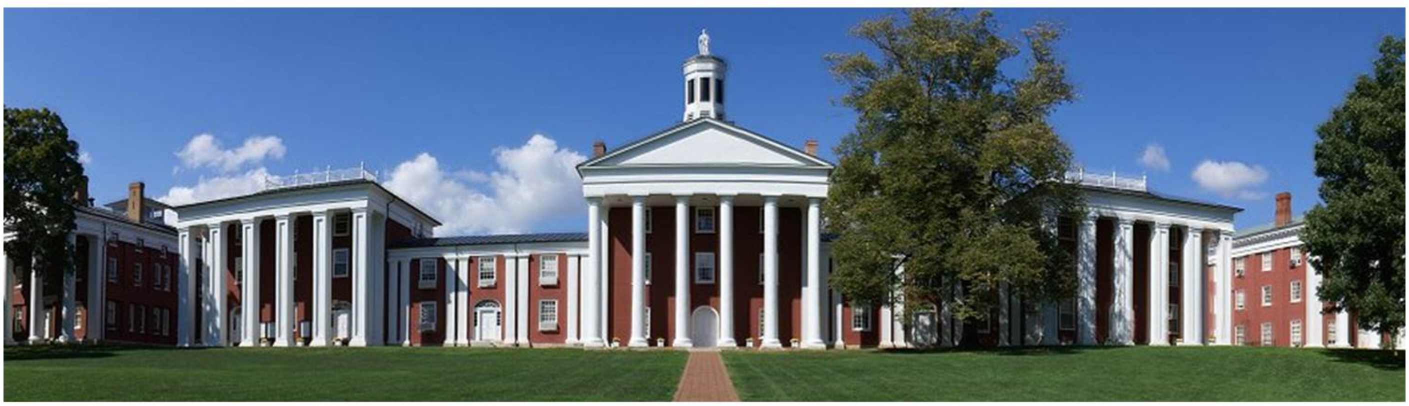
WASHINGTON AND LEE
UNIVERSITY

Employee Handbook



Human Resources
Revised March 2025

Contents

ABOUT THIS HANDBOOK

This handbook is intended as an explanation and description of Washington and Lee University's policies and employee benefits. It is not intended, nor should it be construed as, an employment contract, and it does not create any binding obligation. The descriptive materials contained in this handbook are only summaries, and any discrepancies between these summaries and the terms of the actual plans, or plan documents, must be governed by the actual terms of the more detailed plans and plan documents. Like any other compilation of general information, certain portions of the handbook may become outdated. You should check with the Office of Human Resources to be sure you have current information before taking action based on any specific information in this handbook. It is your responsibility to confirm the status of policies or other information. This handbook is available in a hard-copy version from Human Resources or on the Human Resources website at http://go.wlu.edu/employee-handbook.

The Employee Handbook contains employment-related policies applicable to both faculty and staff employees of W&L. The Employee Handbook also contains certain employment-related policies applicable only to staff. ***The Faculty Handbook*** (http://go.wlu.edu/facultyhandbook) contains certain employment-related policies applicable only to faculty. Beyond the handbooks, the W&L Code of Policies (http://go.wlu.edu/policies) contains additional university policies that govern various aspects of employment and university operations. Where a policy appears in either or both handbooks and the Code of Policies, the code is the authoritative source. Faculty and staff employees should familiarize themselves with all applicable handbook provisions and university policies, as well as other applicable university practices and department/school rules and procedures.

Washington and Lee is an at-will employer, and this handbook in no way precludes, limits, alters or otherwise restricts the university's at-will-employer status. Staff and administrative employees have the right at any time to terminate their employment with or without cause, and Washington and Lee reserves the same right to terminate employment with or without cause. No University official has authority to make any agreement to the contrary.

Washington and Lee University reserves the right at any time to modify, revoke, suspend, terminate or change, either retroactively or prospectively, any and all terms of this handbook, plans, policies or procedures, in whole or in part. Except for W&L benefit documents, the policies contained in this handbook are intended to supersede the policies and procedures that existed prior to the date of this handbook. All prior policies and procedures are, therefore, null and void except where the University has agreed otherwise.

INTRODUCTION

Welcome from the President

By accepting employment at Washington and Lee University, you have chosen to work at one of the finest liberal arts colleges in the nation. Washington and Lee has long prided itself on being a warm, friendly, open community that strives for excellence, with a caring staff that is involved in the life of the University. Washington and Lee has earned a reputation as a place unique in the national educational scene for many reasons. The depth and breadth of its curriculum, combining the traditional liberal arts with pre-professional programs in business and journalism; the School of Law, one of the smallest, nationally recognized legal programs in the country; the student-run Honor System; the emphasis on leadership, integrity and service; and the close-knit community explain why so many students don't want to leave the W&L campus after graduation.

I hope you will have a rewarding experience while working at Washington and Lee. Our employees are one of the University's most valuable resources, and we strive to provide you with the services, benefits and information you need to perform your job. Today's workforce is diverse, and our employees have a varied and broad array of skills, all of which contribute to the student experience and the work environment.

Washington and Lee understands that our employees are often balancing complex work and family lives. Working at the University provides you with various benefits, many of which this handbook describes. As an employee, you have health care and other benefits choices, work-life resources, and time-off options to help you manage your work and family life commitments. I encourage you to take advantage of these and other opportunities and resources that are available to employees.

This handbook has been developed to inform you of your benefits and responsibilities as W&L employees, and to acquaint you with the variety of services and programs available to you at W&L. This Employee Handbook serves as a convenient reference for matters of employee interest and concern. By reading this handbook and being an informed, responsible member of the W&L community, you can contribute significantly to W&L's success and strengthen the University's excellent reputation as a fine liberal arts institution.

I would like to thank you for your contribution to the success of the University. I hope that your association with W&L will be long and rewarding.

Sincerely,

William C. Dudley

William Dudley
President

ABOUT WASHINGTON AND LEE UNIVERSITY

Mission Statement
Washington and Lee University provides a liberal arts education that develops students' capacities to think freely, critically, and humanely and to conduct themselves with honor, integrity, and civility. Graduates will be prepared for lifelong learning, personal achievement, responsible leadership, service to others, and engaged citizenship in a global and diverse society.

Washington and Lee History
Our history traces the arc of the nation's history. Founded as Augusta Academy in Augusta County, Virginia, in 1749, the school changed locations and names several times over the years. Those names included Liberty Hall Academy, Washington Academy and Washington College. In 1871, the name was changed to Washington and Lee University, recognizing the contributions of both George Washington, an early benefactor of Liberty Hall Academy, and Robert E. Lee, who served as president of Washington College from 1865-1870. Today, W&L is the ninth-oldest college in the country and is nationally recognized as one of the top liberal arts colleges in the United States.

The Honor System
The Honor System's roots can be traced to at least the mid-19th century. In the early 1900s, control of the Honor System was transferred to the Executive Committee of the Student Body, a group of elected student representatives that continues to administer the Honor System today.

Each new generation of students defines the Honor System by its actions. Washington and Lee's Honor System is a single-sanction system, based upon the principle that any action deemed a breach of the community's trust will be considered an Honor Violation. The single sanction requires a student who is found guilty of an Honor Violation in an Executive Committee Hearing to withdraw from the University unless they choose to appeal to a Student Body Hearing. If a student appeals and is found guilty in the Student Body Hearing, the student must leave the University and their transcript will indicate that they were "Dismissed."

Students at Washington and Lee recognize the great authority they possess and the communal presumption to behave honorably. Students are expected to abide by the Honor System by representing themselves truthfully and seeking no unfair advantage over their peers. This understanding instills a profound sense of trust among all within the University community and enriches every aspect of student life.

While students define and oversee the Honor System, all members of the Washington and Lee community, including faculty, staff, and administration, play an important role. All members of the community are expected to understand and support the Honor System and should refer appropriate cases to the Executive Committee. At the same time, the overarching presence of the Honor System in all aspects of life at Washington and Lee allows the community at large to place trust in students, and each generation of students ensures that this trust is not misplaced.

Speaking Tradition
W&L prides itself on its sense of community, which is evidenced by our Speaking Tradition. It is common practice for students, faculty, and staff to offer a quick greeting to others they encounter on campus.

Statement of Ethical Principles
The ethical principles of Washington and Lee University derive from one of the two fundamental objectives of the University, as set forth in its expanded mission statement: "To pursue its educational mission in a climate of learning that stresses the importance of the individual, personal honor and integrity, harmonious relationships with others, and the responsibility to serve society through the productive use of talent and training."

Faculty and staff employees of the University are expected to commit themselves to these fundamental institutional objectives and to uphold the highest ethical standards while acting on behalf of Washington and Lee University in discharging its business and academic affairs.

Statement of Commitment to Diversity
Washington and Lee affirms that diverse perspectives and backgrounds enhance our community. We are committed to the recruitment, enrichment, and retention of students, faculty, and staff who embody many experiences, cultures, points of view, interests, and identities. As engaged citizens in a global and diverse society, we seek to advance a positive learning and working environment for all through open and substantive dialogue.

Statement on Response to Bias Incidents
Washington and Lee University strives to be a diverse and inclusive community. It draws intellectual and social strength from the range of knowledge, opinion, belief, and background of its members, whether of race, color, religion, national or ethnic origin, sex, pregnancy, childbirth or related medical conditions, gender identity, gender expression, sexual orientation, age, marital status, disability, military status, genetic information, or any other protected class under the law.

Bias incidents—incidents that one could reasonably conclude may intimidate, mock, degrade, or threaten individuals or groups because of actual or perceived inclusion in any of the categories or statuses listed above—can adversely affect the members of our university community and undermine the climate of civility and respect necessary to achieve and maintain a diverse and inclusive community. The university is therefore committed to responding promptly and effectively, as appropriate, to bias incidents reported by members of the University community.

Non-Discrimination/Equal Employment Opportunity Statement
In compliance with Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and all other applicable non-discrimination laws, Washington and Lee University does not discriminate on the basis of race, color, religion, national or ethnic origin, ethnicity, sex, pregnancy, childbirth or related medical conditions, gender, gender identity, gender expression, sexual orientation, age, marital status, disability, military status, genetic information, or any other protected class under the law in its educational programs and activities, admissions, and with regard to employment. Inquiries may be directed to Lauren E. Kozak, Title IX Coordinator, Elrod University Commons 237, (540) 458-4055, kozakl@wlu.edu, who is designated by the University to coordinate compliance efforts and carry out its responsibilities under Title IX, as well as those under Section 504 and other applicable non-discrimination laws. The Coordinator has designated the following Title IX Assistant Coordinator: Jodi Williams, Executive Director of Human Resources, Two South Main 109, (540) 458-8318, jwilliams@wlu.edu. Inquiries may also be directed to the Assistant Secretary for Civil Rights, U.S. Department of Education.

WORKING AT WASHINGTON AND LEE

Office of Human Resources

The Office of Human Resources engages with the Washington and Lee University community in a welcoming and professional manner offering people-focused consultation, programming, and resources to recruit, welcome, develop, and support our faculty and staff.

Human Resources also serves employees and supervisors when situations occur that involve conflict resolution, coaching and counseling, workplace investigations, Employee Assistance Program (EAP) referrals and policy interpretation and guidance. HR works in collaboration with other departments and university leaders to address employee relations questions and concerns.

Recruitment and Job Postings

To fulfill its mission, Washington and Lee University must have a high caliber staff, one that strives for excellence and is committed to the ideals and goals of the University. The University is committed to strong faculty and staff recruitment practices that attract candidates dedicated to furthering the educational aims of the institution. Announcements of vacant positions are placed on the Human Resources website at https://www.wlu.edu/employment-opportunities/jobs-at-w-l.

Current employees must have strong performance in order to apply for a different position on campus. Hiring managers are responsible for informing internal candidates when they are a finalist for a posted position. At that point, internal candidates are required to inform their current supervisor that they are a finalist for a different position.

Hiring Managers are required to check references on all new hires, job transfers, and promotions when the incumbent works outside their department (please see References for additional information).

Internal promotions of highly qualified individuals whose careers at Washington and Lee have prepared them for specific vacancies will be permitted without a search when the head of the administrative department or division identifies specific skills which qualify an employee for the promotion. And, on occasion, the University may make an appointment without conducting a full search to meet a strategic objective. Such promotions/appointments will require the review of the Executive Director of Human Resources.

Human Resources confirms by letter all benefit eligible non-faculty appointments as well as all promotions, job transfers and changes in employment status. Appointment letters for faculty are prepared by the Provost or Deans' offices. Before beginning work, new employees must complete the necessary employment forms including the I-9.

Employment Categories

- ***Full-time***—Employees who work in positions that are approved for a minimum of 1,365 annual hours. Generally, employees in full-time positions work 35 or more hours per week for at least nine months of the year. Employees who have reduced their hours as part of an approved phased retirement arrangement remain categorized as full-time.

  Undergraduate faculty in this category teach at least five courses per academic year and have other administrative responsibilities such as advising.

Law faculty in this category teach a minimum of three courses during the academic year (made up of 2, 3 or 4-credit bearing courses) and devote substantial time to one or more of the following responsibilities (as appropriate for their tenured, tenure-track or visiting status): student engagement outside of class; legal scholarship; faculty governance; legal clinic, immersion program, or other administrative duties; service to the law school, University, legal profession, and the public.

- ***Part-time with partial benefits*—**Employees who work in positions that have been approved for less than full time, but at least 1,000 hours per year. Only certain benefits are provided for employees in these positions.

  Undergraduate faculty in this category teach 3 or 4 (3 or 4-credit hour courses) per academic year.

  Law faculty in this category teach a minimum of two courses during the academic year (made up of 3 or 4-credit bearing courses) and devote substantial time to one or more of the following responsibilities: legal clinics, immersion program, or other administrative duties; service to the law school, University, legal profession, and the public.

- ***Part-time*—** Employees in this category cannot exceed 999 hours in each anniversary year and cannot exceed 29 hours of work per week. Only those benefits mandated by law are provided (FICA, workers' compensation, unemployment insurance).

