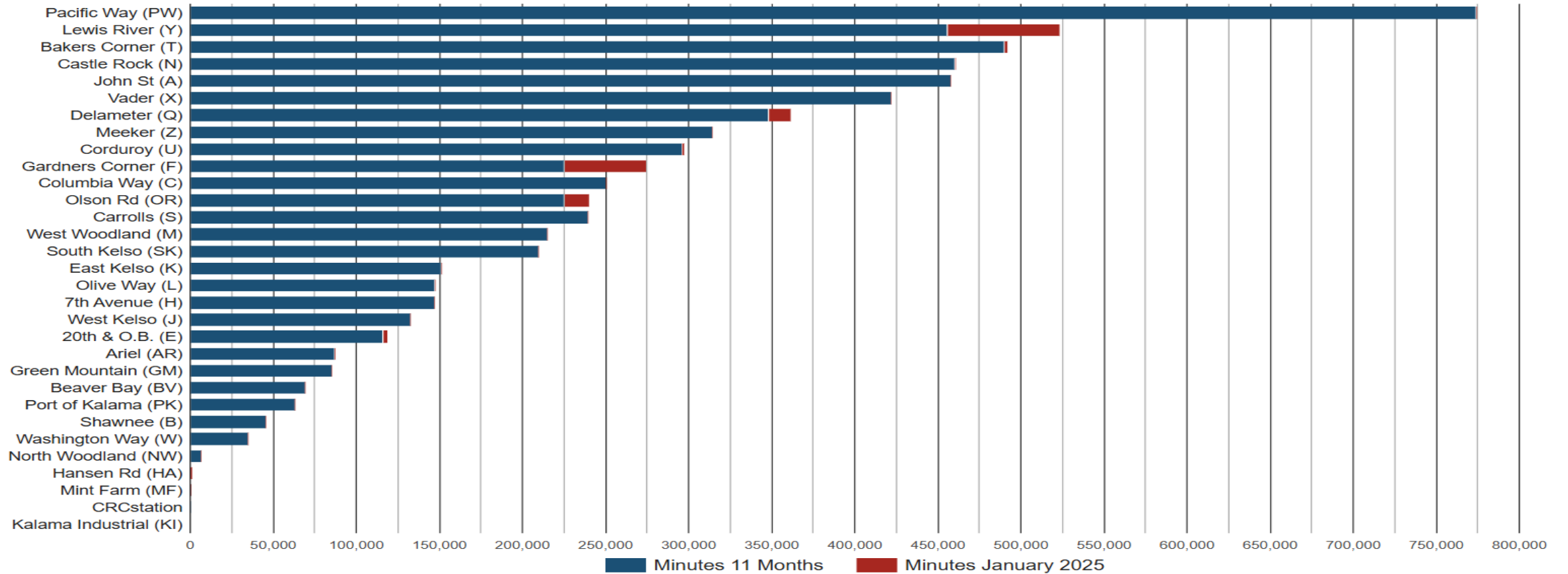


# 4.5 Substation Outages (exclusive of storms)



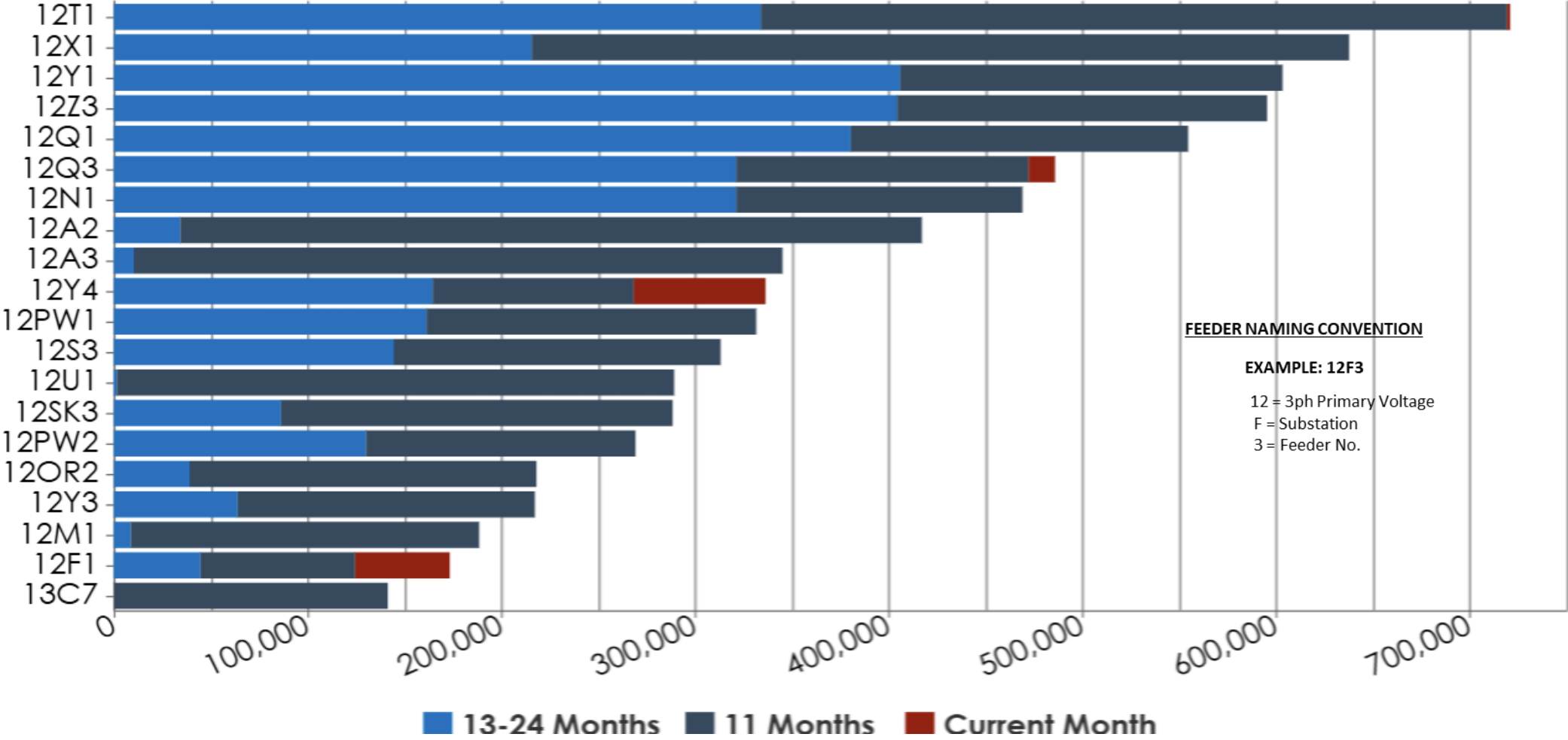
# 4.5 Substation Outages continued

Minutes Out By Substation - Rolling 12 Months



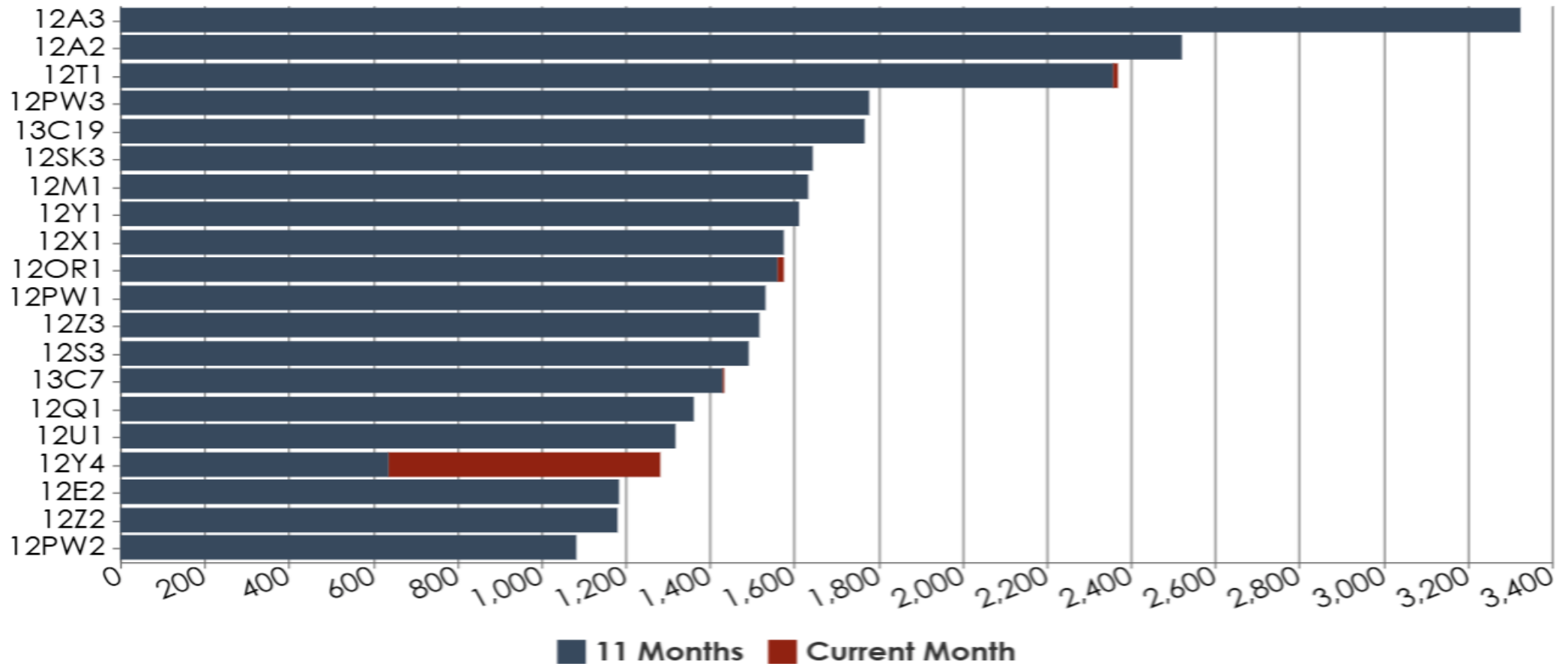
# 4.6.1 Feeder Outages and Causes (exclusive of storms)

