



AGREEMENT

BETWEEN

**THE PALO ALTO MEDICAL FOUNDATION/SANTA
CRUZ DIVISION**

AND

**THE ENGINEERS AND SCIENTISTS OF CALIFORNIA
Local 20, IFPTE (AFL-CIO & CLC)**

COVERING REGISTERED NURSES

March 6, 2023 through June 30, 2026

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SECTION 1. RECOGNITION AND SCOPE OF AGREEMENT

- A. The Employer recognizes the Union as the exclusive collective bargaining representative of the Registered Nurses employed by Palo Alto Medical Foundation at the Santa Cruz Hematology/Oncology & Infusion Clinic located at 2850 Commercial Crossing in Santa Cruz, CA; excluding Clinical Research Nurses, confidential employees, office clerical employees, guards, and supervisors defined in the Act.

SECTION 2. NO DISCRIMINATION

- A. There shall be no discrimination by the Employer against any Registered Nurse or applicant for position as a Registered Nurse on account of membership in or activity on behalf of the Union, provided that such activity shall not interfere with any Registered Nurse's regular work or with the normal activities of the Employer. Neither the Employer nor the Union shall discriminate for or against any employee or applicant for employment on account of sex, race, creed, color, religion, national origin, sexual orientation, age, physical or mental disability, or veteran's status to the extent required by law.
- B. The Employer and the Union agree that all employees, including managers and physicians will treat each other, regardless of position, with dignity, respect, courtesy and trust.

SECTION 3. UNION MEMBERSHIP

A. Harmonious Labor-Management Relations

The Union recognizes its obligation to cooperate with the Employer to help ensure maximum service of the highest quality and efficiency, as professionals. The Employer and the Union recognize their obligations to treat employees in a fair and equitable manner. The Employer and the Union affirm the principle that harmonious labor-management relations are to be promoted and furthered.

B. Union Membership and Service Fees

- 1. All employees subject to this Agreement presently employed by the Employer on the execution date of this Agreement who are currently members of the Union, and all such employees who may subsequently become members of the Union, shall be required as a condition of employment to maintain their membership in the Union in good standing during the life of this Agreement.
- 2. All new employees subject to this Agreement first employed by the Employer after the execution date of this Agreement shall, as a condition of employment, either
 - (1) join and remain a member of the Union within thirty (30) days after employment, or (2) in the alternative, pay to the Union, commencing within thirty (30) days after employment, a fee for services rendered by ESC in an amount equivalent to regular membership dues, less non-chargeable costs defined as

follows:

Non-Chargeable Costs

The costs of the following activities are not included in the calculation of the service fee:

- a. Lobbying or other political activity except as authorized by law;
- b. Payments to affiliates, except for chargeable costs as authorized by law;
- c. Social activities except as authorized by law;
- d. Charitable and philanthropic activities;
- e. Insurance and other benefits programs except as authorized by law; and
- f. Any cost that, by law, cannot be included in an agency shop service fee.

In no event shall the service fee charged exceed 95 percent of the regular union membership dues.

Any newly employed Registered Nurse subject to this provision may:

1. Execute a written declaration that he/she is a member of a bona fide religion, body or sect which holds a conscientious objection to joining or financially supporting any employee labor organization as a condition of employment; and
2. Pay a sum equal to the agency shop service fee to a non-religious, non-labor charitable fund chosen the employee from those charities listed with United Way, Combined Health Appeal of California, or Environmental Federation of California.

Within thirty (30) days after the Employer hires a new employee, the Employer will inform the Union in writing of the name, address, and classification of said individual. Said notification shall be in electronic format and forwarded to the Union via email to a representative designated by the Union.

C. Indemnification

The Union shall indemnify the Employer and hold it harmless against any and all suits, claims, grievances, demands and liabilities that arise out or by reason of any action or omission of the Employer in complying with the parties' agreement on union membership and service fee.

SECTION 4. WAGES

All employees shall receive 'across the board' increases as follows:

- 4.0% ATB effective the first full pay period following ratification of contract.
- 3.0% ATB effective the first full pay period following six (6) months of ratification of contract.

- 2.25% ATB effective the first full pay period following the first anniversary of ratification of contract.
- 2.0% ATB effective the first full pay period following eighteen (18) months of ratification of contract.
- 2.0% ATB effective the first full pay period following the second anniversary of ratification of contract.
- 2.5% ATB effective the first full pay period following thirty (30) months of ratification of contract.

1. New Graduate Reclassification

A New Graduated RN will move to step 1 of the RN1 scale after completing all unit based competencies and 1664 hours of service from date of hire.

2. Future Progression:

Once placed in the wage grid, an RN will progress yearly through the first six (6) steps. For movement through the tenure steps, defined as years of service as an RN at the Foundation, or at a Sutter Entity, an RN must have met the year's requirement for that step. No RN shall advance more than one step in any twelve (12) month period. If an employee is eligible for a step progression, the increase will be effective at the beginning of the pay period following the salary review date.

3. Differentials

- A. Registered Nurses who start work at or after 10:00 am and work four (4) or more hours of their shift after 4:00 PM will be paid a 10% differential for eligible hours worked in the shift zone - 4:00 PM to 12:00 midnight.
- B. Registered Nurses who work on Saturday shall receive a 10% differential in addition to their regular base pay for hours worked between 11:00 pm Friday and 10:59 pm Saturday.
- C. Registered Nurses who work on Sunday shall receive a 15% differential in addition to their regular base pay for all hours worked between 11:00 pm Saturday and 10:59 pm Sunday.
- D. Registered Nurses who are assigned charge duties will be paid a 10% shift differential in addition to their regular base pay for all hours worked. Charge duty assignment will be assignment will be designated by Management.
- E. Registered Nurses Employees designated to act temporarily as a trainer will receive an additional 10% per hour added to their regular base rate for all hours spent training subject to pre-approval by their supervisor/manager. This pay differential applies only to qualified employees who take on the temporary additional responsibility of training. Trainers in the context of this policy must be qualified to train and must have a proven format or plan for instructing in a specific subject. This includes members of the nursing and other clinical staff trained to act as preceptors through an official Preceptor Program.

- F. The Foundation shall provide the translation payment, under the same terms and conditions, to employees represented by the Union as the Foundation provides to its non-represented employees.

The Foundation shall notify the Union thirty (30) days in advance of any changes to the policy but shall not be required to bargain with the Union regarding the changes or the effects of the changes.

- G. Registered Nurses who are working a "Short Hour" if not benefitted, shall be paid a shift differential of 10% for all hours worked.

H. **Short Notice**

Pay-Registered Nurses called to work with less than 12 hour-notice, shall be paid a 20% differential in addition to their regular base rate and any shift premium that applies, for all hours worked (beginning when the Registered Nurse reports to work). They shall be guaranteed a minimum of 4 hours pay. This provision does not apply to Per Diem Registered Nurses.

SECTION 5. SENIORITY

- A. Seniority shall be defined as a Registered Nurse's continuous length of service within the bargaining unit.
- B. Notwithstanding the foregoing, it is agreed that for all Registered Nurses covered under this agreement as of [ratification of the agreement], seniority shall commence from said Nurse's original date of hire as a Registered Nurse with PAMF.
- C. In the event of a tie, the Registered Nurse with the lower California Registered Nurse license number will be considered the more senior Nurse.
- D. Seniority shall be considered terminated by:
1. Termination of employment from PAMF for any reason other than involuntary layoff
 2. An involuntary layoff period which exceeds twelve (12) months
 3. If a bargaining unit RN leaves her/his bargaining unit job at PAMF to take a job outside of the bargaining unit at PAMF

SECTION 6. CATEGORIES OF EMPLOYEES

A. **Regular Full-Time Registered Nurses**

A Full-Time Registered Nurse is an RN who works a regular predetermined work schedule of at least sixty (60) hours per pay period (0.75 to 1.0 FTE)

B. Regular Part-Time Registered Nurses

A Part-Time Registered Nurse is an RN who works a regular predetermined work schedule of at least forty (40), but less than sixty (60) hours per pay period (0.5 to 0.749 FTE).

C. Short-Hour Registered Nurses

A Short-Hour Registered Nurse is an RN who works a regular predetermined work schedule of at least sixteen (16), but less than forty (40) hours per pay period (0.200 to 0.49 FTE).

D. On-Call (Per Diem) Registered Nurses

An On-Call (Per Diem) Registered Nurse is an RN who is employed to work intermittently on an as-needed basis. Per Diem Registered Nurses do not have a regular schedule but must be available on short notice to cover shifts. On-Call (Per Diem) Registered Nurses must be available to work at least five (5) shifts per month. Each year in November, 1 of the 5 shifts

will be within a week of Thanksgiving. In addition, either in December, 1 of the 5 shifts will be within a week of Christmas, or in January, 1 of the 5 shifts will be within a week of New Year's Day.