- ***Seasonal* –** Employees hired for annually recurring work during specific times of the year. Examples include employees working in the University Store during book rush or in University Facilities on the summer custodial crew. Seasonal employees receive only legally mandated benefits (FICA, workers' compensation, unemployment insurance). While they are not limited to 29 hours per week, they may not exceed 999 hours in an anniversary year, and their employment period must be less than six months.

Background Checks

Background checks are administered by Human Resources for all employment and some contingents (i.e., volunteers, contractors, and other visitors to the University). Background checks may include but are not limited to reviews of criminal history, sex offender registry, degree and employment verification, social media screening and motor-vehicle record checks.

Additional motor-vehicle-license checks may be performed throughout employment. For positions that require operation of a motor vehicle, checks on convictions shall include misdemeanor traffic violations. If a driving record indicates major violations, (e.g., driving under the influence, reckless driving, driving while license is suspended or revoked, or a pattern of repeated violations), this may be deemed an indication of poor judgment or lack of behavioral control and could impact candidate selection. Employees whose positions require driving on University business are required to maintain an unrestricted, valid driver's license and insurance coverage as long as they are in the position necessitating this requirement. Employees must promptly report any changes in restrictions on their license or in insurance coverage to their supervisor and to Human Resources.

All background checks performed by outside agencies will conform to the Fair Credit Reporting Act. The University will conduct and utilize these background checks as they relate to the fitness for duty for a particular position, in accordance with law. A relevant job-related conviction is grounds for termination of employment or non-selection of an applicant. Falsification of application materials during the hiring process or during employment, is grounds for termination of employment or non-selection of a candidate.

Reporting Convictions
University employees must notify Human Resources within five days of a conviction for any misdemeanor or felony offense, including but not limited to any drug, alcohol, or sex-related offense. Failure to report such conviction is grounds for disciplinary action. Supervisors should notify Human Resources immediately upon being informed of any such conviction.

Immigration Reform and Control Act
The University, in accordance with the Immigration Reform and Control Act of 1986, is committed to employing only those applicants authorized to work in the United States. As a condition of employment, all new and rehired employees must complete an Employment Eligibility Verification Form, utilizing the national E-Verify program, and provide proof of identity and work authorization as required by the Act within the required timeframe under the Act. If your immigration status changes, and therefore impacts your employability, you must notify Human Resources.

Employing Minors
Individuals must be age 16 or older to work for the University. However, they cannot drive university vehicles (including golf carts) until they reach age 18.

Employment of Relatives (Nepotism)
The University seeks to employ and promote the most highly qualified and competent candidates. The University will not prohibit employment of spouses, close relatives or domestic partners in the same department or unit, provided that neither employee participates in making recommendations or decisions specifically affecting the appointment, retention, promotion, demotion, salary or work assignments of the other, and that one family member does not directly supervise another.

Employees' relatives should apply for employment through Human Resources. While not prohibited, relatives of employees will not normally be placed in the same department in which the employee works.

Orientation
To support new benefit-eligible employees, the University offers three distinct orientation sessions. Information will be provided in an employee's offer letter and HR will share these dates with the new employee's supervisor.

- Phase I provides an overview of employee benefits, university policies and other immediate employment related information.
- Phase II focuses on the Live Well W&L wellness program, the PATH performance development program, and provides an introduction to Workday (software employees use to record time worked and time off, access pay slips, maintain personal data, enroll in benefits, pay bills, etc.) and the Business Office. Individuals who will manage other W&L employees will attend an additional session, "Managing at W&L," which provides an overview of policies, procedures, and resources for managers.

- Phase III, a full-day orientation held twice a year, is an opportunity for employees to meet other new employees and hear from the university's senior leadership team about the university's mission, values, and strategic plan.

University Cards
A Washington and Lee University Card is issued to each new benefit-eligible employee. Part-time employees who need access to buildings may request one. The University card is not an official identification document outside of the university community.

Work Hours and Meals
Most full-time employees are scheduled to work either a 35-hour or 40-hour week. These hours may vary, but the standard schedule for administrative offices is 8:30 a.m.– 4:30 p.m. Monday through Friday, with an unpaid hour for lunch. Schedules in other areas of the University vary according to the function performed. Exempt employees work all hours necessary to complete their assignments.

Lunch or meal periods will vary by department and will range from a half hour to a full hour. Meal periods are not paid time unless the non-exempt employee is required to work and remain at the work site.

The University reserves the right to determine the hours of employment when shift work is necessary. Although the University attempts to minimize the disruption of changing shifts, it may need to change shifts from time to time to meet operational needs.

It is also expected that employees be willing to work additional hours and/or overtime when needed. Supervisors will provide notification as far in advance as possible and will limit recurring overtime requests.

Flexible, Hybrid and Remote Work Arrangements
With supervisory approval, flexibility in the workday schedule is permitted, provided the business needs of the office and University are met. Work schedule flexibility examples include adjusting the start time or the end time of the workday, adjusting the length of lunch breaks, or providing the opportunity for an employee to pick up children from school and then work remotely for the remainder of the workday. Supervisors may also provide flexibility in the work week as long as offices remain open during the standard workday (8:30 a.m.– 4:30 p.m., Monday through Friday). Work week adjustments could also include permitting employees to work their 35 or 40-hour workweek in four days instead of five.

Supervisors have the flexibility to adjust work schedule or provide hybrid opportunities on an annual basis, a seasonal basis, or as aligned with the university calendar. For example, a department could provide remote opportunities during academic calendar breaks when presence on campus in student facing roles is less critical. Some departments may be able to offer a reduced work schedule during the summer, in which case, salary and benefits would also be prorated during the reduced schedule.

Washington and Lee University is a residential campus with a focus on providing high-quality direct services to students, parents, alumni, and colleagues. While in-person work is the preference, supervisors may approve hybrid remote work arrangements in which employees fulfill their job responsibilities at a site other than their onsite work location, for **up to two days per week**. The hybrid work arrangement must ensure that university, department, and job performance expectations are met. Managers are encouraged to consult with Human Resources for guidance on implementing hybrid work arrangements.

Remote work consisting of **three or more days per week** will be considered on a case-by-case basis according to a variety of position and performance factors. Human Resources must approve positions for remote eligibility; remote work must be located within the United States. A remote work agreement will be required.

Attendance, Punctuality and Dependability

To maintain a productive work environment, W&L expects employees to be reliable and punctual in reporting for work and remaining in the designated work area throughout the scheduled workday. You should notify your supervisor as soon as possible prior to a scheduled absence. When you are unable to report to work due to an illness or injury, you must notify your supervisor as early as possible, each day of your absence. Excessive tardiness, absenteeism, or unauthorized absence may result in disciplinary action.

No-Call/No-Show

Not reporting to work and not calling to report the absence is a **no-call/no-show** and is a serious matter. A history of this behavior will result in termination. A supervisor may consider extenuating circumstances when determining disciplinary action for a **no-call/no-show** and has the right to exercise discretion in such cases. (For instance, if the employee is in a serious accident and is hospitalized.) In the instance of no-call/no-show on two consecutive days, the employee is considered to have resigned from their position. No corrective actions will be taken without the direct involvement of Human Resources in collaboration with the supervisor.

Employee Committees

The administration has created committees to advise and assist it in discharging certain of its responsibilities. Visit the website for a list of committees, their purpose, and membership.

Emergency Operations

There is a need to continue essential services and provide for the University's residential students even in case of extreme adverse weather. Therefore, every effort will be made to maintain the University's normal operations. When there is a closing, a shift to remote operations, or a delay, the University will use the following communication outlets:

- General Alerts
- Emergency Hotline: 540-458-5277 (GOCLASS) or x5277 (on-campus)
- University website: http://go.wlu.edu/emergency-management
- Broadcast e-mail and/or voicemail
- Radio: WREL FM/WWZW AM (96.7/1450), WMRA FM (89.9), WLUR FM (91.5) WKDW AM (900)
- Television: WDBJ (CBS Roanoke), WSLS (NBC Roanoke), WSET (ABC Lynchburg)

The University may operate on schedule or on a remote basis even when area schools and businesses are closed or delayed. Therefore, always check the hotline or website for the latest update or to verify any TV/radio cancellation announcements, because the public media announcements are sometimes erroneous. In remaining open, the University does not advise anyone to travel who feels that they cannot do so safely. Employees should exercise their best personal judgment about their own local road conditions and other safety concerns. Supervisors are encouraged to utilize remote work arrangements when job duties can be performed successfully from remote locations.

University Status
Closed with Essential Employees Reporting: This status may apply when severe weather conditions or other emergencies interfere with normal operations. Classes will be canceled. Essential employees will be expected to report, unless told not to do so by a supervisor. Under certain circumstances, a limited number of non-essential employees may also be asked to report based on the type of emergency and the specific needs of the campus. A supervisor must have the approval of the appropriate vice president or dean before asking non-essential employees to report.

Remote with Essential Employees Reporting: This status may apply when severe weather conditions or other emergencies interfere with normal on-campus operations. All scheduled on-campus events will be canceled, and any activities that can be transitioned to remote formats will be rescheduled accordingly. Essential employees are required to report to work unless explicitly instructed otherwise by their supervisor. All non-essential staff will shift to remote work.

Faculty members have full authority to conduct remote instruction or adjust course content to accommodate future class sessions. Faculty who choose not to meet virtually should use the following guidance to plan for missed work: For every hour of in-class activity missed, twice the amount of out-of-class activity should be assigned. Exceptions may be warranted depending on the class type, for instance, laboratory sections.

*Delayed Opening***:** This status may apply when severe weather conditions may interfere with campus safety or employee travel, but conditions are expected to improve. Classes usually will be held on a published modified schedule. Essential employees will be expected to report as regularly scheduled; non-essential employees will be expected to report when the University opens. If conditions do not improve, a decision may later be made to close the university.

Early Release: This status may apply when severe weather conditions interfere with employee travel or with normal operations after the workday has begun. Classes may or may not be cancelled, and some offices may need to continue to operate. As a result, some staff may be asked to remain or, in the case of second or third shift employees, to report to work by the supervisor. An official early release announcement and time will be communicated to all employees via the university communications channels described in this policy. Essential employees will be expected to remain until relieved or notified by their supervisors to leave. Employees must make individual decisions about whether to travel between the university and home based on local conditions.

Pay Policies during Emergency Operations
In the event of inclement weather and the delay, shift to remote operations, or closing of the University or early release of employees, the following provisions apply to reporting to work and compensation.

Non-Essential Employees
Delayed Opening - Regularly scheduled hours prior to the delayed opening should be charged to "Campus Closure (not worked)." Employees who report to work later than the delayed opening should charge the time between the opening until their arrival to CTO. Employees who do not report to work should use CTO for the entire day. Alternatively, and with supervisor approval, time can be made up during the same pay period.

Remote Operation-Regularly scheduled hours performed on a remote basis will be paid at the regular rate of pay. Employees who do not work their regularly scheduled hours should use CTO to record unworked time. Alternatively, and with supervisor approval, time can be made up during the same pay period.

Early Release - Regularly scheduled hours after the early release should be charged to "Campus Closure (not worked)." Employees who leave work earlier than the early release should charge the time between their departure and the early release to CTO. Employees who do not report to work should use CTO for the entire day. Employees who leave work early without an official closing or early release will need to charge that time to CTO. Alternatively, and with supervisor approval, time can be made up during the same pay period.

Non-essential employees who are not asked to report as outlined above will receive no additional compensation if they choose to work when the University has been delayed, closed or if there is an early release.

Essential Employees

Because of the essential nature of their work, specified employees in the Student Health Center, Facilities Management, Athletics, Public Safety and Dining Services are expected to report to work as close to schedule as possible, or to continue to work their regular schedule, even when the university is closed, unless they are specifically instructed otherwise. Non-benefit-eligible employees in these departments, if scheduled to work or called in to work, are also considered essential. Additional essential personnel are designated by Human Resources based on the circumstances of the closing.

Hourly paid essential employees identified above are eligible for double-time for the hours deemed applicable by Human Resources after the event has ended.

Health and Safety

Washington and Lee University is committed to the health and safety of its students, employees, and visitors. It is essential that the entire campus community accept responsibility for developing and practicing safety awareness. Every employee is responsible for complying with university and governmental safety and health standards in the work area, using protective equipment and promptly reporting hazardous conditions and job-related injuries.

To promote applicable health and safety standards, Washington and Lee has the Safety Committee to assist in the review of University policies, procedures and physical plant issues related to the safety of University employees, students and the public. The committee is principally charged with promoting safety on the campus and fostering an environment in which the risk of accidental injury to individuals is minimized.

Campus Safety and Welfare Responsibilities

Positions designated as a Campus Security Authority (CSA) in accordance with the Clery Act have certain responsibilities. Employee job descriptions will note if a position is designated as a CSA. Such positions are required to report Clery qualifying crimes to the Department of Public Safety and complete annual training about reporting responsibilities under the law. Additional information is available at https://my.wlu.edu/student-life/health-and-safety/public-safety/campus-safety-and-crime-reporting/campus-security-authorities.

Incident Reporting

Employees should immediately report incidents and accidents on campus, as well as concerns about unsafe health, safety, or environmental conditions, to:

- their supervisor,
- Director of Environmental Health and Safety at x8175, or
- Public Safety at x8999.

Employees have the right to report work-related injuries or illnesses without retaliation. The University will not tolerate any such retaliation. Supervisors are expected to report all accident/incidents/"near-misses" via the Safety Incident Report in Workday within 24 hours.

Outside Employment

The University does not prohibit outside employment. However, assuming an employee is employed full time, the employee's job at the University is expected to be primary. Employees are expected to meet the University's attendance and performance expectations.

Employees are prohibited from working at outside employment while on SLR, Parental Leave, Family Medical Leave or Short-Term Disability without approval from Human Resources.

