

# **MFStrategies Employee Manual**

*October 2023*

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# EMPLOYEE MANUAL

## EMPLOYEE MANUAL INTRODUCTION

This Manual is designed to acquaint you with MFStrategies, LLC and provide you with information about working conditions and policies affecting your employment.

The information contained in this manual applies to all employees of MFStrategies, LLC. Following the policies described in this Manual is considered a condition of continued employment. However, nothing in this Manual alters an employee's status. The contents of this Manual shall not constitute nor be construed as a promise of employment or as a contract between the Company and any of its employees. The Manual is a summary of our policies, which are presented here only as a matter of information.

You are responsible for reading, understanding, and complying with the provisions of this Manual. Our objective is to provide you with a work environment that is constructive to both personal and professional growth.

## CHANGES IN POLICY

This Manual supersedes all previous employee manuals and memos that may have been issued from time to time on subjects covered in this Manual.

However, since our business and our organization are subject to change, we reserve the right to interpret, change, suspend, cancel, or dispute all or any part of our policies, procedures, and benefits at any time. We will notify all employees of these changes. Changes will be effective on the dates determined by the Company, and after those dates all superseded policies will be null.

If you are uncertain about any policy or procedure, speak with your direct supervisor.

## EMPLOYMENT APPLICATIONS

We rely upon the accuracy of information contained in the employment application and the accuracy of other data presented throughout the hiring process and employment. Any misrepresentations, falsifications, or material omissions in any of this information or data may result in exclusion of the individual from further consideration for employment or, if the person has been hired, termination of employment.

## EMPLOYMENT RELATIONSHIP

You enter into employment voluntarily, and you are free to resign at any time for any reason or no reason. Similarly, MFStrategies, LLC is free to conclude its relationship with any employee at any time for any reason or no reason.



## **DEFINITIONS OF EMPLOYEES STATUS**

### **“EMPLOYEES” DEFINED**

An “employee” of MFStrategies, LLC is a person who regularly works for MFStrategies, LLC on a wage or salary basis. “Employees” may include exempt, non-exempt, regular full-time, regular part-time, and temporary persons, and others employed with the Company who are subject to the control and direction of MFStrategies, LLC in the performance of their duties.

### **EXEMPT**

Employees whose positions meet specific criteria established by the Fair Labor Standards Act (FLSA) and who are exempt from overtime pay requirements.

### **NON-EXEMPT**

Employees whose positions do not meet FLSA criteria and who are paid one and one-half their regular rate of pay for hours worked in excess of 40 hours per week.

### **REGULAR FULL-TIME**

Employees who are regularly scheduled to work 40 or more hours per week.

### **REGULAR PART-TIME**

Employees who are regularly scheduled to work less than 40 hours per week.

## EMPLOYMENT POLICIES

### NON-DISCRIMINATION

In order to provide equal employment and advancement opportunities to all individuals, employment decisions at MFStrategies, LLC will be based on merit, qualifications, and abilities. MFStrategies, LLC does not discriminate in employment opportunities or practices because of race, color, religion, sex, gender, sexual orientation, gender identity, national origin, age or disability.

MFStrategies, LLC will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in an undue hardship. This policy governs all aspects of employment, including selection, job assignment, compensation, discipline, termination, and access to benefits and training.

Employees with questions or concerns about discrimination in the workplace are encouraged to bring these issues to the attention of their supervisor. Employees can raise concerns and make reports without fear of reprisal. Anyone found to be engaging in unlawful discrimination will be subject to disciplinary action, including termination of employment.

### NON-DISCLOSURE/CONFIDENTIALITY

The protection of confidential business information and trade secrets is vital to the interests and success of MFStrategies, LLC. Such confidential information includes, but is not limited to, the following examples:

- Financial information
- Marketing strategies
- Pending projects and proposals
- Proprietary production processes
- Personnel records
- Conversations between any persons associated with the company

All employees are required to sign a non-disclosure agreement as a condition of employment.

Employees who improperly use or disclose trade secrets or confidential business information will be subject to disciplinary action, including termination of employment and legal action, even if they do not actually benefit from the disclosed information.