## Top 20 Feeders by CMI



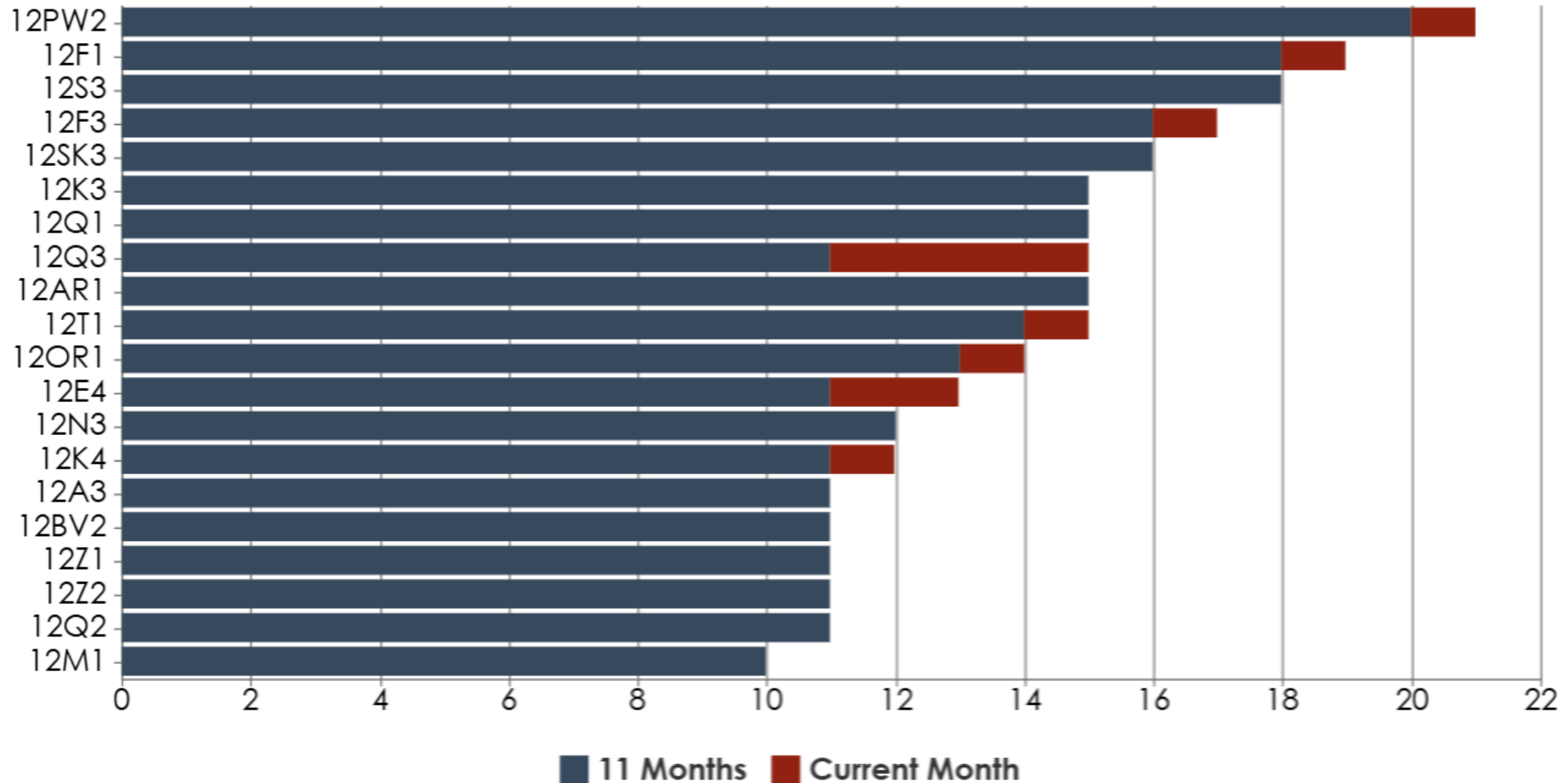
# 4.6.2 Feeder Outages and Causes continued

## Top 20 Feeders by Customer



# 4.6.3 Feeder Outages and Causes continued

## Top 20 Feeders by Incidents



# 5.0 Customer Service



5.1 Customers Served

5.2 Customer Payments

5.3 Customer Disconnects

5.4 Customer Assistance

5.5 Customer Arrearages

5.6 Warm Neighbor Program

5.7 Customer Programs

5.8 Customer Service Levels

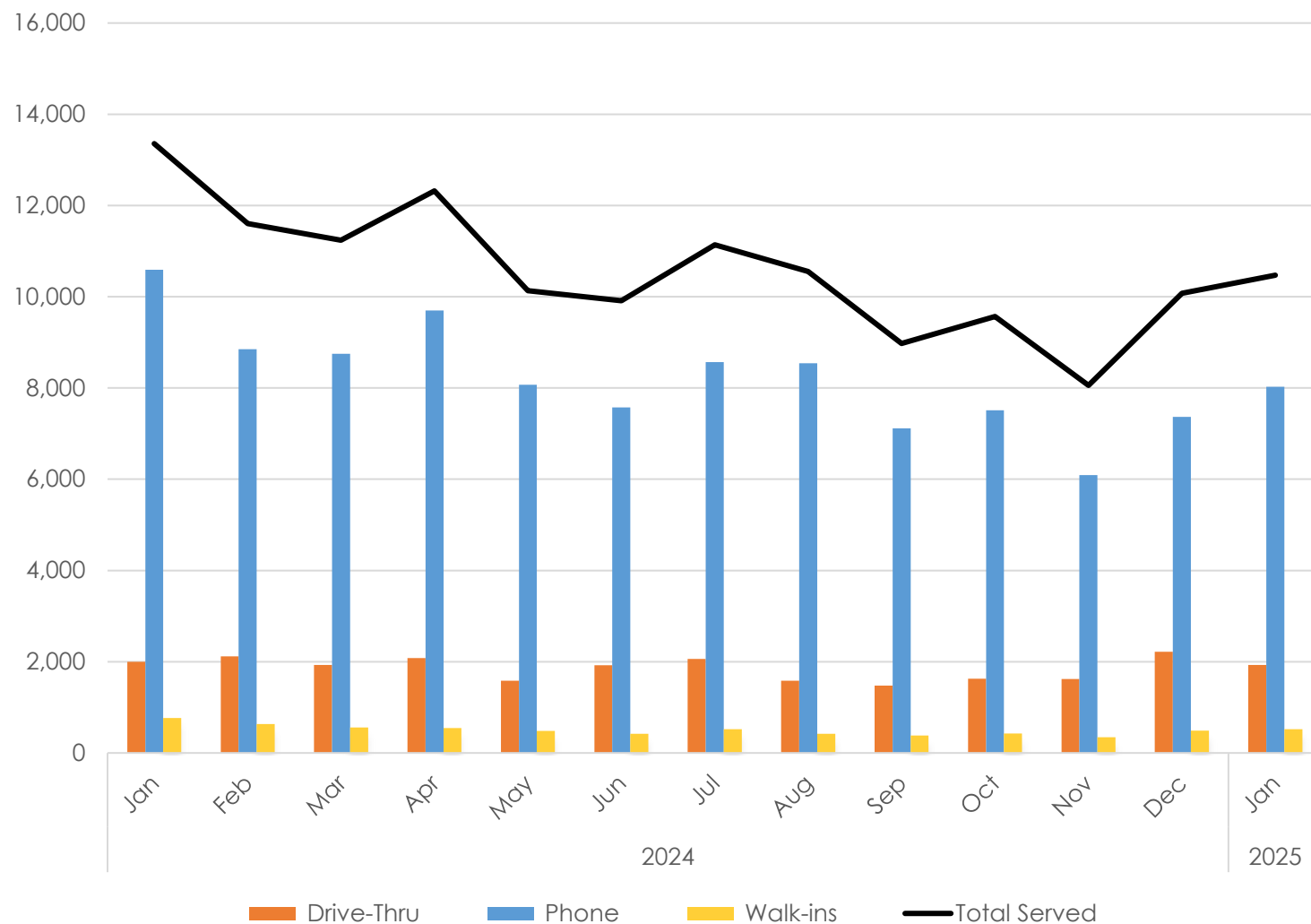
# 5.1 Customers Served

**January Customers Served – 10,474**

Drive Thru – 1,926

Phone – 8,026

Walk-Ins – 522



- Total customer contacts increased slightly for January, regarding high bill and billing assistance needs, which is common for this time of year.
- Overall total customer contacts were down by approximately 3k compared to last January due to no major storm events.