Parking

Upon application, W&L employees will receive a parking tag free of charge by registering their vehicle online at, https://wlu.thepermitstore.com. Parking in the designated lots on campus is free of charge.

Personnel and Insurance Records

Official employee personnel files are maintained in Workday and in Human Resources. Additional information on faculty may be in the relevant dean's office. Personnel files may contain, but are not limited to, the following types of information:

- Employment letters or contracts
- Payroll data
- Employment application, curriculum vita or résumé
- Performance planning and review documents
- Letters of commendation or discipline
- Employee benefit and medical records are maintained separately from personnel files in accordance with applicable laws

There are several records that employees should remember to keep current. Use the instructions found here to update this information in Workday:

- Address or telephone number change
- Emergency Contact(s)
- Legal name change
- Change of marital status
- Change of tax exemptions
- Change of insurance beneficiary
- Change in dependents on health insurance coverage (including additions and deletions because of age, graduation from college, marital status, or employment).

Use of Recording (Audio or Video) Devices
Employees are prohibited from recording job-related conversations with other employees (including their supervisors) without the express consent of all parties to the conversation.

Length of Service and Reemployment
An employee's length of service is defined as the period of continuous employment in an ongoing position beginning with the current period of work, plus any qualified previous service. Such employment is the basis upon which eligibility for benefits is normally determined, although specific programs may impose additional restrictions and waiting periods.

Approved paid absences, such as combined time off, sick-leave, short-term disability, parental leave, and military leave, as well as authorized unpaid absences/leaves, do not constitute a break in continuous employment.

Re-employment. If an employee has five years of previous service in a benefit-eligible position, leaves employment voluntarily, and returns to University in a benefit-eligible position within two years of the previous separation date, the employee will be reinstated with an adjusted date of hire reflecting the number of years of previous service. Re-hired employees should inform Human Resources immediately upon reemployment of any prior service at Washington and Lee University.

TOTAL REWARDS

Rewards Philosophy

At Washington and Lee we believe in:

- Cultivating a work environment where employees value the day-to-day work experience.
- Defining rewards as a combination of base pay, benefits, career development, growth, and recognition.
- Offering market-based compensation competitive with the appropriate labor markets to attract, motivate and retain high-caliber employees.

The following sections contain information about the total rewards package offered to employees at Washington and Lee.

COMPENSATION

Compensation Philosophy and Objectives
Washington and Lee University strives to maintain a compensation program directed toward attracting, retaining, and rewarding a highly qualified and talented workforce to serve students, faculty, and staff. The compensation program focuses the University's efforts on maintaining both external competitiveness and internal equity, making decisions that support the overall rewards philosophy, consistently administering pay policies, and responding to and supporting organizational priorities, changes and needs.

Maintain external competitiveness by developing and maintaining a pay structure based on benchmark market data and pay targeted at the median of our market competitors.

The market for our positions includes those organizations we compete with for employees, or with whom we have decided to compare ourselves. For most positions, we use the top-25 liberal arts colleges (excluding the United States Naval and Military Academies). The list can vary somewhat from year to year, but currently comprises the following schools:

- Amherst College
- Barnard College
- Bates College
- Bowdoin College
- Carleton College
- Claremont McKenna College
- Colby College
- Colgate University
- Davidson College
- Grinnell College
- Hamilton College
- Harvey Mudd College
- Haverford College
- Macalester College
- Middlebury College
- Pomona College
- Smith College
- Swarthmore College
- University of Richmond
- Vassar College
- Wellesley College
- Wesleyan University
- Williams College

Maintain internal equity by reviewing pay ranges to determine whether jobs with comparable skill sets and responsibilities have similar pay opportunities.

Support the rewards philosophy by conducting salary reviews on a regular and consistent basis, to determine current market-related data to maintain external equity.

Establish salaries for new employees at levels that recognize the individual's skills and experience, while considering the salary levels of current employees within the same position or role.

Make salary-increase decisions based on recognizing performance, retaining our best employees, maintaining market alignment, and supporting internal equity.

Create compensation structures and strategies that respond to and support organization priorities, changes and needs.

Complete details of the Compensation Program can be found in the Compensation Program Overview at http://go.wlu.edu/HR/compensation.

Fair Labor Standards Act (FLSA)
Washington and Lee is committed to compliance with all terms of the Fair Labor Standards Act (also known as the Federal Wage and Hour Law), including the payment of minimum wages and overtime pay. This law and its implementing regulations establish the criteria for determining which positions are non-exempt (eligible to receive overtime pay), and which are exempt (not eligible to receive overtime pay). The Director of Compensation is responsible for overseeing compliance with such laws, including the determination of exempt and non-exempt status.

Exempt Staff Positions
Exempt staff positions are those that are exempt from certain provisions of the FLSA and are not entitled to overtime pay. These positions generally include administrators, managers, and professionals (including faculty). Staff members in exempt positions receive a fixed salary paid monthly. The work of exempt staff is evaluated and compensated on outcomes accomplished. Exempt employees are expected to work all hours necessary to complete their assignments.

Non-Exempt Staff (Hourly) Positions
For staff positions that the law defines as non-exempt, the University is required to keep hourly time records and to calculate pay on an hourly basis. Such positions are entitled to overtime pay at 1.5 times the employee's regular pay rate for all hours beyond 40 in a work week. (Hours worked between 35 hours to 40 hours will be paid at the regular rate.)

Pay Frequency and Time Reporting
Exempt employees are paid monthly on the last banking day of the month. Non-exempt employees are paid biweekly on alternate Fridays. Exceptions are noted on the payroll schedule posted on the Business Office website http://go.wlu.edu/businessoffice.

Non-exempt employees are required to record all hours worked for each biweekly pay period in Workday. Supervisor must review time entry for accuracy and approve/submit to Payroll by noon on Monday of the pay week.

Non-faculty exempt employees must record absences in Workday.

Time recorded must accurately document hours worked. It is essential that hourly paid employees accurately record all time worked—time sheets are a legal document. Additionally, time off must be recorded. Failure to record time off appropriately may result in non-payment of accrued CTO on separation of employment.

Direct Deposit of Paychecks
Employees are strongly encouraged to have their pay directly deposited. Direct deposit can be made to multiple accounts in most any U.S. bank, credit union and/or savings and loan.

Optional Payroll Deductions
Employees who wish to make charitable contributions to The University or The United Way, may enter those in Workday.

Pay When Working a Holiday
Non-exempt employees (benefit eligible and non-benefit eligible) who are required by their supervisor to work on a university approved holiday will be paid at a rate of double-time and one-half. If an employee's regular shift does not fall on a holiday, adjacent days to the holiday may be indicated as holiday for time entry and payroll processing.

Exempt employees who are required by their supervisor to work on a holiday may take another day off during the fiscal year.

Employees who work a benefit eligible position for nine months in one department and work full-time during the summer in another department are eligible for the Juneteenth and Independence Day holidays.

Pay When Working Overtime
Employees may be asked to work extra hours as needed. Overtime assignments will be distributed as equitably as practicable to all non-exempt employees qualified to perform the required work.

Non-exempt employees will receive time-and-one-half the regular rate of pay for hours worked over 40 hours per week. All non-exempt employees must receive approval from their supervisor prior to working any hours beyond a regular work week. Non-exempt employees who work overtime without receiving prior authorization will be paid for those hours worked but may be subject to disciplinary action. Paid-time-off hours count toward the 40-hour threshold for overtime eligibility.

On-Campus Workshops
The University offers on-campus classes and seminars throughout the year on a variety of topics including, but not limited to, supervisory skills, communication, retirement planning, computer classes, wellness activities, and University policies. Staff are encouraged to attend and should speak with their supervisor if workshops are offered during work hours.

Managers are encouraged to support employee attendance at these programs - many of which are intended to help the individual achieve personal or professional growth or help the department achieve its goals. Attendance of on-campus educational sessions fosters community and connection amongst employees, positively impacting morale. Employees will be compensated for attendance at sessions that occur during their regular work hours.

With supervisory approval, employees may be compensated for attendance at workshops and seminars that are held when they are not scheduled to work, in compliance with Federal wage and hour laws and regulations. In such instances, the employee's work schedule for the week might be adjusted so that work hours do not exceed regularly scheduled hours.

Compensatory Time

All hours worked must be reported in the period they are worked and will be paid on the standard biweekly pay cycle. Compensatory Time (comp time), the practice of saving or holding extra hours worked beyond the same pay period to be exchanged for time off or paid later is not permitted. With supervisory approval, adjustments may be made to an employee’s ***weekly*** work schedule to accommodate the need for time off and/or to make up hours missed.

Deductions from Exempt Employees’ Salary

The University is committed to complying with the Fair Labor Standards Act, which governs deductions that can be made from the salary of exempt employees other than individually authorized deductions and mandatory federal and state payroll deductions. Employees who believe their pay has been improperly reduced should contact the Payroll Manager.

Exempt employees are paid on a salary basis. Except in the case of mid-month start or end dates, and the deductions outlined below, exempt employees receive their full salary for any workweek in which they perform any work, without regard to the number of days or hours worked, subject to statutorily permitted deductions. Exempt employees do not need to be paid for any workweek in which they perform no work. Deductions from the pay of exempt employees are permissible in the following circumstances, and otherwise as provided by the Fair Labor Standards Act:

1. Absences of one or more full days for personal reasons, other than sickness or disability, when the employee is not eligible for paid leave applicable to the circumstances, has exhausted all available paid time off or the employee has requested leave without pay. Partial days must be paid.
2. Absences of one or more full days due to sickness or disability when the employee has exhausted all applicable paid leave benefits. Partial days must be paid.
3. Unpaid disciplinary suspensions of one or more full days for violations of workplace conduct policies applicable to all employees.
4. Sanctions for violations of safety rules of major significance.
5. Deductions for unpaid leave taken in accordance with a legitimate absence under the Family Medical Leave Act.
6. Deductions for the first and last week of employment, when only part of the week is worked by the employee.

Additional Compensation for Exempt Employees

Occasionally, full-time exempt staff may be asked to serve in a capacity outside their normal work environment. Examples of such assignments include, but are not limited to, teaching a class, presenting workshops, consulting, serving on various committees, and/or performing duties for other University departments. Normally these assignments are to be considered part of exempt employment for which the employee is already compensated. Therefore, exempt staff will not receive additional compensation for performing such duties even when such duties are conducted during the employee’s own time or outside of normal business hours. Exceptions to this policy must be approved by the Executive Director of Human Resources before the work is performed.

Determining Appropriate Pay
The Director of Compensation and the HR Generalist are responsible for managing and overseeing pay decisions, in consultation with the appropriate vice president, dean, department head, manager and/or supervisor, based on available market data and internal equity.

For all positions, managers must consult with HR for pay determinations. Communicating pay decisions should not occur until after appropriate approvals have been received.

Starting Pay
Determining the appropriate starting salary requires the consideration of several factors both in relation to the applicant and current position incumbents. Decisions will be made after a careful assessment of available information from interviews, reference checks, professional and educational accomplishments, internal considerations, etc. Starting salaries are based on candidates' job qualifications, work experience, education, and the market reference range for each position. Starting salaries typically fall within the minimum and midpoint of the salary range. Exceptions may be made to attract highly skilled and experienced candidates or to respond to specific market conditions. Hiring managers must consult with the Director of Compensation for exempt positions and the HR Generalist for non-exempt positions prior to discussing salary with prospective candidates and before extending a salary offer.

Supplemental Pay
Supplemental pay is additional pay for assuming temporary new duties/responsibilities in a higher career stage. Supplemental pay can be provided to an employee who is assigned different or additional duties and responsibilities on an interim basis for a limited period (i.e., assignment to a special project, reassignment during organizational changes, filling a vacant position, extended leave of another employee).

The amount of the adjustment will be determined by the Director of Compensation in consultation with the vice-president or dean of the division. The adjustment will be based on the market reference range of the interim position, the responsibilities to be assumed by the employee, and the level of additional effort required. Once an employee is relieved of the additional responsibilities, the pay is returned to the original level (plus any annual salary increases the employee would have received). The job description of the higher-level position is used to specifically identify additional responsibilities.

Annual Salary Increase Process
Each year, as a part of the annual budget process, the Board of Trustees approves the university budget parameters and sets the available salary increase pool. The Director of Compensation then develops increase guidelines to reward staff within the established budget. The Director of Compensation works with the provost and deans to determine appropriate distribution parameters for continuing, non-fixed term faculty within the allocated budget.

All continuing, non-fixed term, benefit-eligible employees are eligible for an annual increase. Employees who start work at W&L between March 1 and June 30 *are not* eligible for salary increases until the following fiscal year increase cycle. Managers/supervisors should ensure this is communicated to the employee at the time of hire. Individuals hired after July 1 will be eligible for an increase prorated according to their date of hire.

Employee salary pool increase decisions are determined in coordination with managers, department heads, division heads, deans, and vice presidents. Annual increases take into consideration many factors including an employees' position in range, internal equity, market factors and performance.

Market Adjustments

The salary structure will be reviewed annually to ensure market competitiveness and internal equity. The Director of Compensation regularly assesses the University's base salary levels relative to the defined market. Based on these findings, the Director of Compensation may suggest market adjustments for select jobs and/or incumbents to better align these salaries to the market. This is most common when labor-market pressures force pay rates higher, resulting in pay compression amongst new hires and longer serving employees. These adjustments are typically based on the positioning of the salaries relative to the market and the University's budget. The Director of Compensation makes recommendations for market adjustments, which are reviewed with vice presidents and deans and approved as a part of the annual staff-salary-increase process.

Spot Awards

Discretionary spot awards may be given to recognize extreme effort and/or achievement of outstanding results. Spot awards are generally given for performance above and beyond the normal scope of the job. Vice presidents and deans may make requests for spot awards to be reviewed by the Provost, the Executive Director of Human Resources, and the Vice President of Finance and Administration.

Annual Salary Letters

The Director of Compensation coordinates with the President to send letters to continuing benefit-eligible employees notifying them of changes to their pay effective July 1. Letters are typically distributed via Workday in early June, contingent on the completion of an annual salary increase process.

