

LIFEWISE ACADEMY



POLICY MANUAL

2024.1

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INTRODUCTION

We're glad you're here! We consider your presence, as part of LifeWise Academy, a blessing from God and are committed to coming alongside you so that together we can effectively reach the next generation with the gospel.

A LifeWise staff member is anyone who serves in an official capacity with LifeWise. As a LifeWise staff member, you represent the Body of Christ in both your work life and your private life. As a result, we count on you to always be sensitive to how others may see you biblically, spiritually and ethically. You are inextricably linked with the integrity of this ministry. Accordingly, we encourage you to strive toward living a life that reflects your personal commitment to Jesus Christ and is an example to others of your support of the vision and values of LifeWise.

The LifeWise Policy Manual is intended to provide guidelines and summary information about LifeWise's foundational concepts and general policies. For specific operational procedures, refer to the LifeWise Program Handbook. Specific policies and procedures may be communicated to you verbally or in the form of written procedure statements. No statement, information or policy set forth in this handbook is intended to be, nor does it constitute, a contract between LifeWise and any individual. Although extensive, this Policy Manual is not exhaustive. It is our expectation that each program conducts itself in a manner consistent with the spirit of these policies as well as with the literal interpretation of them.

The policies and practices described in this manual are subject to change from time to time, with or without notice, at the sole discretion of LifeWise, who reserves the right to modify, supplement, rescind or revise any policy, benefit or provision as it deems necessary or appropriate. Any understanding or agreements that in any way contradict this manual are invalid unless they are in writing and executed by the proper individuals.

100 – FOUNDATIONAL CONCEPTS

101 Released Time Religious Instruction

LifeWise is a released time religious instruction program that teaches the Bible to public school students at all grade levels. Released time is a period of time during which "... a student is excused from school to attend a course in religious instruction conducted by a private entity off school district property."¹ Released time allows students to receive religious education in public school and honors the judicial doctrine of the separation of Church and State by adhering to the guidelines established in the key U.S. Supreme Court decision *Zorach v. Clauson*, which has been tested and upheld ever since.

"We are a religious people whose institutions presuppose a Supreme Being. When the State encourages religious instruction or cooperates with religious authorities by adjusting the schedule of public events to sectarian needs, it then follows the best of our traditions, or it then respects the religious nature of our people and accommodates the public services to their spiritual needs. To hold that it may not would be to find in the Constitution a requirement that the government show a callous indifference to religious groups. That would be preferring those who believe in no religion over those who do believe. We find no constitutional requirement which makes it necessary for government to be hostile to religion and to throw its weight against efforts to widen the effective scope of religious influence."

– Justice William O. Douglas, *Zorach v. Clauson* (1952)²

Released time guidelines both guard against government establishment of any one religion while allowing expression of our right to the "free exercise of religion" also protected by the First Amendment. Specific state policies vary. For example, Ohio law HB 171 (ORC 3313.6022) was added by the 130th General Assembly and signed into law by the Governor in 2014. The law allows public school students to be excused from school to receive religious instruction as long as certain conditions are met:

- ◆ The released time program is conducted by a private entity off school district property
- ◆ The student's parent or guardian gives written consent
- ◆ The released time program maintains attendance records and makes them available to the partnering school(s)
- ◆ The released time program makes provisions for and assumes liability for the student
- ◆ No public funds are expended and no public school personnel are involved in providing the religious instruction
- ◆ The student assumes responsibility for any missed schoolwork

No student may be released or excused from a core curriculum subject course to attend a released time program. While attending a released time program, students are not considered absent from school. LifeWise is a replicable released time program that meets all of these conditions and legally teaches the Bible during school hours.

¹ Taken from HB 171: 3313.6022 Released time courses in religious instruction.
<http://codes.ohio.gov/orc/3313.6022>, accessed 3/11/2019.

² <https://caselaw.findlaw.com/us-supreme-court/343/306.html>, accessed 3/12/2019.

102 Statement Of Faith

LifeWise centers its Statement Of Faith on the core tenets of the gospel, primarily on the life, death and resurrection of Jesus Christ as recorded in the Bible. It is our Statement of Faith, our shared understanding of reality, that drives us to serve in this ministry and guides our biblical teaching.

- ◆ Resource: [Statement of Faith](#)

103 Vision Statement & Philosophy

Our Vision Statement & Philosophy defines our primary objective as an organization and lays out our approach to accomplishing our vision to reach students through released time. While there are many benefits of LifeWise to families, schools and communities, including churched and unchurched people alike, the central vision statement is: *To reach unchurched public school students with the gospel through a replicable released time religious instruction program.*

- ◆ Resource: [Vision Statement & Philosophy](#)

104 Core Values

The unified LifeWise Core Values are the qualities for which we strive collectively and individually.

- ◆ Resource: [Core Values](#)

105 Religious Affiliation

LifeWise is organized and operated within, and as a part of, the world-wide community of believers, the Church of our Lord and Savior, Jesus Christ, independent of any other recognized denomination, organized local congregations and any other part of the Church of the Lord Jesus Christ. Because LifeWise is a parachurch ministry with a missionary focus, it shall regularly partner with other denominations and organized congregations and other parts of the Church of the Lord Jesus Christ in order to fulfill its mission. LifeWise will not officially endorse any particular church or denomination.

106 Organizational Structure

LifeWise was founded in 2018 as the released time division of Stand For Truth, a public school ministry founded in 2007. In September 2022, Stand For Truth was renamed as LifeWise, Inc. LifeWise Academy falls under the governance of the LifeWise, Inc. Board.

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200 – GENERAL POLICIES

201 Team Member Conduct

The purpose of this policy is to provide direction so that LifeWise Staff and Board Members can seek further clarification on issues related to the subject of acceptable personal conduct and standards of operation.

- ◆ Resource: [Team Member Conduct](#)

Working/Traveling with Individual of Opposite Gender

To remain above reproach and to promote healthy boundaries between members of the opposite gender, it is the LifeWise, Inc. policy that no two employees of the opposite gender be alone for any reason. While it isn't possible to anticipate every scenario, the following is a brief list of guidelines:

- ◆ Meetings in the workplace between one man and one woman will not take place in secluded or private settings. If in an office/room, doors must have windows and/or remain open.
- ◆ One man and one woman will not meet outside the workplace alone for any reason, including going to lunch together, having coffee, etc.
- ◆ Car trips will have at least 3 people or separate cars will be taken
- ◆ Hotel rooms on separate floors will be requested while traveling
- ◆ One man and one woman should not be in the workplace alone for any significant period of time

Should circumstances arise where it is absolutely impossible to comply with this policy, the supervisor for each employee should be contacted immediately. Convenience and expense control are insufficient reasons for exception.