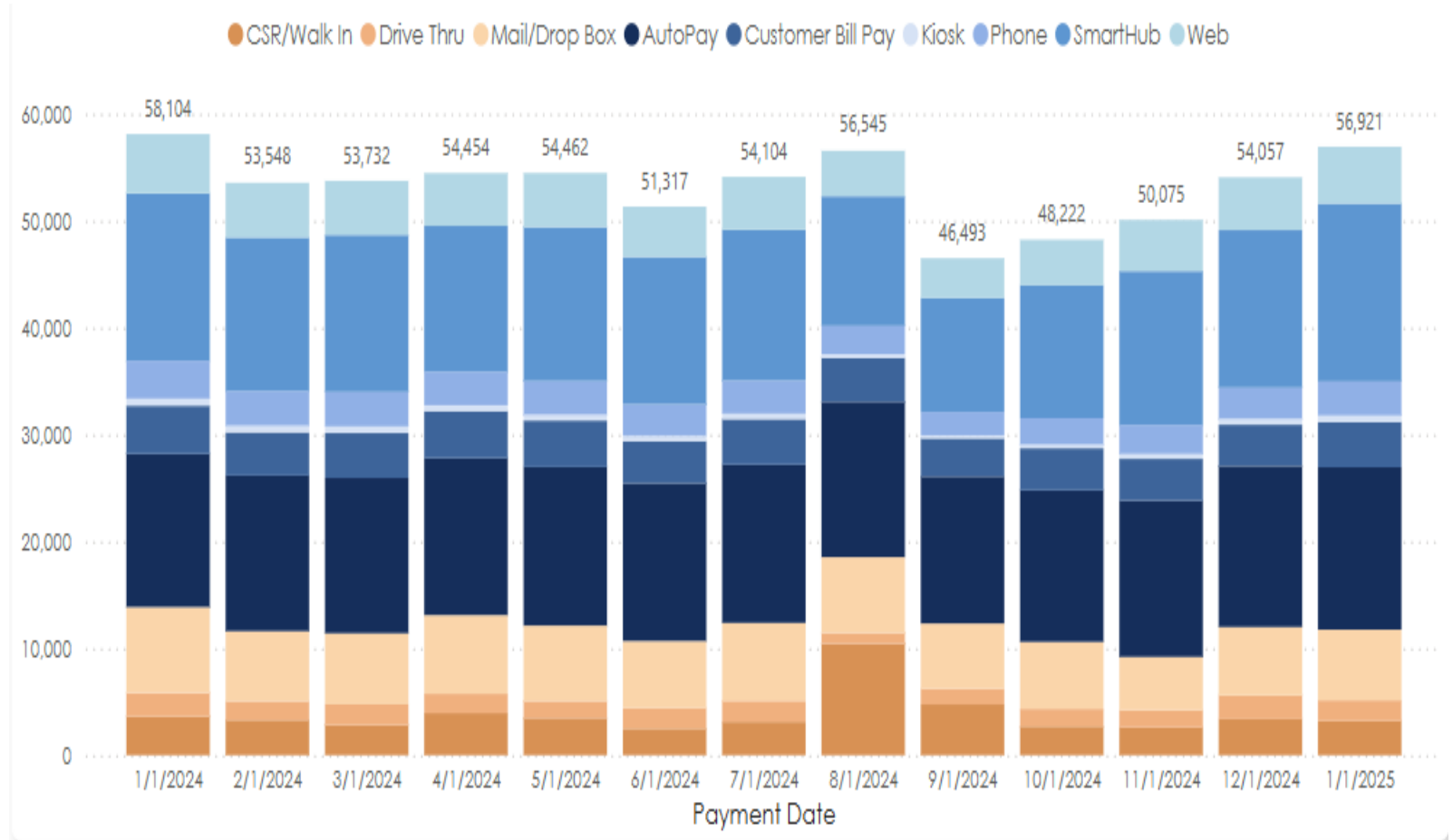


# 5.2 Customer Payments

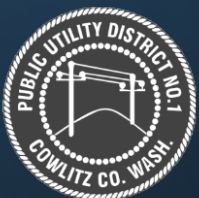
**January Payments – 56,921**

CSR Processed – 11,747

System Processed – 45,174



- Total customer payments increased by approximately 2.8k from the previous month, but remain average for January.
- CSR processed payments (total orange) decreases just slightly for January.



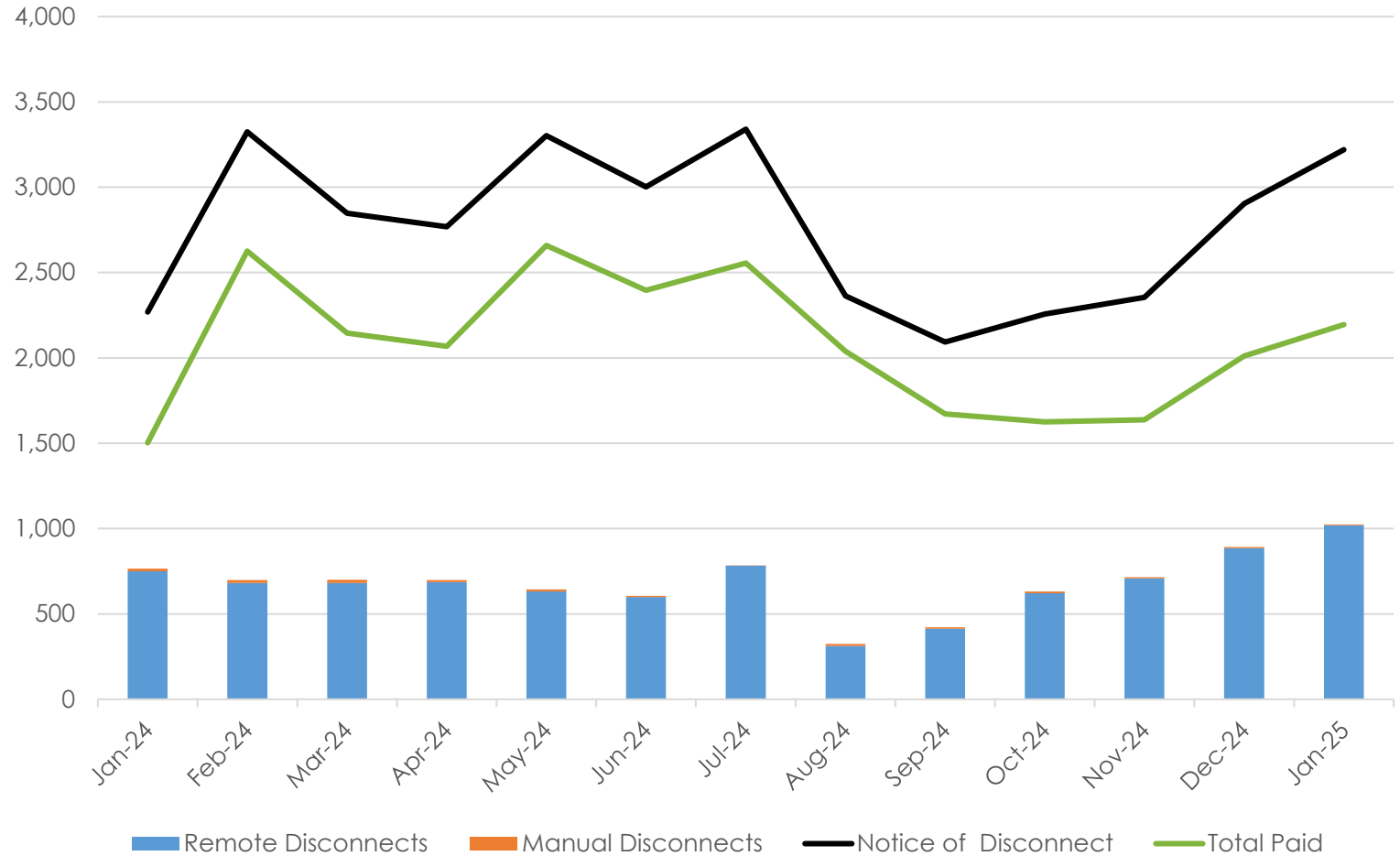
# 5.3 Customer Disconnects

## January Disconnects – 1,025

Remote – 1,020  
Manual – 5

Traditional – 444  
PrePaid – 581

Pending Disconnects – 3,220  
Accounts Paid – 2,195



- Disconnects increased again in January but not uncommon for this time of year due to higher bills.
- The installation of remote meters has also changed customer behaviors, resulting in customers being disconnected for nonpayment and then paying to be immediately reconnected.

# 5.4 Customer Assistance

## January Assistance - \$139,139

DISCOUNT RATE - \$59,719

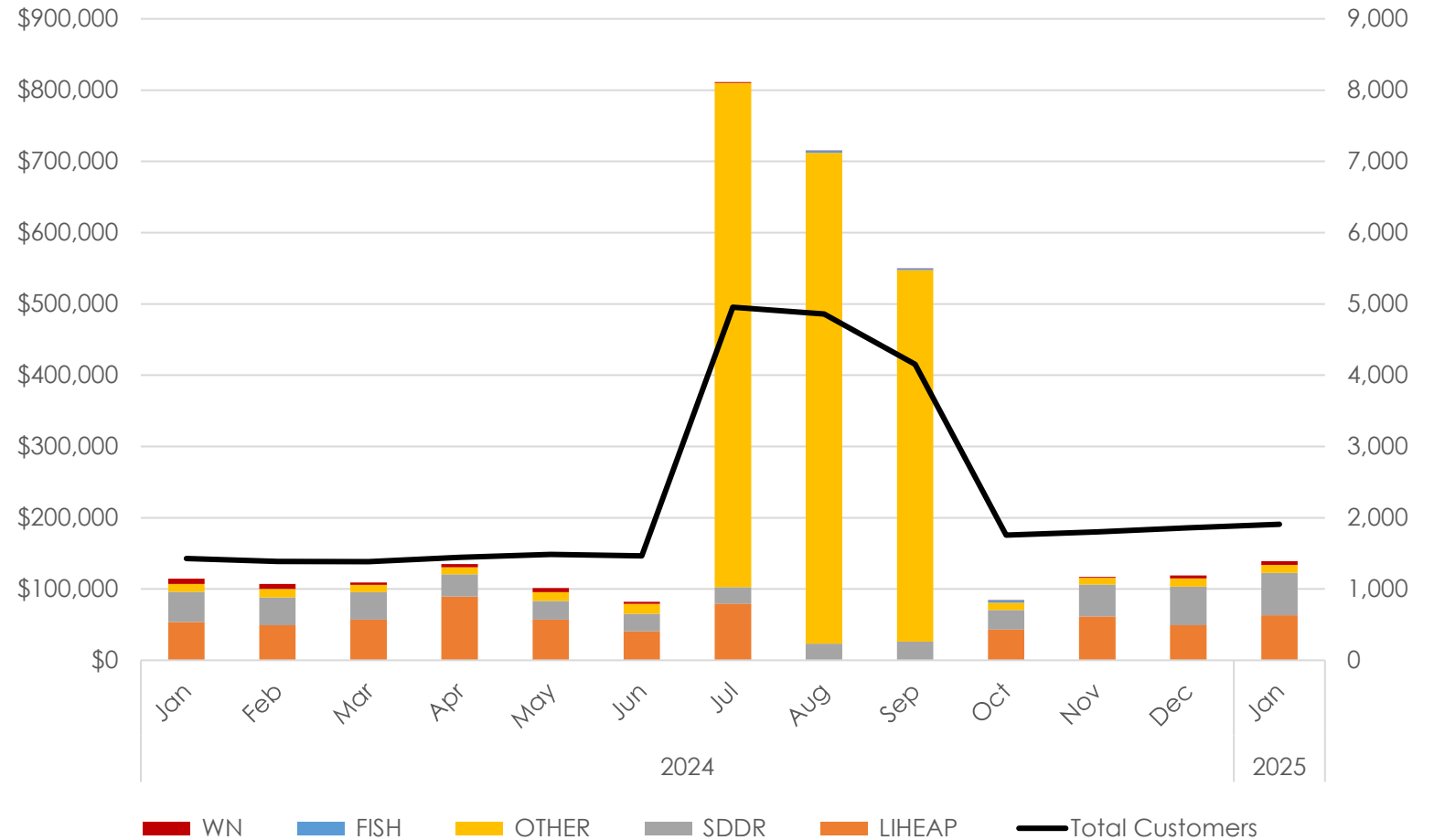
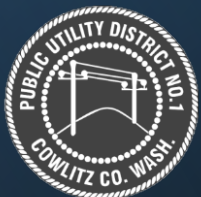
FISH - \$0

LIHEAP - \$63,173

OTHER - \$10,741

WARM NEIGHBOR - \$5,506

TOTAL CUSTOMERS - 1,910



- An additional 500 customers were assisted compared to January of last year.
- Warm Neighbor and LIHEAP both increased for January by approximately \$19k, and anticipate this will continue for several months due to the colder weather.