E. Temporary Registered Nurses

A Temporary Registered Nurse is an RN hired for an anticipated term of employment of less than six months in a Regular Full-Time or Regular Part-Time position.

SECTION 7. INTRODUCTORY PERIOD

- A. Each newly hired Registered Nurse, and those rehired Registered Nurses previously employed by PAMF, will have an introductory period of three (3) months. During this time, a Registered Nurse will have no seniority. Upon satisfactory completion of his/her introductory period, the Registered Nurse's seniority date will be established as defined in Section 5 Seniority.
- B. During the Introductory Period, a Registered Nurse may be given written notice of unsatisfactory performance or failure to adhere to the Employer's rules, and such notice may include a warning that future poor performance or misconduct during the introductory period will result in termination.
- C. The Registered Nurse will have recourse to the grievance procedure as of the day after his/her introductory period ends. The Registered Nurse will have his/her benefits eligible based on the provisions of this agreement.

SECTION 8. JOB POSTINGS

- A. The Employer shall post bargaining unit job requisitions online for a minimum of five (5) days before filling the position. The posting shall indicate that the job is a union represented job. This does not prevent the Employer from filling the vacancy on a temporary basis during the five-day posting period. The Employer will attempt to fill job vacancies with bargaining unit RNs prior to utilizing external staffing resources. This provision for posting of job vacancies is for the information of Registered Nurses so that they may apply for any job vacancy for which they believe they are qualified.
- B. It shall be the policy of the Employer to give first priority to bargaining unit Registered Nurses for filling of lateral vacancies and promotional positions covered by this Agreement. When qualifications and performance are approximately equal, seniority shall be the deciding factor in who is selected to fill the position. The determination of who shall fill the job vacancy shall be at the determination of the Employer based on the above criteria.

SECTION 9. WORK SCHEDULES

A. Schedules

As long as there is sufficient work, Regular Full-Time, Regular Part-Time and Short-Hour RNs will be scheduled to work their Full Time Equivalent (FTE) hours in a work schedule established by the Employer. For the convenience of RNs, work schedules will be posted at least fourteen (14) days in advance of the effective date of the schedule. The work schedule will specify an RNs workdays and work shifts.

The Employer shall make every effort to maintain an RN's regular work schedule, however the Employer may need to make temporary changes to meet an operational need.

For temporary changes, the Employer will make every effort to reduce negative impacts to RNs including but not limited to asking for volunteers, reaching out to Per Diem RNs, and discussing such potential changes with the affected RN to explore solutions.

In the event of a permanent change to an RN's regular work schedule, the Employer will provide at least thirty (30) days' notice in writing to the RN.

B. Changes to Posted Work Schedule

Distribution of Additional Hours

When there is a need for additional hours, RNs on a voluntary basis by seniority, will be offered those hours starting with the most senior qualified RN.

In the case where the Employer has less than twenty four (24) hours' notice of the need to fill a shift, and if no qualified RNs volunteer to work the additional hours, the additional hours will be offered by reverse seniority starting with the least senior qualified RN.

Order of seniority is by the following:

1. Per Diem RNs

2. Temporary RNs
3. Short-Hour RNs
4. Regular Part-Time RNs
5. Regular Full-Time RNs

- C. In scheduling of RNs, Practice RNs may work as an Infusion RN and Infusion RNs may work as a Practice RNs only on a volunteer basis, mutual consent between the manager and the assigned nurse, and only if they are competent to perform the work.

Nothing in this section shall be interpreted in such a way as to compel the employer to offer overtime pay prior to exhausting non-overtime options.

SECTION 10. ALTERNATIVE WORK SCHEDULES

- A. The Employer may choose to offer schedules consisting of shifts of more than eight (8) hours, but not more than ten (10), to defined work units. These schedules are known as Alternate Work Schedules (AWS).
- B. An AWS is an agreement between an RN and management in which the Nurse agrees to waive his/her rights to overtime compensation for hours worked over eight (8) in a day in exchange for working a compressed work week. Management has the right to assign the days/hours worked.
- C. In the event a Nurse who is part of a work unit comprised of AWS determines that he/she is unable to work the defined schedule, he/she may request an accommodation without penalty.
- D. The Employer complies with California labor law with regards to the disclosure, approval and implementation process of AWS agreements.
- E. The Employer will provide the union with a list of approved Alternative Work Schedules that involve Registered Nurses on a quarterly basis.

SECTION 11. HOURS OF WORK AND OVERTIME

A. Straight-Time Workweek

The straight-time workweek shall not exceed forty (40) hours per week.

B. Straight-Time Workday

The straight-time workday shall not exceed eight (8) hours per day within a period of not more than nine (9) consecutive hours. Each RN who works an eight (8) hour shift shall receive a lunch period of at least one-half hour. The Employer will use its best efforts to release Registered Nurses promptly for their designated lunch periods. The Employer will pay for RNs to attend departmental staff meetings, and time spent in these meetings will

be included in computing overtime.

C. Days Off

Each regular full-time or part-time Registered Nurse shall be offered two consecutive days off every other week. (This does not apply to short-hour or on-call Registered Nurses.)

D. Overtime Compensation

A Registered Nurse shall be compensated for all work in excess of eight (8) hours per day or forty (40) hours per work at the rate of one and one-half (1-1/2) times his/her basic straight-time hourly rate, unless the Registered Nurse has agreed to an Alternate Work Schedule (See Section 10). Compensation of time over twelve (12) hours per day shall be at two (2) times the basic straight time hourly rate.

SECTION 12. Meal and Rest Period

A. Rest Period

Each RN shall be granted a rest period of ten (10) minutes during each four hours of his/her shift without deduction in pay. Rest periods may not be combined with the meal period to extend the meal period. RN's do not need to record this time.

B. Meal Period

Each RN shall be granted an unpaid, duty free meal period of no less than 30 minutes as close to the middle of each eight (8) hour work period as practical but no later than the start of the fifth hour unless the RN has a valid Flexible Meal Period agreement on file. Meals may be taken outside of the clinic.

C. Missed Rest or Meal Period

Advance notice to a supervisor is required to avoid missed rest periods or meal periods. If, for any reason, an RN believes he/she may not be able to take a rest period or meal period due to work conditions, the RN must notify his/her supervisor in advance of missing the rest period or meal period. In the event work conditions force an RN to forgo a rest period or duty free meal period, the RN must record "missed rest/meal period" on the timecard. An RN who has missed one or both rest periods or a meal period, shall receive one hour of premium pay. However, if an RN is provided the opportunity for a rest period and voluntarily elects not to take it, no premium payment applies.

D. Voluntary Meal Period Waiver

An RN may sign a meal period waiver and the Union shall be informed of all signed waivers. Waivers may be canceled by the RN at any time.

E. Flexible Meal Period Agreement

An RN may sign a Flexible Meal Period Agreement and the Union shall be informed of all agreements. The agreement may be canceled by the RN at any time.

SECTION 13. MEETINGS/IN-SERVICE TRAINING (COMPENSATION FOR REGISTERED NURSE ATTENDANCE)

- A. An RN can take CE's during the week or on a weekend, in order to allow for more options to take CE's. Education leave shall be paid if the educational program occurs on a day the Nurse is not scheduled to work, provided criterion under the guideline is met. Such leave shall not count as time worked for the purpose of determining eligibility for overtime. Prior management authorization is required in order to be paid Education Leave benefits.

SECTION 14. CONVENIENCE TIME OFF (CTO) AND CANCELATION

- A. Should the Employer determine that it is necessary to cancel RNs for a shift(s) or partial shift(s), then the following procedure will be followed, provided the remaining RNs are qualified to perform the work:
1. RNs working overtime or premium pay shifts will be canceled
 2. Convenience Time Off (CTO) will be offered. CTO is defined as a day and/or part of a day without pay and without loss of benefits and/or seniority. CTO is not pre-scheduled time off. An RN will not be required to use PTO to cover voluntary CTO. CTO will be offered in seniority order, starting with the most senior RN.
 3. Should there be no CTO volunteers, RNs will be canceled starting with the least senior in the following order
 - a. RNs working an extra (non-premium) shift
 - b. Temporary RNs
 - c. Per Diem RNs
 - d. Short-Hour RNs
 - e. Regular Part-Time and Full-Time RNs

In event of low census, then it would be reverse seniority by rotation

SECTION 15. PAID TIME OFF (PTO)

A. Accrual of PTO

Full Time, Part Time and Short Hour RNs accrue PTO from their first day of employment based on their actual hours worked including overtime, exclusive of missed meal/break penalties. PTO is accrued based on a maximum of eighty (80) hours paid per pay period. PTO hours are used for the paid recognized holidays and may be used for vacation, illness, family emergencies, religious observance, preventative health or dental care, personal

business and other elective absences.