Theological Connections

LifeWise leaders should minimize their public connections to theological topics that aren't the core, gospel-centered principles around which LifeWise is unifying. This is a sacrifice we all make, not because these secondary matters aren't important, but because we're choosing to make the choice of setting them aside for unity in the larger mission.

202 Background Checks and Screening

LifeWise has a duty to undertake reasonable efforts to safeguard the children it serves, the public and its own interests. Therefore, it is the policy of LifeWise, as a minimum requirement for consideration for service, to conduct a thorough background screening of all LifeWise staff, Leadership Board and volunteer team members. Mandatory rechecks will be done every three years for all team members. Additionally, LifeWise may periodically reassess current team members.

Background screenings will include:

- ◆ National Criminal Database Search
- ◆ National Sex Offender Registry Search
- ◆ SSN Verification and Name/Address History Trace
- ◆ Automatic Search for criminal records under Maiden or Alias Names discovered on SSN Trace
- ◆ Automatic Re-Verification of Records and Possible Records
- ◆ Child Safety Training (required for all program team members, including Directors, Leadership Board members, teachers, drivers and volunteers)

Additionally, LifeWise utilizes a variety of other methods (in addition to the above checks) for screening and selection of team members, including but not limited to the following:

- ◆ Applications (which may be kept on file)
- ◆ Personal interviews
- ◆ Personal and professional references
- ◆ Fingerprinting for a Bureau of Criminal Investigation (BCI) check of state criminal records (if applicable)

LifeWise reserves the right to reject team member applicants, suspend or dismiss current staff and volunteers, based on the content of all utilized background screening processes. Additionally, LifeWise will abide by pertinent employment law regarding its background check policy and other employment matters.

LifeWise will conduct background screenings only with the consent of candidates. Negative hiring, continued employment or volunteer service decisions that are based on a background screening will be disclosed to the employee or candidate in order to allow the employee or candidate opportunity for rebuttal.

Volunteers and staff members who have undergone a background check with another LifeWise program (within the last three years and at the same background check level) may transfer their background check information to serve at another LifeWise program without the need to run an additional background check. To verify and transfer the background check, Program Directors should submit a ticket for Human Resources, requesting this information.

* NOTE: LifeWise Program Directors hold the responsibility for ensuring background screenings are completed for all team member applicants at the local program.

203 Sexual Abuse, Harassment and Other Abuse Prevention

LifeWise seeks to promote a culture in which all team members reach their full spiritual and professional potential in ministry service. Also, LifeWise desires to do what is possible to ensure that team members conduct themselves in a wholly pure way while carrying out the ministry's mission. LifeWise Team Members are called to respect, honor and uphold the inherent God-given dignity of all persons with whom they come in contact.

Therefore, LifeWise will not tolerate any type of misconduct or harassment against any protected persons. This includes sexual abuse or misconduct and verbal or physical conduct by any employee or other person who harasses, disrupts or interferes with another's performance or who creates an intimidating, offensive or hostile environment.

LifeWise provides procedures for employees, volunteers, board members, associates or any other victims of sexual abuse, harassment or misconduct to report such acts. Those reasonably suspected or believed to have committed sexual abuse or misconduct will be appropriately disciplined, up to and including termination of employment or service, as well as criminal prosecution if warranted. No employee, volunteer, board member or other person, regardless of his or her title or position has the authority to commit or condone sexual abuse or misconduct.

203.1 Contact Guidelines

Definitions and Examples: The following definitions or examples of abuse, misconduct or harassment may apply to any and/or all of the following persons: employees, volunteers, students or other third-parties.

Team members should be aware that even a one-time instance of prohibited speech or behavior may rise to the level of abuse, misconduct or harassment.

Sexual harassment, abuse or misconduct may include, but is NOT limited to:

- ◆ Child sexual abuse – any sexual activity, involvement or attempt of sexual contact with a person who is a minor (under 18 years old) where consent is not or cannot be given
- ◆ Physical assaults or violence such as rape, sexual battery, abuse, molestation or any attempt to commit such acts
- ◆ Material such as pornographic or sexually explicit images, posters, calendars or objects or otherwise any demeaning, insulting or sexually suggestive written, recorded or electronically transmitted messages
- ◆ Unwelcome and inappropriate sexual activities, advances, comments, innuendos, bullying, jokes, gestures, electronic communications or messages (e.g., email, text, social media, voicemail), exploitation, exposure, leering, stalking or invasion of sexual privacy
- ◆ Unwanted physical contact or conduct of any kind, including sexual flirtations, touching, advances or propositions
- ◆ Verbal harassment of a sexual nature, such as lewd comments, sexual jokes or references and offensive personal references
- ◆ Demeaning, insulting, intimidating or sexually suggestive comments about an individual

General Contact Guidelines: For any class or activity sponsored by LifeWise, at least three adults, all of whom have successfully completed Child Safety Training and a background check and who are not related to each other, must be present.* Whenever possible, at least one of the adult team members should be female. This rule applies to all LifeWise functions within the classroom and event space where youth are present. No other persons shall have contact with LifeWise students during LifeWise classes and/or events except with the prior approval of the Program Director. Moreover, the number of the adults is to be in proportion to the age and number of the participants, and the duration and difficulty of the activity. Prudence is required in applying this policy to different age groups, length of activity and the risk level of the activity. *Note: For middle and high school classes, only one volunteer is required (in addition to the teacher) as long as security cameras are in use and actively monitored.

One-on-One Contact: When a one-on-one conversation with a student is necessary (e.g., correction or counsel), visibility is required at all times. If the one-on-one conversation takes place in an office, classroom or other room, the door is to remain open. If it becomes necessary to close the door part way to reduce distraction, this may be done only if the office, classroom or other room has a window free from adornment. If the window has blinds, the blinds must remain open. *Note: These policies remain in place even if the program has a functional security camera system.*

Physical contact with children: Physical boundaries must be set that will promote a positive, nurturing environment while protecting children from misunderstandings. Following an explicit code of permitted behavior also assists in protection against false allegations of abuse.

Appropriate physical contact and displays of affection: Appropriate physical contact between adults and children is a positive part of a healthy relationship. The following are regarded as appropriate examples of physical contact and displays of affection:

- ◆ Side hugs, shoulder to shoulder or “temple” hugs;
- ◆ Pat on the head, shoulder or back when culturally appropriate;
- ◆ Handshakes and knuckle bumps;

- ◆ “High-fives” and hand slapping;
- ◆ Holding hands during prayer or when a child is upset;
- ◆ Holding hands while walking with small children;
- ◆ Kneeling or bending down for hugs with small children;
- ◆ Verbal praise.

