



MID-OHIO REGIONAL  
**MORPC**  
PLANNING COMMISSION

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## Memorandum

**TO:** Mid-Ohio Regional Planning Commission Benefits and Compensation Committee

**FROM:** Shawn Hufstedler, Chief of Staff & Director of Operations

**DATE:** July 26, 2019

**SUBJECT:** Employee Guidebook recommended changes

The Benefits & Compensation Committee's last revision to the Employee Guidebook was in 2017. Systematic review of policies are scheduled to take place at least every four years by legal counsel. The last systematic review by legal counsel was in 2017. In other years, changes are recommended as needed. There are numerous updates, refinements and modifications to the guidebook.

Note that once this Committee provides input and approval and prior to presenting a resolution for approval to the Executive Committee, all changes will be reviewed by legal to ensure adequate compliance and consistency with MORPC and other reasonable practices.

The following is a brief highlight of the proposed updates to the guidebook, in addition to any minor clarifications and language clean-up. Specifically:

### Section 1 – Classification Plan

- Made explicit the Executive Director's ability to add or remove positions within established grades.

### Section 3 – Benefits

- Copied language from the Grandfathered Sick Leave section to the Paid Time Off section for clarity.
- Clarified training types (professional development; other) that fall within education opportunity types. (This is to clarify when an additional approval is needed and when it is not.)
- Updated H-1B Sponsorship language to note MORPC will pay for the costs, as required. (Re-verifying with legal.)
- Incorporated the C-pass program in the Guidebook.

### Section 4 – Wage & Salary Administration

- Clarified language for flex time.

### Section 8 – Reimbursement & Purchasing

- Removed restriction of allowing cost reduction due to an overnight stay for only Saturday nights, allowing the cost reduction if available for any night.

**William Murdock, AICP**  
Executive Director

**Rory McGuiness**  
Chair

**Karen J. Angelou**  
Vice Chair

**Erik J. Janas**  
Secretary

- Added paragraph for newly implemented Franklin County Auditor policy that employees who incur sales tax charges when making purchases out-of-pocket will not have such amounts paid reimbursed to them.
- Updated the Purchasing section language to better mirror the bylaws language and provide additional language for basic procurement requirements. (Except to be consistent with the next bullet below, this does not change current policies or practices within the agency, as the practices and policies were already consistent.)
- The Purchase Order Procedures section was updated to change the Department Head authorization limit from \$2,000 to \$2,500 to align with the “small purchase” limits included in the Purchasing section.
- Removed reference to the weatherization warehouse closed earlier this year.

**Other Employee Guidebook Changes**

- Updated logo
- Updated department names



# EMPLOYEE GUIDEBOOK

MORPC Offices

Phone: 614-228-2663  
[www.morpc.org](http://www.morpc.org)

Last Full Update – September 7, 2017

**Commented [SS1]:** Need to revise and reformat entire document throughout with new logo and font (Arial)



## SECTION 1 – CLASSIFICATION PLAN

The Mid-Ohio Regional Planning Commission (“MORPC”, the “Commission” or “agency”) Classification Plan, which shall govern payroll and personnel matters, consists of the MORPC Staff Organizational Chart, the Pay Range and Authorized Staff Positions by Job Title Table, and position descriptions.

The Pay Range and Authorized Staff Positions by Job Title Table represents the annual pay range for each full-time position and the established positions as recommended by the Executive Director and authorized by the Executive Committee. No established position shall be assigned a pay rate higher than the maximum or lower than the minimum pay rate except by written authority of the Executive Director. For Department Heads, such an exception must be authorized by the Executive Committee. [The Executive Director may add or remove positions within pay ranges in a manner consistent with the current Pay Range and Authorized Staff Positions by Job Title Table based on agency needs.](#)

For all positions including department head level, the Executive Director is authorized to determine the required number of authorized staff and their organization within the agency, and to hire, grant promotions and wage adjustments. All such changes must be in writing.

The Operations Department is responsible for maintaining the classification plan covering all job titles, including position descriptions for each position. Operations shall administer and prepare amendments to the classification plan with the approval of the Executive Committee. All actions affecting the classification plan shall be within the limits established by the overall MORPC budget. All actions affecting individual employees shall be within the annual compensation guidelines and limits set by the Executive Committee.

The position description is a communication tool designed to clarify functions, employer expectations, responsibilities and interrelationships for each position. It is also used to evaluate the performance of each position and to determine when accommodations may be reasonable.

A master file of current position descriptions is maintained by Human Resources.

### POSITION DESCRIPTION

The assignment of a job within MORPC’s classification plan is based on the content of the position description and the pay range. The position description summarizes the major responsibilities associated with a specific job title. Each major area of responsibility must relate to position, department, and agency goals and objectives. It provides a brief description of the position responsibilities with examples of the types of duties performed. The position description delineates the essential functions, required knowledge, skills and abilities needed to successfully perform the position responsibilities. It also provides educational, technical or formal training requirements.