Current accruals will remain in effect through the final pay period in 2021.

Effective the first full pay period in January, 2022:

Accrual Schedule for Full-Time RNs:

<u>Years of Service</u> <u>Year</u>	<u>Maximum Accrual Per Pay Period</u>	<u>Maximum Accrual Per Pay</u>
Less than 1 year	8.00 hours	26 days (208 hours)
1 st through end of 3 rd year	9.54 hours	31 days (248 hours)
4 th through end of 8 th year	11.08 hours	36 days (288 hours)
9 th year and above	12.62 hours	41 days (328 hours)

Part-time and short hour employees who work less than a full straight-time week (40 hrs.) shall accrue PTO on a prorated basis. The proration shall be based on the ratio of actual hours worked in the week to the full straight-time workweek.

B. PTO Eligibility

All full time, part time and short hour employees are eligible to utilize accrued PTO.

C. The Use of PTO

PTO, as with all other time off, must be requested in writing in advance of the time off desired, and approved in writing by the supervisor/manager, except for emergency or illness. Approval will be based upon the supervisor/manager's determination of the department or unit's staffing needs.

Individual PTO requests are granted based on first in, first granted, with seniority in the bargaining unit being the tie breaker and with consideration for time taken the prior year during periods considered highly desirable (e.g., those surrounding or including recognized holidays). The Registered Nurse must receive an answer from the immediate supervisor/manager regarding approval or denial of the PTO request within two weeks of making the request. PTO requests shall not be unreasonably denied. Once a PTO has been approved, management may not rescind it. The Registered Nurse must have enough PTO accrued at the time a requested PTO is to be taken.

1. PTO requests shall not be made more than 6 months in advance.
2. RN's shall provide the supervisor/manager with their PTO requests by the following schedule and process:

Vacation/PTO scheduling:

Oct/Nov/Dec/

Jan Feb/Mar/Apr/May

June/July/Aug/Sept

PTO Requests in by:

Jan 1st (June -Sept)

April 1st (October - Jan of following year) September 1st (Feb - May of following year)

Ranking system for vacation requests:

Nurses shall rank their #1 choice vacation through 3 during the request period for assisting the scheduler in accommodating the maximum number of vacations for the whole team. Each request will have three choices to best accommodate each person making a request.

3. PTO requests for the premium holiday/vacation periods will not be considered by management before the aforementioned cut-off dates nor granted by management before the aforementioned final approval dates.
4. PTO approval for premium holiday/vacation periods will be based on the previous year's PTO record to ensure equitable distribution.
5. For all requests that fall outside of the premium vacation/holiday periods, individual PTO requests will be reviewed and granted on a first-come-first-serve basis.
6. For all of the aforementioned scenarios, seniority in the bargaining unit will be used as the tiebreaker when multiple requests are made for the same time period. After seniority has been taken into account, approval will be based upon the supervisor/manager's determination of the department staffing needs.

D. PTO Maximum

Hours over 328 will be automatically cashed out on the first pay date each December without a 6% penalty, and voluntarily cashed the first pay date in April with a 6% penalty.

E. Payment Upon Termination

The employee will receive payment for all PTO hours accumulated at the time of termination.

F. PTO Hardship Distribution:

Employees who have a PTO bank balance of more than eighty (80) hours may be eligible to request a PTO payment due to hardship outside of the designated sell back periods once per rolling backward 12-month period. Hardship is defined as an **extreme** financial

hardship as a result of catastrophic events beyond the employee's control, and the requested funds are necessary to satisfy that financial need. Documentation of circumstances will be required prior to approval. The PTO hardship payout is subject to six percent (6%) penalty/forfeiture in addition to all applicable payroll taxes.

G. PTO Cash Out

Eligible employees who have a PTO bank balance of at least eighty (80) hours may be eligible to request a “sell-back” of PTO once per year.

Requested hours will be paid on the first pay date in April of each year. The request must be submitted through the Employee Self Service for final approval and delivery to the Payroll department.

PTO hours will be deducted from the employee’s PTO bank. These hours will be converted to dollars based on the employee’s current hourly rate excluding any shift differential. The PTO sell-back amount is subject to six percent (6%) penalty/forfeiture in addition to all applicable payroll taxes. PTO sell-back will be distributed via normal payroll distribution channels.

H. Donation of PTO to an Employee under Emergency Circumstances

Employees who have a PTO bank balance are eligible to request a transfer of any amount of accrued PTO hours to another PTO-eligible employee at the same affiliate or legal entity who has experienced an unanticipated Medical Emergency. Employees can contribute hours that will maintain a balance of eighty (80) hours in his/her PTO bank. A Medical Emergency is a medical condition of the employee or a family member of the employee that will require a prolonged absence of the employee from duty and will result in a substantial loss of income to the employee because the employee will have exhausted all accrued PTO. The receiving employee must have exhausted all forms of payment prior to receiving a PTO donation.

SECTION 16. HOLIDAYS

A. Recognized Holidays

Premium pay will be paid on the following recognized holidays:

New Year’s Day
Martin Luther King Jr. Day
President’s Day
Memorial Day
Independence Day
Labor Day
Thanksgiving Day
Christmas Day

B. Holidays Worked

In the event a Registered Nurse is required to work on any of the recognized holidays, he/she shall receive time and one-half (1-1/2) for all hours worked on said holiday.

C. Additional Available Shifts on Holiday Week

During the holiday week, a regular full-time or part-time RN, whose normal scheduled shift lands on a holiday and is not scheduled to work on the holiday, shall have the option to pick up an additional available shift prior to the shift being offered to a per diem.

- D. When an unplanned clinic closure occurs on a nurse's set schedule, then the nurse shall have the option to take a CTO day or a PTO day.

SECTION 17. MEDICAL LEAVE, FAMILY CARE AND PREGNANCY DISABILITY LEAVES OF ABSENCE

A. General Information

1. An employee who must be away from work more than seven (7) consecutive calendar days for a medical reason for the employee or a qualified family member shall apply for a leave of absence.
2. To request a leave of absence, the employee shall complete the online Request for Leave of Absence.
3. To the extent permitted by law, FMLA, CFRA, and MLOA shall run concurrently for non- work related injuries/illnesses and FMLA, CFRA, MLOA, and OLOA shall run concurrently for work-related injuries/illnesses. FMLA, CFRA, and PDL shall run concurrently as permitted by law.

B. Notice of Leave

1. The employee shall provide his/her supervisor at least thirty (30)-days prior notice of the need for a leave of absence. If this is not possible, notice shall be given as soon as practicable.
2. For elective or planned medical procedures where employees have flexibility for the timing of their medical treatment, employees shall consult with their supervisor regarding the dates of planned medical procedure to minimize disruption to operations.
3. When providing notice, sufficient information shall be provided to determine if the leave qualifies under this agreement and/or law, and shall include the anticipated start date and duration of leave.

C. Request for Leave and Certification

1. Requests for leave shall be supported by appropriate certification.
2. The Disability Department shall provide employees with the applicable certification requirements and forms.
3. Employees may be required to submit re-certifications if new or continuing leave time is sought after the expiration of an initial certification.

D. Pay During Leave

1. PTO, if available, may be used to supplement other wage replacement benefits to provide income up to approximately 100% of Pre-Disability Gross Earnings based upon FTE status.
2. Employees can elect (on the Request for Leave of Absence form) whether to use accrued PTO to cover any applicable Elimination Period and to integrate PTO with other wage replacement benefits if the leave is covered under FMLA/CFRA, or PDL. If the employee does not affirmatively decline using PTO, the Medical Foundation shall integrate accrued PTO with all applicable forms of wage replacement. If the leave is not covered by FMLA/CFRA, or PDL, the Medical Foundation requires the use of accrued PTO.

E. Medical Leave of Absence (MLOA)

1. An employee's own Serious Health Condition, other than work-related conditions, that prevents the employee from performing one or more of the essential functions of his/her job qualifies an eligible employee for an MLOA.
2. Full-time, part-time, short-hour, and per diem employees who have completed the Introductory Period are eligible for an MLOA.
3. MLOA duration is for up to six (6) months of cumulative absence in a rolling backward twelve (12) month period. MLOA runs concurrent with other leaves of absence.
4. MLOA may not be taken on an intermittent or reduced-schedule basis, unless running concurrently with regulatory leaves that allow for intermittent leaves.
5. Limited term employees are eligible for an MLOA for up to thirty (30) continuous calendar days in a rolling backward twelve (12) month period.
6. If an employee is not eligible for an MLOA under this provision, or if an employee has exhausted his or her MLOA under this provision, a leave may be provided on a case by case basis as a reasonable accommodation in accordance with the federal Americans with Disabilities Act (ADA) and similar state law.
7. If an employee takes an MLOA, returns to work and then returns to a medical leave of absence status, the leave is subject to the maximum limit.