Career Events and Corresponding Pay Adjustments

<u>Job Enrichment</u>

Jobs can change in a variety of ways. Most staff members' jobs change in the form of job enrichment. Job enrichment is typically when employees take on additional tasks or work, without increasing the level of responsibility within the job. Employees are expected to increase the amount of work performed as they become more proficient in the job; accordingly, job enrichment is typically a part of all employee jobs and does not normally warrant a change in career stage, market reference range or salary. Jobs that grow and expand through a significant increase in responsibility and skill level, however, may require a change in career stage or market reference range, and a subsequent salary increase. These situations are defined as job reclassifications, and the process for assessing whether a job should be redefined is outlined below.

<u>Job Reclassification to a Higher Career Stage</u>

The reassignment or movement of a job to a different career stage or market reference range would normally result from a significant change in current job responsibilities and require a significant increase in skill level, including:

- Responsibilities that add a major component to the current job requirements; and/or
- New responsibilities that are very different from current responsibilities.

If there is a situation in which a job reclassification may be necessary, the supervisor should discuss the issue with the Director of Compensation and the respective vice president or dean, highlighting the changes in the role and subsequent impact on the job placement within the staff compensation structure. If the department head and supervisor agree that a job reclassification is justified, the supervisor will complete and submit the following to the Director of Compensation prior to March 1st:

- An updated job description; and
- A brief cover letter highlighting the job duties and responsibilities that have changed.

The Director of Compensation will review the materials and determine whether a change of career stage and/or salary is warranted. Normally, when a job is reclassified and assigned to a new career stage, a salary increase of 5-15%, or to the minimum of the new market reference range, whichever is greater, will be approved. The Director of Compensation will discuss any changes with the department head prior to final approval.

Job Reclassification to a Lower Career Stage

Movement to a lower career stage or market reference range typically occurs for one of three reasons, and each would have a different impact on the employee's salary:

Transfer, initiated by staff member, to pursue new interests or to enhance and broaden development opportunities within the University	Current salary may be reduced, because it would be adjusted to the new job's market reference range.
Transfer or demotion occurs due to poor performance or lack of skills in prior job	Salary would be reduced to level appropriate to the employee's skills, competencies, and performance relative to the new job's expectations and standards.
Organizational changes (i.e., reorganization)	Treatment of salary adjustments due to an organizational change would be handled on a case-by-case basis

Lateral Transfer

A lateral transfer occurs when an employee moves to a similar position within the same market reference range. Normally, no increase is given for a lateral transfer when the pay ranges of the old and new positions are approximately equivalent.

Most changes in positions within a career stage do not constitute reasons for salary changes. However, there may be circumstances that warrant salary adjustments based on the staff member's skill, experience, and capabilities. The Director of Compensation should be contacted to discuss whether an increase would be warranted in this circumstance.

Promotion

A promotion occurs when an employee moves to a job with greater responsibilities with a higher market reference range. A promotion may occur because of the following:

- The employee applying for and being selected for a position through the recruitment and selection process.

- The employee demonstrating exceptional performance and advanced competencies, thereby receiving a promotion as recognition for contributions to the University.

Changes to individual capabilities and activities (e.g., learning a new skill, increasing number of staff supervised) do not constitute a promotion (although they may help develop an employee's skills and competencies to enhance their career) (see "Job Enrichment").

A promotional increase generally ranges from 5–15% based on an employee's experience, skill level, market reference range for the new position, and relevant internal salaries. The new salary will be at least at the minimum of the new position's market reference range. No salary adjustment will be made if the employee's previous salary exceeds the maximum salary range of the new position. If an employee is promoted to a position requiring greater qualifications or experience than is currently possessed, the promotion increase to the range minimum may be phased in over a set period to allow for training.

Starting salaries for promotions will be determined in consultation with the Director of Compensation for exempt positions and by the HR Generalist for non-exempt roles. For internal promotions that occur outside of recruitment, the manager provides a job description for the proposed position so that the Director of Compensation or HR Generalist can market price the role and provide an appropriate promotion increase. The Executive Director of Human Resources approves all promotions made without a search.

Faculty Re-Assignment and Transfer Process

Faculty may be re-assigned or transferred to a department or unit outside of their college, unit, or department, and:

- Any assignment or transfer shall be based on the best educational interests of students or best interests of the University.
- Fair treatment of the faculty in terms of tenure review, promotion consideration, and annual review, will not be jeopardized. The relevant deans and department heads, in consultation with the faculty member, should consider whether modifications should be made concerning tenure, promotion, or merit review in those instances where assignment or transfer will affect the process of tenure, promotion, or merit review.
- Consultation with faculty so assigned or transferred is required to ensure that the best educational interests of students are met, and that faculty will have adequate time and resources to prepare for new courses or responsibilities. This process should conclude not less than one term before the transfer is to occur although this period may be shortened by mutual consent.
- After the reassignment or transfer process has concluded, the relevant deans and department heads should promptly notify all faculty in the impacted departments, that a faculty member is being transferred to or from their department.

BENEFITS FOR FACULTY AND STAFF

Washington and Lee offers an extensive range of health and life insurance benefits, retirement options, educational assistance programs, and other programs and services to staff and faculty. Because we want to attract and retain the highest-quality staff, we are committed to providing a competitive benefit package.

Enrollment in some benefit plans is not automatic. Although Human Resources tries to notify or remind employees when they become eligible to enroll in a particular benefit plan, it is the employee's responsibility to enroll in a timely manner. Employees should consult with Human Resources should any questions arise concerning eligibility for or status in a plan.

Although it is the intent of the University to continue the benefit plans described in this section, the University reserves the right to modify, amend or terminate any benefit plan, with or without notice. The summaries included below describe only the major features of the plans. In the event of any inconsistency between these summaries and the legal plan documents, the legal plan documents (located in the Office of Human Resources) will govern.

Benefits Philosophy

Washington and Lee is committed to providing its employees with a highly competitive benefits package that enhances the well-being of its employees and is consistent with the strategic objectives of the University. This befits its rich tradition as a top-quality institution of higher education and is important to attract and retain high-quality faculty and staff.

There are five underlying objectives that are considered when constructing the university-provided and university-assisted benefits program at Washington and Lee.

- Provide wise defaults for employees.
- Protect employees against catastrophic expenses or income interruptions.
- Provide a total compensation package that is strongly competitive with those of peer institutions.
- Comply with all relevant Federal and State laws.
- Manage the benefits package to get the highest total value for premium dollars and to ensure the continued financial soundness of the institution.

Process for Structuring Benefits at the University

Human Resources and the administrative units to which that department reports have the responsibility for the structuring of benefits at the University, as well as periodic reevaluation of their appropriateness. An Employee Benefits committee exists as an advisory committee to provide feedback to Human Resources and the administration from the employees' perspective. Click here for committee membership and to review the Benefits Philosophy Statement.

Benefit Categories

- ***Full-time***—Employees who work in positions that are approved for a minimum of 1,365 annual hours. Generally, employees in full-time positions work 35 or more hours per week for at least nine months of the year. Employees who have reduced their hours as part of an approved phased retirement arrangement remain categorized as full-time.

Undergraduate faculty in this category teach at least five courses per academic year and have other administrative responsibilities such as advising.

Law faculty in this category teach a minimum of three courses during the academic year (made up of 2, 3 or 4-credit bearing courses) and devote substantial time to one or more of the following responsibilities (as appropriate for their tenured, tenure-track or visiting status): student engagement outside of class; legal scholarship; faculty governance; legal clinic, immersion program, or other administrative duties; service to the law school, University, legal profession, and the public.

- ***Part-time with partial benefits***—Employees who work in positions that have been approved for less than full time, but at least 1,000 hours per year. Only certain benefits are provided for employees in these positions.

  Undergraduate faculty in this category teach 3 or 4 (3 or 4-credit hour courses) per academic year.

  Law faculty in this category teach a minimum of two courses during the academic year (made up of 3 or 4-credit bearing courses) and devote substantial time to one or more of the following responsibilities: legal clinics, immersion program, or other administrative duties; service to the law school, University, legal profession, and the public.

- ***Part-time***— Employees in this category cannot exceed 999 hours in each anniversary year and cannot exceed 29 hours of work per week. Only those benefits mandated by law are provided (FICA, workers' compensation, unemployment insurance).

- ***Seasonal*** **–** Employees hired for annually recurring work during specific times of the year. Examples include employees working in the University Store during book rush or in University Facilities on the summer custodial crew. Seasonal employees receive only legally mandated benefits (FICA, workers' compensation, unemployment insurance). While they are not limited to 29 hours per week, they may not exceed 999 hours in an anniversary year, and their employment period must be less than six months.

Domestic Partner Benefits
To the extent permitted by law and by the underwriting guidelines imposed by the insurance companies the University extends the same benefits to persons who meet the University's definition of domestic partner that the University extends to spouses of employees.

A domestic partner is an unrelated adult of the same or opposite sex of the employee with whom the employee is living in an intimate, long-term relationship with a commitment like marriage, in which the partners are jointly responsible for one another's welfare and share financial obligations. To qualify for benefits, the domestic partnership must have been in existence for at least six (6) consecutive months with the expectation that the relationship will continue indefinitely.

For more information and applicable forms, visit http://www.wlu.edu/human-resources/benefits/about-our-benefits-program/domestic-partner-benefits.

Benefit Premiums

Benefit premiums are deducted equally from paychecks over the course of the year. **Full-time non-exempt employees** whose primary position is less than 12 months a year are paid over the months actually worked – typically September through June. Benefit premiums are calculated for the entire plan year and deducted over the actual paydays – typically 18 - so benefit deductions are higher during that time to pay for benefit coverage during the months when there is no pay. Employees who do not return to work in the fall will owe benefit premiums for the months of July and August. The premium will be deducted from CTO payout if applicable or billed to the employee if CTO is not available.

Taxation of Health, Dental, Voluntary Vision and Life Insurance Premiums

In most cases, the employee's portion of the premium cost for health, dental, voluntary vision, and life insurance under $50,000 is paid with pre-tax dollars. This means that an employee will not pay federal or state income taxes or FICA tax on these premiums, thereby reducing the taxes paid by the employee.

Health Insurance

http://www.aetna.com
https://www2.optumrx.com

The University offers eligible employees and their eligible family members' enrollment in the university health and prescription drug plan.

A. Eligibility

- Full-time and part-time benefit-eligible employees.
- Spouses, dependents through the end of the month in which they turn age 26, and/or eligible domestic partners. Dependents are your naturally born and/or adopted children, stepchildren, or other dependents for whom you are the legal guardian. Coverage is available regardless of their student, marital or tax dependent status and regardless of their access to another employer sponsored group plan. When enrolling a non-IRS dependent, notify Human Resources as the share of the premium for them may be taxable.

B. Enrollment Options

Employees may select from one of four options: Employee Only, Employee and Spouse/Domestic Partner, Employee and Child(ren), or Family.

C. Cost

The University contributes between 70% and 78.5% of the premium based on the employee's salary tier. Premiums are available in the Benefits Guidebook located on the HR website.

In addition, the University offers to subsidize the cost of health insurance so that full-time benefit-eligible employees do not contribute more than 10% of their family income for health insurance premiums. Contact Human Resources for details. Discounts are also available for full-time and part-time benefit-eligible employees who participate in the University's wellness program.

D. When Coverage Begins

Coverage is available on the first day of employment.

E. Timely Enrollment is Necessary

Health insurance coverage is not automatic. New employees have 30 days to enroll, and coverage is retroactive to the first day of employment. After the initial enrollment opportunity, coverage may be added only during open enrollment (typically held in May with coverage to be effective July 1), or within 30 days of an eligible qualifying life event.

Dental Insurance

A. Eligibility

- Full-time and part-time benefit-eligible employees.
- Spouses, dependents through the end of the month in which they turn age 26, and/or eligible domestic partners. Dependents are your naturally born and/or adopted children, stepchildren, or other dependents for whom you are the legal guardian. Coverage is available regardless of their student, marital or tax dependent status and regardless of their access to another employer sponsored group plan. When enrolling a non-IRS dependent, notify Human Resources as the share of the premium for them may be taxable.

B. Membership Options

Employees have a choice of two plans, core or buy-up, and may select either an Individual membership, a membership for the employee and one legal dependent, or a Family membership.

C. Cost

The University contributes equivalent to the cost of an Individual core plan membership.

D. When Coverage Begins

Coverage is available on the first day of employment.

E. Timely Enrollment is Necessary

Dental insurance coverage is not automatic. New employees have 30 days to enroll, and coverage is retroactive to the first day of employment. After the initial enrollment opportunity, coverage may be added only during open enrollment periods (typically held in May with coverage to be effective July 1), or within 30 days of an eligible qualifying life event.

Voluntary Vision Insurance

The University offers eligible employees an opportunity to elect Blue View voluntary vision coverage through Anthem BlueCross BlueShield (Unicare). You may choose to receive care from a participating doctor (in-network) or from any non-participating doctor of your choosing (out-of-network).

A. Eligibility

- Full-time and part-time benefit-eligible employees.
- Spouses, dependents through the end of the month in which they turn age 26, and/or eligible domestic partners. Dependents are your naturally born and/or adopted children, stepchildren, or other dependents for whom you are the legal guardian. Coverage is available regardless of their student, marital or tax dependent status and regardless of their access to another employer sponsored group plan. When enrolling a non-IRS dependent, notify Human Resources as the share of the premium for them may be taxable.

B. Enrollment Options

Employees may select either an Individual membership, a membership for self and one legal dependent, or a Family membership.

C. Cost

The premium is paid entirely by the employee.

D. When Coverage Begins

Coverage is available on the first day of employment.

E. Timely Enrollment is Necessary

Voluntary Vision coverage is not automatic. New employees have 30 days to enroll, and coverage is retroactive to the first day of employment. After the initial enrollment opportunity, coverage may be added only during open enrollment periods (typically held in May with coverage to be effective July 1), or within 30 days of an eligible qualifying life event.