Prohibited physical contact and displays of affection: All forms of inappropriate contact by adults with children are prohibited. In order to maintain the safest possible environment for children, the inappropriate contact includes, but is not limited to:

- ◆ Any form of unwanted affection (physical contact listed as appropriate can be inappropriate if a child, parent or guardian asks for it to stop, and the LifeWise Team Member does not stop)
- ◆ Inappropriate, forceful or lengthy embraces, and / or “bear hugs”
- ◆ Kisses
- ◆ Lap-sitting
- ◆ Touching buttocks, chest, knees, thighs or genital areas
- ◆ Placing hands in the pockets of a child
- ◆ Showing affection in isolated areas such as bedrooms, closets, adult-only or staff-only areas or other private rooms
- ◆ Lying down, cuddling or sleeping near a child
- ◆ Being in bed with a child
- ◆ Wrestling or tickling
- ◆ Piggyback rides
- ◆ Massages or shoulder rubs
- ◆ Stroking a child’s hair or shoulders

Emotional boundaries: In addition to physical boundaries that must be set, emotional boundaries must be created between children and LifeWise Team Members. Examples of emotional boundary violations include:

- ◆ Compliments that relate to physique or body development
- ◆ Meeting alone in locations away from a parish, school, agency or institution
- ◆ Meeting alone in remote locations on parish, school, agency or institution property
- ◆ Calling, emailing or texting a child for purposes other than those directly related to academics or ministry
- ◆ Displaying and/or taking excessive photographs of a child
- ◆ Engaging in sexually oriented conversations not related to education or ministry
- ◆ Contacting by social media, e.g., Facebook, etc.

Matters related to transporting children: If it becomes necessary for any LifeWise team member to provide transportation for children, the following guidelines must be strictly observed:

- ◆ LifeWise team members must never transport one child alone. There should be at least two adults in every vehicle that transports children;
- ◆ Children must be directly transported to their destination or make only previously planned stops;
- ◆ Children must never be transported without written permission from the child’s parent or guardian;
- ◆ LifeWise team members must avoid unnecessary physical contact with children while in the vehicle.

Using the Restroom: Should a student require assistance in the bathroom, it is mandatory for two screened adults to be present. One adult should assist the student with the door open, while the other adult is responsible for visually monitoring the environment. In no instance should this task be delegated to another child, or any person other than an approved adult female team member. If a class has a student who may need assistance in the restroom, an additional screened volunteer should be scheduled.

When gendered bathrooms are assigned at a LifeWise facility, LifeWise team members and students attending LifeWise will use the bathroom that corresponds to the gender identified on their birth certificates. LifeWise team members, including all adult staff and volunteers, who do not adhere to this policy may receive disciplinary action. If a child does not adhere to this policy, the child's parents or legal guardians will be contacted and appropriate action will be taken, including suspension from the LifeWise program.

Digital Communication: LifeWise team members will use prudence when communicating with a child, including, but not limited to, written communications, the internet, online services, emails, instant messaging, online bulletin boards, social networking sites, text messaging, podcasts, blogs, chat areas and telephones, including cell phones. Appropriate and ethical communication boundaries in ministry must always be observed. Any form of communication that is intended to inappropriately manipulate a child or that incorporates any suggestive language, suggestive photos, sexual innuendos, inappropriate personal self-disclosures, etc., is forbidden.

LifeWise team members shall not initiate social media connections with youth. Team members shall treat their interaction with youth on social networking sites, as well as any electronic communication, as though the interaction were occurring in public in front of other adults and youth. Additionally, team members should avoid one-on-one texting and private messaging with students. LifeWise team members shall refrain from electronic interactions that can be seen by a reasonably prudent person as inappropriate in frequency, tone or content.

203.2 Reporting Suspected Misconduct or Abuse

Every LifeWise team member, whether paid employee or unpaid volunteer, is a mandated reporter. This means that all LifeWise team members are required by law to report immediately any cases of suspected or observed child abuse to a public children services agency or a law enforcement officer in the county in which the child resides or in which the abuse or neglect is occurring or has occurred.

LifeWise is committed to following applicable law regarding reporting allegations or incidents of sexual abuse or misconduct to appropriate law enforcement and child or adult protective service organizations. It is the policy of LifeWise, Inc. not to attempt to investigate or assess the validity or credibility of an allegation of sexual or physical abuse of a minor, or a clearly criminal act, as a condition before reporting the allegation to proper law enforcement authorities or protective services organizations. LifeWise will strive to follow the guidelines as set forth at childwelfare.gov.

Reporting Suspected Child Abuse or Neglect: Many acts of child abuse are felonies. By law, everyone who knows that a felony has been or is being committed must report that information to law enforcement authorities. Failure to do so is a misdemeanor in many states and can result in prosecution.

All suspected instances of child abuse or neglect should be reported by calling Child Protective Services for the county or city where the LifeWise program resides. The LifeWise Support Center should also be

notified of any reports of abuse or neglect. If the alleged child abuser is a LifeWise Team Member, all such incidents should be reported to the LifeWise Support Center immediately.

If a suspected incident of child abuse or neglect, as defined by applicable state laws, occurs during released time or is revealed to or observed by a LifeWise team member, the team member will:

- ◆ Seek to ensure the child or student's safety
- ◆ Contact the LifeWise Program Director

The LifeWise Program Director is responsible to do the following:

- ◆ Immediately alert the proper child protective services authorities or law enforcement when any crime is suspected to have been committed
- ◆ Immediately alert the LifeWise Support Center in order to develop a course of action for the situation

Reporting Student Disclosures: LifeWise team members who are not licensed professional counselors are not bound by confidentiality laws. So, team members will promptly report any knowledge of the following situations to the LifeWise Program Director:

- ◆ A student threatening to hurt themselves (suicide, cutting, etc.)
- ◆ A student threatening to hurt someone else
- ◆ A student who reveals a personal crisis/endangerment (pregnancy, drug addiction, criminal activity, etc.)

Reporting Suspected Misconduct of a LifeWise Team Member: If you are subjected to any conduct that you believe violates this policy or witness any such conduct, you must immediately contact the LifeWise Program Director. If the Program Director is the alleged party committing the acts, report the harassment or activity to other authorities or to the LifeWise Support Center. Any instances of perceived misconduct may be reported via the [Misconduct Report Form](#). Any team member who witnesses sexual harassment or misconduct or abuse or learns of an allegation but does not report it to the Program Director or one of the contacts listed above is subject to disciplinary action. The Program Director or the LifeWise Support Center will ensure that a prompt investigation is conducted.