F. Family Care Leave (FMLA/CFRA) and Pregnancy Disability Leave

FMLA/CFRA and PDL leaves of absence will be granted in accordance with applicable law. FMLA/CFRA shall be recorded in accordance with the twelve (12) month rolling period measured backward from the first date the employee commences leave under FMLA/CFRA.

G. Intermittent and Reduced Schedule Leave

1. An employee does not need to use leave under FMLA/CFRA/PDL in one block. Leave can be taken intermittently, or as part of a reduced schedule when medically necessary.
2. Leave for bonding or the care of a new child generally shall be taken in blocks of at least two (2) weeks, but an employee may take two (2) leaves in increments shorter than two (2) weeks. Additional requests in increments shorter than (2) two weeks may be granted with the approval of his/her supervisor and IDAM.

H. Reinstatement/Return to Work

1. Employees returning from an approved leave not exceeding six (6) months shall be restored to the same position, unit, and shift s/he held at the commencement of the leave or, if unavailable due to reasons unrelated to the employee's leave or because holding open the position would substantially undermine the Medical Foundation's ability to operate the business safely and efficiently, to an equivalent position (with equivalent pay, benefits, and other employment terms). If the leave of absence exceeded six (6) months, the Medical Foundation shall use its best efforts to return the employee to the same position, unit, and shift.
2. An employee returning from a leave due to his/her own medical condition shall provide required medical certification confirming that the employee is able to return to work with or without reasonable accommodation.
3. Failure or inability to return to work upon the expiration date of a leave of absence may be considered a voluntary resignation and the affected employee shall be terminated unless an extension of leave has been approved.

I. Health and Welfare Benefits During Leave

1. The employee's current medical, dental, vision, life, and long-term disability (LTD) benefits shall be continued during an approved leave for up to a maximum of twelve (12) months.
2. Employees should consult with the S3 Benefits department regarding enrolling newly eligible dependents in benefit coverage and how the leave may affect their benefits.
3. During a leave of absence, the employee shall pay his/her share of any benefit premiums either through payroll deductions or by check delivered to the S3 Benefits Department by the applicable due date. Employees not in a paid status sufficient to cover the premium shall be billed by the S3 Benefits Department and should contact the Sutter Health Employee Line for information about premium payments while on leave. S
4. Where leave is taken for birth or adoption, the employee may enroll the child

into the health plan within sixty (60) days of the child's date of birth or placement in order to obtain coverage. Failure to enroll the child within this time frame will result in lack of coverage and the employee shall not be allowed to enroll his/her child until the next open enrollment period.

Occupational Leave of Absence (OLOA)

A. General Information

1. An OLOA is a job-protected leave of absence provided for an employee who has sustained a work-related injury/illness on the job that prevents the employee from performing one or more of the essential functions of his/her job.
2. Employees are eligible for an OLOA if:
 - a. The employee incurs a medically-substantiated work-related illness or injury arising out of employment or in the course of employment while on the job;
 - b. The employee's claim is open and accepted by the Workers' Compensation TPA;
 - c. The period of absence is verified by the authorized primary treating provider as work-related;
 - d. The employee has been released to temporary Modified Duty or Light Duty for the injury/illness in question, and the employee cannot be accommodated under ADA or the Connecting to Work Program.
3. An employee who must be away from work for more than three (3) consecutive calendar days for a work-related injury or illness shall request an OLOA. If the need for leave is foreseeable, the employee shall request leave at least thirty (30) days in advance. If the need for leave is not foreseeable, the employee shall request leave as soon as practicable.
4. To request an OLOA, the employee shall complete the online Request for Leave of Absence, which can be accessed at MySutter Connection or by calling the Sutter Health Employee Line for help with accessing and completing the form.
 - a. An OLOA may not be taken on an intermittent or reduced-schedule basis.
 - b. An OLOA affords up to twelve (12) months of leave for the qualifying injury/illness. This includes reoccurrence(s) within twelve (12) months of the employee's return to work.

B. Request for Leave and Certification

1. Requests for leave shall be supported by appropriate certification.
2. The Disability Department shall provide employees with the applicable certification requirements and forms.

3. Employees may be required to submit re-certifications if new or continuing leave time is sought after the expiration of an initial certification.

C. Reinstatement/Return to Work

1. Employees returning from an approved leave not exceeding twelve (12) months shall be restored to the same position, unit, and shift s/he held at the commencement of the leave or, if unavailable due to reasons unrelated to the employee's leave or because holding open the position would substantially undermine the Medical Foundation's ability to operate the business safely and efficiently, to an equivalent position (with equivalent pay, benefits, and other employment terms). If the leave of absence exceeded twelve (12) months, the Medical Foundation shall use its best efforts to return the employee to the same position, unit, and shift.
2. An employee returning from a leave due to his/her own medical condition shall provide required medical certification confirming that the employee is able to return to work with or without reasonable accommodation.
3. Failure or inability to return to work upon the expiration date of a leave of absence may be considered a voluntary resignation and the affected employee shall be terminated unless an extension of leave has been approved.

D. Health and Welfare Benefits During Leave

1. The employee's current medical, dental, vision, life, and long-term disability (LTD) benefits shall be continued during an approved leave for up to a maximum of twelve (12) months.
2. Employees should consult with the S3 Benefits department regarding enrolling newly eligible dependents in benefit coverage and how the leave may affect their benefits.
3. During open enrollment, an employee on a leave shall be provided appropriate information on how to process his/her benefit selections.
4. During a leave of absence, the employee shall pay his/her share of any benefit premiums either through payroll deductions or by check delivered to the S3 Benefits Department by the applicable due date. Employees not in a paid status sufficient to cover the premium shall be billed by the S3 Benefits Department and should contact the Sutter Health Employee Line for information about premium payments while on leave.

Personal Leave of Absence (PLOA)

- A. All full-time, part-time, short-hour, and per diem employees who have completed one year of employment from their Anniversary Date are eligible for PLOA. Temporary and Limited Term employees are not eligible for a PLOA.

- B. A PLOA may be requested for emergency situations where an employee has exhausted leave entitlements or does not qualify for leave under this agreement or state/federal leave laws. Personal Leaves shall not be granted for the pursuit of other employment, to extend vacations, or for time spent incarcerated.
- C. A PLOA may be granted for a minimum of seven (7) days, up to a maximum of two (2) months, with one extension for up to a maximum of three (3) months total time off. An employee may be granted a PLOA one (1) time per rolling twelve (12) month period, measured backward from the date the employee commences leave. A PLOA may not be taken on an intermittent or reduced-schedule basis.
- D. Accrued PTO must be used while an employee is on PLOA.
- E. Employees should provide the supervisor at least thirty (30)-days prior written notice of the need for a PLOA. If this is not possible, notice must be given as soon as practicable after the employee learns of the need for the PLOA, depending on the circumstances. Employees requesting PLOA shall complete the online Request for Leave of Absence.
- F. The supervisor and Human Resources shall review each PLOA request and, in their discretion, determine whether to grant or deny it based on the staffing and operational needs of the department.
- G. Benefited employees shall be responsible for the full premium amount of health, vision, and dental insurance (both the employee and employer portions) for any full pay period during which an employee has been placed in a PLOA status code. If an employee does not pay premiums in a timely manner, the insurance shall be discontinued.
 - a. The Medical Foundation shall continue to pay the employer share of the cost for life insurance and long-term disability (LTD) insurance, provided the employee maintains coverage by paying his/her portion of the premium, if applicable.
 - b. Retirement benefits shall accrue in accordance with the rules set forth in the SutterHealth Retirement Plan Document, as amended.
 - c. Employees shall not accrue additional benefits during PLOA, except as may be provided for by the terms and conditions of a particular employee benefit plan.
- H. Employees returning from an approved PLOA shall be reinstated in the same job classification held prior to the PLOA, including the department and shift, unless mutually agreed to otherwise in writing.
- I. Failure or inability to return to work upon the expiration of PLOA shall be considered a voluntary resignation and the affected employee shall be terminated unless an extension has been approved in advance.