### NEW EMPLOYEE ORIENTATION

Orientation is a formal welcoming process that is designed to make the new employee feel comfortable, informed about the company, and prepared for their position. New employee orientation includes an overview of the company history, an explanation of the company core values, vision, and mission; and company goals and objectives. In addition, the new employee will be given an overview of tax, and legal issues, and complete any necessary paperwork.

Employees are presented with all codes, keys, and procedures needed to navigate within the workplace. The new employee's supervisor then introduces the new hire to staff throughout the company, reviews

their job description and scope of position, explains the company's evaluation procedures, and helps the new employee get started on specific functions.

## **OFFICE HOURS**

MFStrategies, LLC conducts business as a remote operation with flexible working hours designed to accommodate client and individual employee needs. Employees are expected to maintain a base schedule of 40 hours per week that they adhere to when not staffing clients or on vacation.

Changes to an employee's base schedule must be approved by the employee's supervisor 2 weeks prior to the change taking effect.

## **WORK LOCATION AND COMMUTING**

MFStrategies, LLC is a fully remote operation and therefore does not maintain a regular office space. Employees are able to work from any location they choose as long as they are able to adequately fulfill their duties.

If 50% or more of an employee's duties require them to travel to a specific office or location, that travel may be designated as the employee's commute by the employee's supervisor. Commutes of fewer than 50 miles are not reimbursable; commutes of 50 miles or greater may be reimbursed at half of the IRS's standard mileage rate.

All commute mileage must be submitted on a weekly basis as part of the employee's regular reimbursements and is subject to approval by the employee's supervisor.

## **LUNCH BREAKS**

Employees are allotted 1 hour per working day for lunch. Lunch breaks can be taken at the employee's discretion throughout the day and no notice needs to be given to the employee's supervisor.

## **PERSONNEL FILES**

Employee personnel files include the following: job application, job description, résumé, records of participation in training events, salary history, records of disciplinary action and documents related to employee performance reviews, coaching, and mentoring.

Personnel files are the property of MFStrategies, LLC, and access to the information is restricted. Management personnel of MFStrategies, LLC who have a legitimate reason to review the file are allowed to do so.

Employees who wish to review their own file should contact their supervisor. With reasonable advance notice, the employee may review his/her personnel file in Company's office and in the presence of their supervisor.

## **PERSONNEL DATA CHANGES**

It is the responsibility of each employee to promptly notify their supervisor of any changes in personnel data such as:

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**MFStrategies, LLC**  
**PO Box 439, Harrisburg, PA 17108**  
**[www.MFStrategies.com](http://www.MFStrategies.com)**

- Mailing address
- Telephone numbers
- Name and number of dependents
- Individuals to be contacted in the event of an emergency.

An employee's personnel data should be accurate and current at all times.

## **EMPLOYEE PERFORMANCE REVIEW AND PLANNING SESSIONS**

Supervisors may conduct informal performance reviews and planning sessions as needed.

Performance reviews and planning sessions are designed for the supervisor and the employee to discuss his/her current job tasks, encourage and recognize attributes, and discuss positive, purposeful approaches for meeting work-related goals. Together, employee and supervisor discuss ways in which the employee can accomplish goals or learn new skills. The planning sessions are designed for the employee and his/her supervisor to make and agree on new goals, skills, and areas for improvement.

MFStrategies, LLC directly links wage and salary increases with performance. Your performance review and planning sessions will have a direct effect on any changes in your compensation. For this reason among others, it is important to prepare for these reviews carefully, and participate in them fully.

## **OUTSIDE EMPLOYMENT**

Employees may hold outside jobs in non-related businesses or professions as long as the employee meets the performance standards of their job description with MFStrategies, LLC. Unless an alternative work schedule has been approved by MFStrategies, LLC, employees will be subject to the company's scheduling demands, regardless of any existing outside work assignments.

MFStrategies, LLC's office space, equipment, and materials are not to be used for outside employment.

## **CORRECTIVE ACTION**

MFStrategies, LLC holds each of its employees to certain work rules and standards of conduct. When an employee deviates from these rules and standards, MFStrategies, LLC expects the employee's supervisor to take corrective action.