203.3 Allegation Response Plan

LifeWise has a mandatory duty to report all alleged incidents of misconduct to the proper authorities. Allegations must also be reported to LifeWise's insurer within 30 days of learning of the allegation in order to be covered under our Sexual Misconduct Policy.

LifeWise will cooperate fully with any investigation conducted by law enforcement or other regulatory/protective services agencies. No person who is involved in the complaint, nor any person closely associated with that person shall be part of the team that responds to the allegation(s).

Allegation Response Process: The LifeWise Program Director will take the following action if an allegation is made against a LifeWise team member:

- ◆ Send a copy of [this email](#) to the school's administration to confirm whether the school has reported the allegation to the police or children services
 - ◇ Assuming the school already reported it, report the incident to the same agency to which the school reported it
 - ◇ Gather all the information the school can disclose
 - ◇ Contact the Support Center for next steps

Once the investigation concludes, the Program Director, in conjunction with the LifeWise Support Center, will respond to the findings of the investigation and take appropriate disciplinary action, up to termination. The employee will be notified of the findings. In the event that termination is deemed necessary, the employee will receive a written notice specifying the grounds for the decision.

Workplace Harassment or Misconduct: If LifeWise has a reasonable basis to believe an allegation of workplace harassment or misconduct not involving a minor has occurred, it shall conduct a thorough investigation of the allegation. Such investigation may include engaging the assistance of competent third parties. Based upon the results of the investigation and the provisions of this policy, LifeWise shall determine the appropriate response. LifeWise will make every reasonable effort to keep the matters involved in the allegation as confidential as possible while still allowing for a prompt and thorough investigation.

LifeWise takes all allegations of sexual (or other) misconduct seriously and will promptly, thoroughly and equitably investigate whether an allegation of misconduct is credible. LifeWise may impose appropriate disciplinary action, up to and including discharge, for inappropriate conduct, regardless of whether the conduct constitutes a violation of the law.

Anti-Retaliation and False Allegations: LifeWise prohibits retaliation made against any employee, volunteer, board member or other person who lodges a good faith complaint of sexual abuse or misconduct or who participates in any related investigation. Retaliation may result in disciplinary action, which could include termination of employment. LifeWise prohibits team members from making false or malicious sexual misconduct allegations, as well as deliberately providing false information during an investigation. Anyone who violates this rule is subject to disciplinary action, up to and including termination of employment or service and criminal prosecution if warranted.

204 Political Activities

LifeWise Academy is not affiliated with or supportive of any particular political party, figure or candidate. LifeWise is for all families regardless of political persuasion.

LifeWise strongly discourages employees from participating in political activities and/or holding public office. Team members may only participate in political activities, including endorsement of candidates or specific legislation, during their personal time (i.e., non-working hours). Additionally, they may not identify themselves as a representative of LifeWise or by their LifeWise position or title in any public appearance, letters, advertisements or other documents or electronic media produced in any direct or indirect support for, or opposition to, a candidate or proposition or ballot initiative. LifeWise property may not be used in connection with any such political campaign, including but not limited to offices, phones, computers, copy equipment, websites, donor lists, letterheads and email systems.

◆ **Resource:** [Policy on Political Activity](#)

205 Privacy

LifeWise reserves the right to inspect all work spaces, including desks, lockers and released time transportation. Additionally, LifeWise reserves the right to monitor organizational cell phone calls, voice mail, computer network transmissions (including email) and to inspect company-owned computer and telephone databases at any time with or without notice or cause.

206 Confidential Information

Ministry property includes not only tangible property like computers, desks and phones, but also intangible property such as confidential information. Confidential information includes all information obtained by team members during the course of their service that is not known generally to the public, including student records, financial data, donor information, internal documents and communication, curriculum, employee data and performance, etc.

Team members shall not disclose or use confidential information except as their service requires. Team members who improperly use or disclose confidential information will be subject to disciplinary action, up to and including termination of service, even if they do not actually benefit from the disclosed information and even if they had no part in compiling the original information.

In addition, after termination, team members may not use confidential information obtained while in the service of LifeWise for their personal benefit or disclose such confidential information to third parties without the prior written consent of the Chief Executive Officer. This covers all confidential information and applies all to team members both during their employment and after they leave LifeWise. A violation of this policy constitutes theft and will be addressed accordingly.

Written Communication with School Officials

Public school officials, such as school board members and superintendents, are subject to information laws which can require they release records pertaining to their interaction with LifeWise personnel. Therefore, anyone affiliated with LifeWise should be mindful of their written communication (including text messages) with school officials. Team members should only write correspondence they would be comfortable entering into public record.

207 Ministry Partner (Financial Supporter) Interaction

LifeWise considers its relationship with its Ministry Partners a matter of trust and privacy. Team members may not use their Ministry Partner contacts to market business products or to solicit donations for other organizations. This policy prohibits contacting Ministry Partners on behalf of commercial businesses. This policy also prohibits a staff member from soliciting contacts, to which a business wishes to market its products, in exchange for contributions.

208 Discipline And Dismissal

Generally, LifeWise will attempt to be redemptive and progressive (i.e., degree of sternness commensurate with the severity of the transgression) in its discipline. However, LifeWise reserves the right to implement any system of discipline that it deems, in its sole subjective discretion, to be appropriate in the circumstances, up to and including immediate termination/dismissal of employment or volunteer service.

Disciplinary actions may include, but are not necessarily limited to, termination/dismissal of employment or volunteer service, suspension (with or without pay), verbal or written reprimands, probation, re-assignment, reduced pay or reduced or forfeited pay raises. All disciplinary actions will be fully documented.

Team members may be disciplined for misconduct. Misconduct may include, but is NOT limited to:

- ◆ Discrimination in recruitment and job allocations based upon age, race or gender
- ◆ Verbal and emotional abuse and harassment (including, but not limited to, the use of derogatory, offensive or demeaning language in relation to others)

- ◆ Physical abuse (including, but not limited to, fighting, throwing items, practical jokes or other disorderly conduct that could cause harm to others)
- ◆ Insubordination
- ◆ Engaging in acts of bribery, bullying or sabotage
- ◆ Misrepresentation of LifeWise Academy
- ◆ Property damage
- ◆ Misuse of LifeWise property/materials
- ◆ Fraud, theft, attempted theft, dishonesty
- ◆ Use and/or possession of illegal weapons/substances
- ◆ Inability to meet and sustain performance criteria
- ◆ Failure to follow LifeWise policies and procedures
- ◆ Behavior that is inconsistent with the LifeWise Statement of Faith, Vision Philosophy, Core Values or Team Member Conduct Agreement
- ◆ Falsifying or making a material omission on LifeWise records, reports or other documents, including payroll, personnel and employment records
- ◆ Divulging confidential LifeWise information to an unauthorized person
- ◆ Violation of any law which adversely affects LifeWise or conviction in court of any crime which may cause you to be regarded as unsuitable for continued service

209 Transportation

Team members transporting students in vehicles must follow all applicable laws. In addition, LifeWise-owned vehicles may only be operated by approved LifeWise vehicle drivers for official LifeWise functions, such as transporting students to and from class or field trips or participating in a community event (parade, car show, etc.). Personal use of a LifeWise-owned vehicle is strictly prohibited.