SECTION 18. BEREAVEMENT LEAVE

- A. All full-time, part-time, and limited term employees are eligible for bereavement leave. Short hour employees will be eligible for bereavement leave effective the start of the pay period following ratification.
- B. Employees who experience the death of a Family member or Relative and intend to request bereavement leave must notify their supervisor as soon as possible of their need for bereavement leave pay and time off. Management may request verification of death and/or relationship to the deceased.
- C. In the event of the death of a Family member, employees may receive a maximum of three (3) days of bereavement leave pay, including applicable shift differentials.
 - 1. Family member shall include the following: spouse by marriage (not including common law marriage), registered domestic partner, parent, parent-in-law, child, grandchild, son-in-law, daughter-in-law, grandparent and sibling, individuals for whom the employee is the legal guardian, or other relative as defined below living in the employee's home. Step relationships are equal to blood relations and "great-grand" the same as "grand."
- D. In the event of the death of a Relative, Employees may receive a maximum of one (1) day of bereavement leave, including applicable shift differentials.
 - 1. Relative shall include the following: aunt, uncle, niece, nephew, cousin, grandparent-in-law and sibling-in-law. Step relationships are equal to blood relations and "great-grand" the same as "grand."
- E. Bereavement leave days do not need to be taken consecutively but need to be taken within two (2) weeks (14 consecutive calendar days) of either the service (e.g. funeral, internment, cremation, memorial, etc.) or death. Compensation will be provided to replace regularly scheduled workdays missed and are not considered hours worked for the purpose of calculating overtime. The two-week time frame may be extended at the discretion of management as an accommodation due including, but not limited to, religious, cultural or geographical reason(s).
- F. The Medical Foundation recognizes there may be a need for additional time off when a death occurs in the family and time is needed for the surviving family members to mourn the loss or when employees must travel extensively in order to make arrangements and/or attend funeral/memorial services. Additional time off – either Paid Time Off (PTO) or unpaid time off, where applicable, may be granted to the employee at the discretion of management.
- G. Employees who are on Paid Time Off (PTO) when the death occurs are eligible for bereavement leave pay. In such instances, bereavement leave pay will be paid in-lieu-of PTO hours.
- H. Employees who are on an approved leave of absence during which s/he is integrating PTO hours are eligible for bereavement leave pay. In such instances, bereavement leave pay

will be paid in-lieu-of PTO hours. Any bereavement pay the employee receives in-lieu-of PTO hours must be reported to the Employment Development Department (EDD) and Short- Term Disability/Long-Term Disability carriers, if applicable. If the employee has chosen **not** to integrate PTO hours with disability payments, s/he is not eligible to receive bereavement leave pay.

SECTION 19. JURY DUTY

- A. All full-time, part-time, and limited term employees are eligible for jury duty pay upon hire. Short hour employees will be eligible for jury duty effective the start of the pay period following ratification.
- B. Employees who serve on Jury Duty will receive Jury Duty Pay for the time they are required to serve up to, but not exceeding, their regularly scheduled hours. Employees are required to provide proof of service to receive compensation.
- C. Jury Duty Pay will be paid as base wages including applicable shift differential. Jury Duty hours are not considered hours worked for the purpose of calculating overtime.
- D. An employee receiving a jury summons shall advise his/her supervisor as soon as possible, but no later than within three (3) days of its receipt.
- E. To receive compensation once the employee reports for Jury Duty, eligible employees must select the telephone on-call option, if available. Employees electing the telephone on-call option are to report to work until such time as they are called in to physically report for service, unless excused in advance by their supervisor. Employees who are on call and have not reported for Jury Duty are not eligible for Jury Duty Pay under this policy until they report for Jury Duty.
- F. If an employee is scheduled to work the night shift the day before and/or the day they are scheduled for Jury Duty, s/he will be released from the schedule and eligible employees will receive Jury Duty Pay not to exceed the employee's regularly scheduled hours.
- G. When an employee is required to serve on his/her scheduled days off, the employee will not receive Jury Duty Pay for those days.
- H. Employees who are on an approved leave of absence during which s/he is integrating PTO hours are eligible for and may request Jury Duty Pay. In such instances, Jury Duty Pay will be paid in-lieu-of PTO hours. Employees should note that Jury Duty service during a leave of absence might impact their disability claim, since the hours could be considered work. Additionally, employees on leave for their own illness and/or injury should consider checking with their doctor to verify they are able to participate in Jury Duty. Any Jury Duty Pay the employee receives in-lieu-of PTO hours must be reported to the Employment Development Department (EDD) and Short- Term Disability/Long-Term Disability carriers, if applicable. If the Employee has chosen **not** to integrate PTO hours with disability payments, s/he is not eligible to receive Jury Duty Pay.

- I. An employee who has been selected and wishes to serve on a Civil Grand Jury that is voluntary in nature needs to provide advance notice and receive authorization from his/her supervisor prior to serving. If approved, the employee will utilize accrued PTO since Civil Grand Jury service that is voluntary in nature is excluded from coverage under this policy.
- J. If an employee is on Jury Duty for less than half of his/her shift, s/he should call his/her supervisor to find out whether s/he needs to return to work. The supervisor's decision will depend on a number of factors, including the time it takes the employee to get to work, length of shift remaining, and staffing. If the supervisor determines the employee doesn't need to return to work, the employee will receive Jury Duty Pay for the full shift. Supervisors have the option of excusing employees for the full shift in advance.

SECTION 20. MEDICAL-DENTAL-VISION, LIFE INSURANCE AND AD&D BENEFIT PROGRAMS

- A. The Foundation shall provide the same health plan benefit programs (i.e. Medical, Dental, Vision, Life Insurance and Accidental Death and Dismemberment), under the same terms and conditions, to employees represented by the Union as the Foundation provides to its non-represented employees.
- B. The Foundation shall notify the Union thirty (30) days in advance of any changes to the health plan benefit programs, but shall not be required to bargain with the Union regarding the changes or the effects of the changes.

SECTION 21. SHORT TERM DISABILITY (STD) BENEFIT AND LONG TERM DISABILITY (LTD)

A. Short-Term Disability (STD) Salary Continuation Benefits Program.

The purpose of the program is to provide an additional income benefit to complement state and/or federal wage replacement programs for employees during an approved leave or when partially disabled and working in a reduced schedule and meet the qualifications to continue to receive STD benefits.

1. Eligibility:

Regular full-time, part-time and limited term employees are eligible for coverage. STD eligibility begins on the day immediately following the date the employee completes three (3) months in a full-time, part-time, or limited term position, as long as the employee is in an active status with PAMF and not currently in a leave status. To receive STD benefits under this program, the employee must be on an approved medical leave of absence and apply for 16Tstate and/or federal wage replacement programs (i.e. State Disability Insurance (SDI), Social Security (SS), Total Temporary Disability (TTD)), where applicable.16T Details regarding the benefits and terms of coverage are outlined in the Human Resources Policy - Short Term Disability Salary Continuation.

2. Benefits provided:

- a. STD is a supplemental wage replacement benefit provided to the employee in the event of total and continuous disability up to approximately sixty-six and two-thirds (66-2/3) of their normal pre-disability gross earnings when integrated with state and/or federal wage replacement programs.
- b. STD benefits may include salary continuance for employees who are temporarily and partially disabled. The benefit is integrated with any state and/or federal wage replacement programs and any pay received from light duty work.
- c. Employees can elect (on the Request for Leave of Absence form) whether to use accrued PTO to cover any applicable elimination period and to integrate PTO with other wage replacement benefits if the leave is covered under FMLA/CFRA, PDL, or Military Leave. If the employee does not affirmatively decline using PTO, the Medical Center shall integrate accrued PTO with all applicable forms of wage replacement.

If the leave is not covered by FMLA/CFRA, PDL, or Military Leave, the Medical Center requires the use of accrued PTO.

- d. PTO may also be used to supplement state and/or federal wage replacement programs and STD to provide income up to approximately one hundred percent (100%) of pre-disability gross pay based upon FTE status. Payroll will automatically integrate PTO with the above benefits if the employee does not specifically designate on the Leave of Absence Request Form to not integrate PTO.

3. Calculation:

- a. Day 0-3 (elimination period) will be unpaid under the STD benefit for occupational disabilities.
- b. Day 0-7 (elimination period) will be unpaid under the STD benefit for non-occupational disabilities.
- c. Day 8 (for approved STD claim for non-occupational disability) or day 4 (for approved STD claim for occupational disability) the employee will be paid the full salary continuation benefit less the maximum state and/or federal wage replacement or other anticipated income.

4. Benefit Period:

The maximum benefit period is one hundred and eighty (180) calendar days from the date the disability begins.

5. Qualifying Period:

Re-occurrence of the same disability within one hundred and eighty (180) calendar days of the onset of the original disability will be treated as a continuation of the original disability. The employee will not be subject to another elimination period; however, all time for the original period of disability will be counted in determining the remaining benefit period. Once an employee has exhausted all of his or her one hundred and eighty (180) calendar days of disability of STD benefit, the employee will not be entitled to additional STD pay for the same disability until he or she has returned to work in active status, for a period exceeding one hundred and eighty (180) calendar days.