# 5.5 Customer Arrearages

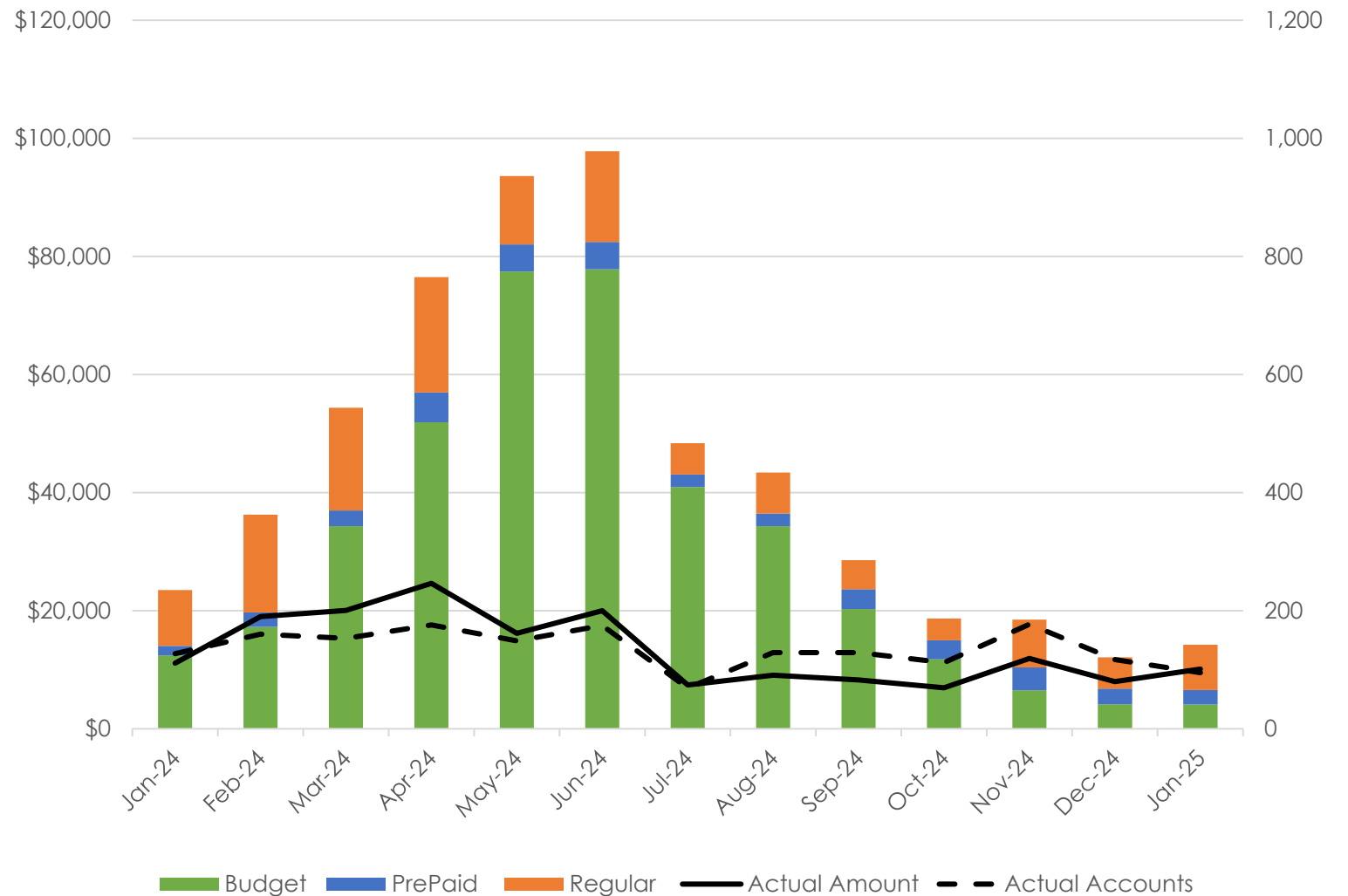
**January Arrearages – \$14,215**

Total Accounts – 138

Actual Past Due:

Past Due Total - \$10,115

Past Due Accounts - 95



- Total arrearages had a slight increase from last month but remain much lower than January of last year.
- Actual Past Due amounts increased with regular accounts increasing the most in January.

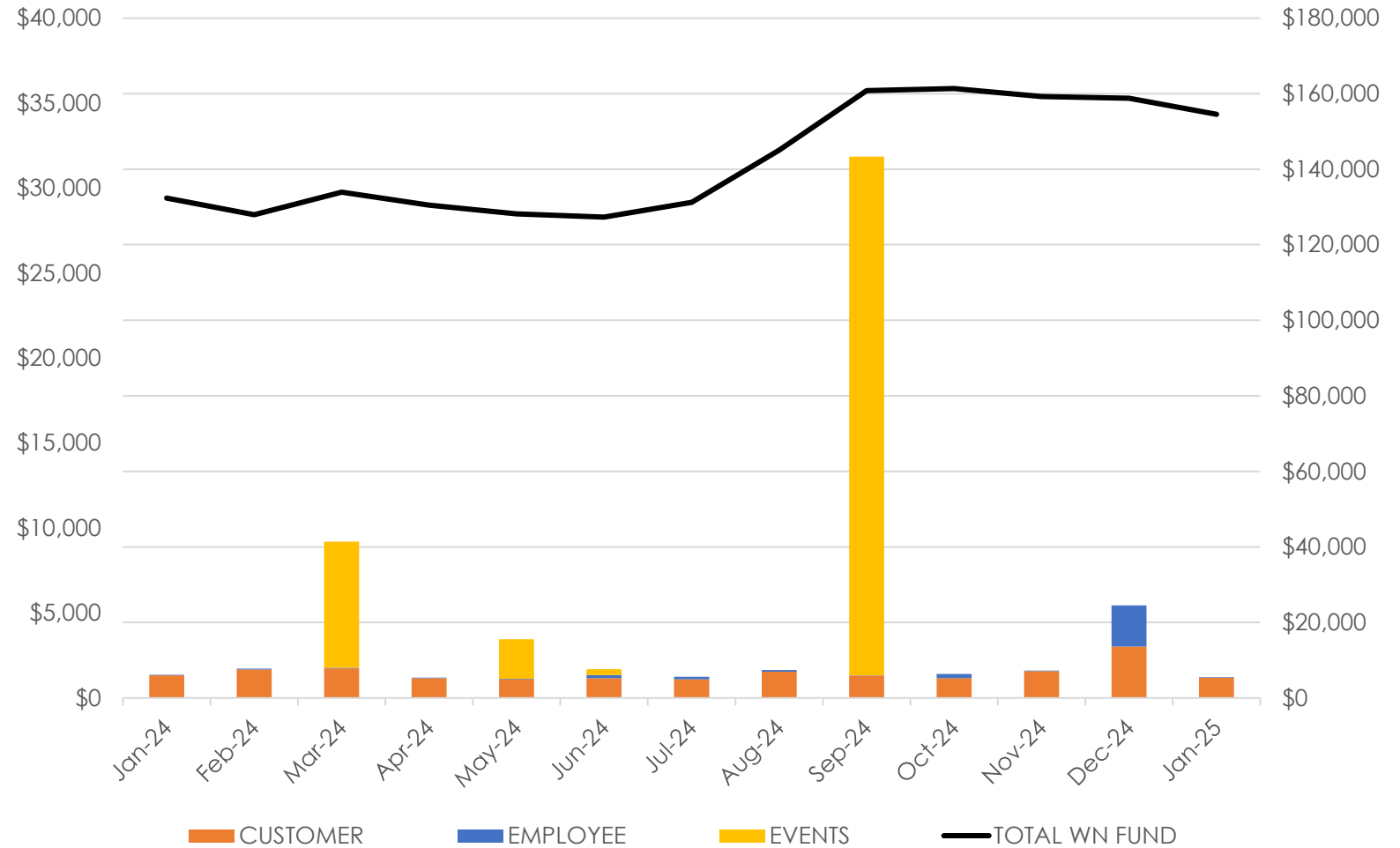
# 5.6 Warm Neighbor Program

**January WN Balance – \$154,515**

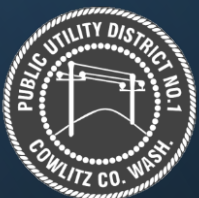
Customer - \$1,192

Employee - \$36

Events – \$0



- Donation amounts leveled off for January and is typical this time of year.
- Final numbers for the Lights in the Park event will be reported when funds are received.