The LifeWise Vehicle Policy applies to all vehicles covered by the LifeWise, Inc. auto insurance policy, as well as all individuals who operate these vehicles.

- ◆ **Resource:** [Vehicle Policy](#)

210 Technology Purchase and Use Policy

LifeWise Academy is a “Bring Your Own Device” organization and does not provide devices, such as laptops or smartphones, to team members as a standard practice. Team members are expected to provide their own devices.

- ◆ **Resource:** [Technology Purchase and Use Policy](#)

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300 – EMPLOYMENT

301 Employment At Will

During the course of serving with LifeWise, Inc., both LifeWise Staff and the ministry will have the right to terminate the relationship at any time with or without advance notice and with or without cause. This is called "employment at will," and no one can enter into an agreement that modifies this policy unless it is in writing and signed by the LifeWise, Inc. Chief Executive Officer. Nothing contained in this handbook is intended to modify or limit this 'at-will' policy.

302 Equal Opportunity

It is the policy of LifeWise, Inc. to provide equal employment opportunities for all applicants and team members who share its faith and mission. LifeWise, Inc. does not unlawfully discriminate on the basis of race, color, sex, national origin, age or disability. It is the responsibility of every team member to conscientiously follow this policy.

Title VII

In accordance with Title VII,³ LifeWise is authorized to exclusively employ individuals who adhere to our religious beliefs. While LifeWise upholds its status as an equal-opportunity employer, we reserve the right to consider religious beliefs in our hiring process. This is done to ensure that our staff collectively shares a common religious commitment integral to our mission.

Nepotism

No person shall become an employee for any position requiring that person to directly supervise or be directly supervised by a relative. This policy is intended to ensure effective supervision, internal discipline, trust and positive morale in the workplace and seeks to avoid the appearance of, or potential for, favoritism, conflicts of interest, the appearance of impropriety and conflicts of loyalty associated with nepotism. As used in this section, the term "relative" includes grandparents, parents, children, grandchildren, brothers, sisters, aunts, uncles, first cousins, in-laws and any members of the employee's household, whether or not related by blood. The term "relative" also includes those with a similar relationship which has been established through adoption or remarriage, i.e. stepchild, half-sister, etc.

303 Disability Accommodation

LifeWise, Inc. is committed to complying fully with the Americans with Disabilities Act (ADA) and ensuring equal opportunity in employment for qualified persons with disabilities. All employment practices and activities are conducted on a nondiscriminatory basis. A disability refers to a physical or mental impairment that substantially limits any major life activity, there is a record of such impairment and the team member is regarded as having such impairment. A "qualified person with a disability" means an individual with a disability who, with or without reasonable accommodation, can perform the essential functions of the position.

Pre-employment inquiries are made only regarding an applicant's ability to perform the duties of the position. Reasonable accommodation is available to all qualified team members whose condition meets the definition of a disability as defined by the ADA where their disability affects the performance of their

³ Taken from U.S. Equal Employment Opportunity Commission. Questions and Answers: Religious Discrimination in the Workplace. <https://www.eeoc.gov/laws/guidance/questions-and-answers-religious-discrimination-workplace>. accessed 11/22/2023.

job functions. Such reasonable accommodation may include any accommodations required by applicable law that do not create an undue hardship on LifeWise, Inc./LifeWise. Reasonable accommodation will not be made if it creates an undue hardship for LifeWise, Inc. or if it poses a direct threat to the safety of LifeWise Staff, Volunteer Team or students. LifeWise, Inc. employees are entitled to compensation, benefits and job assignments as may be required by applicable law without regard to disability. This policy is neither exhaustive nor exclusive. LifeWise, Inc. is committed to taking all other actions necessary to ensure equal employment opportunity for persons with disabilities in accordance with the ADA and all other applicable federal, state and local laws.

304 Applications

LifeWise, Inc. relies upon the accuracy of the information contained in the volunteer and employment applications, as well as the accuracy of other data presented throughout the screening or hiring process. Any misrepresentations, falsifications or material omissions in any of this information or data may result in the exclusion of the individual from further consideration for serving, or for employment, or if the person is currently serving, can be cause for dismissal. Individuals under consideration for employment or volunteering will be required to undergo a thorough background screening, to include a County or Statewide Criminal Court Search and Education or Employment Verification, if they have regular or direct contact with children. Additionally, all employees are required to complete a United States Citizenship and Immigration Services (USCIS) Form I-9, Employment Eligibility Verification, and supply two pieces of identification for review.

305 Intellectual Property

Intellectual property produced during working hours or using LifeWise-owned equipment shall be owned exclusively by LifeWise unless other arrangements are agreed to in advance in writing and approved.

306 Payroll Categories

LifeWise, Inc. employs staff members in of the following three categories:

- ◆ Part Time (Hourly)
- ◆ Flex Full Time (Hourly)
- ◆ Full Time (Salary)

The terms “exempt” and “nonexempt” are used to identify groupings of jobs as covered in the Fair Labor Standards Act (FLSA). Non-exempt employees are non-managerial staff who, regardless of title or function, are required to track your hours and are eligible for overtime pay provisions as noted by the FLSA. All LifeWise, Inc. employees who do not meet the qualifications for exemption are included in the term “non-exempt.”

- ◆ **Resource:** [LifeWise Pay Structure FAQs](#)

307 Pay Scale

LifeWise, Inc. recognizes that pay rates will vary regionally due to cost of living differences and varying levels of responsibility of employees. Accordingly, a wide pay scale is provided as a guideline: Hourly: \$15-\$30/hour

308 Pay Periods

LifeWise uses a semi-monthly pay cycle. Employees will receive paychecks on the 15th of each month and the last day of the month. If the 15th or the last day of the month falls on a weekend or holiday, paychecks will be distributed the last business day prior to this date. Timecards will need to be completed and

approved by the 8th of the month (for the pay period that includes the 22nd through the 7th) and the 22nd of the month (for the pay period that includes the 8th through the 21st).