Corrective action at MFStrategies, LLC is progressive. That is, the action taken in response to a rule infraction or violation of standards typically follows a pattern increasing in seriousness until the infraction or violation is corrected.

The usual sequence of corrective actions includes an oral warning, a written warning, probation, and finally termination of employment. In deciding which initial corrective action would be appropriate, a supervisor will consider the seriousness of the infraction, the circumstances surrounding the matter, and the employee's previous record.

Though committed to a progressive approach to corrective action, MFStrategies, LLC considers certain rule infractions and violations of standards as grounds for immediate termination of employment. These include but are not limited to: theft in any form, insubordinate behavior, vandalism or destruction of company property, improper use of company equipment and/or resources,



untruthfulness about personal work history, skills, or training, divulging Company business practices, and misrepresentations of MFStrategies, LLC to a customer, a prospective customer, the general public, or an employee.

## EMPLOYMENT TERMINATION

Termination of employment is an inevitable part of personnel activity within any organization, and many of the reasons for termination are routine. Below are a few examples of some of the most common circumstances under which employment is terminated:

- **Resignation** – voluntary employment termination initiated by an employee.
- **Termination** – involuntary employment termination initiated by MFStrategies, LLC.
- **Layoff** – involuntary employment termination initiated by MFStrategies, LLC for non-disciplinary reasons.

When a non-exempt employee intends to terminate his/her employment with MFStrategies, LLC, he/she shall give MFStrategies, LLC at least 2 weeks written notice. Exempt employees shall give at least 4 weeks written notice.

Any employee who terminates employment with MFStrategies, LLC shall return all files, records, keys, and any other materials that are property of MFStrategies, LLC. No final settlement of an employee's pay will be made until all items are returned in appropriate condition. The cost of replacing non-returned items will be deducted from the employee's final paycheck. Furthermore, any outstanding financial obligations owed to MFStrategies, LLC will also be deducted from the employee's final check.

## HEALTH-RELATED ISSUES

Employees who become aware of any health-related issue, including pregnancy, should notify their supervisor of health status. This policy has been instituted strictly to protect the employee.

A written "permission to work" from the employee's doctor is required at the time or shortly after notice has been given. The doctor's note should specify whether the employee is able to perform regular duties as outlined in his/her job description.

A leave of absence may be granted on a case-by-case basis. If the need arises for a leave of absence, employees should notify their supervisor.

## EMPLOYEE REQUIRING MEDICAL ATTENTION

In the event an employee requires medical attention, whether injured or becoming ill while at work, the employee's personal physician must be notified immediately. If it is necessary for the employee to be seen by the doctor or go to the hospital, a family member will be called to transport the employee to the appropriate facility. If an emergency arises requiring Emergency Medical Services to evaluate the injury/illness of an employee on-site, the employee will be responsible for any transportation charges. Furthermore, MFStrategies, LLC's employees will not be responsible for transportation of another employee due to liabilities that may occur.

A physician's "return to work" notice may be required.

## **SUPPLIES, EXPENDITURES, OBLIGATING THE COMPANY**

Only authorized persons may purchase supplies in the name of MFStrategies, LLC. No employee whose regular duties do not include purchasing shall incur any expense on behalf of MFStrategies, LLC or bind MFStrategies, LLC by any promise or representation without written approval.

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### **EXPENSE REIMBURSEMENT**

Expenses incurred by an employee must have prior approval by a supervisor. Reimbursements will be included in the employee's next regular paycheck. An example of such an expense would include mileage. Requests for reimbursement should be submitted weekly when prompted by Basecamp. Your supervisor will review and approve all requests.

Mileage is reimbursed at the standard IRS rate for the calendar year in which the expense was accrued.

### **IMMIGRATION LAW COMPLIANCE**

MFStrategies, LLC employs only United States citizens and those non-U.S. citizens authorized to work in the United States in compliance with the Immigration Reform and Control Act of 1986.

Each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility. Former employees who are rehired must also complete the form if they have not completed an I-9 with MFStrategies, LLC within the past three years or if their previous I-9 is no longer retained or valid.