B. Long Term Disability (LTD)

1. Eligible employees shall receive Employer-paid core long-term disability insurance in the amount 60% of pre-disability earnings, as defined by the certificate of coverage, up to a maximum monthly benefit of \$5,000 and a maximum benefit period of 5 years. An eligible employee may buy up the long term disability insurance that provides a benefit of 60% of pre- disability earnings up to a maximum monthly benefit of \$10,000 and a maximum benefit period to age 65 (or up to age 70 if the Employee is over age 60). The Employee pays premium for this insurance.
2. The Employee must work at least 40 hours per pay period to be eligible for core and buy up long term disability insurance. The eligibility waiting period for a new employee is the first day of the month following 30 days of hire.
3. New or newly eligible employees must complete the enrollment process to purchase buy up long term disability insurance within 60 days of becoming eligible. If the employee does not enroll by the 60-day deadline, the employee will not be able to enroll in coverage until the next open enrollment period. Changes to buy up long term disability insurance may also be made at open enrollment.
4. Certain benefit limitations apply. The terms and conditions of the coverage are set forth in the certificate of coverage. The coverage shall be administered consistent with the certificate of coverage, contract with the carrier and the plan documents.

SECTION 22. RETIREMENT

A. Retirement Plan

All employees are eligible, including Short-Hour and Per Diem statuses, to participate in the Sutter Health Retirement Income Plan (SHRIP). Employees will be given materials, including a summary plan description. Annual employer contributions made to employee accounts based on Years of Service from 5% to 8% of eligible compensation. Employees must complete a Year of Service each calendar year for a contribution. A year of service is a calendar year with at least 1,000 hours.

1. **Dispute Resolution**

Except as provided herein, the SHRIP Plan Document provides a detailed description of the SHRIP provisions and is the governing document when interpreting plan provisions. Any disputes or claims for benefits will be handled in accordance with the steps outlined in the SHRIP Plan Document

B. 403(b) Retirement Plan

Full-time, Part-time, Short Hour and Per Diem employees are eligible to participate in the 403(b) Retirement Plan under the terms set forth in the plan document. The Foundation will match fifty percent (50%) of the employees contributions, up to three (3%) of eligible compensation. The Foundation shall have the right unilaterally to modify this plan, but any such modification shall not affect the vested benefits, if any, of any employee.

The Foundation agree that neither the Foundation's modification of the 403(b) Retirement Plan nor the effects of such modification is subject to the Grievance and Arbitration provisions of this Agreement.

Upon either parties' request, the Union and the Foundation shall agree to meet and confer regarding the effects of changes to the 403(b) Retirement Plan prior to implementation of the changes.

C. Retiree Medical Programs

1. Early Retiree Medical Access (ERMA)

The Foundation shall offer the Early Retiree Medical Access (ERMA) program. Full-time, part-time, and limited term employees shall be eligible for the ERMA program. The specifics of the program shall be available to employees and can be obtained, during normal business hours by calling the Sutter Health Employee Line: 855-398-1631. The cost of the program shall be borne exclusively by the member and rates may be adjusted periodically by the carrier. Affiliate retains the right to terminate, amend, or modify this program or any other similar program in its sole and absolute discretion.

2. Retiree Health Care Account (RHCA)

The Foundation shall provide a post-retirement health care arrangement for eligible employees as follows: The Retiree Health Care Account Plan ("RHCA Plan") shall be available to all full-time and part-time employees who, at the time of retirement, are at least sixty (60) years of age and have both at least ten (10) years of service (1,000 or more hours of service in each calendar year) and at least five (5) years of continuous service (at least 1,000 hours of service in each calendar year) in a benefited employment status upon meeting the RHCA Plan's eligibility requirements. Eligible employees will receive one thousand dollars (\$1,000) credit for each year of eligible service up to a career maximum of ten thousand dollars (\$10,000). These funds may be used to pay for health insurance premiums prior to age sixty-five (65) or for Medicare Part B and Part D premiums, or Medicare

Supplemental plans, after age sixty-five (65), as provided for by the terms of the RHCA Plan. Participation in the RHCA Plan shall be governed by the terms of the plan document. See Summary Plan Description for detailed provisions.

SECTION 23. GRIEVANCE PROCEDURE

The purpose of the procedures set forth herein is to provide the parties with an orderly means of resolving differences which may arise between them.

A. Informal Conflict Resolution

Conflict may arise around issues other than interpretations, application and/or compliance with provisions of this Agreement or whether discharge or discipline was for just cause. When this type of conflict arises, the Registered Nurse is encouraged to promptly use informal conflict resolution. To facilitate resolution of the conflict, the following resources are available to the Registered Nurse (not listed in order of priority):

- a. Management Representatives
- b. Peers
- c. Union Representatives
- d. the Employee Assistance Program
- e. Human Resources Department

B. Grievance

1. Definitions

A grievance is defined as a question or complaint filed by a Registered Nurse, the Union or the Employer concerning the interpretation or enforcement of the terms and provisions of this Agreement, the Registered Nurse's working conditions, or any claim or complaint concerning a Registered Nurse's discharge or discipline.

2. Terms of Grievance

- a. Only the Registered Nurse who has successfully completed the initial introductory period of employment is eligible to submit a grievance.

3. Timeliness

The grievance will be submitted no later than fifteen (15) days after the occurrence of an alleged grievance, or the date from when the Registered Nurse became aware of the occurrence of an alleged grievance.

In determining the number of days for the grievance procedure, Saturdays, Sundays and holidays will be excluded. All other days will be included in determining the number of days regardless of the work schedule of the Registered Nurse.

4. Adherence to Time Limits

- a. The Employer and the Union agree that grievances should be raised, and settled promptly.
- b. Failure of the Grievance to proceed within any time limit delineated in this article will constitute a waiver of the claim.
- c. Failure of the Employer to act within any time limit delineated will entitle the Registered Nurse to proceed to the next step of the grievance process.
- d. The Employer will notify the Union in writing of any terminations or disciplinary actions other than verbal counseling so that the Union will have sufficient time to review and respond within the set time limits.
- e. However, any of the time limits may be extended by mutual written agreement.

5. Right to Representation

- a. The Registered Nurse will have the right to a Union representative or steward.
 - 1. The Registered Nurse may be assisted or represented by the Union representative at any step of the grievance procedure.
 - 2. Attendance of the Registered Nurse at any meeting/hearing may be required.

6. Time Off for Hearings

The Registered Nurse and her Union Representative (if an employee of the Employer) will be granted time off for participation in grievance hearings. The Registered Nurse or his/her representative will not lose benefits or seniority as a result of time off related to grievance.

C. Grievance Procedure

1. Step 1 – Filing of Grievance

- a. The Union will file formal notice of Grievance in writing to Human Resources.
- b. The matter may be referred to the Informal Conflict Resolution process with the agreement of all parties.

2. Step 2 – Human Resources Review Meeting

- a. Review Meeting

Upon the receipt of the grievance, Human Resources or his/her designee will arrange a review meeting within fifteen (15) days with individuals directly involved.

b. Resolution

Human Resources or her/his designee will provide a written determination of the grievance to the Registered Nurse and to the Union with ten (10) days after the review meeting.

3. **Step 3 – Mediation**

a. Referral to Mediation

If the Registered Nurse and/or the Union do not accept the determination of Human Resources or his/her designee, the matter shall be referred to mediation. The Union has ten (10) days from the receipt of the determination to submit the written referral to mediation.

b. Mediation

The Employer and the Union shall request and utilize the services of an agreed upon Federal Mediator, from the FMCS, in an attempt to resolve the grievance, and to avoid unnecessary use of the arbitration process. The recommendation of the Federal Mediator is not binding on either party. It is the intent of the Union and the Employer to conduct the mediation within sixty (60) days of receipt of the request for mediation, dependent upon the availability of the mediator.

4. **Step 4 – Arbitration Procedure**

a. Referral to Arbitration

If the grievance remains unresolved after the conclusion of the mediation step the grievance may be referred to arbitration. A referral to arbitration must be made in writing and must be made within ten (10) days of the conclusion of the mediation

b. Selection of an Arbitrator

The Arbitrator will be selected by the Union and the Employer. If the Union and the Employer cannot agree upon an arbitrator, either side may request that the Federal Mediation and Conciliation Service supply a list of seven (7) names of arbitrators. The arbitrator will be selected from this list by the alternative striking of names (the first strike being determined by a flip of a coin) and the last name remaining will be the Arbitrator.

c. Arbitrator

Arbitration will begin as soon as possible, considering schedules of the representatives of the Employer and the Union. The hearing will be closed unless the arbitrator rules otherwise. Prior to the hearing the Union and the Employer will attempt to agree on a joint submission of the case to the arbitrator. If the parties fail to agree on a joint submission, each will present a separate submission. The joint or separate submission(s) will state the issue(s), and the specific article(s) of the Agreement, which the arbitrator is to interpret or apply.

d. Resolution

1. After the hearing, the arbitrator will render a decision, which will be final and binding on all parties.
2. The arbitrator will have no power to add to, or subtract from, alter, modify, or amend any of the terms or provisions of this Agreement.
3. The arbitrator has the authority to award monetary damages to lost wages and/or benefits. However, the arbitrator's award will not be made which violates the conditions of this Agreement.

e. Expenses

The expenses of arbitration will be divided equally between the Employer and the Union. The expenses will include transcription costs and payment to the arbitrator. Transcription may be waived by mutual agreement of the Employer and the Union.