309 Timekeeping

Hourly employees are responsible for ensuring that their time worked is accurately recorded. Federal and state laws require LifeWise, Inc. to keep an accurate record of time worked to calculate employee pay and benefits. Time worked is all the time actually spent on the job performing assigned duties. Employees should consult the LifeWise Support Center for specific methods for recording and submitting time worked.

The timesheet is to be completed by the employee and be accurate to the nearest 15 minutes (0.25 hours).

Rest Periods

All employees are permitted a 15-minute paid rest break for each four-hour work period. Breaks are not permitted at either the beginning or end of the workday to offset arrival and departure times. Employees who voluntarily work through their rest breaks will not be paid additional compensation.

Meal Periods

All employees who work eight or more hours in a day are encouraged, but not required (unless required by state and local laws) to take an unpaid meal break of 30 minutes.

Training, Fundraising and other Non-Primary Responsibility Obligations

Employees shall be paid for all work-related activities such as, but not limited to, training events, staff meetings, fundraising events and community outreach events.

Travel Time

Employees will be paid for time spent in travel to and from events that are outside of their primary employment obligations. Employees may also submit a [Payment Request Form](#) to be reimbursed for mileage expenses when traveling. Per IRS rules, mileage reimbursements may only include travel that is beyond the employee's typical commute. Employees should keep a detailed and accurate record of all travel beyond their typical commute, including the date, destination, purpose and mileage of each trip.

310 Payroll

The Program Director shall determine the employment status of each person rendering service to the program, whether as a common law employee or independent contractor. Each such employee shall submit all required employment documents (e.g., Forms W-4, W-9, I-9, etc.), prior to receiving remuneration in any form.

- ◆ Resource: [Onboarding Program Director Form I-9 Process](#)
- ◆ Resource: [Onboarding Employee Form I-9 Process](#)
- ◆ Resource: [HR Butler Authorized Representative Instructions](#)

The LifeWise Support Center will provide payroll processing for LifeWise Staff. Payroll changes require the approval of the Program Director and Leadership Board and communicated to the LifeWise Support Center. The Support Center will report all compensation to the appropriate tax agency as required by law and will remit all payroll taxes in a timely fashion as required by law.

311 Overtime Pay

(For Hourly Employees Only) Unless instructed otherwise, full-time non-exempt employees should limit their work hours to 40 per week, and part-time non-exempt to an average of up to 29 hours. Workweeks are tracked from Monday through Sunday and may not coincide with pay periods. Non-exempt employees should get permission for overtime work hours in advance. They will receive overtime pay at the rate of one and one-half times their normal rate of pay for hours worked in excess of 40 hours in a workweek. Holiday time is calculated as work time at the regular number of hours an employee is scheduled to work. If a non-exempt employee is asked to work on a holiday, they will be given a day's pay (based on normal/average hours worked) for the holiday plus regular pay for any hours worked. Overtime hours are calculated based on the number of actual hours worked. Vacation, snow/inclement weather and sick time are not considered actual hours worked. Exempt employees are not eligible to receive overtime pay.

312 Benefits

Retirement

LifeWise, Inc. provides employees an opportunity to participate in its 403(b) retirement savings plan immediately upon hire. For employees who elect to participate in the 403(b) plan, paycheck contributions are automatically deducted each pay period and LifeWise provides a 5% 403(b) match for enrolled employees. This 5% match will come from your program fund. Refer to our [Retirement Packet](#) for details.

Paid Time Off (PTO)

Full Time – Salary

Paid Time Off (PTO): LifeWise, Inc. believes that employees are at their best professionally, personally and spiritually when given the opportunity to relax, recover and rejuvenate on a regular basis. Accordingly, eligible employees are offered PTO. Full-Time employees will leverage an unlimited PTO policy. Sick leave days are included within this PTO policy, but leave under ADA and workers' compensation is separate.

Holidays: LifeWise, Inc. will grant holiday time off on the following holidays: New Year's Day, Good Friday, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, the day after Thanksgiving, Christmas Eve and Christmas Day. When the legal holiday falls on a Saturday, the holiday will be observed on the immediately preceding Friday. When the legal holiday falls on a Sunday, the holiday will be observed on the immediately following Monday. LifeWise, Inc. will grant paid holiday time off on the above dates to regular full-time employees. If a recognized holiday falls during an eligible employee's paid absence (such as vacation or sick leave) holiday pay will be provided instead of the paid time off benefit that would otherwise have applied. Paid time off for holidays will not be counted as hours worked for the purpose of determining overtime.

Part Time – Hourly

Unless otherwise dictated by local and state law, Part Time employees are not PTO eligible and will therefore not be paid for time away from work or holidays. In instances where local laws dictate otherwise, the aforementioned calculation for combined PTO accrual will apply.

Flex Full Time – Hourly

LifeWise, Inc. offers a combined PTO/Holiday Pay policy for employees hired in the flex full time category. The full details of the combined policy can be found in the [LifeWise Academy Paid Time Off and Holiday Pay Policy](#).

Worker's Compensation

LifeWise, Inc. provides a comprehensive workers' compensation program. This program covers any injury or illness sustained in the course of employment that requires medical, surgical or hospital treatment. Subject to applicable legal requirements, workers' compensation insurance provides benefits after a short waiting period or immediately if the employee is hospitalized. LifeWise staff members who sustain work-related injuries or illnesses must inform their supervisor immediately. This will enable an eligible employee to qualify for coverage as quickly as possible. Individual program funds will be charged costs associated with workers' compensation claims made by their staff members.

LifeWise, Inc. will not be liable for the payment of workers' compensation benefits for injuries that occur during an employee's voluntary participation in any off-duty recreational, social or athletic activity sponsored by LifeWise, Inc.

Bereavement Leave

Employees who wish to take time off due to the death of a family member should immediately notify the LifeWise Program Director. The amount of time off granted will be determined by the LifeWise Program Director in conjunction with the Support Center.

Jury Duty

LifeWise, Inc. encourages employees to fulfill their civic responsibilities by serving jury duty when required. Regular full-time employees are eligible for paid jury duty leave.

Family and Medical Leave Act (FMLA)

LifeWise, Inc. complies with the Family and Medical Leave Act (FMLA) and will grant up to 12 weeks of leave during a 12-month period to eligible employees (or up to 26 weeks of military caregiver leave). For more details on the LifeWise, Inc. FMLA Policy, see [Family and Medical Leave Act \(FMLA\) Policy](#).

Disability Leave

While LifeWise, Inc. is not required to provide FMLA benefits, we will honor a medical leave of absence without pay to eligible employees who are temporarily unable to work due to a serious health condition or disability. Eligible employees may request medical leave only after having completed one (1) year of service. A health care provider's statement must be submitted verifying the need for medical leave and its beginning and ending dates. Employees returning from medical leave must submit a health care provider's verification of their fitness to return to work.