The position description shall be updated to reflect material changes in responsibilities as they occur. At all times, however, MORPC reserves the right to modify employee job duties and

**Commented [SH2]:** Made explicit the Executive Director’s ability to add or remove positions within established grades. (Functionally, this includes changing titles, redesigning positions, and promotions to new positions.)



requirements, with or without formally revising the position description. Revisions to position descriptions must be routed to the Department Head and coordinated and reviewed by Operations to promote department and agency consistency. Because the position description summarizes the job responsibilities and qualifications, changes should be infrequent.

#### EMPLOYMENT CLASSIFICATION

**Full-time Employees:**

Full-time status refers to an employee who is regularly scheduled to work at least 40 hours per week or, for employees on an alternative schedule, an average of 40 hours per week. Full-time employees are entitled to all benefits and opportunities in this manual.

**Part-time Employees:**

Part-time status refers to an employee who is regularly scheduled to work less than 40 hours per week. Part-time employees are eligible for benefits as listed in Section 3.

**Temporaries:**

Dependent upon need, temporary employees are utilized on a short-term hourly basis. Temporary workers generally do not receive benefits unless otherwise provided by applicable law. Temporary employees hired and put on MORPC payroll may work an assignment for a maximum of six (6) months, unless explicitly authorized for a longer period by the Executive Director. ~~A Payroll Authorization form, containing appropriate signatures, specific details of the work to be performed, expected length of temporary employment and task number should be forwarded to Human Resources.~~ Human Resources will contact the appropriate sources to hire a temporary worker.

**Student Interns:**

Interns are utilized from various academic or professional programs. Compensation is based upon the guidelines set forth in the program sponsoring the intern and/or upon pre-approved MORPC and departmental guidelines. An intern may not work more than 1,500 hours in any calendar year and generally does not receive benefits unless otherwise provided by applicable law. In some cases, interns may remain as employees beyond graduation, generally for a semester.

**Classification Changes:**

It is required that any changes affecting an employee's classification be documented by the supervisor and forwarded to the Director of Operations for review and approval. Classification changes affect personnel, insurance and payroll records, therefore a new Payroll Authorization form will need to be completed and submitted to the payroll officer upon completion of all necessary signatures.



## SECTION 3 – BENEFITS

### LEAVES OF ABSENCE WITH PAY

Leaves of absence with pay include grandfathered sick leave, PTO, serious illness leave, maternity, paternity, adoption leave, bereavement leave, special leave, jury duty, military leave, and official holidays observed by MORPC.

#### **Paid Time Off (PTO):**

PTO hours are for full-time and part-time employees, who are regularly scheduled to work at least 20 hours per week, and may be used for reasons such as: observances of religious holidays not otherwise observed by MORPC, leave for deaths not covered by bereavement leave and/or time off for rest, vacation, relaxation, one of the following health reasons affecting the employee or a member of the employee's immediate family: illness, injury, medical, dental, or optical examination or treatment, and/or quarantine because of contagious disease or mental health illness, and/or other personal reasons.

Commented [I3]: Added for clarity.

Employees will be permitted to take PTO hours with the prior approval of the employee's Supervisor and/or Department Head. Employees may not take more PTO hours than they have accrued as of the end of the pay period which includes the date of use (i.e., PTO balances may not be negative). Advanced notice of the PTO shall be given as practicable.

The PTO earnings schedule is shown below. PTO hours are accrued in the amount indicated annually and for each pay period. When an employee qualifies for increased PTO as a result of longevity, the increased rate of the employee's PTO accrual is calculated based on the chart below. The increased rate of PTO begins to accrue each pay period beginning with the pay period that includes the employee's anniversary date, or adjusted anniversary date based on any prior service credit. PTO is not accrued when an employee is in Leave Without Pay status.

While negative PTO balances should not occur, if the resignation or separation of an employee should occur with the employee having taken available but unearned PTO, the amount of unearned PTO taken will be deducted from the employee's final paycheck. When an official holiday, as set forth in this guidebook, occurs during an employee's scheduled PTO, that day shall not be considered a day of PTO. PTO leave shall be charged at a minimum of 1/4 hour increments.

The minimum annual PTO leave usage requirement is 80 hours per calendar year for all full-time employees and is pro-rated for all part-time employees, based on their regularly scheduled part-time hours for a full two-week pay period. New employees are not required to use a minimum number of PTO hours during the calendar year in which they were hired. Balances of PTO hours in excess of 640 hours (or a pro-rated amount for part-time employees, based on their regularly scheduled part-time hours) as of December 31, or at the time of separation from employment, will be forfeited.

To comply with applicable laws and except in rare circumstances authorized by Operations,  
~~E~~employees may not elect to take unpaid time off in lieu of using available PTO.

Commented [SS4]: Consider eliminating this requirement

Commented [ISR4]: Edited, pending legal review.



**Years of Service:**

PTO Leave Schedule	Years of Service:					
	1st Year	2nd Year	3-7 Years	8-14 Years	15-20 Years	21+ Years
Annual	96	120	160	184	224	264
Accrual Per Pay (26 pays)	3.69	4.62	6.15	7.08	8.62	10.15

If an employee fails to return to work at the end of the approved PTO, MORPC may terminate the employee's employment.