## STANDARDS OF CONDUCT

The work rules and standards of conduct for MFStrategies, LLC are important, and the Company regards them seriously. All employees are urged to become familiar with these rules and standards. In addition, employees are expected to follow the rules and standards faithfully in doing their own jobs and conducting the Company's business. Please note that any employee who deviates from these rules and standards will be subject to corrective action, up to and including termination of employment.

While not intended to list all the forms of behavior that are considered unacceptable in the workplace, the following are examples of rule infractions or misconduct that may result in disciplinary action, including termination of employment.

- Theft or inappropriate removal or possession of property
- Falsification of timekeeping records
- Working under the influence of alcohol or illegal drugs
- Possession, distribution, sale, transfer, or use of alcohol or illegal drugs in the workplace
- Fighting or threatening violence in the workplace
- Boisterous or disruptive activity in the workplace
- Negligence or improper conduct leading to damage of company-owned or customer-owned property;
- Insubordination or other disrespectful conduct
- Violation of safety or health rules
- Sexual or other unlawful or unwelcome harassment
- Excessive absenteeism or any absence without notice
- Unauthorized use of company-owned equipment
- Using company equipment for purposes other than business
- Unauthorized disclosure of business "secrets" or confidential information
- Violation of personnel policies
- Unsatisfactory performance or conduct

## ATTENDANCE/PUNCTUALITY

The Company expects that every employee will be regular and punctual in attendance. This means being ready to work at their starting time each day as determined by the employee's base schedule. Absenteeism and tardiness places a burden on other employees and on the Company.

If you are unable to report for work for any reason, notify your supervisor before your regular starting time. You are responsible for speaking directly with your supervisor about your absence. It is not acceptable to leave a message on a supervisor's voice mail, except in extreme emergencies. In the case of leaving a voice-mail message, a follow-up call must be made later that day.

Should undue tardiness become apparent, disciplinary action may be required.

If there comes a time when you see that you will need to work some hours other than those that make up your usual work week, notify your supervisor at least 3 working days in advance. Each request for special work hours will be considered separately, in light of the employee's needs and the needs of the Company. Such requests may or may not be granted.

## **ABSENCE WITHOUT NOTICE**

When you are unable to work owing to illness or an accident, please notify your supervisor. This will allow the Company to arrange for temporary coverage of your duties, and helps other employees to continue work in your absence. If you do not respond to communications and the Company is not notified of your status, it will be assumed after two consecutive days of absence that you have resigned, and you will be removed from the payroll.

If you become ill while at work or must leave the office for some other reason before the end of the workday, be sure to inform your supervisor of the situation.

## **HARASSMENT, INCLUDING SEXUAL HARASSMENT**

MFStrategies, LLC is committed to providing a work environment that is free of discrimination and unlawful harassment. Actions, words, jokes, or comments based on an individual's sex, race, ethnicity, age, religion, or any other legally protected characteristic will not be tolerated.

If you believe you have been the victim of harassment, or know of another employee who has, report it immediately. Employees can raise concerns and make reports without fear of reprisal.

Any supervisor who becomes aware of possible harassment should promptly advise their supervisor who will handle the matter in a timely and confidential manner.

## **PUBLIC IMAGE**

A professional appearance is important anytime that you come in contact with clients or potential clients. Employees should be well groomed and dressed appropriately for our business and for their position in particular.

When meeting with a client, the dress code is more business-oriented

Consult your supervisor if you have any questions about appropriate business attire.

## **SUBSTANCE ABUSE**

The Company is committed to providing a safe and productive workplace for its employees. In keeping with this commitment, the following rules regarding alcohol and drugs of abuse have been established for all staff members, regardless of rank or position, including both regular and temporary employees. The rules apply during working hours to all employees of the Company while they are on Company premises or elsewhere on Company business.

- The manufacture, distribution, possession, sale, or purchase of controlled substances of abuse on Company property is prohibited.
- Being under the influence of illegal drugs, alcohol, or substances of abuse during working hours is prohibited.
- Working while under the influence of prescription drugs that impair performance is prohibited.