The Employer and the Union will bear its own expenses of representatives and witnesses.

SECTION 24. LAYOFF AND RECALL

A. In the event of a layoff or reduction of FTE status, the Employer shall first request volunteers. If not enough Registered Nurses volunteer, then the following order shall be used to select the impacted Registered Nurses:

1. Registered Nurses with documented history of performance problems (i.e., written or final written warning) within the last twelve (12) months.
2. The Employer will determine how many On-Call (Per Diem) RN positions are needed. If the Employer decides to reduce the number of On-Call (Per Diem) RN positions, such reduction(s) will be made beginning with the least senior On-Call (Per Diem) RN, provided the remaining On-Call (Per Diem) RNs are qualified to perform the available work.
3. Short Hour, Regular Part-Time or Regular Full-Time Registered Nurses with the least

seniority provided the remaining Registered Nurses are qualified to perform the available work. A Short Hour, Regular Part-Time or Regular Full-Time Registered Nurse that is subject to layoff, except those with a documented history of performance problems in the last twelve (12) months, shall have the option to bump the least senior On-Call (Per Diem) Registered Nurse, provided she/he is qualified to perform the available On-Call (Per Diem) work.

- B. Registered Nurses who are laid off, except those with a documented history of performance problems in the last twelve (12) months, shall have recall rights for 12 months or until the Registered Nurse is offered an equivalent bargaining unit position, whichever occurs sooner. Recall rights shall be in order of seniority.

SECTION 25. SEVERANCE PAY

- A. Regular employees who are permanently laid off as a result of a reduction in force shall be entitled to severance pay in the following amount, provided they choose to waive all further seniority rights to reinstatement to their jobs:
 - 1. 6 months to 4 years of service 2 weeks pay
 - 2. 5 to 9 years of service 3 weeks pay
 - 3. 10 to 14 years of service 4 weeks pay
 - 4. 15+ years of service 6 weeks pay
- B. To qualify for severance pay, the employee must sign a waiver of reinstatement rights within thirty (30) days of the commencement of the layoff.

SECTION 26. MANAGEMENT FUNCTIONS

- A. The Employer retains, solely and exclusively, all the rights, powers and authority that it possessed or exercised prior to the execution of this Agreement, except as expressly limited by a specific provision of this Agreement.
- B. Without limiting the generality of Paragraph 1, the rights, powers and authority retained by the Employer include, but are not limited to, the following: to determine the type and scope of work to be performed, and of the health care services to be provided; to determine the methods, processes, means and places of providing health care services; to effect technological changes; to increase or decrease the work force and to determine the size thereof; to assign work and to decide which employees are qualified to perform work; to suspend, eliminate, add to, expand and control the quality services; to discontinue work for economic, medical or operational reasons; to contract for supplies or services; to select employees for hire, scheduling, promotion, demotion, layoffs or transfer; to manage and direct its business, operations and work force and maintain the efficiency thereof; to create, change, combine or abolish jobs, departments and facilities in whole or in part; to establish work standards, schedules of operation and work load; to specify or assign work requirements and overtime; to schedule working hours and shifts; to utilize external traveler RNs (this is not intended to permanently replace staff or abolish positions); and to

adopt or modify work place policies and rules of conduct and penalties for violation thereof.

- C. All other rights of management not expressly limited by the clear and explicit language of this Agreement are also expressly reserved to the Employer, even though not enumerated above. The exercise of any right reserved to management herein in a particular manner, or the non- exercise of any such right, shall not be deemed a waiver of the Employers' right or preclude the Employer from exercising the right in a different manner.
- D. The retained rights of management shall not be subject to the grievance and arbitration provisions of this Agreement, unless they are in direct violation of the terms of this agreement, nor shall the Employer be required to bargain with the Union over the Employer's exercising of any such rights. The Union does not waive its right to bargain over the impacts of the application of the rights outlined above.

SECTION 27. UNION ACCESS

- A. The authorized representative of the Union shall be allowed to visit the facility for the purpose of ascertaining whether or not this Agreement is being observed. The Union representative shall notify Human Resources in advance of the visit. The Union representative shall not interfere with the work of registered nurses during the visit or cause them to neglect their work and shall limit his/her activity to matters arising under the Agreement. The Union representative conferring with registered nurses will do so only upon the registered nurse's free time and in public areas separate from any patient care area or patient waiting area.

SECTION 28. STRIKE AND LOCKOUT

- A. The Union agrees that during the term of this Agreement there shall be no strikes, work stoppages, work slowdowns, coordinated withholding of services, boycotts, or picketing of the Employer for any reason regardless of whether the underlying dispute is subject to resolution through the grievance and arbitration procedure. No registered nurse shall encourage other registered nurses to take part in any work stoppage or slowdown during the term of this Agreement. The Employer agrees that during the term of this Agreement there shall not be a lockout of registered nurses for any reason.
- B. The Union's no strike pledge also prohibits alleged sympathy strikes, and it is expressly understood that registered nurses may not refuse to cross or work behind any picket line placed at the Employer's facility unless the picket line is a lawful primary picket line established by the Union.

SECTION 29. REGISTERED NURSES NEGOTIATING COMMITTEE

- A. Appropriate nursing coverage will be provided for those Registered Nurses attending negotiations meetings during clinical hours.

- B. If more than one Registered Nurse is from the same department, then the manager will work with the Union in determining Negotiating Committee participation while maintaining safe staffing to meet patient care needs. When Negotiating Committee meeting times and dates are confirmed, Human Resources will notify the Registered Nurses' managers to release the Registered Nurses for the sessions. If there are conflicts in scheduling, the Union, Human Resources and the department manager will work together to come up with a mutually agreeable solution.

SECTION 30. SAVINGS CLAUSE

- A. If any provision of this Agreement is found to be in conflict with the laws of the State of California or of the United States of America or any agency thereof, the remaining provisions of this Agreement shall remain in full force and effect.

SECTION 31. Reimbursement of Professional Licensure/Certification Fees and Membership Dues

- A. RNs covered under this agreement shall have the same access to the Reimbursement of Professional Licensure/ Certification Fees and Membership Dues policy that the Foundation provides to its management represented employees.

SECTION 32. Patient Care Improvement Committee

The Patient Care Committee shall be composed of two (2) bargaining unit employees selected by the Union, and up to two (2) representatives of the Foundation. The parties may mutually agree to expand the number of representatives to these committees as the need may arise. The employees and Foundation Administration may change their representatives on the Patient Care Committee from time to time. The Patient Care Committee will meet before the first anniversary of ratification of this agreement. The parties will hold four meetings per year. In the event that more meetings are needed, it will be by mutual consent.

There shall be Co-Chairpersons of the Committee, one (1) designated by the Union and one (1) designated by the Foundation, who shall alternate the Chair of meetings. The Co-Chairpersons shall confer in advance of each Committee meeting to establish an agenda for the meeting. Employee representatives shall be entitled to a maximum of one (1) hour pay each meeting at the RN's straight-time rate for the purpose of attending Committee meetings, provided that time spent at any meeting shall not constitute time worked for any purpose under this Agreement. Meetings will be scheduled so as not to interfere with the work of the Foundation. These meetings will not be grievance meetings or collective bargaining meetings.

The recommendations of the Committee are advisory only. Disputes within the Committee will not result in waiver of the No Strike-No Lockout provisions of this Agreement, nor be subject to the grievance and arbitration provisions of this Agreement. The provisions of the Contract shall not be superseded by this Committee.

SECTION 33. RN Career Ladder

RN III Career Ladder

A year after ratification of the agreement, nurses will be able to apply for RN III based on the conditions listed below.

The RN III Classification is set at 5.0 % above the RN II classification rate.

BASIC REQUIREMENTS

1. A Registered Nurse with current licensure (includes Oncology RN).
2. Minimum one (1) year of experience as an RN II at PAMF.
3. Employee in good standing with no current outstanding written warnings.
4. Possession of a Bachelor's or Master's Degree related to applicant's position.

REGISTERED NURSE III REQUIREMENTS

- Meets basic requirements.
- The RN III candidate and Clinical Supervisor/Manager will mutually establish goals and objectives to complete identified activities.
- In addition, meets five (5) points or more from the criteria listed below within the year prior to application.
- Registered Nurse III is maintained by meeting criteria each year. Application for renewal will take place at the time of the employee's annual review.
- Should an RN III fail to meet criteria for renewal of his/her status, the Registered Nurse will be given 15 days to meet the criteria. If criteria have not been met to maintain RN III status after 15 days, the Registered Nurse will be reclassified to the RNII and the RN III differential will be rescinded.
- The new application and or renewal will be reviewed and approved by the Clinical Supervisor/Manager, the HR Business partner and a union steward.
- Appeal - Should an RN fail to meet RN III criteria for renewal of their status at their anniversary and after the additional 15 days the RN may appeal the decision and submit their case to the HR Director for review and independent decision. The HR Director's decisions will be forthcoming within 30 days of submission (not subject to grievance process).