Eligible employees are normally granted leave for a period of the disability, up to a maximum of 12 weeks within any 12-month period. Employees will be required to first use any accrued paid leave time before taking unpaid medical leave. If any employee fails to report to work promptly at the end of the medical leave, LifeWise, Inc. will assume that the employee has resigned.

Paid Family and Parental Leave

While LifeWise, Inc. is not required to comply with all applicable requirements of FMLA regarding leave for parental care, LifeWise, Inc. will honor a family and parental leave of absence without pay to eligible employees serving as the primary caregiver following the birth or adoption of a child for up to a maximum of 12 weeks within any 12-month period. Employees will be eligible for two (2) weeks of paid time off before taking unpaid leave. Only full-time and full-time flex employees qualify for this benefit.

Administrative Leave

An employee may be placed on an administrative leave, with or without notice, to permit LifeWise, Inc. to review or investigate circumstances including dishonesty, theft or misappropriation of company funds or

property, violence on the job, safety, negligence or acts endangering children, volunteers, team members or others, insubordination or any other conduct that warrants removing the employee from the worksite. At the discretion of LifeWise, Inc., administrative leave may be paid or unpaid.

Military Leave

Military leave will be provided to eligible employees in accordance with [USERRA](#).

313 Offboarding & Severance

When a team member exits (voluntarily or involuntarily), the team member's Supervisor (Program Director or Program Coach) must complete the [Supervisor's Employee Exit Form](#). This applies to both paid employees and volunteers. The team member will then be removed from all systems. Note that all items must be completed *before* the form is submitted, including the [System Access Request Form](#) linked therein.

If the resigning individual is an Advisory Leadership Board member, he or she must submit this [Resignation Form](#).

The exit form should be completed even when there is no formal resignation/termination, such as if a team member opts not to return for the next school year.

Please note: If an active employee chooses to become an unpaid volunteer, please contact HR immediately. The active employee will be reclassified as a volunteer following the completion of a Volunteer Agreement.

Severance

It is the policy of LifeWise to grant severance pay to terminating employees on a discretionary, case-by-case basis. See our full Severance Policy below.

- ◆ **Resource:** [Severance Pay Policy](#)

314 Workplace Posters

The law requires that all employees and applicants have access to certain posters based on federal and state laws. Because LifeWise, Inc. employs individuals across many states, with many employees working out of a home office, these posters can be found in the following locations:

- ◆ **Support Center:** These posters are physically located above the printer in the lower level. The posters cover all the state and federal laws that apply to Ohio employees.
- ◆ **The LifeWise, Inc. Website:** The "Career" page has "Workplace Posters" links to all federal laws, as well as laws related to each state where LifeWise, Inc. currently operates
- ◆ **The LifeWise, Inc. Resource Hub:** The article titled "Labor Law Regulations" provides a link to the Career webpage

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400 – FINANCIAL POLICIES AND PROCEDURES

401 Financial Affairs Oversight – LifeWise Program

The financial affairs of LifeWise shall be under the direction and control of the LifeWise, Inc. Board. The LifeWise Support Center causes—or causes to be kept—each program’s books of account in accordance with the policies set forth in this document. The LifeWise, Inc. Board shall provide fiscal oversight and governance. Material changes in financial policy shall require LifeWise, Inc. Board approval.

402 Local LifeWise Property 501(c)3

LifeWise will not purchase real estate in local areas to be used for programs. All real estate used for a program will be owned by a local entity. While maintaining operations under LifeWise, communities often opt to start a new local nonprofit when the need for real estate ownership arises. The Support Center has developed a suggested process for creating a 501(c)3 non-profit which is available upon request.

The local LifeWise Property nonprofit 501(c)3 must not include the use of the name “LifeWise” in its own legal name in order to reduce the potential for entity confusion. It is suggested to use the following syntax: “{Area} Character Academy”.

The local LifeWise Property nonprofit 501(c)3 must be managed by a local Leadership Board. The local Leadership Board shall provide fiscal oversight and governance. Material changes in financial policy shall require local Leadership Board approval. The local Leadership Board may retain the services of an outside accountant to assist with various bookkeeping functions, including required annual filing and to provide counsel regarding accounting matters.

The purpose of the local LifeWise Property nonprofit 501(c)3 organization must be strictly limited to the intent to own and operate a facility or other asset (such as a vehicle) and shall not exist with the intent to direct LifeWise program funding through an alternative giving channel. Funds requested from the program account to the local LifeWise Property nonprofit 501(c)3 organization for the purpose of the purchase, renovation or maintenance of an asset will be subject to the LifeWise [Restricted Gift Agreement](#).

403 Ministry Funds

All funds received by the program shall be the property of LifeWise and shall be under its exclusive control unless the funds are directed in writing to a LifeWise Property 501(c)3 responsible for the purchase, management and maintenance of real estate. If a LifeWise program dissolves or disaffiliates with LifeWise, all funds and assets will be retained by LifeWise Academy LLC/LifeWise, Inc.

Out of Pocket Reimbursement

Purchases on behalf of a LifeWise program are made using an expense card. All expenses should be paid using the expense card whenever possible. If a purchase cannot be made with the expense card, the Program Director can submit the supporting documentation for payment via the [Payment Request Form](#). Any out-of-pocket reimbursements can be requested via the Payment Request Form, following our [Out of Pocket Reimbursement Policy](#).

Interest Savings Program

LifeWise programs meeting minimum fund balances will earn interest on their fund balance. For more information, read [LifeWise Interest Savings Program](#).

404 Tax-Exempt Status

LifeWise, Inc., and LifeWise as a division, is a recognized 501(c)3 tax-exempt organization. LifeWise, Inc. is required to use surplus revenues to further achieve its mission. Unauthorized, unreported or unreasonable distributions or use of LifeWise, Inc. assets to or by executives, board members and others may constitute a serious violation of the Internal Revenue Code subjecting the recipient, LifeWise, Inc. and its entire board membership to severe financial sanctions. Accordingly, such unauthorized, unreported or unreasonable distributions or use of LifeWise, Inc. assets is strictly prohibited.

As a tax-exempt organization, a LifeWise program is able to purchase many items without having to pay sales tax. In an effort to save funds, all members are strongly encouraged to present a Blanket Tax-Exempt Certificate when making tax exempt purchases. Please access the LifeWise Resource Hub to access the appropriate certificate for your program.

As a 501(c)3 public charity, LifeWise, Inc. relies on the financial support of donors. Gifts to the organization may be tax deductible; donors are encouraged to consult their tax advisor for more information. This is a benefit team members should communicate to potential supporters.