So that there is no question about what these rules signify, please note the following definitions:

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## **COMPANY PROPERTY**

All Company owned or leased property used by employees.

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## **CONTROLLED SUBSTANCE OF ABUSE**

Any substance listed in Schedules I-V of Section 202 of the Controlled Substance Act, as amended.

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## **DRUG**

Any chemical substance that produces physical, mental, emotional, or behavioral change in the user.

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## **DRUG PARAPHERNALIA**

Equipment, a product, or material that is used or intended for use in concealing an illegal drug, or otherwise introducing into the human body an illegal drug or controlled substance.

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## **ILLEGAL DRUG**

- Any drug or derivative thereof whose use, possession, sale, transfer, attempted sale or transfer, manufacture, or storage is illegal or regulated under any federal, state, or local law or regulation.
- Any drug, including – but not limited to – a prescription drug, used for any reason other than that prescribed by a physician.
- Inhalants used illegally.

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## **UNDER THE INFLUENCE**

*A state of not having the normal use of mental or physical faculties resulting from the voluntary introduction into the body of an alcoholic beverage, drug, or substance of abuse.*

Consistent with the rules listed above, any of the following actions constitutes a violation of the Company's policy on drugs and may subject an employee to disciplinary action, up to and including immediate termination:

- Using, selling, purchasing, transferring, manufacturing, or storing an illegal drug or drug paraphernalia, or attempting to or assisting another to do so, while in the course of employment.
- Working or reporting to work, conducting Company business, or being on Company property while under the influence of an illegal drug or alcohol, or in an impaired condition.

## WAGE AND SALARY POLICIES

### WAGE OR SALARY INCREASES

Each employee's hourly wage or annual salary will be reviewed at least once each year. The employee's review date will usually be conducted on or about the anniversary date of employment or the date of the previous compensation review. Such reviews may be conducted more frequently for a newly created position, or based on a recent promotion.

Increases will be determined on the basis of performance, adherence to company policies and procedures, and ability to meet or exceed duties per job description and achieve performance goals.

Although the Company's salary ranges and hourly wage schedules will be adjusted on an ongoing basis, MFStrategies, LLC does not grant "cost of living" increases. Performance is the key to wage increases in the Company.

### PERFORMANCE GOALS

#### REVENUE GOALS

All associates will be held responsible for quarterly revenue goals based on the total invoiced retainers and commissions, regardless of other qualifying/disqualifying factors, between January 1 and December 31 on contracts assigned to that associate. Goals for the next full calendar year will be determined through collaboration between the associate and MFStrategies, LLC management prior to the end of the year.

#### ALTERATION OF GOALS

Goals may be reviewed and revised during the year in collaboration with the associate to accommodate changing market conditions or other factors. Final goals may be altered at the discretion of MFStrategies, LLC management.

#### GOAL PERFORMANCE REVIEW

Goal progress will be reviewed on a monthly basis by MFStrategies, LLC management.

##### **Revenue Goal Progress Review**

If an associate is currently performing, or projected to perform, at less than 80% of the current quarter's revenue goal a meeting with MFStrategies, LLC management will be scheduled to discuss necessary support and cooperatively establish a performance improvement plan (PIP) to increase performance in the following quarters.

If an associate performs at or less than 60% to goal for four (4) consecutive quarters, an associate's responsibilities may be restructured or termination may be considered.

### YEAR-END INCENTIVE BONUSES

**MFStrategies, LLC**  
**PO Box 439, Harrisburg, PA 17108**  
**[www.MFStrategies.com](http://www.MFStrategies.com)**

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## **GUARANTEE OF YEAR-END INCENTIVE BONUS**

Year-end bonuses are paid solely from the cash flow of MFStrategies, LLC. Although MFStrategies, LLC currently intends and expects to continue this bonus, it reserves the right to amend, reduce, interpret, or discontinue all or part of it at any time with or without reason.

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## **POLICY IMPLEMENTATION DATE**

This policy goes into effect January 1, 2024, supersedes all prior policies, and covers all current/future employees and contracts.