CRITERIA FOR ADVANCEMENT (with assigned points) as verified by immediate supervisor (must include application and supporting documentation).

1. Possession of a Bachelor's or Master's Degree related to applicant's position.
2. Trained and worked as an RN student preceptor for a minimum of 16 days annually; or, was assigned by Supervisor to orient new employees to the department and serve as a role model/mentor for the Introductory Period of the new employee's employment. Completes departmental orientation checklist, answers questions, and explains the department procedures/protocols and gives input on 90 day evaluation
3. Actively participates on PAMF Committees, task forces, or quality teams focused directly on patient care and improving the patient care setting for:

12 hours per year.

1-point

24 hours or more per year

2-points

Attendance verification of hours served is required. Time spent on related assignments and/or projects outside of meeting time will count towards committee participation time and must be approved by the supervisor in advance.

If the manager or supervisor directs the nurse not to attend a meeting due to staffing issue, this shall also count as hours served.

4. Maintains professional certification in the Registered Nurse's area of clinical specialty, i.e., OCN or other professional certification.

1-point

5. Develops, gains approval, and completes a special individual project to improve the Clinical Setting (process improvement). Must be approved by supervisor in advance.

1-point

6. Collaborates on significant update/revision of a current department specific policy/procedure, or develops a standardized procedure for use in a Clinical department (independent of NQA committee work) and educates/trains department staff.

1-point

7. Preparation and presentation of an in-service totaling 20-30 minutes or three (3) mini in-services on different subjects, each 5-10 minutes in length, that contributes to the professional growth of the staff. (Could be course material from a seminar or material from individual research).

1-point

8. Develops, gains approval, and implements educational material and/or new methods of clinical teaching that are used with patients on an ongoing basis.

1-point

9. Has been trained to work in 2 of the 3 modalities (Infusion RN, Practice RN Breast Navigator) and has been willing to cover up to 2 shifts per month in the past 12 months or has covered 24 shifts in a year.

1-point

10. Completes nurse clinical training applicable to Registered Nurse position at PAMF/PAD. Submits proof of completion and accumulates:
Thirty (30) CEU's in the year, twelve (12) of the thirty (30) CEU units must be in oncology/hematology

1-point

11. Has served as a volunteer at a Sutter approved community event(s) for a minimum of 8 hours in the last 12-month period. Such events can be locally based, or system-wide. (Note: to be approved by the supervisor. There will be no compensation for participation, and documentation of participation must be submitted.)

1-point

12. Belongs to a professional organization and actively participates (e.g., publishes articles in a professional journal, presents information at a national conference, and/or serves on the Board).

1-point

13. Successfully completed a professional development certificate program offered by Sutter University.

1-point

14. Has been a super user for six (6) months of the year.

1-point

SECTION 34. TERM OF AGREEMENT

The agreement will be in effect until June 30, 2026.

This Agreement has been executed on this 2 day of March 2023.

For PAMF

	12/28/23
_____ Katie Selzer, Human Resources Director	_____ Date

For IFPTE, Local 20

	01/15/2024
_____ Jamie Thompson, ESC	_____ Date

_____ Nicole Moore, RN	_____ Date
Nicole Moore, RN	

_____ Catharine O'Neal, RN	_____ Date
Catharine O'Neal, RN	

	23/02/2024
<small>John Mader (Feb 23, 2024 12:37 PST)</small>	
_____ John Mader, ESC Local 20 President	_____ Date

Wages -

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MEMORANDUM OF AGREEMENT

BETWEEN

Palo Alto Medical Foundation and Engineers and Scientists of California, Local 20

The following Memorandum of Agreement is between Palo Alto Medical Foundation and Engineers and Scientists of California, Local 20, representing the PAMF Santa Cruz Infusion RN bargaining unit. This agreement shall apply retroactively to July 2, 2019.

Tuition Reimbursement

1. All full-time and part-time employees who have successfully completed their introductory period are eligible for Tuition Reimbursement.
2. The maximum tuition reimbursement that an Eligible Employee, including Eligible Employees employed at multiple Sutter Health Legal Entities, may receive is \$2,500 per calendar year. Approved requests for tuition reimbursement will be reimbursed at one hundred percent (100%) of covered expenses, up to the calendar year maximum.
3. Eligible courses include courses that appear likely to lead to improvement in skills and knowledge in the employee's present job or reasonable potential advancement to a higher skill level or position. The course of study must be offered through accredited institutions, including, but not limited to colleges, universities, and business/technical/or vocational schools. In addition, other courses that are eligible for reimbursement include: Graduate Equivalency Degree (GED) courses from an accredited institution and English as a second language (ESL) course from an accredited institution.
4. Excluded from tuition reimbursement are seminars, conferences, and workshop. Course work or other education involving sports, games, or hobbies are also not eligible for reimbursement under this policy, unless that course work or education is related to the affiliate's business or required as part of the employee's degree program. It is not the intent of this benefit to provide or guarantee accumulation of continuing education credit. Course work must not conflict with the employee's work schedule, including overtime and standby requirements, if any (unless otherwise approved by an employee's supervisor).
5. Covered expenses include tuition fees, lab fees, registration fees, and costs of required books. Covered expenses shall not include the costs of commuting, parking, application fees, ID fees, graduation fees, archive fees, deferred payment fees, late fees, entrance exams, expenses for miscellaneous school supplies and materials, expenses for uniforms, expenses for books that are not required by the course syllabus, expenses for graphing calculators, laptop or other computers, printers, any other specialized equipment, mail-in registration fees, fees for non-residents that have not been previously approved by the Employer, any other special or non-recurring fee, costs for meals, or costs for lodging that are incurred by an employee and are incidental to the taking of an eligible course.
6. Employees desiring tuition reimbursement shall complete the tuition reimbursement form and submit the completed form to their supervisor for approval at least three (3) weeks prior to the starting date of the course(s). If the tuition reimbursement request is denied, the employee is responsible for all costs. Costs for fees and books should be estimated on the tuition reimbursement form. The supervisor shall review the request and confirm or deny course eligibility. If approved, the supervisor shall sign and return the form to the Eligible

Employee. A new request shall be completed for each semester or similar period of study. Should an employee use all funds available in a calendar year, no further benefit will be paid even if a Tuition Reimbursement Request has previously been filed and approved.

7. To receive reimbursement for an approved course, the employee must remain an eligible employee for two (2) weeks beyond the last day of instruction. Employees shall submit the following items to S3 Benefits no later than four (4) months after the course has been completed including any required exams (however, if the course is for the fall semester and it is the employee's desire to have the costs applied to the current year's maximum tuition reimbursement, they need to be submitted by the first Friday in December of the current year). It is the employee's responsibility to ensure documentation is received accordance with the required timelines.
8. A copy of the approved Tuition Reimbursement request form;
9. A canceled check or official receipt of payment made for tuition, allowable fees and receipts for books;
10. The official record indicating an acceptable grade (C or above) or satisfactory completion; or, for fall semester classes, a Projected Grade Letter form completed by the instructor(s) with the employee's anticipated grade. The Projected Grade Letter form is available through the MySutter Connection portal
11. Paid tuition reimbursement is applied toward the benefit amount available for the calendar year in which the expense reimbursement is paid to the employee, i.e. an employee who begins classes in the fall semester but submits the grades and receipts in January of the following year will have that amount counted against the calendar year in which the expenses are reimbursed. Employees are encouraged to submit these documents as early as possible for courses that end late in December. If an employee is taking a class in the fall through the Tuition Reimbursement program and wants the benefit allocated in the same calendar year, s/he must submit the tuition reimbursement request by the first Friday in December of the current year (see above).

The parties agree that the previous PAMF policy "Foundation's Educational Reimbursement and Educational Leave Policy, PolicyStat ID: 2839868, dated 9/30/2016", ceased to apply to ESC Represented Santa Cruz Infusion RNs as of July 2, 2019. If any employee received payment under the old policy, from July 2, 2019 through the signing of this agreement, the employer agrees to not seek reimbursement from that individual, and that amount will be applied to the Tuition Reimbursement Policy outlined above.

Signature: 
Nicole Moore (Jan 16, 2024 14:49 PST)
Email: mamacoly2@aol.com

Signature: 
Catharine O'Neal (Jan 17, 2024 13:39 PST)
Email: catharinegeo@gmail.com