**PTO Leave Cash-Out for Separating Employees:**

Upon separation of employment for any reason, the employee's final paycheck will include payment for any earned but unused PTO. Separating employees may request to receive the cash-out over an extended period (not to exceed one year without the express written consent of the Executive Director), rather than in a lump sum on the employee's final paycheck.

**PTO Leave Cash-Out Option:**

This option to convert ("cash-out") PTO to cash is available to all employees who have at least eight (8) hours of earned, unused PTO as of the end of the ~~month on a quarterly basis based on~~ calendar quarter (March, June, September, December), for payment as part of the employee's first paycheck in the following month. The rate of pay is based on the last day of the previous quarter. The maximum earned, but unused PTO hours that can be cashed out by an employee in any calendar year is the employee's earning amount for that year, i.e., 96, 120, 160, etc., hours. When considering a cash-out, employees should keep an adequate balance of PTO for planned time off and unforeseen needs.

Per the Ohio Public Employees Retirement System (OPERS) basic rules for an annual conversion plan: "The maximum amount of converted PTO that can be considered earnable salary by OPERS is the amount the employee earns in one calendar year, less any amounts taken during the calendar year. To be considered earnable salary the PTO also must have been earned in the calendar year it was converted. This concept is considered the LIFO method (last in, first out). The only exception is that PTO conversion may occur in January for the prior calendar year. In this case the amount considered earnable salary would be the amount of PTO earned in the prior year minus the amount of PTO taken in the prior year."

As a result of LIFO method required by OPERS, any cash-out requested and approved in excess of the allowable OPERS conversion amounts will not be considered earnable salary by OPERS. For example, if an employee who earns 160 hours per year uses 100 hours during the year ended December 31, a conversion request for 160 hours will result in 60 hours of OPERS earnable salary and 100 hours of non-earnable salary will be cashed out. All cash-outs requested will be considered OPERS earnable salary until the maximum OPERS earnable salary has been reached per this policy.

Once an employee converts a specified number of PTO hours to cash, the same amount of hours will be deducted from the employee's unused PTO balance. This cash-out provision does not reduce nor can it be substituted for mandatory PTO hours discussed above, i.e., 80 hours.



The conversion of PTO hours to cash is voluntary and can be requested by submitting an election form to finance by the announced due date.

**Prior Public Service PTO Credit:**

An employee who has worked for the State of Ohio or any qualifying political subdivision of the State of Ohio, (absent a collective bargaining agreement which specifically excludes the right) may apply for prior public service credit for PTO earnings calculations. MORPC does not honor any unused annual leave that an employee may have had with any previous employer. When properly certified, MORPC will include an employee's time of service with a previous public employer when determining the employee's MORPC PTO earnings rate. Any employee may obtain the Prior Service Credit form from the Human Resources intranet web site under Forms. It will be the responsibility of the employee to ensure that the form is completed and certified by the previous employer. Only prior service that is properly certified will be counted toward the employee's years of service.

**Grandfathered Sick Leave:**

Grandfathered sick leave (earned prior to January 1, 2016) ~~or PTO~~ may be used for one of the following reasons affecting the employee or a member of the employee's immediate family: illness, injury, medical, dental, or optical examination or treatment, and/or quarantine because of contagious disease or mental health illness. Grandfathered Sick Leave must be charged in 1/4 hour increments. Employees may not elect to take unpaid time off in lieu of using available grandfathered sick leave. Requests to use grandfathered sick leave shall be submitted to the employee's Supervisor at least 30 days in advance of the need for grandfathered sick leave when the need for leave is foreseeable. When the leave is not foreseeable, the employee shall provide notice as early as practicable. MORPC may require the requesting employee to submit a certificate from a certified healthcare professional substantiating the need, anticipated duration and/or reason(s) for leave. MORPC reserves the right to have any employee examined by its own doctor at its own expense to substantiate the grandfathered sick leave request.

If an employee has a remaining balance of grandfathered sick leave of less than 0.25 hours (which by definition cannot otherwise be used), this remnant balance of hours will be added to the employee's PTO hour balance for more flexible use and the corresponding grandfathered sick leave balance will be eliminated.

**Grandfathered Sick Leave Cash-Out Option**

This option to convert accrued but unused grandfathered sick leave hours to cash is available to all employees who have a grandfathered sick leave balance in excess of 80 hours (pro-rated hours for part-time employees) as of the end of the month on a quarterly basis based on calendar quarter (March, June, September, December), for payment as part of the employee's first paycheck in the following month. Grandfathered sick leave hours converted may not reduce the employee's unused grandfathered sick balance below 80 hours for full-time employees, pro-rated hours for part-time employees. The cash-out option is limited to a total maximum of 80 hours per employee per calendar year (pro-rated hours for part-time employees). Employees will be paid 33.33% of their current hourly rate of pay for each hour of grandfathered sick leave converted to cash. Every grandfathered sick leave hour converted to cash will be deducted from the employee's unused





grandfathered sick leave balance.

The conversion of grandfathered sick leave hours to cash is voluntary and can be requested by submitting an election form to Finance by the announced due date. Prior public service sick leave hours are not eligible for conversion to cash by MORPC. All grandfathered sick leave cash outs are not considered earnable salary by OPERS.