# 5.7 Customer Programs

## January Program Participation

SDDR – 1,696

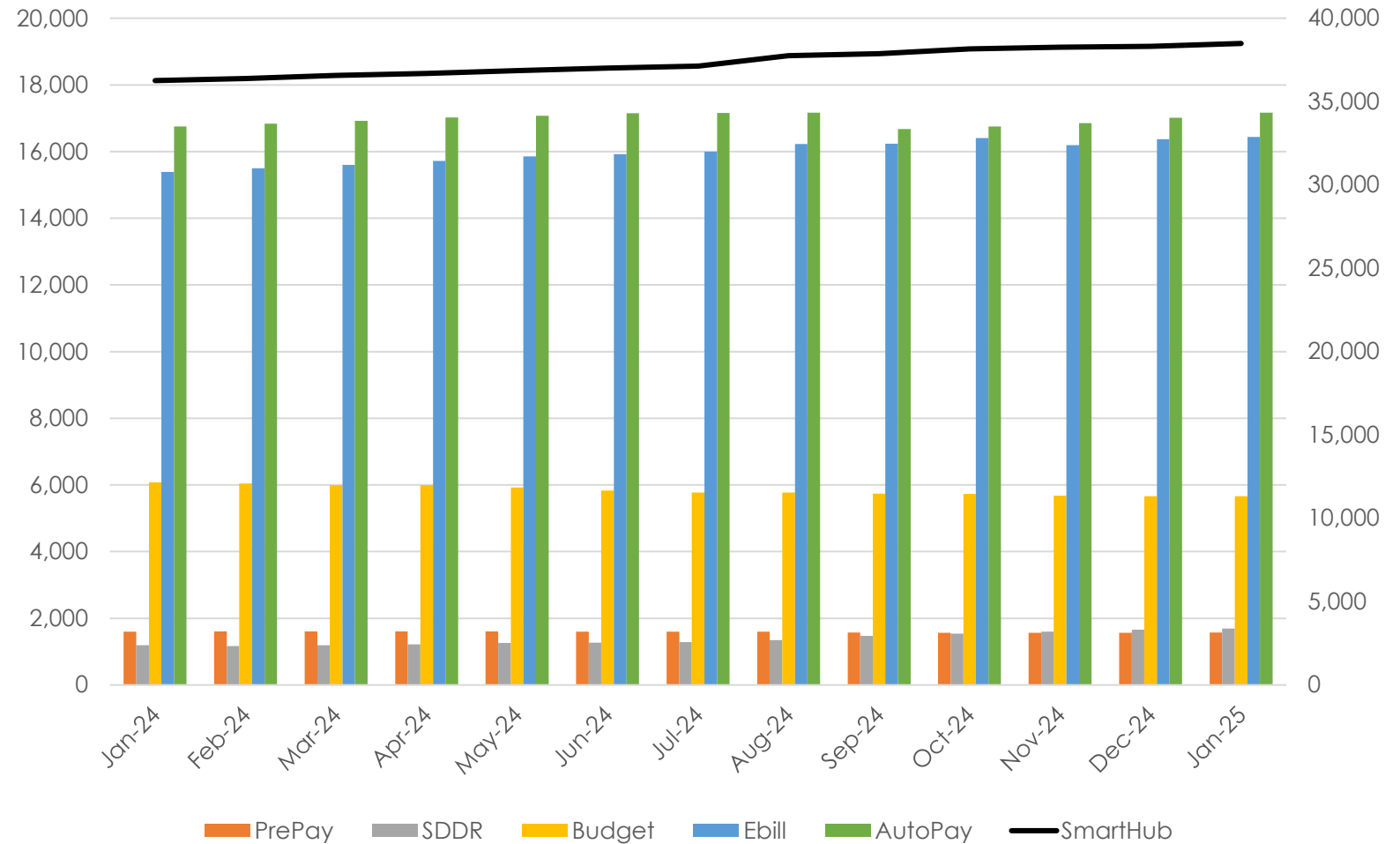
PrePay – 1,571

Budget – 5,663

eBill – 16,438

AutoPay – 17,169

SmartHub – 38,485



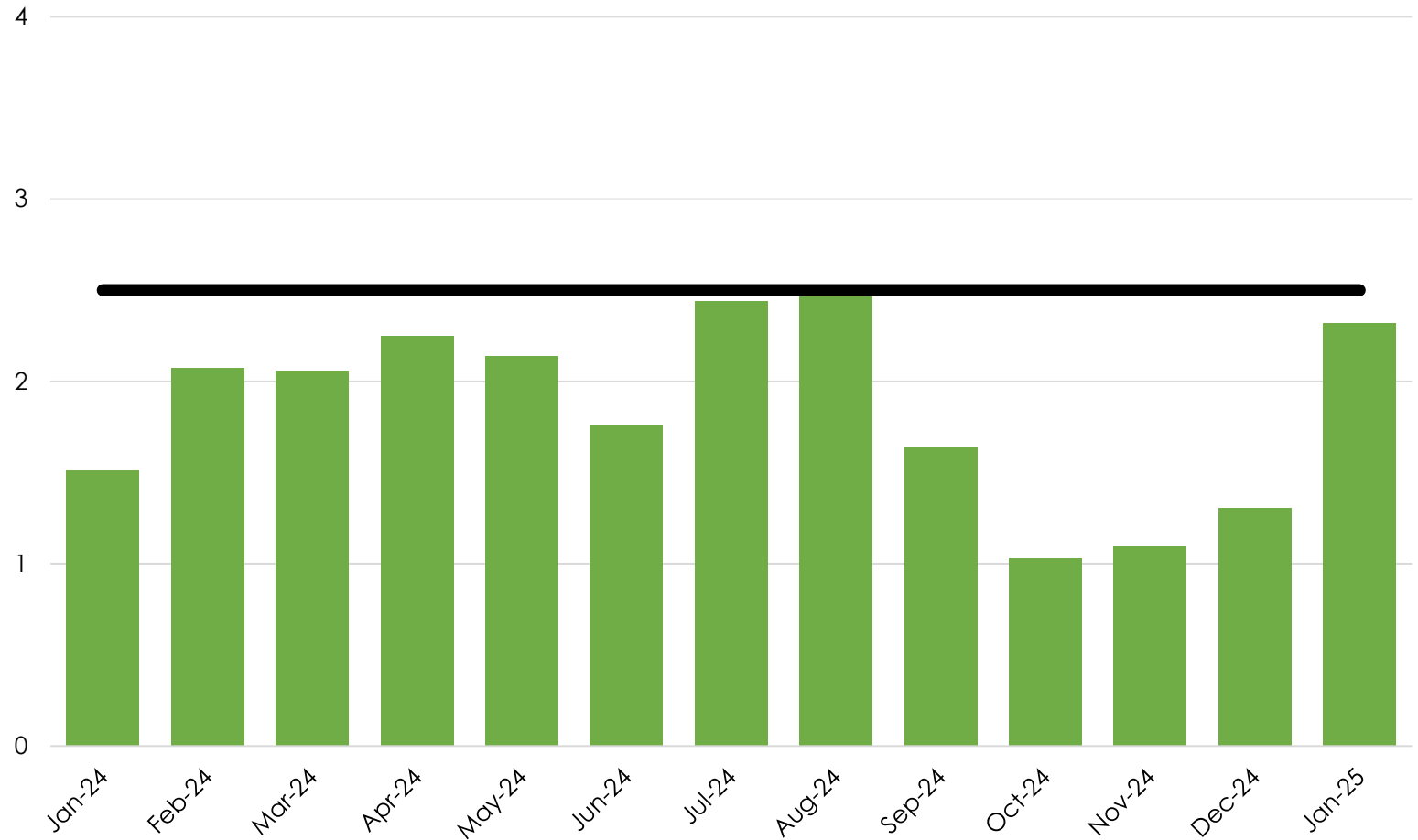
- All programs remain steady with SDDR continuing to gradually increase month over month, with a total of 500 new customers have since last January.
- Customers who meet the age, disability, or veteran requirements are now automatically enrolled in SDDR if they have been approved for LIHEAP. This saves both the customer and the District time in collecting and processing duplicate income information.

# 5.8 Customer Service Levels

## January Call Wait Times

Service Level Goal – 2.5 mins

Current Month – 2.32 mins



- Call wait times increased in January due to higher call volume and is relatively normal for this time of year and is still under the 2.5 minutes.

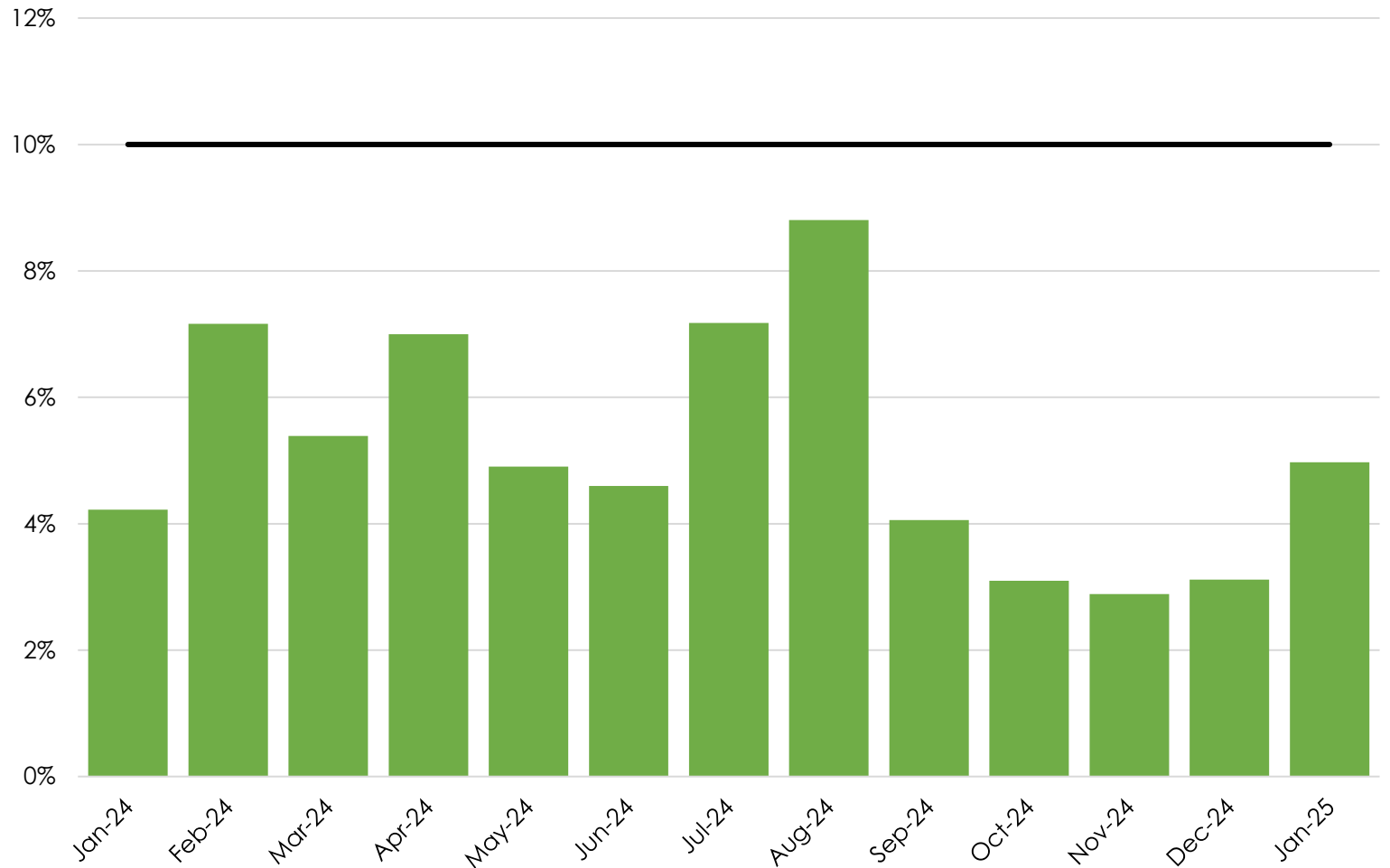


# 5.8 Customer Service Levels

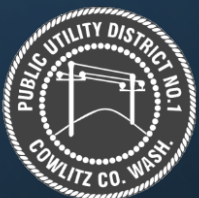
## January Abandoned Calls

Service Level Goal – <10%

Current Month – 5.0%



- Abandoned calls increased for January.
- A total of 420 calls were abandoned out of 8,026 total calls.