Life Insurance

The University offers a life insurance program with coverage directly related to the employee's salary. This helps to protect the value of the insurance from erosion due to inflation.

A. Eligibility

Full-time and part-time benefit-eligible employees.

B. When Coverage Begins

Coverage is available on the first day of employment.

C. Cost

The University pays 50% of the premium.

D. Amount of Insurance

Insurance coverage for full-time employees is two times annual salary rounded down to the nearest $1,000. The minimum coverage is $50,000 of insurance and the maximum coverage is $400,000 of insurance. The insurance coverage is adjusted, as appropriate, each July. Part-time benefit-eligible employees are eligible to elect a $10,000 policy.

The amount of insurance decreases to 65% of the above formula on July 1 of the year following attainment of age 65, and to 50% on July 1 following attainment of age 70.

A person with a terminal illness may be eligible to receive an advance of up to 80% of the face value of the life insurance benefit.

E. Timely Enrollment is Necessary

Employees can enroll within 30 days of employment without medical underwriting. After the initial offer, employees can apply during open enrollment or within 30 days of a qualifying life event but will be subject to full medical underwriting.

Supplemental Life Insurance

In addition to the basic life insurance benefit, eligible employees may purchase additional life insurance for themselves (up to $300,000), their spouse or domestic partner (up to $150,000), and their dependent children (up to $10,000).

Group Long-Term Disability

Should a lasting disability occur, the University's Long-Term Disability Plan (LTD) provides income for as long as the disability continues or until the maximum period of payment has been reached, whichever comes first. The University's long-term disability insurer has the right to review medical records and to assess whether the disability designation should continue.

A. Eligibility

Benefit-eligible employees.

B. When Participation Begins

Benefit-eligible employees are automatically enrolled in this plan after one year of qualifying employment. The one-year waiting period may be waived for employees who meet the following criteria:

- The employee was covered by group LTD coverage for at least 12 consecutive months prior to employment with W&L.
- The coverage ended no more than 90 days before starting employment with W&L.
- The employee must notify HR of their previous coverage within 30 days of their W&L employment start date.

C. Cost

The University pays the entire cost of employees' participation in this plan.

D. When Payments Begin

If approved by the University's long-term disability insurer, payments begin after 180 days of disability as that term is defined in the University's Long-Term Disability Plan.

E. Amount of Benefit Payments

The plan assures a monthly income benefit equal to 60% of the employee's pre-disability pay by supplementing disability income, if any, from Social Security or workers' compensation up to this 60% combined total (with a maximum monthly amount of $7,000). This benefit is taxable unless an employee chooses, upon enrollment, to pay taxes on the premium instead. This income payment may continue until your normal retirement age under the Social Security Act, or to somewhat later if disabled on or after age 65.

If the employee is receiving university contributions to the defined contribution retirement plan before the onset of a disability, the plan will, from the date long-term disability benefits begin, contribute 10% of the employee's former monthly salary to the retirement annuity plan, up to a monthly maximum of

$1,167, until the employee's disability income payments end. Thus, through the combination of income payments and annuity contributions, the plan provides an income for life.

F. Cost-of-Living Increases

A cost-of-living adjustment (COLA) will be made to the monthly benefit payable under this plan on July 1 if the individual continues to be disabled, is not working on that date, and has been disabled for all of the 12 months before that date. Payments will increase on that date by the lesser of the current annual increase in the Consumer Price Index or 3%. Social Security has traditionally increased its disability payments annually, and future increases in an individual's Social Security payments do not reduce the benefits payable under this plan.

Personal Income Protection Benefits

Full-time benefit-eligible employees may purchase a Personal Income Protection benefit through MetLife to provide more comprehensive coverage in the event of a disability. This plan protects a portion of an individual's base salary and is portable should the employee leave W&L. Benefits are tax-free when they are received.

Identity Theft Protection

The university offers identity theft protection through payroll deduction through LifeLock. You can choose to purchase protection for you or for yourself and qualifying family members. The premium is paid with post-tax dollars so you can enroll or cancel at any time.

Metlife (Pet Insurance)

The university offers pet insurance through Metlife. Visits to the vet can be unpredictable. According to the 2022 Pet Parent Pulse Poll, most pet parents are facing rising care costs to keep their pets happy and healthy, with 54% of owners worried about being able to care for their pets in the future with economic uncertainties. A small monthly payment can help you prepare for those unexpected vet expenses down the road.

Flexible Spending Accounts

Benefit-eligible employees are eligible, upon hire, to participate in Health Care and Dependent Care Flexible Spending Accounts that enable an employee to pay for certain health care and dependent care expenses with pre-tax dollars, thus eliminating federal and state income taxes and Social Security (FICA) tax on these expenses. The amounts in each account must be decided upon initial benefits enrollment or during annual open enrollment and cannot be changed during the year except in certain circumstances prescribed by law. Up to $640 in a healthcare FSA at the end of the plan year can be carried over to the following plan year. Funds more than $640 are forfeited. The maximum that can be contributed to a Dependent Care FSA is $5,000 for the 2024-2025 plan year. The University will match up to $500, therefore employees may elect up to $4,500.

In the event of an employee's death or separation from employment, if you have spent less than you have contributed, you will be offered continuation of coverage through COBRA. If you do not elect continuation coverage, you will have 90 days to spend down the balance in the account for charges incurred before or on the date of the qualifying event.

Each year during open enrollment, employees determine whether to participate and elect their contribution to one or both accounts. Details on the programs are available on the Office of Human Resources website at the link above.

Health Advocate
Benefit-eligible employees are automatically enrolled in Health Advocate, the nation's leading health-care advocacy and assistance company, serving millions of Americans nationwide. Health Advocate helps employees, and their families navigate the complexities of the healthcare, eldercare, and health-insurance systems. The program is centered around a team of personal health advocates, typically registered nurses, supported by medical directors and benefits specialists who provide highly personalized services ranging from addressing a host of clinical and insurance issues to providing one-on-one support for improving health and well-being.

In addition, the GENERATIONS Aging Adult & Caregiver Support Program provides employees and their aging loved ones with unlimited access to a dedicated Nurse Coach who will help navigate the healthcare system, connect with well-being and emotional support, and access resources to help balance work and life.

The cost for these services is fully funded by the University. Coverage is extended to an eligible employee's spouse or domestic partner, dependent children, parents, and parents-in-law.

Employee Assistance Plan
The Employee Assistance Plan (EAP) offers professional and confidential counseling to benefit-eligible employees and their family members. EAP services include, but are not limited to, stress management, substance abuse, depression, anger, anxiety, and grief. Experienced counselors are available 24 hours a day, seven days a week by phone. When you call, a counselor will assess the situation, provide short-term counseling when appropriate, and assist you with scheduling visits with their staff or other counselors or resources as mutually agreed upon. The first four sessions per life situation are free. Additional sessions, if necessary, are billed to your health insurance.

Savi (Student Loan Repayment/Forgiveness)
W&L employees have access to a financial wellness service that helps find the best federal repayment and loan forgiveness programs for your financial situation. Brought to you through TIAA and Savi, this service not only helps strengthen your financial footing in the short-term, it also helps lower your monthly student loan payment and positions you for student loan forgiveness. W&L pays the fee for you to use this service. The cost for your dependents to use the service is $70.

Qualifying Life Events
Per Internal Revenue Service (IRS) rules, employees enrolled in pre-tax benefit plans may only make elections or changes to their plans once per year. Because of these rules, your benefit elections will be binding through the plan year. However, you may make changes to your election if you experience one or more of the following special circumstances, which are known as **"Qualifying Life Events"**:

- Marriage
- Birth, adoption, or placement for adoption of an eligible child
- Divorce, annulment of marriage or change in domestic partner status
- Loss of spouse's job or change in work status (when coverage is maintained through spouse's plan)
- A significant change in your or your spouse's health coverage that is attributable to your spouse's employment
- Death of spouse or dependent
- Loss of dependent status

- Becoming eligible for Medicare or Medicaid during the year
- Receiving a Qualified Medical Child Support Order (QMCSO)

Employees have only 30 days following a qualifying life event to make benefit changes. The qualifying life event must correspond to the requested benefit change.

Benefit changes that are requested due to a "change of mind" cannot be allowed until the next Open Enrollment Period.

COBRA
The Federal Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA) provides eligible employees and their qualified dependents the opportunity to continue coverage under the University's health, dental, voluntary vision, medical flexible spending account, wellness program, and EAP, when a qualifying event would normally result in loss of benefit. Under federal law, enrollment may be continued up to 18, 29 or 36 months depending on the qualifying event. The employee is responsible for paying 100% of the group premium rate plus a 2% administration charge.

Educational Grant Program for Eligible Children
After employees have completed five consecutive years of full-time employment, their dependent children are eligible for an educational grant from the University. "Dependent" is defined by the IRS code and is verified from five years of employee tax records. The educational grant is awarded for up to four years of post-secondary undergraduate education. Eligible children may receive only one grant, even if both parents work for the University. Grant requests should be directed to the Treasurer's Office.

Employees who were classified as full-time on or before June 30, 2006 and have remained in that status since June 30, 2006, the University will pay the lesser of 90% of the tuition of the institution that the dependent child is attending, or 90% of Washington and Lee University's undergraduate tuition. The benefit may be reduced by scholarship and grant assistance that the child receives outside of Washington and Lee University. There are instances where an outside scholarship would fund room, board, and fees where the University would not reduce its tuition-grant benefit. In no case will the other assistance and Washington and Lee University's grant exceed the value of tuition, room, and board of the dependent's institution. The recipient is eligible for up to four years, or the equivalent, of undergraduate study at an accredited institution of higher education. The recipient must be under the age of 25 to receive this grant. For a dependent to be eligible for this grant, the employee must have at least five consecutive years of full-time employment and be full time at the time the benefit is to be received.

Employees who have been classified as full-time after June 30, 2006, the University will pay the lesser of 50% of the tuition of the institution that the dependent child is attending, or 50% of Washington and Lee University's undergraduate tuition. All other terms and conditions, as described above, continue to apply.

Tuition Remission for Undergraduate Study at Washington and Lee University for dependents whose parent(s) meet the eligibility guidelines outlined above will be equal to 90% of Washington and Lee's undergraduate tuition.

Tuition Exchange Programs
The University participates in the Associated Colleges of the South and the Great Lakes Colleges Association Tuition Exchange Program. Dependents whose parent(s) meet the eligibility guideline as outlined in the Educational Grant Policy may apply for participation in the exchange. Application does not guarantee a spot in the program, however. Benefits are subject to the exchange agreement through ACS. Contact the Office of Financial Aid for more details on this program.

Retirement Benefits

Social Security
http://www.ssa.gov
The mandatory Social Security tax (FICA) deducted from an employee's paycheck is matched by the University.

Defined Contribution Retirement Plan
http://www.tiaa.org
https://nb.fidelity.com/public/nb/atwork/home
Social Security benefits are not substantial enough to be an individual's sole or primary source of retirement income; therefore, the University strongly encourages its employees to participate in the Washington and Lee University Defined Contribution Retirement Plan. The University offers retirement savings plans through TIAA and Fidelity.

All employees are eligible, upon employment, to open an account and contribute up to the IRS maximum. There are several attractive features, such as loan, hardship, and in-service withdrawal options (all subject to qualifications). W&L students employed by the university cannot participate during the academic year but can participate if employed during the summer.

After two consecutive anniversary years of working 1,000 hours or more for Washington and Lee University, employees are eligible for a university contribution. Time worked at another higher educational institution in each of the two 12-month periods just prior to employment by W&L may count toward this waiting period. If you believe you meet this condition, contact us for a form your former employer will need to complete. If you return the form within 90 days and we determine the waiting period doesn't apply, we will contribute retroactive to your first day of employment.

The University contributes an unmatched 5% to the plan and matches an employee's contribution up to 5% (up to the IRS maximum allowable). Additional catch-up contributions may be available for employees older than 50.

Employee contributions may be made tax-deferred or post-tax ROTH up to permissible federal and state limits. For plan information, go to http://www.wlu.edu/human-resources/benefits/retirement-savings-plan.

Additionally, Personal Financial Planning is available at no cost to benefit-eligible employees through SageView, an independent investment advisory firm.

Home Loan Benefit
Full-time employees are eligible to apply for university housing loans. Exempt full-time employees will be eligible for the Home Loan Program immediately upon their start date of employment. Non-exempt full-time employees will be eligible for the Home Loan Program 18 months following the date

they begin full-time employment at the University. These housing loans may be used to purchase, build, or improve a principal residence within 50 miles of 204 W, Washington St.

Computer Purchase Program

The University offers interest-free loans to purchase a personal computer and printer. Employees must have completed six or more months in a benefit eligible position. Loans may not exceed $4,000 and must be re-paid within 24 months through payroll deduction. For more information contact Human Resources.

PAID TIME OFF/LEAVES

Combined Time Off (CTO)

CTO can be used for vacation, personal illness, doctor's appointments, and other personal reasons, including care of immediate family.

Departments establish practices for providing notice of absences from work and for scheduling time away. Some departments whose workload is directly dependent on students being on campus are encouraged to take their time off when students are not in residence. Other departments schedule time off by mutual arrangement based upon the person's need and the department's workload.

Earning CTO

- Full-time benefit-eligible staff accrue CTO the last day of each pay period.
- CTO does not accrue when an employee has reached the maximum accrual.
- CTO does not accrue when an employee is on the following leaves: unpaid leave, short-term disability, or military leave.
- Employees who are in the "part-time with partial benefits" category receive 30 hours of CTO upon their part-time benefit-eligible employment date and each part-time benefit-eligible anniversary date thereafter. The maximum accrual for this employment category is 45 hours.
- Employees (exempt and non-exempt) who work less than 12 months or have a prorated weekly schedule receive a prorated accrual based on the months/hours scheduled to work.
- Faculty appointed to term administrative roles, such as Assistant/Associate Dean, Assistant/Associate Provost, and Directorships do not participate in the CTO Program.
- Staff Assistant Coaches do not participate in the CTO Program.