405 Accounting System

The LifeWise Support Center shall use a modified cash basis accounting. All financial statements relating to the LifeWise Program 501(c)3 account and any reporting to the IRS or other governmental entities shall be completed using this method.

In general, fixed assets will be expensed (and not capitalized); accordingly, the LifeWise Support Center shall not record depreciation expenses.

406 Financial Statements

Financial statements for LifeWise programs shall be prepared monthly by the LifeWise Support Center. These statements will be sent to each program monthly for local review.

407 Insurance

A program is covered for the following occurrences up to, but not exceeding, the limits set forth in the policy. These insurance coverages are subject to all policy terms and conditions.

Religious Freedom

Protects each program against claims of injury resulting from the expression of religious beliefs.

Sexual Acts

Limited litigation coverage is provided for allegations of sexual misconduct or harassment made against LifeWise, Inc. as a ministry. Subsequently, each individual program may benefit from this coverage in the event of an allegation brought against the affiliate. The purpose of this coverage is to protect the name and reputation of the ministry, not necessarily individual team members accused of sexual misconduct or harassment, and will be utilized appropriately.

Employment Practices

Covers hiring practices and other lawsuits which could be brought against LifeWise, Inc. for an improper employment practice or wrongful employment act. This policy also covers:

- ◆ Claims involving any LifeWise Team Member resulting in injuries from bullying, stalking, intimidation or (non-sexual) harassment, whether conducted in person or remotely

- ◆ Limited defense coverage for Board members

Property

Each program is covered for a limited amount of damages incurred by theft of personal property

Media Fallout

Personal injury coverage against allegations of defamatory acts, infringement acts, advertising violations or personal violations as a result of media activities.

Medical Coverage

\$10K per incident

Income, Extra Expense and Donations

If a program is forced to close or suspend operations due to a covered incident, this coverage can help pay additional expenses in restoring program operations which may include donation income and LifeWise Staff pay.

Other Liability Coverages

- ◆ Fire, Legal and Non-Owned Property Damage
- ◆ Counseling Acts
- ◆ Broad Scope Cyber Coverage:
 - ◇ Unintentional transmission of computer viruses
 - ◇ Loss of personal information
 - ◇ Errors caused by Information Technology contractors
 - ◇ Data breach
- ◆ Defense Reimbursement:
 - ◇ Civil Liability
 - ◇ Criminal Inquiry
- ◆ Traumatic Incident Response

Additionally, there is a \$2M Excess/Umbrella policy in the event that a loss exceeds the limits of coverage in the underlying policy.

408 LifeWise Fees

For the purposes of location startup and ongoing program budgeting, some financial considerations and fees shall apply.

- ◆ Resource: [Support Center Fees / Explanation of Services](#)

Launch Fees

- ◆ Programs progressing through the Launch Process shall incur a \$500 LifeWise fee upon transition to Step 3, a \$1,000 staff training fee at Step 7 and a final \$1,500 startup fee upon Step 10 (Live). Launch fees (\$3,000 in total) aid in offsetting the cost for the LifeWise Support Center to develop and provide coaching and guidance throughout the process, along with modest transportation costs for local day travel. Necessary, reasonable and customary travel costs will also be charged to the program for any overnight, airfare and/or multi-day expenses.
 - ◇ The Live startup fee includes: Two registrations to the annual LifeWise Summit, A-frame “Classes Today” sign and one retractable banner
- ◆ These fees aid in offsetting the cost for the LifeWise Support Center to develop and provide

coaching, guidance and training throughout the process.

Annual Student Fee

- ◆ Each program is assessed an annual \$20 per student fee.
- ◆ In order to mitigate inherent risk to the program, the unique count of students participating in a given school year shall be counted toward the total number of students in the program. For example, if a student participates even once, they shall be included in the total count.
- ◆ This fee will be assessed monthly, during the school year, via an accounting journal entry and reconciled annually in May in alignment with any offsetting Investment Fund distributions.
- ◆ A floor and ceiling on total annual charges is in effect as follows:
 - ◇ \$1,000 Min (floor) / Year per Program (i.e., 50 student equivalent)
 - ◇ \$12,000 Max (ceiling) / Year per Program - up to 5 schools (i.e., 600 student equivalent)
 - \$1,000 increase to the max per additional school beyond the first 5 schools served

Donation Processing Fee

- ◆ All donations will incur a 4% donation processing fee

409 Red Zone Policy

The Red Zone Policy outlines the approach that LifeWise will take to manage financially underperforming programs in order to be good stewards of the funds God has provided us to carry forward His work. The strong desire of LifeWise is to do everything possible to restore programs back to health through various courses of action. However, there will certainly be times when our best efforts will not ultimately overcome the deficit, and significant changes and tough decisions must be made.

Financial risk determination for all programs will be assessed on a monthly basis. LifeWise recognizes that programs that have not yet launched may incur a deficit prior to executing the Kickoff Campaign, but programs should manage expenses to prevent their fund balance from dropping below a deficit of \$2,500 prior to launch. A fund balance deficit of more than \$2,500 prior to launch will result in triggering an immediate Red Zone Month 1 notice, as described below.

Yellow Zone is defined as a fund balance that is less than two months of average operating expenses. Average operating expenses are calculated as an average of the previous six months of expenses.

- ◆ Program Directors will be notified if their fund balance causes them to be in the yellow zone
- ◆ Program Directors will begin meeting with a Program Coach on a biweekly basis to review progress toward a healthy fund balance

Red Zone is defined as a fund balance of less than \$0.

- ◆ Beginning in the first month in which a program enters the Red Zone, the following policy shall be implemented:
 - ◇ Month 1 – Program placed On Notice
 - Program Director to begin weekly touchpoints with Program Coach to review progress toward health
 - ◇ Month 2 (consecutive, or twice within one quarter) – Program Director to submit a **Written Improvement Plan**
 - Plan should include both support-raising and other revenue-generating activities along with expense reduction decisions or considerations

- Program Director notified that reduced pay will take effect in subsequent month if program remains in the Red Zone
- ❖ Month 3 (consecutive, or immediately following a written plan month) – Reduced pay for the Program Director until program projected to perform in the black
 - Pay will be reduced to minimum wage in accordance with applicable state employment laws
 - Pay will be returned to the original rate when the program fund balance is positive. A one-time bonus may be requested after the program fund balance is more than two months of operating expenses.
- ❖ Month 6 (or end of school year) – Full payback schedule begins
 - Viability of the program will be evaluated
 - Payback schedules will vary based on severity of the issue and long-term vision for the program
- ◆ As a rule, LifeWise will strive to maintain programs through the end of the school year

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