# 6. Employee Services

6.1 Personnel Status

6.2 Current Employee Recruitments

6.3 Career Fair – Public and Student Outreach

# 6.1 Personnel Status

## Current Employee Count:

176 full-time employees

3 part-time employee

## Promotions:

- Tracy Lloyd was promoted to the new position of Customer Service Data Quality Specialist as of Monday, February 10, 2025.
- Garrett Colkitt was promoted to the new position of Reliability Compliance Analyst I as of Monday, February 10, 2025.

## 6.2 Current Employee Recruitments

### External Recruitments:

- We are currently recruiting to fill the following position:
  - Groundman – this position is to backfill a vacant position. This position is posted through February 2, 2025. We hope to have this position filled by March 2025.
  - Engineering Interns – we are currently recruiting for two interns in the Transmission and Distribution Engineering department. These positions are open through March 30, 2025.

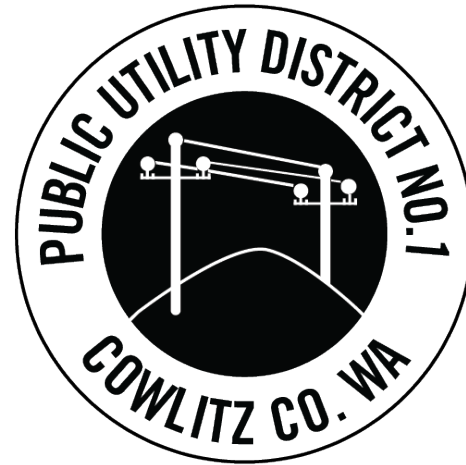
## 6.3 Career Fair – Public and Student Outreach

### Outreach Events Coming up for 2025:

- **Longview High School College & Career Fair Day – 2/27/2025**
  - RA Long and Mark Morris High Schools will be hosting a one day college and career fair for their students.
    - RA Long will run from 8:30-10:30am
    - Mark Morris will run from 12:30pm – 2:00pm
- **WSU Vancouver Engineering and Technology Career Fair – 3/26/2025**
  - This event will take place on March 26<sup>th</sup> at WSU Vancouver. We will be promoting our internships and open positions to WSU students.
  - The District will have the following Internships open for 2025 – two Transmission & Distribution Engineering internships.
- **Woodland High School Career Fair – 4/18/2025**
  - This event will take place on April 18, 2025 in the Woodland High School gym.
  - Students will have the opportunity to meet with over 40 businesses from Cowlitz and Clark county and learn about what careers they offer.
- **Castle Rock High School Skilled Trades Fair – April 22, 2025**
  - This event will take place on April 22, 2025 in the Castle Rock High School parking lot.
  - This event will be open to not only Castle Rock High School students but from students at different high schools bringing over 600 students to the event.

## 7. Public Relations and Communications

- Connected
- Columbia River Reader
- Radio Messaging
- Website Messaging
- Social Media
- Internal Messaging



## Income Eligible Heat Pump Water Heater Program

Cowlitz PUD is seeking eligible customers for our limited Hybrid Water Heater Program.

- Do you own or rent a single-family or manufactured home or duplex?
- Are you currently heating your water with a standard storage tank water heater?

If you answered YES to the questions above, call Energy Efficiency Services at 360.501.9514, toll free at 800.631.1131, or email [eeservices@cowlitzpud.org](mailto:eeservices@cowlitzpud.org) to see if you qualify\*.

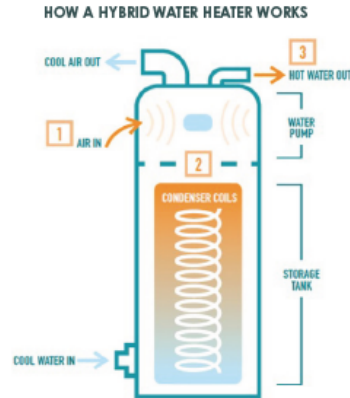
### Why install a hybrid water heater?

- Reduce water heating costs by up to 60%
- Reduce your total electric bill by up to 10%
- Most units have additional controls, such as temperature and away settings.
- Easy to operate.
- Low maintenance.

### Income Guidelines

1 person	\$50,400	5 people	\$77,800
2 people	\$57,600	6 people	\$83,920
3 people	\$64,800	7 people	\$94,680
4 people	\$72,000	8 people	\$105,440

\* First come, first served. Funding can run out at any time without warning.



## GoForth Electric Carshare Program

Take a free ride in the all-electric Chevy Bolt, stationed at 961 12th Ave (first come reservations only).

Carshare reservations available until 3.31.2025.

### Why Drive electric?

- No more gas stations
- Higher performance
- A cheaper drive
- Benefit the economy and environment

Download the MDO Carshare app from Google Play or App Store or scan the QR code to make a reservation!



Need more info? Visit [goforthcarshare.com](http://goforthcarshare.com) or call 503.850.0007



**CLOSURES:** Monday, February 17th – President's Day

## Pay It Forward

Did you know you can pay anyone's electric bill?

Give one of our Customer Service Representatives the name or address of the person you want to help, and we can apply any payment to their account.

For more information, contact our Customer Service Department at 360.423.2210

## SmartHub: Auto Enroll In Warm Neighbor

**How to Enroll:** Go to Bill & Pay, then Warm Neighbor. From there, click enroll, and choose round my bill up to the next dollar, set a fixed amount, or make a one-time additional donation. Your contribution will appear on your bill as a Warm Neighbor Donation.



## Tip of the Month: Pick your Due Date

Do you wish your bill was due on a different day?

You can now choose which Monday of the month works best for you. The first Monday might work best for you if you get paid on the 1st of each month.

For more information, contact our Customer Service Department at 360.423.2210

## AARP Tax-Aide Provides Free Tax Preparation

Longview/Kelso area residents can get their taxes done for free beginning in early February and continuing through mid-April.

AARP membership is not required, and there are no age or income limitations.

To make an appointment for free tax preparation with IRS Certified AARP Tax-Aide volunteers, call the Longview Library 360.442.5300 or Lower Columbia CAP 360.425.3430



Connected is published by Cowlitz PUD  
961 12th Avenue  
PO Box 3007, Longview, WA 98632  
360.423.2210 | Toll Free 800.631.1131  
[cowlitzpud.org](http://cowlitzpud.org)



## Bill Assistance Programs:

### LIHEAP: 2024-2025 Season

Schedule your appointment today at [www.lowercolumbiacap.org](http://www.lowercolumbiacap.org)

The Low-Income Energy Assistance Program (LIHEAP) is a Federally funded program administered through CAP.

### WARM NEIGHBOR

Are you low-income and struggling to pay your bills? One-time bill assistance of up to \$300 may be what you need to get back on your feet.

### How to Apply:

- Complete the [application](#) on SmartHub, in the office, or print from website
- Submit online, email, mail, or drop off the application and required documentation at our office.

FAMILY SIZE	ANNUAL	MONTHLY
1	\$ 90,400	\$ 4,200.00
2	\$ 97,600	\$ 4,800.00
3	\$ 64,800	\$ 5,400.00
4	\$ 72,000	\$ 6,000.00
5	\$ 77,800	\$ 6,483.33

### DISCOUNTED RATE PROGRAM

Are you low-income, 62+, disabled, active military, or a veteran? You may be eligible to receive up to 30% off your monthly bill.

### How to Apply:

- Complete the [application](#) on SmartHub, in our office, or print from our website.
- Submit online, email, mail, or drop off the application and required documentation at our office.

FAMILY SIZE	SDR 30%		SDR 20%	
	ANNUAL	MONTHLY	ANNUAL	MONTHLY
1	\$23,475	\$1,956	\$50,400	\$4,200
2	\$31,725	\$2,644	\$57,600	\$4,800
3	\$39,975	\$3,331	\$64,800	\$5,400
4	\$48,225	\$4,019	\$72,000	\$6,000
5	\$56,475	\$4,706	\$77,800	\$6,483.33

Contact Customer Service for more details: 360.423.2210

Board of Commissioners meets the second and fourth Tuesday of each month at 2pm.

To attend contact [mpeterson@cowlitzpud.org](mailto:mpeterson@cowlitzpud.org)



## PLUGGED IN TO COWLITZ PUD

By Alice Dietz  
Cowlitz PUD Communications  
& Public Relations Manager

As a public utility, it is our job to ensure we are good stewards of our ratepayers' money. The more creative we are in using our funding sources, the farther these dollars can go to fund energy efficiency assistance, incentives, and rebates for all residential, commercial, and industrial customers. Below is a list of funding sources the Energy Efficiency Department uses to stay compliant with energy efficiency in the State of Washington.

Alice Dietz is Cowlitz PUD's Communications /Public Relations Manager. Reach her at [adietz@cowlitzpud.org](mailto:adietz@cowlitzpud.org), or 360-501-9146.