**Grandfathered Sick Leave Time Off Cash-Out for Separating Employees**

Upon separation of employment for any reason, employee may elect to be paid for a percentage of the balance of accrued but unused grandfathered sick leave through the separation date, up to a maximum of 1,500 hours, unless otherwise instructed. Separating employees may request to receive the cash-out over an extended period (not to exceed one year without the express written consent of the Executive Director), rather than in a lump sum on their final paycheck.

Compensation for accrued but unused grandfathered sick leave up to a maximum of 1,500 hours will be paid for unused grandfathered hours earned at MORPC at 33.33% of the employee's final rate of pay. Unused prior service sick leave will not be compensated at separation unless the prior service was with an employer paid by an Ohio County Auditor warrant.

If any employee of MORPC, regardless of term of service, dies while in paid status (prior to separation), unused grandfathered sick leave up to a maximum of 1,500 hours earned at MORPC shall be paid to the estate of the deceased employee at 33.3% of the accrued hourly rate of pay. The remaining two-thirds balance, subject to a \$10,000 limit, shall be paid to the estate in addition to the first one-third at 33.33% of their current hourly rate of pay.

**Parental Or Adoption Leave**

This paid leave is a benefit that will pay 100% of employee's pay for two (2) weeks for maternity, paternity, or adoption leave and in place of serious illness leave, where applicable. This leave runs concurrently with FMLA leave, where applicable. The employee must still request leave and have it approved by their Supervisor and Department Head.

**Serious Illness Leave**

This paid leave is a benefit that will pay 100% of employee's pay for two (2) weeks for a serious illness. This leave runs concurrently with FMLA leave, where applicable. The employee must still request leave and have it approved by their Supervisor and Department Head. Serious illness leave will be awarded only to employees that receive benefits from the Short Term Disability Plan as determined by the third party administrator.

**Bereavement Leave**

Full-time employees shall be entitled to forty (40) hours per calendar year of bereavement leave with pay for the death of a member of the employee's immediate family, regardless of where the funeral or interment may be located. Part-time employees are entitled to a pro-rated amount of bereavement leave. Employees must still request leave and receive advanced approval from their immediate Supervisor. Bereavement leave for other relatives or friends not defined as immediate family will not be granted, and employees should request PTO in those circumstances. (See Glossary for definition of immediate family).



**Special Leave**

Special leave is time off with pay available to full-time employees for personal emergency situations (e.g., an unforeseen, unusual or nonrecurring act of nature or emergency such as home fire, flood, or burglary and/or extraordinary situations not otherwise covered in this manual) or for work-related situations as determined by the Executive Director (e.g., in response to emergencies, unusual or nonrecurring work situations approved within the timeframe established by the Executive Director when use of flex time cannot be accommodated, and/or extraordinary situations not otherwise covered in this manual).

Special leave must be requested. The immediate Supervisor, Department Head and Executive Director must approve all special leave requests. A maximum of two days (16 hours per year) of special leave may be awarded.

**Jury Duty**

Employees required to serve on jury duty must request leave to their immediate Supervisor as soon as possible prior to jury duty. The immediate Supervisor, Department Head and Executive Director must approve all jury duty leave, whether paid or unpaid. Full-time employees on jury duty will be paid their regular pay for time spent on jury duty. Part-time employees regularly scheduled to work 30+ hours per week will be paid their regular pay for time spent on jury duty, up to their regularly scheduled amount of hours per week. Jury duty leave for part-time employees regularly scheduled to work less than 30 hours per week, temporaries and student intern employees is unpaid. Employees serving on jury duty for a partial day are expected to report for work for the balance of the work day.

**Military Leave**

In accordance with applicable Ohio law, a regular full-time or part-time employee who is a member of the Ohio organized militia or other reserve components of the armed forces of the United States, including the Ohio National Guard, is entitled to a leave of absence with pay for the time he/she is performing service in the uniformed services for periods up to one month, for each calendar year in which he/she is performing service in the uniformed services. One month means 22, 8-hour work days or 176 hours. Under certain limited circumstances, and in accordance with applicable law, an employee may be entitled to up to \$500 in pay for service greater than a month in a calendar year.

To receive paid military leave, the employee must submit to the Executive Director the published order authorizing the call or order to the uniformed services or a written statement from the appropriate military commander authorizing the service.

MORPC will provide unpaid military leave in accordance with the Uniformed Services Employment and Reemployment Rights Act (“USERRA”) and any other applicable federal and state law(s).

**Holidays**

The official holidays observed by MORPC shall be as follows:

- New Year’s Day
- Martin Luther King Day
- President’s Day
- Memorial Day
- Independence Day



Labor Day  
Columbus Day  
Veteran's Day  
Thanksgiving Day  
Christmas Day

Each full-time employee in paid status shall be entitled to eight hours of pay for each of the listed holidays. Employees in Leave Without Pay status on either the last workday preceding the holiday or the first workday after the holiday are not eligible to receive holiday pay. Eligible part-time employees in paid status receive pro-rated amount of hours based on their scheduled average daily work hours per week. Holidays falling on a weekend will usually be celebrated on either the preceding Friday or the following Monday.