Using/Recording CTO

- CTO can only be used during the months in which the employee is scheduled to work.
- Non-exempt employees should record actual hours used. Exempt employees should record CTO for full days away or half days away.
- Employees may not elect to take leave unpaid if accrued time exists in their CTO bank without prior approval from Human Resources, and only then for exceptional circumstances.
- To learn more about recording CTO, refer to this page for Workday job aids under Time Entry and Time Off.

CTO to SLR Transfer

- To ensure employees who are at or near their CTO maximum continue to earn CTO each pay period, Workday automatically transfers hours from the CTO plan to the SLR plan when you are within 20 hours of your CTO maximum provided the SLR plan is not at its maximum accrual of 60 days.
- For 35 hour/week employees, the transfer occurs when your CTO balance is more than 295 hours.
- For 40 hour/week employees, the transfer occurs when your CTO balance is more than 340 hours.

CTO Payout Upon Separation

- Employees who leave the University will be paid for unused CTO up to a maximum of 20 days if CTO has been recorded appropriately throughout employment.
- Individuals who serve as President, Provost or Dean and move to a Faculty position upon completion of that role, will be paid for unused CTO up to a maximum of 20 days.
- Full-time benefit-eligible employees who transfer to a part-time with partial-benefits position will have 90 days to use CTO hours more than 45 hours. On day 90, a balance more than 45 hours will be forfeited. Employees will not earn additional CTO until their next anniversary date.

CTO Accrual Chart

Employee Weekly Schedule	Accrual if Paid Bi-Weekly	Accrual if Paid Monthly	Total CTO Hours Accrued Per Year In Hours (Days)	Maximum CTO Hours Permitted In Hours (Days)
35	6.73	14.58	175 (25)	315 (45)
40	7.69	16.67	200 (25)	360 (45)

Sick-Leave Reserve (SLR)

Full-time, benefit-eligible staff receive five days of SLR upon employment. Additional time credited to SLR is the result of an automatic transfer from the CTO plan when an employee is nearing the CTO maximum.

Part-time with partial benefits employees do not receive SLR. They receive 30 hours of CTO upon their part-time benefit-eligible employment date and each anniversary date thereafter to be used for paid time off such as vacations and illnesses.

SLR can be used for personal illnesses or doctor's appointments, doctor's appointments for immediate family members, or to care for an ill member of the immediate family. Immediate family includes spouse or domestic partner, parents, grandparents, stepparents, children, grandchildren, siblings, brothers/sisters-in-law, sons/daughters-in-law, and father/mother-in-law. SLR can also be used to cover the first ten working days of an employee's extended absence due to a serious illness or injury. *After the first ten working days, eligible employees will be covered by the University's Short-Term Disability plan for up to six calendar months.*

The number of days in SLR is capped at 60 to cover the 12 weeks allotted for family and medical leave in circumstances when the University's Short-Term Disability plan does not apply. Employees who leave the University are not paid for time in their Sick-Leave Reserve.

Bereavement Leave

Bereavement Leave provides time for grieving the loss of a close family member and for the purpose of planning and attending the funeral/memorial of a close family member. Paid leave is arranged directly with the supervisor. Supervisors should consult Human Resources for requests for extended bereavement leave.

Requests for paid leave at the time of a death of a person outside the immediate family should be considered on an individual basis.

Holidays
The University observes the following scheduled holidays: New Year's Day, Memorial Day (provided classes are not in session), Juneteenth, Independence Day, the week of Thanksgiving, and two full weeks of winter holiday. (Employees in "part-time with partial benefits" positions are eligible for five of these holidays as indicated by an asterisk on the holiday schedule and provided they would have normally been scheduled on those designated days).

Religious Holiday Observance
Our university community includes individuals with various religious beliefs, and it is important to recognize and respect the observance of religious holidays. While the operating needs of the department must be met, supervisors should make practical accommodations to work schedules for individuals who request time off in advance for religious holidays. If the time away from work for a religious observance is approved, an employee may use accrued CTO time or supervisors may rearrange work schedules during the week in which the religious practice occurs.

Short-Term Disability
Employees who are out or who expect to be out longer than 10 working days for an illness or injury should notify Human Resources as soon as the absence or need for absence is known. Human Resources will work with the employee to complete paperwork (including FMLA paperwork, if applicable) and will work with the employee and the employee's healthcare provider throughout the absence to assist the employee in returning to work.

To be eligible for short-term disability, an employee must also be eligible for group long-term disability. The first 10 days of an extended absence are charged to an employee's SLR and/or CTO, or will be unpaid if the employee has no accrued time available. Days 11 through six calendar months are, in most cases, paid through the short-term disability plan as long as necessary paperwork, including appropriate medical documentation, is submitted and approved.

CTO does not accrue while on short-term disability.

Workers' Compensation
The University pays the entire cost of workers' compensation insurance covering all employees who sustain work-related accidents or illnesses. If an employee is injured on the job, or if an employee believes they have a work-related illness, regardless of how minor the injury or illness, the employee must report this immediately to their supervisor. The supervisor reports all accident/incidents/"near-misses" via the Safety Incident Report in Workday within 24 hours. If the supervisor fails to report the injury, the employee should report the injury to Michael Jennings, Director of Environmental Health and Safety, 540-458-8175, mjennings@wlu.edu within 24 hours. If the employee is placed on restricted or limited duty by a healthcare provider, the employee and/or supervisor must inform Michael Jennings, and Andrea Velasquez velasqueza@wlu.edu in Human Resources. Human Resources must also be contacted if an injury results in a loss of work time.

Workers' compensation insurance pays for authorized medical bills and a portion of an employee's salary (up to 66.67% up to a maximum salary cap) when the employee is absent due to an approved work-related injury or illness.

- A benefit-eligible employee who is out of work for an approved work-related injury will receive 100% of their salary. The employee must, in turn, remit to the University any workers' compensation supplement received.
- A non-benefit-eligible employee who is out of work for an approved work-related injury will receive 66.67% of their wages. (For variable hour schedules, the actual amount will be calculated based on an average of the weekly hours worked for the prior 12 months.) The employee must, in turn, remit to the University any workers' compensation supplement received.

Return to Work Program
Washington and Lee's Return to Work Program supports employees recovering from workplace injuries or non-work-related conditions by providing temporary, modified duty assignments, based on healthcare provider recommendations, when possible without causing undue hardship for the university. This may involve adjusting the employee's current role or offering an alternate position. Employees must provide a healthcare provider's statement detailing the nature, extent, and duration of their limitations. Participation is limited to 12 consecutive weeks per injury/illness, with exceptions allowed based on the healthcare provider's assessment or ADA requirements. The Office of Human Resources administers the program and provides support to both employees and supervisors.

Family and Medical Leave
Washington and Lee University provides family and medical leave in accordance with the Family and Medical Leave Act (FMLA) of 1993. Eligible employees are entitled to take unpaid, job-protected leave for qualifying family and medical reasons, with benefits continued, if applicable, under the same terms as if the employee had not taken leave. For full details, please visit the Department of Labor's FMLA website. For questions or to determine eligibility, contact the Manager of Work-Life and Employee Leaves in Human Resources.

Jury Duty
The University recognizes employees' civic responsibility to serve on juries and continues employee compensation while they are performing this duty. There is no deduction for compensation received from the Commonwealth of Virginia.

Court Testimony
Time off to testify in court will be charged to CTO or can be made up during the same workweek. If an employee is testifying on behalf of the University, that time will count as paid time.

Election Service
Any employee who serves as a member of a local election board, or officer of election is not required to use CTO because of absence due to providing this service. Click here for additional information can be found here.

Military Leave
The University is committed to supporting its employees' fulfillment of their annual, several-week military training/reserve obligation, as well as those called to active-duty military service.

The University will pay the difference between the employee's regular base salary and base military pay for training and/or active duty. Alternatively, the employee may choose to use CTO for the training and receive full pay from W&L in addition to the military pay.

If an employee is called to active-duty military service, the University will afford all reemployment rights, compensation and benefits provided for by the Uniformed Services Employment and Rights Act of 1994 and other applicable federal or state law. For specific information, contact Human Resources.

CTO does not accrue while on military leave.

Parental Leave – Faculty and Staff

Parental leave is available to all benefit-eligible employees and benefit-eligible faculty with voting rights. Leave is available immediately following the birth (including through surrogacy) or placement of a child through adoption or foster care. This policy cannot be used, however, in the event of adoption of a spouse's or domestic partner's child.

Washington and Lee abides by the Pregnant Workers Fairness Act (PWFA), the Virginia Human Rights Act – Reasonable Accommodations for Pregnancy, and the Providing Urgent Maternal Protections for Nursing Mothers (PUMP) Act. Please see the Parental Leave webpage for further details.

Primary Parental Leave: Eight consecutive weeks of paid leave will be provided to a primary caregiver, to be taken immediately upon the arrival of a child. A primary caregiver is defined as a person who has primary responsibility for the care of a child following the birth or the child coming into the custody, care, and control of the parent for the first time.

Secondary Parental Leave: Four weeks of paid leave (which may be taken intermittently) will be provided to a secondary caregiver, to be used anytime within the first 12 months following the arrival of a child. A secondary caregiver is defined as a person who has parental responsibility for the child but is not the primary caregiver.

Visit the HR website for additional policy information.

Other Unpaid Leaves of Absence

Requests for other unpaid personal leave should be directed to the employee’s supervisor. The dean or vice president and the Executive Director of Human Resources must review requests for such leave. In reviewing the employee’s request, departmental need and workload, seniority, overall work record, and the specific nature of the request are among the factors considered.

Continuation of benefits should be discussed with Human Resources prior to requesting unpaid leave. When a leave of absence ends, every reasonable effort will be made to return the employee to the same position, if it is available, or to a similar available position for which the employee is qualified. W&L cannot guarantee reinstatement in all cases. If an employee fails to return to work promptly at the expiration of the approved leave period, the employee will be deemed to have resigned.

CTO does not accrue while on unpaid leave of absence.

PERFORMANCE AND PROFESSIONAL DEVELOPMENT

The Purpose of PATH

W&L's PATH is a developmentally focused collaboration between employees and their manager. The purpose of this process is to:

- Prompt employees to articulate work-related aspirations for the year and prioritize aspects of their work
- Provide built-in opportunities for employees to evaluate their own performance, articulate strengths, and receive feedback about performance
- Provide defined opportunities for supervisors to consider performance broadly, offer praise, constructive feedback, and learn about their employees' developmental interests
- Offer employees a safe and constructive place/time to learn where their skills can improve and/or grow
- Guide employees towards their greatest potential and job satisfaction

Expectations of Employees and Managers

With regards to the annual PATH process, employees are expected to:

- Become familiar with Competencies
- Work with supervisor to develop 1 to 5 goals each year
- Review and reflect on the essential functions of their role
- Work with supervisor to identify career paths and training opportunities to develop skills or competencies
- Think about the key strengths they bring into their role
- Remain open to considering and learning about where they can grow and develop

With regards to the annual PATH process, managers are expected to:

- Provide clear performance expectations
- Ensure alignment of employee goals with the department's, division's and University's
- Focus on the full year of performance to recognize areas where employees are performing well
- Provide employees with specific, constructive, objective, and respectful feedback about areas where employees can grow and develop
- Identify and support training and professional development needs
- Show genuine interest in identifying ways the employee can contribute in meaningful, fulfilling ways

Details about PATH elements, annual timelines, and rating definitions can be found at https://my.wlu.edu/human-resources/path.

Performance Improvement

If a supervisor determines that employee performance requires improvement, the supervisor should discuss the performance concerns with the employee and identify active steps to work towards improvement. In some instances, a written warning or a performance improvement plan will be developed by the supervisor and shared with the employee. These employee counseling documents include a description of the performance and/or behavioral concerns and detailed expectations for future change in the employee's performance or behavior. Performance documentation is retained in the employee's Workday personnel file.

Human Resources is available to support managers in performance documentation to identify concerns and provide clarity in expectations. Employees who receive a written warning or performance improvement plan are expected to plan and implement ways to build the skills and competencies necessary to successfully perform their role, and to maintain regular communication with their supervisor about their plans and their progress. HR is available as a resource to both employees and their managers to support performance improvement.

When an employee receives an overall PATH performance rating of "Approaching Expectations" or "Does Not Meet Expectations," the employee may be required to engage in a mid-year PATH review in the following year. It is encouraged that the employee's PATH goals for the following year are developed in alignment with their supervisors' expectations for improvement.

If known performance concerns exist, an employee may be ineligible for transfer or promotion to another position and may be ineligible for re-hire. Failure to meet expectations for improvement, as expressed by the supervisor in an employee counseling form may result in disciplinary action, up to and including termination. Disciplinary action is generally progressive and depends on the circumstances and is at the discretion of the University.

Professional Development

Washington and Lee University is committed to continuous learning. We believe that professional development is a shared responsibility and collaboration among the employee, the supervisor, and W&L. Remaining current in the field and keeping up with changes and new technology requires regular training and development. Employees should be prepared to acquire new skills to remain competitive and successful in their current position, and managers should support employees in accessing timely and appropriate development opportunities to meet their learning needs.

The University endeavors to support employees' professional development through the following programs:

Technology Education
Information Technology Services offers face-to-face training and consultation on most University-licensed software systems, as well as online tutorials for Microsoft Office, Adobe Creative Suite, and other systems. If you are interested in any of these services, contact the ITS Information Desk in Leyburn Library at x4357, or by sending an email with your request to help@wlu.edu.

On-Campus Workshops
The University offers on-campus classes and seminars throughout the year on a variety of topics including, but not limited to, supervisory skills, communication, retirement planning, computer classes, wellness activities, and University policies. Employees are invited to register for these classes,

which are advertised as they are developed. Managers are encouraged to support employee attendance at these programs - many of which are intended to help the individual achieve personal or professional goals or help the department achieve its goals. Attendance at on-campus programming is also an important part of building employee engagement.