### Energy Efficiency Funding Streams

Funding	Source	What is it used for?	Why does it matter?
Bonneville Power Administration (BPA): Energy Efficiency Incentive (EEI)	Cowlitz PUD participates in BPA's energy efficiency program. Cowlitz ratepayers pay into the BPA energy efficiency fund through rates.	Rebates and incentives are awarded to residential, commercial, and industrial customers who achieve energy savings (reduce kWh's used).	The Washington State Independence Act (also known as Initiative -937) requires utilities with more than 25,000 customers identify and acquire all cost-effective energy efficiency resources and meet targets set every two years through a Conservation Potential Assessment (CPA).
Business & Operation (B&O) Tax	The State of Washington considers BPA EEI money as revenue. As a result, Cowlitz PUD must pay taxes on this. Senate Bill 5008, passed April 22, 2021, reinstated (B&O) tax exempt. Instead, this money is to be used for income eligible energy efficiency measures and or bill assistance.	Installation and equipment costs of HVAC and water heating for income eligible residential customers.	To meet two-year CPA targets. To ensure no one is left behind (including vulnerable populations and highly impacted communities) during the clean energy transition as mandated by the Clean Energy Transformation Act (CETA). CETA requires the state eliminate coal-fired electricity and transition the electricity supply to be 100% carbon-neutral by 2030, and 100% carbon-free by 2045.
Home Electrification and Appliance Rebate Grant	Washington State Department of Commerce through the Climate Commitment Act	Installation and equipment costs of cold climate heat pumps for income eligible residential customers.	To meet two-year CPA targets and reduce energy burden for vulnerable populations and highly impacted communities.
Retained EEI funding	Cowlitz PUD doesn't always extend the full BPA incentive to our customers for all energy efficiency measures, allowing us the freedom to use our EEI funding in a way best fit for our community.	Incentives for indoor grow operations to implement energy efficiency upgrades throughout their facility. In cases where EEI funding wouldn't allow us to meet two-year CPA.	Energy savings from these projects contribute to our CPA target.
Performance Payment	20% of the EEI budget	In cases where EEI funding wouldn't allow us to meet two-year CPA targets.	Energy savings from these projects contribute to our CPA target.

- CUT HEATING COSTS UP TO 15% WITH SIMPLE FIXES.
- LEDs USE 75% LESS ENERGY THAN INCANDESCENT BULBS.
- START SAVING AT [COWLITZPUD.ORG/EFFICIENCY](http://COWLITZPUD.ORG/EFFICIENCY).



# Radio Messaging

At Cowlitz PUD, we care about helping you keep winter costs down. With simple steps like switching to LED bulbs, adding insulation and sealing drafts, you can significantly reduce your energy costs this season. Visit [cowlitzpud.org](http://cowlitzpud.org) and click the Energy Efficiency tab for more helpful tips and tricks to save.

Cowlitz PUD—supporting our community with energy-saving solutions for warmth and safety.

Cowlitz PUD—Your Power.

# Website Messaging

The banner features a dark blue navigation bar at the top with five icons and labels: SmartHub (a gear with 'smart' text), Outages (a lightning bolt), Efficiency (a leaf), Careers (a briefcase), and Assistance Programs (a heart with hands). Below the navigation bar is the title 'Connected Newsletter' centered between two horizontal lines. The main content area is divided into three sections. On the left is a large image of white electric cars at a charging station with a blue 'P' sign in the background. Below this image is a dark blue box with the text 'Need a Ride? Check out the EV RideShare Program'. To the right of the main image are three stacked promotional cards. The top card shows stacks of coins and the text 'Same Payment. Every Month.'. The middle card shows a person in blue gloves handling a white mesh filter and the text 'Rinse. Dry. Replace. New Year,...'. The bottom card shows a keyboard with an 'update' key and the text 'Update Your Contact Information to...'. At the bottom center of the banner is a dark blue rounded button with the text 'Connected Archives'.

SmartHub Outages Efficiency Careers Assistance Programs

## Connected Newsletter

Need a Ride? Check out the EV RideShare Program

Same Payment. Every Month.

Rinse. Dry. Replace. New Year,...

Update Your Contact Information to...

Connected Archives

# Social Media Messaging

### Page overview

Last 28 days [Create post](#)


Views <sup>i</sup>	85,277
Reach <sup>i</sup>	16,996
Content interactions <sup>i</sup>	858
Follows <sup>i</sup>	70

[See more](#)


### Top content

Last 28 days [See all](#)

Boost this post to reach up to 5247 more people with every \$480 you spend.



**Regularly cleaning filters safeguards your appliances and guarantees they...**


Published by Alice Dietz <sup>i</sup>  
· January 22 at 3:05 PM · 

Views	Reach	Interactions
16,841	6,235	206


[See insights](#) [Extend ad](#)

### Content

Most recent content and ads



**Content**  
See content



**Ads**  
See Ads

January 9th, 2025  
**Watts Up**




**New Year, New You**  
 Develop Healthy Habits with Calm

Commit to healthy habits today to improve your quality of life.

It can be eating your meals mindfully, taking a walk between meetings, or staying hydrated throughout the day. Calm has curated a collection of resources to help you develop healthy habits. These habits will improve your energy and lead to more productivity.

Empire Publishing has recommended by Calm being a habit to try. Calm has teamed up with Dr. Julie Smith, a recognized clinical psychologist, to explore 10 different sessions with guided meditations to help you get your mind right, getting back on track with your goals, and coping with your future self.

**Take a Moment**

- Over 15 days with Jay Shetty, you'll learn how to leverage growth settings to be more present, calm, and confident—all in 15 minutes.
- **Take a Walk**
- Whenever you're going on a walk, try one of the 10 tracks curated by Calm in these sessions so you can rest your mind and be present with your surroundings.
- **Join in January**
- In this upcoming session with Mel Math, you'll gently wake up your mind with light stretching in bed before you get up and start building healthy habits today and for one of the resources in the Calm app.

Join an upcoming Calm session to learn how to paraphrase your top priorities. Learn new mindfulness techniques or strategies with special monthly themed webinars.

**Mindset Makeover**  
 Start the New Year with clarity and confidence.

Canopy offers free and confidential support to help you prioritize your wellbeing:

- Coaching to navigate challenges and support growth
- Coaching to stay focused and motivated
- Webinars for learning and personal development
- Digital tools for self-guided support anytime

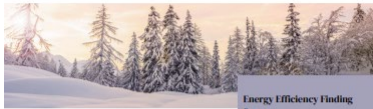
my.canopywell.com | 800.432.2300 | info@canopywell.com



**Burn Prevention Month**

Hot water and scalding Set your water heater to 120°F (49°C) or lower to prevent scalding. Always test bathwater before use, and keep hot beverages out of the reach of children and older adults. Place hot liquids on a fabric mat or towel when cooking. You can also install anti-scald devices in some homes to protect yourself and others from hot things. Check the attachment for more Burn Prevention Tips.

January 16th, 2025  
**Watts Up**

Find the snowflake hidden in the newsletter to be entered for a prize. [advis@cowiiltzpuid.com](mailto:advis@cowiiltzpuid.com)

**Mindful Meal Planning with Canopy EAP**


Most of us would like to eat healthier, but cost can be a major deterrent. By investing a small amount of time and effort in Mindful Meal Planning, you can easily save 10 percent on your family's food bill. In this fun and informative workshop, you will learn how the simple strategies of meal planning can save them time, stress, and money when it comes to eating healthy. Topics covered include: Meal Planning Basics, Why Your Freezer is Your Best Friend, Time Saving Food Prep Tips, and Save Money While Eating Healthy.

Continued on page two...

Click here to watch the video: [Mindful Meal Planning](#)

Mike Lee's Celebration of Life is this Saturday, 1pm at the Cowiiltz County Expo Center

AN ACCOUNT HAS BEEN ESTABLISHED AT THE PUD CREDIT UNION TO ALLOW CONTRIBUTIONS FOR MIKE'S WIFE, LISA, TO HELP COVER THE EXPENSES ARISING FROM HER UNEXPECTED LOSS.



PUD CREDIT UNION HAS COMPLETED OUR Monday, Thursday Item 16 Item Issued For March 25am 2pm Friday 10am 2pm

Checks can be dropped off at the credit union or in the dropbox


**Energy Efficiency Finding Sources**

As a public utility, it is our job to ensure we are good stewards of our ratepayers' money. The more creative we are in using our funding sources the further those dollars can go to fund energy efficiency assistance, incentives, and rebates for all residential, commercial, and industrial customers. Below is a list of funding sources the Energy Efficiency Department uses to stay compliant with energy efficiency in the State of Washington.

**Kudos**

- A big thank you to everyone who helped set up and clean up for the Christmas Lunch! Casey Katal, Travis Walling, Jeremy Beck, Chris Willie, Corey Kanaly, Trent Whittle, Mackenzie Watson, Kelly Parsons, Shari Tomasi, Teedara Wolf, Sasha Hinners, Marisa Heard, Alice Dietz, Sandy Anshila, Monica Petterson, Stacie Pederson.
- We also extend our gratitude to all employees who worked during the storm that began on Christmas Day. Despite being short-handed due to many on PTO, your dedication and long hours ensured our customers were restored promptly.

January 23rd, 2025  
**Watts Up**




**Fidelity**

Ronald Diez, Financial Consultant with Fidelity will be onsite in 2025 holding one-on-one meetings for employees who want to review retirement and 401k plan questions. Appointments are available on a first come first serve basis. Ronald also offers a couple of days each month for virtual or telephone appointments as well. Meetings are free, and Ronald's retirement advice is well worth the time.

- February 27th (onsite, Cowiiltz PUD Main Office)
- April 30th (onsite, Cowiiltz PUD Main Office)
- February 21st (virtual appointments)

To schedule an appointment:

Click on this link to access our central reservation site or call 1-800-662-7331 to schedule your appointment by speaking with my colleagues. Appointment times will not appear online once full.

**Safety**

We are on week 4 of Burn Prevention which is tips on burn first aid. With the Wildfires in California, the Office Safety Committee thought it would be good to send out the attached Wildfire Evacuation Checklist. This is from the wildfire.oregon.gov website.

**Cowliiltz PUD Line Crews**

Representing at Mike Lee's Memorial. Over 500 people attended to celebrate the life of Mike!