**Personal Leave Hours**

At times the Executive Director may offer personal leave hours to the agency, dependent upon budget availability. The personal leave hours may be awarded from 0 - 24 hours annually.

**EDUCATIONAL OPPORTUNITIES**

**Tuition Reimbursement/Professional Development Program:**

MORPC encourages and supports employees' efforts to broaden the skills and knowledge which lead to job enrichment at MORPC. Full-time employees who have completed their six (6) month introductory period are eligible for the MORPC Tuition Reimbursement/Professional Development Program. If approved, MORPC will reimburse staff up to \$3,000 per year for courses or instruction working towards an Associates or Undergraduate Degree or \$5,000 per year for Graduate Degree, provided by colleges, universities or other approved agencies and groups that are directly applicable to the employee's job duties. Other relevant extensive professional development programs (such as Leadership Columbus) may be approved for up to \$5,000 per year as well.

Employees working to achieve or maintain a certification in their field of work (e.g. PE, SHRM, CPA, AICP, Housing Professional Certification, etc.) are also eligible for up to \$3,000 reimbursement for the cost of coursework and testing upon completion of certification. For professional development programs, certification renewal, and coursework that does not require testing upon completion, reimbursement prior to course completion, or direct payment to the vendor is acceptable in a manner consistent with MORPC finance processes and procedures.

Some programs allow for students to test out of classes. MORPC will reimburse for the cost of these tests subject to and included within the same limits and parameters noted above and below including successful outcome of the test (i.e. placing out of the class).

Part-time employees (less than 30 hours per week) are eligible to participate at the expiration of their six-month introductory period and will be reimbursed up to \$1,500 for Undergraduate Degree or Certification and \$2,500 for Graduate Degree.

Permission for use of the Tuition Reimbursement/Professional Development Program must be obtained prior to course registration from the immediate Supervisor, Department Head and Human



Resources. The process for acquiring the appropriate approvals shall be initiated by the employee requesting reimbursement well in advance of course registration deadline dates. The procedure for acquiring approval for tuition reimbursement/professional development begins with the MORPC Tuition Reimbursement/Professional Development Application form which may be obtained on-line from the MORPC intranet in the Human Resources section under Forms.

Payments are made on a reimbursement basis after the employee has completed the course with a grade of “C” or better or achieved certification. Course attendance is to be on the employee’s own time. Original receipts for eligible expenses and the grade report (“C” or better) or proof of successful completion of the course studies, or certification will be required prior to reimbursement. Employees will not receive their actual reimbursement until after the successful completion of the course study or certification.

Other fees, parking, the purchase of books, etc. are not eligible for reimbursement unless otherwise approved by the Executive Director.

Utilizing the MORPC Tuition/Professional Development Authorization for Reimbursement form, Human Resources will make approval for reimbursement of eligible expenses. The form will also serve as the means, after appropriate receipts are attached, by which Finance will be notified of the amount of reimbursement. Any employee, who receives tuition reimbursement/professional development reimbursement and leaves the agency within one year of the reimbursement for any reason, must repay the agency in full.

Additional professional development, such as professional coaching or other MORPC-provided development opportunities, may be paid via direct payment to the vendor or reimbursed via MORPC’s reimbursement policies upon submission of adequate documentation.

Human Resources is responsible for approving all professional development training whether paid from a department budget or the Human Resources budget. The Executive Director has final approval authority for all recommended actions. Approval must be requested on the “Travel Request/Authorization” form if out-of-town travel is required; otherwise a purchase order is required (see Section 8).

**Commented [SH6]:** Moved paragraph to Tuition and professional development section.

**Seminars, Conferences and Other Training:**

When MORPC determines, in its sole discretion that it would be a benefit to the agency and the employee, MORPC may pay the necessary expenses incurred by an employee to officially represent the agency by attending:

- Professional seminars
- Conferences
- Other Training sessions, generally department-specific training, not covered by the Tuition Reimbursement/Professional Development Program section
- Other official meetings or gatherings

**Commented [I7]:** To clarify and distinguish general training from professional development and tuition training.

Department Heads are responsible for monitoring and recommending participation in seminars, conferences and training within departmental budgetary constraints.



~~Human Resources is responsible for approving all professional development training whether paid from a department budget or the Human Resources budget. The Executive Director has final approval authority for all recommended actions. Approval must be requested on the "Travel Request/Authorization" form if out of town travel is required; otherwise a purchase order is required (see Section 9).~~

The following are guidelines to determine the appropriateness of participation in seminars, conferences, training or continuing education: obtaining information necessary to the agency for completion of its goals or objectives; receiving training in new procedures, techniques, or concepts in planning directly applicable to MORPC's work; improving management or supervisory skills; improving capabilities for work with the public; assisting a staff member in acquiring skills necessary to their job function; and/or to take professional exams. Human Resources will assist in the determination and assessment of various programs.

Upon completion of a seminar, conference or training, a copy of the certificate of completion shall be returned to Human Resources within five days of taking the course.

#### H-1B SPONSORSHIP

In a manner consistent with legal requirements, MORPC will pay ~~up to \$1,000 of~~ an existing employee's costs incurred in obtaining or renewing an H-1B visa if the employee has completed any six month introductory period, including for a transfer or promotion, and is satisfactorily meeting all of the requirements of the employee's position. Certain legal restrictions and requirements may apply.