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## **INCENTIVE PERIOD**

The incentive period for year-end incentive bonuses is January 1 through December 31 of a given calendar year.

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## **PAYMENT OF YEAR-END INCENTIVE BONUS**

MFStrategies, LLC will distribute year-end incentive bonuses to qualified employees via the company's regular payroll system within a reasonable amount of time after the close of the incentive period.

Employees will be responsible for all regular taxes on bonus payments.

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## **EMPLOYEE ELIGIBILITY**

Qualifying employees must be full-time, exempt employees who have been employed by MFStrategies, LLC for at least 3 full months and are actively employed by MFStrategies, LLC as of the last day of the incentive period. Employees who are, or could be, terminated for not meeting other performance standards will not qualify for a bonus.

Employees who have taken a leave of absence (paid or unpaid time off of 10 consecutive days or more) during the incentive period may receive a pro-rated bonus. Employees will be notified of any reduction in their bonus before bonuses are distributed.

Employees must have a performance review completed within the 6 months prior to the close of the incentive period. The review must specifically certify that work product quality is being maintained for bonus generating contracts as well as non-bonus generating contracts.

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## **CONTRACT ELIGIBILITY**

Qualifying contracts:

- Must have at least 3 invoices dated within the incentive period.
- All invoices must be paid in full, including any billed reimbursable expenses, by the close of the incentive period.

- Contracts which have been sent to a third party for debt collection, and the full debt has been settled, may have their total value adjusted for bonus purposes only to accommodate fees associated with collection.
- Contracts may be considered eligible or ineligible for inclusion at the discretion of MFStrategies, LLC management.

Contracts signed within 90 days of the end of an incentive period may be grandfathered into the following incentive period at the discretion of MFStrategies, LLC management.

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## DOCUMENTATION

MFStrategies, LLC will maintain an accounting of all qualified contracts, qualified employees, and bonus multipliers. Employees may request copies of their own records at any time which will be provided in a timely manner by MFStrategies, LLC management.

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## YEAR-END INCENTIVE BONUS FORMULA

*New Contract Bonus \* Revenue Goal Multiplier*

### **New Contract Bonus**

- 20% of the first month's retainer during the incentive period + 2% for every full year of employment with MFStrategies, LLC up to a total of 50%
- 2% of total commissions collected during the incentive period + 1% for every full year of employment up to 10%

### **Revenue Goal Multiplier**

<b>% to Annual Revenue Goal on 12/31*</b>	<b>Bonus Multiplier</b>
<b>&gt;100%</b>	.05 for every full 10% over 100%
<b>90% - 100%</b>	1
<b>80% - 89%</b>	.75
<b>70% - 79%</b>	.5
<b>60% - 69%</b>	.25
<b>&lt;60%</b>	0

\*Percentages are rounded to the nearest whole number

MFStrategies, LLC management reserves the right to award discretionary bonuses which do not comply with these formulas.

## TIMEKEEPING

The following policy applies to all hourly employees of MFStrategies, LLC.

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**MFStrategies, LLC**  
**PO Box 439, Harrisburg, PA 17108**  
**www.MFStrategies.com**



Accurately recording time worked is the responsibility of every non-exempt employee. Time worked is the time actually spent on a job(s) performing assigned duties.

MFStrategies, LLC does not pay for extended breaks or time spent on personal matters.

Timesheets must be filled out completely to reflect hours worked to date, signed by the employee, and submitted to their supervisor by 3:00 PM on the Wednesday before payday. Hours worked after a timesheet is submitted will be tracked on the next timesheet. Authorized personnel will review time records each week. Any changes to an employee's time record must be approved by his/her supervisor. Questions regarding the timekeeping system should be directed to the employee's supervisor.

Template timesheets will be available to all employees on the MFStrategies, LLC Basecamp.

## **PAYDAYS**

All employees are paid every other Friday. In the event that a regularly scheduled payday falls on a weekend or holiday, employees will receive pay on the next day of operation.

Paychecks will not, under any circumstances, be given to any person other than the employee without written authorization. Paychecks may also be mailed to the employee's address or deposited directly into an employee's bank account upon request.