**Kudos**

- A heartfelt thank you to Mackenzie Watson for training Melanie Preiss on ScreenCloud and for sharing her innovative and engaging ideas.
- Appreciation goes to Dave Quinn for delivering a touching tribute to Mike Lee at the recent Board meeting.
- Hats off to Steve Jewell for promptly notifying emergency services about a house fire on Villa Road, knocking on doors and windows to search for victims, and ensuring the safety of the fire crews by guiding the meter.
- Thank you to Chris Willie, all line crews, and mechanics for their assistance in transporting line trucks to Mike Lee's memorial service.
- Shoutout to Josh Veach and Dever Hafner-Rathke for their diligent work on the negative bill tracker report, which compiles real-time data from the State's legislative website.

**Wellness**

Just a week left in our January Gym Challenge! Don't forget to fill out your tracking sheet and send it to Teedara by end of day February 3rd so be entered to win some great prizes like a 2025 Fitness Planner, a new gym bag, or a personal blender for your healthy workout drinks.

February 6th, 2025  
**Watts Up**




**Honoring Mike Lee aka HONUST GRUNT**  
 \$25.00 Per Shirt  
 \$20.00 Plus to order



We are selling t-shirts to raise funds for the Lee Family, honoring Mike and Lisa's love for family, especially their grandchildren. Proceeds will be presented to Lisa in a basket with t-shirts for her to wear in memory of Mike. Donations can be made to the "M. Lee T-Shirt Donation" account at the Credit Union.

**Safety**

February Week 1 First Aid Safety Topic - Apps, Websites and Training for First Aid Skills

- [American Red Cross First Aid](#)
- [American Heart Association 2024 First Aid Guidelines](#)
- [Adult and Child First Aid App for your cell phone](#)
- [Red Cross First Aid App](#)
- NEMGOV Training - First Aid: The Basics (25 minutes long)
- NEMGOV Training - General Safety Boost Episode 11: First Aid (5 minutes long)

**Kudos**

- A big shoutout to Warehouse Helper Kevin Walker for investigating and identifying the source of the unpleasant odor in the warehouse.
- Hats off to Corey Kanaly and Trent Whittle for ensuring sidewalks and other walking paths were salted during the icy conditions.
- Appreciation goes to Amanda Claypool and Sasha Hinners for obtaining the necessary documents for the 401k audit.

**Important medical plan information:**

We want to update you on some ongoing issues regarding medical claims processing through our third-party administrator, Loomis. As communicated before, Loomis implemented a new claims processing system in August 2024, and since, we have experienced some residual effects from their system migration that have impacted claims processing.

Please rest assured that our medical plan and your coverage have not changed. These issues are strictly related to Loomis' claims processing system, and we are actively working with them to resolve any outstanding concerns.

If you log into your Loomis portal and notice any unpaid claims, please notify Sasha as soon as possible. Prompt reporting will allow us to escalate these issues with Loomis and work toward a resolution. In working with Loomis on these claim issues, we've had good experience in getting claims re-processed quickly.

We appreciate your patience in this matter. If you have any questions, please don't hesitate to reach out.

**PUD Credit Union and Wellness information on the second page...**

# Weekly All Employee Updates

# 8. Regulatory and Regional Affairs 2/25/2025

## 8 – February **Activity**

- 8.1 – 2025 Legislative Session
- 8.2 – District Actions on Bills
- 8.3 – Bill Tracker
- 8.4 – Federal



# 8.1 2025 Legislative Session



- ❖ ~2,000 bills and resolutions introduced
- ❖ 6 weeks in: Policy bill cutoff occurred Feb. 21st
  - Bills without a fiscal impact that were not approved in committee are now considered “dead”
- ❖ District has engaged on a variety of bills covering:
  - Clean Energy Transformation Act amendments relating to wholesale unspecified electricity market purchases
  - Authorizing counties to impose electric utility taxes
  - Advanced Nuclear commercial liftoff advisory committee
  - Improving community solar accessibility
  - Establishing distributed energy resource targets in CETA standards
  - Streamlining I-937 and CETA renewable portfolio standards
- ❖ Legislation was introduced to establish statewide energy assistance program with universal access to eligible low-income customers
  - Proposed funding through Climate Commitment Act; COU’s have option to join program or continue pursuing CETA statutory requirements
- ❖ Outreach continues on capital budget request for Ryderwood distribution line relocation and underground improvements

# 8.2 District Actions on Bills

Bill	Description	Sponsor	Comp. Bill	Priority	PUD Position	PUD Action
1822	Establishing a driver work zone and first responder safety course requirement.	(Low)	5717	Low	Support	Sign In
1804	Improving accessibility of community solar projects in Washington state.	(Fey)	5634	Low	Support	Sign In
1610	Concerning the disclosure of critical energy infrastructure information.	(Hunt)	5582	High	Support	Sign In
1598	Concerning fair access to community solar.	(Bernbaum)	5515	Medium	Oppose	Sign In
1831	Allowing for corrections to wage and salary disclosures.	(Springer)	5408	Low	Support	Sign In
1329	Concerning wholesale power purchases by electric utilities under the Washington clean energy transformation act.	(Hunt)	5401	High	Support	Written comments
5408	Allowing for corrections to wage and salary disclosures.	(King)	1831	Low	Support	Sign In
5634	Improving accessibility of community solar projects in Washington state.	(Lovelett)	1804	Low	Support	Sign In
5515	Concerning fair access to community solar.	(Shewmake)	1598	Medium	Oppose	Sign In
5401	Concerning wholesale power purchases by electric utilities under the Washington clean energy transformation act.	(Slatter)	1329	High	Support	Testify
1025	Reopening the exemption from the long-term services and supports trust program for employees who have purchased long-term care insurance.	(Abbarno)		Low	Support	Sign In
1975	Amending the CCA by adjusting auction mechanisms and ceiling prices, and amending rules to facilitate linkage with other jurisdictions	(Fitzgibbon)		Medium	Support	Sign In

Bill	Description	Sponsor	Priority	PUD Position	PUD Action
1249	Creating the commercial liftoff for energy from advanced nuclear advisory commission.	(Barnard)	Low	Support	Sign In
1253	Expanding the ability of consumer-owned utilities to enter into joint use agreements.	(Ybarra)	Low	Support	Sign in
1271	Permitting early deployment of state fire service resources.	(Nance)	Low	Support	Sign In
1643	Supporting transportation system improvements by addressing utility facility removal and relocation responsibilities.	(Barkis)	High	Oppose	Sign in
1702	Authorizing counties to impose a public utility tax.	(Wylie)	Medium	Oppose	Testify
1842	Allowing public utility districts to form, own, or use captive insurers.	(Steele)	Low	Support	Sign In
1847	Prioritizing the development of distributed alternative energy resources in targeted circumstances.	(Doglio)	Medium	Oppose	Testify
1913	Repealing the public utility tax credit for home energy assistance.	(Berg)	Medium	Opposed	Testify
5036	Strengthening Washington's leadership and accountability on climate policy by transitioning to annual reporting of statewide emissions data.	(Boehnke)	Low	Support	Sign In
5425	Modernizing the energy independence act to avoid regulatory duplication and overlap with other laws.	(Boehnke)	Medium	Support	Sign In
5429	Concerning membership in the state building code council.	(Short)	Low	Support	Sign In
5434	Establishing balanced legislative oversight of gubernatorial powers during a declared emergency.	(Wagoner)	Low	Support	Sign In
5627	Improving safe excavation practices and preventing damage to underground utilities.	(Ramos)	Medium	Other	Written comments
5690	Concerning utility relocation.	(MacEwen)	Low	Support	Sign In

## 8.3 Bill Tracker

Bill No.	Description		Support	Concerns	Monitor
HB 1329	Amending CETA's 2026 Coal-free Standard to accommodate certain wholesale power purchases made by utilities – <i>Ensures utilities' preference power contracts with BPA are considered a "coal-free resource"</i>				
HB 1253	Expanding the ability of consumer-owned utilities to enter into joint use agreements – <i>allows COUs to engage private entities for joint ventures on energy and infrastructure projects</i>				
HB 1847	Distributed Energy Development – initial bill would have required utilities to include new distributed energy resources comprising 10% of CETA clean energy targets by the end of 2029 or face \$60/MWh penalties for non-compliance. Utility pushback resulted in significant changes that removed utility requirements, but focuses on identifying publicly-owned real estate for the siting of newly-defined "distributed energy priorities" and community solar resources. – <i>implementation was considered infeasible by District, and would have resulted in resource acquisition costs in the hundreds of millions of dollars.</i>				
HB 1903	Establishes Statewide Energy Assistance Program. Commerce would provide funds to utilities to reduce monthly energy bills for low-income customers through universally accessible program. Consumer owned utilities may "opt in" or continue to provide assistance in line with CETA guidelines. Funded through Climate Commitment Act resources – <i>WPUDA and several utilities testified in support – District is concerned over funding sustainability and the potential for rate impacts if funding burden is passed to utilities.</i>				
HB 1702 / SB 5088	Public Utility Tax – authorizes counties to impose a 3% excise tax on the gross income of public utilities, including electric service providers				
HB 1303	Increasing environmental justice by improving government decisions – <i>requires SEPA lead agencies to complete an environmental justice impact statement for potentially impactful projects in certain communities</i>				



## 8.4 Federal

- ❖ APPA's DC Legislative Rally kicks off on Feb 24<sup>th</sup>
  - District staff will meet with NW federal delegation alongside WPUA and NW River Partners members advocating for public power interests
  - Cowlitz PUD is requesting federal support for North County transmission/distribution upgrades to enhance capacity along Interstate 5 exits
  - Will communicate concerns over BPA workforce disruptions resulting from federal reduction-in-force efforts, and reiterate BPA's direct relationship to its customer utilities that is independent from the federal budget
  - Protection of BPA assets from efforts to privatize or weaken NW public utilities' access to preference power from the federal system
  - Preservation of the Columbia River System and the Lower Snake River Dams – pushing back against the Corps' and Bureau's proposed supplemental EIS to the 2020 CRSO EIS
  - Maintaining public power's access to "direct pay" refundable tax credits regardless of the potential changes made to IRA clean energy incentives within the proposed budget reconciliation bill
- ❖ District coordinated SW Washington PUD meeting with Cong. Gluesenkamp Perez
  - Representatives from 3<sup>rd</sup> Cong. District PUDs discussed public powers' priorities with the newly re-elected Congresswoman at NWPPA's office in Vancouver
  - Rep. Perez expressed her commitment to bipartisan solutions to keep the grid stable and protect affordable access to reliable power; appointed to House Appropriations Committee in 119<sup>th</sup> Congress