#### EMPLOYEE COMMUTER BENEFITS

It is the intention of the agency to provide benefits to employees that support MORPC's mission. To this end, MORPC reaffirms its commitment to support alternative transportation efforts to aid employees getting to and from work. In addition to those benefits described here, the Executive Director may authorize additional incentive programs to encourage employees to utilize alternative transportation modes.

##### **Rideshare Matching Services:**

Gohio Commute is a MORPC program created to enable commuters to participate in alternative forms of transportation, such as carpooling, vanpooling and transit. Gohio Commute encourages commuters to share the ride to work to reduce single occupant vehicle use and achieve cost savings and a cleaner environment in the Central Ohio region. Gohio Commute can assist employees interested in commuting to the worksite in a carpool or vanpool. Employees can obtain a free personalized rideshare match list, with names of other commuters interested in carpooling or vanpooling to downtown Columbus. Participating in the carpool or vanpool can save employees money, reduce auto emissions and help alleviate traffic congestion. For more information contact the Gohio Commute staff on extension 4133.

##### **COTA Bus Pass Policy:**



If made available by COTA, MORPC will enroll all employees working the program required minimum hours in the “C-Pass” program, which gives the employee unlimited access to all COTA bus service, at no cost to the employee. The employee is responsible for obtaining their individual “C-Pass” either by downloading the smartphone application from the COTA website, or by obtaining a “C-Pass” card in person at the COTA Customer Service Center. This program is subject to change without notice.

If the C-Pass program is not offered by COTA, the agency will provide an 80% subsidy, as funds allow and subject to change, to assist employees with purchasing COTA one-day passes (minimum of 5) or monthly bus passes. This subsidy is designed to encourage alternative forms of transportation, increase the parking spaces available for MORPC guests and to be useful for the employee as a means of transportation to and from worksite. Bus passes must be used regularly by the employee for commuting to and from work and will not be available for purchase for employee’s family members or friends. If an employee purchases a monthly bus pass subsidized by MORPC and also drives a vehicle to work regularly, Human Resources will determine whether the employee’s privilege to purchase a bus pass will be withheld along with other disciplinary actions as warranted.

**Bicycle to MORPC:**

Employees commuting by bicycle may use the bicycle rack located at the rear of the building or the locked bicycle room provided inside the building. There is a shower and lockers that staff may use located in the building.

MORPC is also a corporate sponsor to the COGO Bike Share program and will reimburse staff for any preapproved bicycle trips made for business purposes.



## SECTION 4 – WAGE AND SALARY ADMINISTRATION

### FLEX TIME FOR EXEMPT EMPLOYEES

In certain instances, MORPC may award flex time to full-time exempt employees, who work more than 40 hours during a workweek. Flex time is awarded at a rate of one hour for one hour of work and must be used within the current 6 month period (i.e. the period ending June 30 or December 31).

Exempt employees may not ~~have accumulate~~ more than a 40 hour balance of flex time at any given time during a 6 month period. Allocation of hours must balance to zero hours of flex time carried at the end of every at 6 the 6 month periods endings ( June 30 and December 31). Any negative Flex Time balances existing at the end of those 6 month periods that time must be eliminated by a combination of offsetting PTO hours charged, or by a reduction in actual hours paid. There is no carry-over or cash out for flex time hours not used during that 6 month period. Must have supervisory approval.



## SECTION 8 – REIMBURSEMENT AND PURCHASING

### OVERNIGHT TRAVEL EXPENSE POLICY

#### **Prior Approval Necessary:**

Prior approval must be obtained for overnight travel involving reimbursable travel, meals or lodging expenses. Prior approval must be obtained in writing by submitting the *Travel Request/Authorization/Purchase Requisition* form. The public purpose and justification for the overnight travel must be completely explained on this form. Program managers are responsible to ensure that prior approval from funding agencies is obtained in writing whenever necessary. ODOT and ODSA/HWAP and other agencies may require such approvals. MORPC employees and officials traveling on MORPC business shall avoid travel requests for meetings in luxury or primarily leisure-oriented destinations; for luxury-level or primarily leisure-oriented accommodations; and, for use of first class or luxury modes of travel.

#### **Travel Arrangements:**

Travel arrangements shall be coordinated by the department administrative assistant to ensure that MORPC receives the best possible rates in the most efficient manner. On-line travel arrangements made through organizations such as Expedia or Travelocity must clearly indicate the cost of the lodging separate from the airfare cost. This is necessary to document compliance with FTR spending limitations. (See lodging.)

#### **Travel Reimbursements:**

Travel reimbursements must be recorded on the *Employee Reimbursement Request* form, with any required receipts attached. The completed form shall be submitted to Finance within two weeks of the return trip. The public purpose and justification for the overnight travel must be completely explained on this form.

#### **Transportation Expenses:**

Transportation expenses include airfare and other common carrier transportation. Reimbursement shall be limited to lowest available rates (documentation must be provided with the Travel Request form), and shall not exceed coach airfare when other transportation modes are used. Reservations shall be made and airline tickets obtained by the employee or the department administrative assistant following receipt of the approved *Travel Request/Authorization/Purchase Requisition* form. Employees are prohibited from using discounted or free tickets obtained through "frequent flyer" programs for personal travel.