## **SOCIAL SECURITY/MEDICARE**

MFStrategies, LLC withholds income tax from all employees' earnings and participates in FICA (Social Security) and Medicare withholding and matching programs as required by law.

## **OPEN PAID TIME OFF (PTO) POLICY**

MFStrategies, LLC does not track or limit employee vacation times or sick days. Regular time off is defined as any non-holiday variation from an employee's base schedule of more than 1 hour. For example, stopping work at 3:00 PM when an employee's base schedule has them working until 5:00 PM would result in 2 hours of paid time off.

## **EMPLOYEE RESPONSIBILITIES**

- For regular time off not covered by a specific leave policy, employees must submit their planned vacation to their supervisor at least 1 week in advance for every 1 day being requested off. For example if an employee is requesting 3 days off, a supervisor must receive the request at least 3 weeks in advance of the first day off. Employees are expected to report unexpected absences or schedule changes to their supervisor as soon as possible.
- Client calls, staff meetings and other time sensitive responsibilities must be covered regardless of personal work schedule. Employees must coordinate with other staff to have coverage for any responsibilities during time off.

## **DETAILS**

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**MFStrategies, LLC**  
**PO Box 439, Harrisburg, PA 17108**  
**[www.MFStrategies.com](http://www.MFStrategies.com)**

- The MFStrategies Open PTO plan is only available to full-time, exempt (salaried) MFStrategies, LLC employees.
- Employees do not “accrue” PTO days as in traditional plans, and so will not be compensated for “unused” PTO time upon termination.
- PTO requests are approved at the discretion of MFStrategies, LLC management and may be denied at the discretion of MFStrategies, LLC management.
- PTO requests longer than 10 consecutive working days will be evaluated on a case by case basis and may only be granted on the condition that the time off be unpaid unless that leave is otherwise outlined in this manual.

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## **PAID PARENTAL LEAVE**

- Paid parental leave is available to all full-time, exempt (salaried) employees of MFStrategies, LLC upon the birth, adoption, or foster care placement of a child.
- Employees should notify their supervisor approximately 2 months, or as soon as is practical, prior to the anticipated start-date of their leave.
- Primary caregivers may take 12 weeks of parental leave at 100% pay.
- Secondary caregivers may take 8 weeks of parental leave at 100% pay.
- Primary and secondary caregivers may choose to take an additional 4 weeks of unpaid leave.

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## **BEREAVEMENT LEAVE**

- Paid bereavement leave is available to all full-time, exempt (salaried) employees of MFStrategies, LLC upon the death of an immediate family member or close personal relation.
- Employees wishing to take bereavement leave should notify their supervisor as soon as possible.
- Employees may take up to 1 week beginning the day after they are notified of the death. Additional leave may be granted by the employee’s supervisor; leaves longer than 10 consecutive working days may be unpaid.

## **RECORD KEEPING**

A calendar of all approved time off will be kept by MFStrategies. This calendar will be available to all MFStrategies staff so that employees can coordinate around each other’s schedules. No details about the time off beyond the days and times of the absence will be available on the calendar.

## **HOLIDAYS**

MFStrategies, LLC observes a number of paid holidays during which MFStrategies, LLC does not conduct business. Annual calendars will be made available to all employees in either November or December of the preceding year.

## **TRAINING AND PROFESSIONAL DEVELOPMENT**

MFStrategies, LLC recognizes the value of professional development and personal growth for employees. Therefore, MFStrategies, LLC encourages its employees who are interested in continuing

education and job specific training to research these further and get approval before signing up for the seminars or courses.

## EMPLOYEE COMMUNICATIONS

### STAFF MEETINGS AND DAILY ALL-STAFF COMMUNICATION

Full staff meetings will be held on an infrequent, but regular basis for all MFStrategies, LLC employees. Meetings will be announced several weeks in advance to allow for appropriate scheduling and travel arrangements to be made.

Daily communications will take place in person, by phone, on Google Hangouts, Basecamp, or a similar group chat platform.

### EMPLOYEE EMAIL ACCOUNTS

All employees of MFStrategies, LLC are issued a company email address and a license for all necessary Google Suite services.