Compensation When Attending On-campus Workshops and Seminars

Employees will be compensated for attendance at on-campus professional and personal development workshops and seminars that occur during their regular scheduled work hours. With supervisory approval, employees may be compensated for attendance at sessions that are held when they are not scheduled to work, in compliance with Federal wage and hour laws and regulations. In such instances, the employee's work schedule for the week might be adjusted so that they do not work more than their regularly scheduled hours.

Auditing Courses

With the approval of the faculty member and the employee's supervisor, an employee may audit courses at the University for no credit and no official record. There is no charge for this privilege, but employees are expected to make up lost work time.

Tuition-Free Courses

Employees in benefit-eligible positions who have a high school diploma or the equivalent, their spouses/partners, and W&L retirees, are eligible to take up to two Washington and Lee undergraduate or law courses per term for credit without any tuition charge. Additional information about this opportunity can be found at http://go.wlu.edu/tuition-free-courses .

Employee Continuing Education Program

Washington and Lee University believes that investments in ongoing employee education contribute to a high level of job satisfaction and improves institutional productivity. The University offers a continuing education program for work-related certification, licensure, and educational opportunities at accredited institutions. Consideration will be made for employees seeking to obtain a college level degree, attend educational courses not leading to a degree, or to attend educational courses in preparation for work-related certification or licensure. Funds may be available for courses that will benefit the employee in their current position, improve job skills, or position the employee for advancement opportunities at the University. Additional information including eligibility and policy details is located at http://www.wlu.edu/human-resources/programs-and-events/employee-learning-and-professional-development.

WORK-LIFE PROGRAMS

Work-Life refers to resources and services that help members of the campus community manage and balance their personal lives and obligations with their professional lives and duties. Contact the Manager of Work-Life in Human Resources for additional information.

Dependent Care Resources
W&L provides a variety of dependent care resources, including the Caregivers ERG and the following:

- **Child Care Resources**
  There are a variety of year-round childcare options, along with summer programs both on campus and in the local community. The University has strong partnerships with Woods Creek Montessori and Yellow Brick Road. Employees with preschool-age children may be eligible for sliding scale scholarships at Woods Creek Montessori, while the University supports the infant/toddler program at Yellow Brick Road.

  Each year, Human Resources compiles a list of area summer camps for employee reference.

- **Elder Care Resources**
  See the Elder Care webpage for numerous resources available to employees, including the Health Advocate Generations Program, available free of charge.

- **Lactation Resources**
  The University supports lactating employees by providing reasonable break time and a private place for an employee to express milk for their nursing child for one year after the child's birth (in accordance with the PUMP Act).

  Multiple lactation rooms are available on campus; see the Nursing Parents webpage for more information. Refrigeration may be provided to employees for the safe storage of expressed milk during the workday.

  Nursing employees are encouraged to discuss their individual needs with their supervisor. They may use the designated lactation rooms for pumping, or their own office, if private. If the employee's workspace lacks privacy, employees are encouraged to discuss alternatives with Human Resources.

Dual Career Resources
Washington and Lee provides job search information to the partners of new employees. While we cannot guarantee placement, we will work with you to explore local options. Applicants may contact the director of talent acquisition for dual-career assistance. Applicants are also encouraged to initiate conversations with department chairs or supervisors during the interview process. Services are extended for one calendar year to the spouse/partners of employees. Services for spouse/partners beyond the one year outside of this are available by request if dual career caseload allows.

Employee Resource Groups
See Employee Engagement Events

Flexible Work Schedules
See Flexible, Hybrid and Remote Work Arrangements

Local Food Options

A CSA subscription offers fresh, locally grown produce delivered regularly, supporting sustainable farming while enjoying seasonal, high-quality ingredients such as produce, eggs, cheeses, and/or meats.

Wellness Program (Live Well W&L)

Washington and Lee is committed to a work environment that promotes healthy lifestyles and enhances a culture of wellness on campus. Through health promotion, educational programming, and a full array of athletic and recreational facilities, employees have unique opportunities readily available. Financial incentives are available for benefit-eligible employees and their spouses/partners who participate in the wellness program. For a spouse/partner to receive the wellness incentive, the employee must participate and meet minimum wellness goals.

UNIVERSITY-SPONSORED EMPLOYEE ENGAGEMENT EVENTS

The University recognizes and honors employees' work and dedication throughout the year. The following annual events are designed to engage employees and celebrate their contributions to the campus community.

Fall Academy
Fall Academy is two weeks of workshops, discussion panels and information sessions designed to help faculty and staff prepare for the upcoming academic year.

Live Well W&L Employee Wellness Fair (Fall)
Annual wellness fair with approximately 50 local vendors promoting health and wellness resources and education, flu/COVID shots, health screenings, etc.

Winter Academy
Winter Academy is a condensed version of Fall Academy that begins the week of fall semester exams.

Employee Enrichment Activities (throughout the year)
Enrichment Experiences are designed to connect employees with one another and the Lexington community while providing opportunities for fun, learning, growth, and professional development. These activities are offered throughout the year. All W&L employees are invited to participate in Enrichment Experiences.

Employee Recognition Banquet (April)
The University recognizes and honors staff who have reached certain service milestones. Awards are presented to employees in recognition for years of service beginning at five years and at every five-year milestone beyond. In the spring, a special luncheon is held in their honor. Staff who are retiring during that fiscal year are also honored.

Administrative Professionals Day (April)
Each April we recognize Administrative Professionals for the work they do throughout the year.

Live Well W&L 5K Fun Run/Walk (April)
Each April, Live Well W&L hosts a 5K in which employees, retirees, and spouses/partners can either walk, run, or volunteer to help. It's a wonderful opportunity to connect with the W&L community.

FINALE - Employee Appreciation Picnic (May)
An annual picnic is held to show appreciation to employees for their contribution to the University's mission. Family members are invited to join in the festivities, which include food, games, door prizes and other activities.

Employee Resource Groups
Washington and Lee recognizes the value of fostering a strong sense of community among faculty and staff. To support meaningful connections, the Provost's Office and Human Resources have partnered to offer Employee Resource Groups (ERGs), which bring together employees with shared interests and experiences. ERGs are voluntary, employee-led groups open to all faculty and staff. ERGs strengthen our University community by acting as a platform for employees to connect, share experiences, and contribute to a supportive workplace environment.

While ERGs are employee-led, the University provides funding and infrastructure to support robust events and programming. All faculty and staff are welcome to attend and participate in any ERG.

- Alumni: Alumni Engagement Sponsored (by invitation)
- Asian, Asian American, and Pacific Islander
- Black, African American, and the African Diaspora
- Caregivers
- Disabilities and Chronic Conditions
- Indigenous and Native American Cohort
- International / Dual Citizen
- Latine / Hispanic
- Military (open to all veteran and active-duty service members, along with ROTC cadets)
- Newcomers: sponsored by Human Resources (activities are open to benefit-eligible employees hired in the last three years by invitation)
- Pride at W&L
- Women

These ERGs have been established based on employee interest and participation. We welcome hearing about ideas for the ERGs or your interest in developing a future ERG; please contact the Executive Director of Human Resources or the Associate Provost for Faculty Development.

LEAVING WASHINGTON AND LEE

Death
To help protect an employee's family from the sudden loss of earnings, the University provides a comprehensive program of survivor benefits.

403(b) Retirement Account
The full value of an employee's retirement annuity accumulation is paid to any named beneficiaries.

Health Insurance
An employee's spouse and children may remain in the University health insurance plan through COBRA continuation for up to 36 months. The University continues to pay its portion of the premium for the first year. If the employee had met retirement eligibility at the time of death, other benefits may be available to the surviving spouse.

Dental and Vision Insurance, and FSA Participation
The Federal Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA) provides eligible dependents the opportunity to continue coverage under the University's dental and vision insurance plans and flexible spending account (under some circumstances) when a departure from employment would normally result in loss of benefit. Enrollment may be continued up to 18, 29 or 36 months depending on the qualifying event under federal law. If continued coverage is elected, the enrollee pays 100% of the group premium rate plus a 2% administration charge.

Basic and Supplemental Life Insurance Benefits
Coverage for an enrolled spouse, partner or children may continue upon request. Policies may be continued as term policies or converted to whole life policies.

Educational Grant for Children
If an employee worked full-time for five or more consecutive years immediately preceding death, the employee's eligible children will remain eligible for the educational grant benefit.

Home Loan Program
The Treasurer's Office will work with the Executor of the Estate or whomever has been identified to handle the deceased employee's financial matters to determine a timeframe for the mortgage to be satisfied.

Disability Prior to Reaching Retirement Eligibility
See Information Related to Separation of Employment for additional information.
Should a lasting disability occur, the University's Group Long-Term Disability plan provides income for as long as the disability continues or until the employee is eligible for retirement benefits. Details are available from the Office of Human Resources.

403(b) Retirement Account
If you have an account, contact TIAA or Fidelity for your options.

Health Insurance
A participant may continue coverage through COBRA for up to 18 months from the date long-term

disability benefits begin, as determined by the University's long-term disability insurer. The University will continue to pay its portion of premium attributable to the employee only.
If the participant is approved for Social Security Disability and notifies Human Resources, COBRA coverage may be extended an additional 11 months (for a total of up to 29 months COBRA coverage).

Dental and Vision Insurance, and FSA Participation
The Federal Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA) provides employee and their eligible dependents the opportunity to continue coverage under the University's dental and vision insurance plans and flexible spending account (under some circumstances) when a departure from employment would normally result in loss of benefit. Enrollment may be continued up to 18, 29 or 36 months depending on the qualifying event under federal law. If continued coverage is elected, the enrollee pays 100% of the group premium rate plus a 2% administration charge.

Life Insurance
If an employee becomes disabled before age 60, as determined by the University's long-term disability insurer, the employee can submit a waiver of life insurance premium form to continue the employee's life insurance coverage at no cost. If the participant is designated disabled by the group life insurance carrier, the benefit may continue to age 70. All other benefit reductions outlined in the plan document apply. Contact the University's group life insurance carrier for more information.

Note: The term "disability" under the University's Long-Term Disability Plan does not necessarily indicate a corresponding "disability" for purposes of the Americans with Disabilities Act (ADA) or with Social Security Disability. Whether an employee is a qualified employee with a disability for purposes of ADA will be assessed on a case-by-case basis.

Educational Grant for Children
If an employee has worked full-time for five or more consecutive years immediately preceding separation due to disability, the employee's eligible children will remain eligible for the educational grant benefit provided that the disabled employee continues to meet the disability definition under the University's long-term disability program.

Home Loan Program
If departing from the university on long-term disability, employees holding university mortgages must contact the Treasurer's Office to setup automatic payments from checking or savings to continue the loan. All other conditions will remain the same.

Resignation
See Information Related to Separation of Employment for additional information.
Employees should notify their immediate supervisor of the departure in writing, and the supervisor must notify HR via Workday. Non-exempt employees are expected to provide at least two weeks' notice, and exempt employees are expected to provide four or more weeks whenever possible. Employees who fail to provide the recommended departure notice to their supervisor may be ineligible for future employment at the University.

An employee's actual date of separation must be the last day worked and cannot be extended by the use of CTO or SLR. Employees who leave the University will be paid for accrued CTO up to a maximum of 20 days as long as CTO has been recorded appropriately throughout employment. Unused SLR is not paid upon separation.

403(b) Retirement Account
If you have an account, contact TIAA or Fidelity for your options.

Health, Dental, and Vision Insurance, and FSA Participation
The Federal Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA) provides eligible employees and their qualified dependents the opportunity to continue coverage under the University's health and dental insurance plans and flexible spending account (under some circumstances) when a departure from employment would normally result in loss of benefit. Enrollment may be continued up to 18, 29 or 36 months depending on the qualifying event under federal law. If continued coverage is elected, the employee pays 100% of the group premium rate plus a 2% administration charge.

Basic and Supplemental Life Insurance Benefits
You may continue these term policies or convert the policies to whole life policies.

Home Loan Program
Upon separation of employment, an employee must contact the Treasurer's Office immediately to determine the timeframe for satisfying the mortgage.

Longstanding Service Recognition at Resignation
In recognition for longstanding service to the university, employees with 20 or more years of service who leave the university prior to retirement age (59 ½), without the intention of benefit eligible reemployment outside the university, will be afforded the following benefits:

- Recognition at the annual Employee Recognition Banquet
- Gift at end of employment
- University card retention
- Access to University library, gym, and recreation facilities

Retirement
See Information Related to Separation of Employment for additional information.
An employee is eligible for full retirement benefits when they have attained the age of 59.5 years and have a minimum of ten consecutive years of full-time, benefit-eligible service immediately before retiring.
Retirees are encouraged to maintain their connection to the W&L community. As such, retirees retain access to the University Library, gym and recreation facilities, and W&L email upon request.

Health Insurance at Retirement
Individuals who meet the retirement eligibility definition may continue participating in the group health insurance plan until age 65. The retiree spouse (until age 65), and children (under the age of 26), are also eligible to continue the University's group health insurance plan. The University will continue to make contributions consistent with the level provided in the group health plan. At age 65, the university's health insurance plan ends, and Medicare begins.

For full-time benefit-eligible employees hired before April 1, 2003 who retire after July 1, 2008, the University will provide up to a total of $35,000 for you (and an additional $35,000 for your spouse) toward your health care at retirement. The University will make contributions in annual incremental installments to a TIAA Health Reimbursement Account (HRA) Money Market Fund, until the $35,000 has been exhausted. (Funds are available in annual increments only.) These funds are to be used for reimbursement of premiums paid for Medicare Supplement Plans, Medicare Part D prescription drug premiums, Medicare Part B premiums, and other medical expenses that are incurred in retirement. The TIAA HRA is a tax-advantaged plan with administrative services provided by TIAA and Optum, a third-party claims processor.