#### **Saturday-Additional Night Stayovers:**

If a total cost savings is realized by extending a business trip over a ~~Saturday~~ Saturday additional night, MORPC will reimburse the employee the cost of the additional night's lodging and up to one additional day's meals according to the Meal Allowance policy if the employee elects to stay the extra night. For a net cost savings, the amount saved in airfare for a ~~Saturday~~ Saturday additional night stayover must be greater than the cost of adding one night's stay and up to one day's meals to the cost of the travel. Substantiated documentation of this cost savings must be provided with the *Travel Request* form.





#### TAX-EXEMPT STATUS

MORPC is a governmental unit, and is exempt from the payment of Ohio sales tax. This exemption does not extend to other assessed taxes, such as hotel lodging taxes, telecommunications taxes or excise taxes. Employees shall provide tax-exempt certificates to businesses to avoid paying sales taxes on agency expenses when payment is to be made by MORPC directly to the business. The certificates can be obtained from Finance.

[Employees who incur sales tax charges when making purchases out-of-pocket will not have such amounts paid reimbursed to them, in accordance with the allowable cost policy of the Franklin County Auditor. The policy does allow reimbursement for sales tax for certain costs, specifically lodging and meals.](#)

#### PURCHASING

MORPC's procurement policies and guidelines, set forth in [the purchasing policy currently in effect as adopted by the Executive Committee Resolution AC 10 98](#), are based on federal, state and local laws and regulations and sound business practice to meet MORPC's needs and obligations. Employees involved in purchasing goods and services shall read and be familiar with agency purchasing policies.

- All expenditures must be for a public purpose. The definition of a public purpose for MORPC can be found at the beginning of this Section (8) of this Employee Guidebook. As a practical matter, MORPC's Public purpose is defined in our mission statement, annual work plans and goals.
- Expenditures for alcoholic beverages, personal gifts and entertainment are prohibited.
- All expenditures must be necessary and reasonable in the proper and efficient conduct of agency business.
- MORPC's Diversity Plan encourages the use of minority-owned, women-owned and disadvantaged vendors, when practical, to help obtain our diversity procurement goals. Employees are encouraged to use the diversity vendor lists on the intranet when seeking vendors.
- Procurement policies (~~MORPC Resolution AC 10 98~~) applicable to small purchases shall be followed:
  - a) Cost or price must be reasonable (see CFR 2 Part 200).
  - b) Avoid purchase of unnecessary or duplicate items.
  - c) Purchase through Franklin County and State of Ohio competitively bid master purchaser agreements whenever possible.
  - d) Deal with responsible suppliers.
  - e) Respect open competition, MORPC's DBE goals and code of ethics when selecting suppliers.

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All expenditures must be consistent with other MORPC policies and any applicable contractual terms and conditions and state or federal regulations.

Minor purchases of goods or services for amounts not exceeding \$2,500 in total may be made without obtaining competitive quotations, as long as a determination that the price is fair and reasonable is documented.

Small purchases of goods or services for amounts greater than \$2,500 but less than \$50,000 may be made after obtaining price or rate quotations from at least three qualified sources. Quotes may be verbal or written, but verbal quotes must still be documented. These limits are subject to change based on Ohio Revised Code limits. See MORPC's purchasing policy for more information.

Competitive biddings, or RFQ's/RFP's are required for purchases of goods or services totaling \$50,000 or more. Allowable exceptions to the bidding requirement are described in Ohio Revised Code Section 307.86. See MORPC's purchasing policy for more information.

Subject to an approved budget and legal appropriation, the following have the authority to enter into agreements:

- a) Executive director for agreements up to \$75,000
- a)b) Executive Director plus an Executive Committee resolution for agreements greater than \$75,000

The following individuals have authority to ~~make~~ approve obligations- (Purchase Orders); or enter into agreements:

- a) Department Heads for obligations up to \$2,0500
- b) Chief of staff or director of operations for obligations greater than \$10,000
- c) Executive Director for all obligations greater than \$25,000
- d) Commission Chair (or alternate officer) for all obligations greater than \$50,000
- a)e) Finance Director shall authorize all obligations regardless of dollar amount.
- b) ~~Executive Director for obligations up to \$75,000.~~
- e) ~~Executive Committee resolution is needed for obligations and agreements greater than \$75,000 and in the current budget.~~
- e)f) Commission resolution is needed for obligations ~~and agreements~~ not in the current budget.
- e)g) All contracts need to be reviewed ~~and approved~~ by the Chief of Staff & Director of Operations, ~~or designee~~, and approved by the Executive Director.

Expenditures must be properly documented under MORPC's procedures and approval of payments must be authorized as follows:

- a) Department Heads ~~and directors~~ for all expenditures.



- b) Finance Director authorizes all expenditures.
- c) Chief of Staff & Director of Operations authorizes all expenditures over \$10,000.
- d) Executive Director for expenditures greater than \$25,000.
- e) Commission chair for expenditures greater than \$50,000.