#### CURRENT EMPLOYEE EMAIL ACCESS BY GOOGLE SUITE ADMINISTRATOR

Under extremely rare circumstances, MFStrategies, LLC reserves the right to access an employee's company Google account in order to protect the company's operational needs. The following procedure is designed to ensure that every step is taken to avoid this action and that employees are as informed as possible about when, why, and by whom their account is being accessed.

- The employee must be contacted immediately when a need for a file in their possession occurs. This may be by email, phone, or text expressing the reason for urgency and the necessary file or information.
- If the employee does not respond to any communication for 2 hours, the Google Suite Admin will send the employee an email informing them, again, of what information they need. The email will also outline exactly when the Administrator intends to access the account.
  - The scheduled access of the account will be at least 2 hours from when this email is sent.
- If the employee is able to retrieve the requested information in that time period, the account will not be accessed by the administrator.
- The Google Suite administrator may be required to change the employee's password to gain access to the account. Those temporary credentials will be immediately communicated to the employee so they can re-establish access to their account.
- Google Suite admin will access the account with the "least invasive degree of inspection", i.e. that upon encountering a personal message/file the admin will stop looking at it and move on. Access will be terminated once the needed information is obtained.

#### EMAIL ACCESS AND RETENTION UPON TERMINATION

- Upon termination employees will no longer have access to their company email account or any company platforms. Prior to the employee's last day, employees should:
  - Transfer all relevant files from other devices to an MFStrategies, LLC Google Drive

- Consider whether any Company information is stored on non-Company personal accounts or devices and transfer or delete any such data as appropriate.
- Remove or transfer personal information to non-Company resources
- Set up an auto-reply notifying senders that the employee no longer works for MFStrategies, LLC
- Set up an auto-forward so all email traffic will be forwarded automatically to the employee's supervisor.
- All files left on MFStrategies, LLC services will become the property of MFStrategies, LLC. Administrative privileges will be transferred to the employee's supervisor.
- Email accounts will be deactivated and all account contents deleted after 6 months.

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## **ACCESSING A FORMER EMPLOYEE'S EMAIL OR FILES FOR OPERATIONS**

Due to privacy, it is not standard practice for staff to provide access to former employees' accounts. In incidents where company operational needs require access to a former employee's files, a Google Suite admin will access the account with the "least invasive degree of inspection", i.e. that upon encountering a personal message/file the admin will stop looking at it and move on. Access will be terminated once the needed information is obtained.

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## **FAMILY MEMBER ACCESS TO EMAIL OR FILES OF A DECEASED STAFF MEMBER**

If a family member requests access to the email or files of a deceased staff member company practice is to coordinate those requests with the deceased staff member's supervisor.

The staff member's supervisor or another staff member with knowledge of the former staff member's accounts may go through the materials with the spouse or family member. This is to protect any data that the company may consider confidential.

Power of Attorney does not automatically provide access to all of the deceased faculty member's files.

## **PRINCIPAL CONTACT**

Marty Santalucia can be reached at 610-306-6198 or via email at [marty@mfstrategies.com](mailto:marty@mfstrategies.com)

## **PROCEDURE FOR HANDLING COMPLAINTS**

Under normal working conditions, employees who have a job-related problem, question or complaint should first discuss it with their immediate supervisor. At this level, employees usually reach the simplest, quickest, and most satisfactory solution. If the employee and supervisor do not solve the problem, MFStrategies, LLC encourages employees to contact Marty Santalucia.

**EMPLOYEE MANUAL AND STYLE GUIDE ACKNOWLEDGEMENT  
(EMPLOYEE COPY)**

I have read and agree to abide by MFStrategies, LLC's Employee Manual and Style Guide

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Employee Signature / Date

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MFStrategies, LLC / Date

**EMPLOYEE MANUAL AND STYLE GUIDE ACKNOWLEDGEMENT  
(COMPANY COPY)**

I have read and agree to abide by MFStrategies, LLC's Employee Manual and Style Guide

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Employee Signature / Date

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MFStrategies, LLC / Date