For full-time benefit-eligible employees hired on or after April 1, 2003, the University makes monthly contributions to the TIAA Retirement Health Plan (RHP) on behalf of all full-time employees who have attained age 40 and have completed two years of benefit eligible service. The University contributions, along with any voluntary after-tax contribution you make, are invested through TIAA. These funds are directed into the TIAA LifeCycle Funds that closest meets the year of your 65th birthday. The TIAA RHP provides a tax advantaged way to invest and accumulate assets to pay for your insurance premiums and other health expenses in retirement with investment and administrative services provided by TIAA and Optum, a third-party claims processor. An employee will become 100% vested in the University's contributions once they become retirement eligible (59.5 with a minimum of ten consecutive years of full-time, benefit-eligible service.)

IMPORTANT - Retirees ages 65 and older who return to work at W&L full or part-time will not be able to access their Retiree Health Plan (HRA or RHP) accounts while reemployed. If applicable, this restriction also applies to your spouse/partner. You cannot be reimbursed for Medicare premiums or request reimbursement for claims while re-employed. Once your employment ends, your RHP/HRA accounts will be reactivated, and reimbursement can be requested for claims incurred after your new separation date. *(You will not be able to request reimbursement for any expenses incurred during your time of re-employment and cannot be reimbursed for Medicare premiums paid during your period of re-employment).* Any funds not used in the calendar year will be available for use in the next calendar year. During your period of re-employment, contributions by the university will continue on schedule.

Health, Dental, and Vision Insurance, and FSA Participation
The Federal Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA) provides eligible employees and their qualified dependents the opportunity to continue coverage under the University's health and dental insurance plans and flexible spending account (under some circumstances) when a departure from employment would normally result in loss of benefit. Enrollment may be continued up to 18, 29 or 36 months depending on the qualifying event under federal law. If continued coverage is elected, the employee pays 100% of the group premium rate plus a 2% administration charge.

Basic and Supplemental Life Insurance Benefits
You may continue these term policies or convert the policies to whole life policies.

Educational Grant for Children of Retirees
Upon retirement from the university, the employee's eligible children will remain eligible for the educational grant benefit. The retiree shall provide proof of dependency via copies of their tax returns when requested.

Home Loan Program Continuation for Retirees with an Active Mortgage
The mortgage can remain with the university. The retiring employee must contact the Treasurer's Office immediately to establish mortgage payment deductions via a checking or savings account.

Termination

See Information Related to Separation of Employment for additional information.

The University may terminate the employment of a staff or administrative employee at any time in accordance with the procedures in this Handbook.

The University believes in treating employees fairly and will actively engage with managers and employees to remedy performance concerns (please see Performance Improvement for additional information). Although the University generally follows a progressive disciplinary approach, there are occasions and circumstances when W&L terminates an employee immediately. These decisions will be made at the University's discretion. Before any employee is terminated, the supervisor must consult with the Executive Director of Human Resources. Nothing in this handbook, however, creates any contract of employment. Employment with the University remains at-will, subject to termination by either the employee or the University, at any time and for any reason.

Health, Dental, and Vision Insurance, and FSA Participation

The Federal Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA) provides eligible employees and their qualified dependents the opportunity to continue coverage under the University's health and dental insurance plans and flexible spending account (under some circumstances) when a departure from employment would normally result in loss of benefit. Enrollment may be continued up to 18, 29 or 36 months depending on the qualifying event under federal law. If continued coverage is elected, the employee pays 100% of the group premium rate plus a 2% administration charge.

Home Loan Program

Upon separation of employment, an employee must contact the Treasurer's Office immediately to determine a timeframe for the mortgage to be satisfied.

Information Related to Separation of Employment

Technology

Employees should work with their supervisors to see that any University documents or data stored on personal, or University computing equipment or cellular phones may be moved/stored so that it will be accessible as needed for university operations and retention.

Your W&L network credentials will be deactivated the evening of your last day of employment. To retain access to email for 30 days past your day of separation (indefinitely if retiring), complete the form found at this link prior to your last day of employment: https://go.wlu.edu/keepmyemail. Continued retention of email will be reviewed for approval and acceptability of continued use.

University Property

Employees are responsible for returning items in their possession or control that are the property of the University, such as the following: credit cards, equipment and tools, W&L University Card, manuals, cellular phones, pagers, parking tags, protective equipment, computers and audiovisual equipment, tools, uniforms, written materials, CDs and jump drives. All University property must be returned by employees on or before their last day of work. With the employee's signed authorization consistent with Virginia law, the University may withhold from the employee's final paycheck the cost of any items that are not returned when required and the balance of outstanding University charge accounts. The University may also take all action deemed appropriate to recover or protect its property.

Exit Interview

Employees are encouraged to complete an Exit Interview with their supervisor, or Associate Provost for Faculty Development (for faculty). Human Resources also requests an exit interview via a Workday task or in-person when requested. An employee's candid assessment of W&L's working conditions is used in our continuous improvement efforts. This information helps us to identify common trends or themes as we continue to look for ways to improve the W&L work experience.

References

All requests for references for employees or former employees should be referred to the immediate supervisor or anyone in the chain of command. W&L supervisors may provide positive factual information about a former employee's job performance or work record to a prospective employer as requested. If information to a prospective employer would be negative, the manager should refer the prospective employer to Human Resources to provide a verification of employment only.

Verifications of Employment

Requests for verifications of employment can be obtained through The Work Number. If no record exists at The Work Number, requests may be sent to the Office of Human Resources for completion.

COMMUNICATIONS

Maintaining effective communication with employees is a high priority for the university and the Office of Human Resources. Internal communication is important to maintain positive employee morale and to provide feedback to the highest levels of management. It also allows the university leadership to provide direction and guidance to all staff as they work toward the goals and mission of the university. This handbook is one means of helping to inform employees of university policies and procedures. Department heads are encouraged to conduct regular staff meetings to further facilitate communications. Human Resources staff periodically meet with employee groups on a wide variety of subjects to keep employees informed of changes in policies and benefits.

The president of the university holds periodic meetings for faculty and staff to provide updates on topics of interest, including important initiatives and priorities. Human Resources also sponsors informational seminars for employees. All employees have access to email and are encouraged to check messages regularly, as email is the quickest way to disseminate information.

As a member of the Washington and Lee community, you have access to a host of internal communications channels intended to keep you up-to-date regarding university and local community happenings, messages and policies.

Stay Informed about campus and your community
Washington and Lee has cultivated several resources to help you stay informed about the university, its employees and students, campus programming and happenings within the Lexington/Rockbridge area. Always be in the know by familiarizing yourself with the numerous communications resources at your disposal.

Faculty & Staff Dashboard
The faculty & staff dashboard provides a wealth of information relevant to all employees. The site's features include important notifications; helpful links to campus services, resources, and departments; campus news and event stories; university calendar content; and recent employee accomplishments and milestones. Set the dashboard as your internet browser homepage to stay up-to-date on university happenings.

The Columns Weekly
The Columns Weekly is an email newsletter that arrives in employees' inboxes each week and highlights news, feature stories and photos specifically curated for employees, along with a calendar of campus events and programs of note. Additional elements include faculty and staff accolades, employee profiles, job-related tips, and upcoming athletics schedules.

The Columns
The Columns is the university's primary online news magazine, covering news, feature stories, employee accomplishments and campus events. The curated and sortable site also includes profiles of W&L students, faculty, staff and alumni. The Columns content is often placed throughout the university website (www.wlu.edu) and additional deliverables such as The Columns Weekly and the faculty/staff dashboard.

Campus Notices
All employees receive this daily email. The communication features an itemized listing containing

official notices, events, deadlines, and classified advertisements of importance to members of the W&L community. Employees can also post personal notices and/or department information through the Campus Notices system.

W&L: The Washington and Lee Magazine
The magazine is published three times per year and sent to W&L employees, alumni and friends. The magazine features news from campus and of our alumni network around the world. The magazine's archive can be viewed online by visiting https://my.wlu.edu/communications-and-public-affairs/our-work/wandl-the-washington-and-lee-magazine.

Broadcast Emails
Important, time-sensitive information is disseminated through a campus-wide email distribution, called the Broadcast Mailer. These messages can come from senior university administrators or from offices such as Communications and Public Affairs, Facilities or Public Safety, and contain important, official information about Washington and Lee.

Washington and Lee Social Media Accounts
Social media is another excellent way to stay connected with news and happenings at W&L. The university maintains numerous social media channels across a variety of platforms. Employees are highly encouraged to follow the university's primary accounts, especially the "Working at W&L" Facebook account, which is a closed Facebook group specifically for employees. Below are links to the handles for W&L's primary accounts.

Instagram - @wlunews | @wlulex | @wlulaw
Facebook - Washington and Lee University | Working at W&L
Twitter / X - @wlunews | @wlulex | @wlulaw

Rise Displays
W&L subscribes to the Rise Vision cloud-based digital signage software that displays important messaging, news and information on screens throughout campus. This information is often specific to the building locations where the monitors are displayed and can be a helpful resource for employees. To view the policies for content inclusion on the Rise Displays, please visit https://my.wlu.edu/communications-and-public-affairs/digital-communications/campus-digital-displays.

Generalssports.com
W&L boasts a highly-successful intercollegiate athletics program that consistently ranks among the best in NCAA Division III. Athletics news, information, rosters, schedules, statistics and more can be found by visiting our online home at www.generalssports.com.

General Alerts System
W&L uses this notification system to alert university community members of emergencies or other timely information that affects the campus. This system sends text messages to registered mobile devices and email messages to valid email accounts. All university-supplied email accounts for faculty and staff will automatically receive General Alerts. You and your family can also sign up to receive alerts on personal mobile devices and email accounts by visiting the Omnilert system at https://washlee.omnilert.net/subscriber.php.

Live-Safe App
Live-Safe is a mobile-safety technology for the W&L community that empowers employees to take charge of their own safety and to look out for those around them. For more information about the app and how you can download it from your device, please visit https://my.wlu.edu/student-life/health-and-safety/public-safety/livesafe-app.

Alert Rockbridge
This notification system is maintained by the City of Lexington, the City of Buena Vista, and Rockbridge County to alert local residents of emergencies and other important community news such as severe weather, unexpected road closures, missing persons and evacuations of buildings or neighborhoods. To sign up for phone and e-mail alerts, simply visit https://member.everbridge.net/892807736725287/login.

Emergency Management Plan
The Emergency Management Plan supports W&L's ongoing risk and threat assessment operations, emergency preparedness provisions, and business continuity and recovery plans to provide prompt and effective response for the protection of W&L students, faculty, staff and campus visitors in an emergency situation. The plan establishes procedures and an organized structure to guide the university in responding to significant foreseeable emergencies on the W&L campus or property owned or operated by W&L. While no plan can absolutely prevent any damage during an emergency, this plan has been developed to coordinate the resources, facilities, and personnel of W&L, and other external agencies as appropriate, for an effective response to any foreseeable emergency. All personnel assigned specific emergency responsibilities under this plan (including departmental plans) should have a working knowledge of assigned roles, responsibilities, and applicable procedures.

Human Resources encourages all W&L faculty and staff to familiarize themselves with this plan, and to be vigilant and responsive to actual or threatened emergency situations. The plan can be reviewed at http://go.wlu.edu/emergency. Further emergency management information and resources is available on the university’s emergency management site at http:// go.wlu.edu/emergency-management.

UNIVERSITY POLICIES, PROCEDURES, AND GUIDELINES FOR FACULTY AND STAFF

Faculty and staff are required to read and comply with all University policies, procedures, and guidelines, as they may change, including but not limited to those contained in the employee handbook and the Code of Policies, located on the website of the Office of General Counsel at *http://go.wlu.edu/policies*. For quick reference, links to some, but not all, employment-related policies are noted below.

Accommodation Policies and Procedures for Employees with Disabilities
https://my.wlu.edu/general-counsel/code-of-policies/disability-accommodation/employee-accommodation

Alcohol and Drug Use in the Workplace
http://go.wlu.edu/OGC/DrugFree

Child Abuse/Neglect – Mandatory Reporting
http://go.wlu.edu/OGC/ChildAbuse

Computing and Network Use
http://go.wlu.edu/OGC/AcceptableUse

Confidentiality of Information and Privacy Protections
http://go.wlu.edu/OGC/Confidentiality

Conflicts of Interest
http://go.wlu.edu/OGC/CoI-Employee

Consensual Relations
http://go.wlu.edu/OGC/ConsensualRelationships

Emergency Management Plan
https://my.wlu.edu/emergency-management

Guidelines for Interaction with Minors
http://go.wlu.edu/OGC/guidelines-for-minors

University Policy on Prohibited Discrimination, Harassment and Retaliation Other Than Sex
https://my.wlu.edu/general-counsel/code-of-policies/discrimination-harassment-and-retaliation/university-policy-on-prohibited-discrimination-harassment-and-retaliation-other-than-sex

Nondiscrimination/Equal Employment Opportunity Statement
http://go.wlu.edu/OGC/NonDiscrimination

Interim Sexual Discrimination and Misconduct Policy
https://my.wlu.edu/general-counsel/code-of-policies/discrimination-harassment-and-retaliation/sexual-discrimination-and-misconduct-policy

Tobacco/Vaping Policy
http://go.wlu.edu/OGC/SmokingPolicy

Social Media Guidelines
http://go.wlu.edu/OGC/SocialMedia

University Grievance Policy
https://my.wlu.edu/human-resources/employment/information-for-wandl-employees/university-grievance-policy-for-employees

Use of Service Animals on Campus
http://go.wlu.edu/OGC/ServiceAnimals

Use of Volunteers
https://my.wlu.edu/human-resources/employment/volunteers-and-high-school-mentoring-program

Use of W&L Names, Logos and Other Marks
http://go.wlu.edu/OGC/ServiceMarks

Weapons Policy
http://go.wlu.edu/OGC/WeaponsPolicy

Whistleblower Policy; Fraudulent or Dishonest Conduct; Violations of Law
http://go.wlu.edu/OGC/WhistleblowerPolicy