#### PURCHASE ORDER PROCEDURES

**Purchase Order Request:**

Entry form must be submitted in the online purchase order approval system to request that a purchase order be issued to authorize a purchase.

**Purchase Order:**

Legal document titled “Purchase Order” which, when fully approved, encumbers funds and authorizes a purchase. Purchases are not authorized until an approved purchase order is completed.

**Purchases of \$2,500 or less:**

Purchases of \$2,500 or less may be authorized by the appropriate Department Head and the purchase can then be made. When such purchases are requested, a Purchase Order Request must first be entered and submitted online, and then approved online by the Department Head. A physical printout of the approved purchase order is not required unless one is requested by the vendor. This purchase must comply with the policies of Section 8 of this manual. If a vendor requires a purchase order, it should be noted in the description section of the Purchase Order Request when submitted. The Finance team will then provide an approved purchase order.

Commented [SS8]: Changed to \$2,500 to be consistent with “small purchase” limit above.

Toward the end of the calendar year, the Finance team closely monitors appropriation balances to insure that agency legal spending limits are not exceeded. This will include monitoring all new incoming Purchase Order Requests. If it appears the agency appropriation balances may not be adequate to allow the Department Head to authorize further purchases, notification may be given that all purchases for the balance of the calendar year must have an approved purchase order from the Finance team prior to creating an obligation or making a purchase.

**Purchases in excess of \$2,500:**

All purchases in excess of \$2,500 must have a fully approved purchase order. No purchases are to be made or orders placed for amounts in excess of \$2,500 without a fully approved purchase order. Employees may request a purchase order by completing and submitting a Purchase Order Request online.

After a purchase order has been prepared and fully approved, the requesting employee will receive an electronic notification that the Purchase Order has been approved. This copy will serve as authorization for the employee to make the purchase. Purchases shall be planned in advance. It may take one to two weeks to obtain a fully approved purchase order.

**How to obtain a purchase order:**

A purchase order is required for all purchases greater than \$2,500.



1. Complete a Purchase Order Request online, including the vendor name, a description of the purchase, G/L account number, program number, and task number to charge. At the moment an online Request is submitted, the first approver is notified by e-mail and the requestor is notified as successive approvals are made in real time.
2. The Finance team will enter a purchase order in the Franklin County MUNIS system; once all necessary approvals have been obtained online and the online Purchase Order has been generated.
3. Funds are encumbered for the purchase, and the purchase order is issued in MUNIS.

#### PURCHASES ON OPEN ACCOUNTS

To facilitate minor miscellaneous purchases of goods or services, the agency maintains open accounts with some vendors, for purchases such as minor weatherization supplies, delivery services, meals for meetings, etc. All purchases on open accounts must be approved by the appropriate Department Head. Finance will provide vendors with the names of employees authorized to make purchase on an open account. This method of making purchases shall be limited to minor miscellaneous purchases only.

#### PROCEDURES FOR SPECIFIC PURCHASES

**Subscriptions:**

Complete a *Purchase Order Request* form online; obtain online approval and forward the [subscription order form](#) ~~along with the approved *Purchase Order Request* form~~ to Finance to process the payment.

**Memberships:**

See *Subscriptions* section above.

**Publications:**

See *Subscriptions* section above.

**Office Supplies:**

Purchases of office supplies are to be coordinated through Operations. Office supplies that are needed unexpectedly may be purchased by an employee and receipts submitted for reimbursement or purchased from a vendor on account as listed above.

**Airline Tickets:**

Employees traveling on agency business requiring air travel must pay the airfare using personal funds and submit a request for reimbursement on the *Employee Reimbursement Request* form. The travel must be pre-approved and the cost of airfare limited to the lowest available rates.

Alternatively, employees may use Franklin County approved vendor(s) to book flights and MORPC can pay directly for the ticket, if available.

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**Registrations:**

Registrations can be approved through a *Purchase Order Request form online* or through the *Travel Request/Authorization/Purchase Requisition* form. When approved the registration should be made by the department administrative assistant or the registrant.

**Temporary Service:**

Temporary services must be coordinated through Human Resources who will make arrangements for securing temporary help.

**Hiring and Recruitment Advertising:**

Hiring and recruitment advertising will be handled by Human Resources after receiving an approved *Hiring and Recruitment Notice* form with a position description attached. Human Resources will complete the *Purchase Order Request* form online and place the advertisements.

**Weatherization Materials:**

~~An inventory of weatherization materials is stocked in the weatherization warehouse. These materials are purchased following normal MORPC purchasing procedures.~~ While working at a job site, it may be necessary for a weatherization crewmember to make a minor miscellaneous purchase for a material to efficiently complete the job. These miscellaneous materials may be purchased on an open account. These purchases must be monitored by the project supervisor.

**Emergency Purchases:**

In the event that goods or services are immediately needed to provide essential for daily operation, an employee must make all reasonable attempts to comply with this policy. However, if the emergency nature of a situation makes compliance impractical, the employee must obtain verbal approval from the Supervisor and/or Department Head to make the necessary purchase. If possible, such purchases shall be made from an open account vendor. The employee must obtain all required approvals and purchase orders as soon as possible.