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December 14, 2024, through September 30, 2027

AGREEMENT
between
Institute on Aging
and
Service Employees International Union Local 1021, AFL-CIO

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

SECTION 1. UNION RECOGNITION 2
SECTION 2. UNION MEMBERSHIP 2
SECTION 3. MANAGEMENT RIGHTS 3
SECTION 4. LABOR-MANAGEMENT RELATIONS 4
SECTION 5. COMPENSATION 5
SECTION 6. TRAVEL REIMBURSEMENT 7
SECTION 7. ALTERNATIVE WORK ARRANGEMENTS 7
SECTION 8. PROFESSIONAL DEVELOPMENT 9
SECTION 9. PART-TIME WORK 11
SECTION 10. TEMPORARY EMPLOYEES 11
SECTION 11. HOLIDAYS 11
SECTION 12. VACATIONS 12
SECTION 13. SICK LEAVE 13
SECTION 14. GROUP INSURANCE PLANS 16
SECTION 15. RETIREMENT PLAN 20
SECTION 16. LEAVES OF ABSENCE 20
SECTION 17. HEALTH and SAFETY 29
SECTION 18. INTRODUCTORY PERIOD, DISCIPLINE AND DISCHARGE 30
SECTION 19. PERSONNEL FILES 31
SECTION 20. GRIEVANCE PROCEDURE 32
SECTION 21. PREMIUM CONDITIONS 36
SECTION 22. REDUCTIONS IN FORCE OR HOURS 37
SECTION 23. STRIKES AND LOCKOUT 38
SECTION 24. JOB POSTING AND NOTICE TO UNION 38
SECTION 25. SUBCONTRACTING 38
SECTION 26. CHANGE IN OWNERSHIP 39
SECTION 27. SAVINGS CLAUSE 39
SECTION 28. TERM OF AGREEMENT 39

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

This Agreement is entered into between Institute on Aging (hereinafter called the Employer or IOA) and Service Employees International Union Local 1021 (hereinafter called the Union).

SECTION 1. UNION RECOGNITION

The Employer recognizes the Union as the exclusive bargaining agency for employees covered by this Agreement. This Agreement applies to all employees in the classifications listed in the salary schedule attached hereto and made part of this Agreement. Supervisors, as defined in Section 2(2) of the Labor-Management Relations Act, 1947, as amended, are excluded from the terms and coverage of this Agreement.

SECTION 2. UNION MEMBERSHIP

A. UNION SHOP

All current Employees of Institute On Aging who are subject to this Agreement, and who are employed by the Employer on the effective date of this Agreement shall be required as a condition of employment to become members in the Union in good standing within thirty (30) days of the effective date of this Agreement and to remain members in good standing during the course of their employment. All such applications shall be accepted by the Union.

B. DUES CHECKOFF

All Employees of the Employer who are subject to this Agreement and who are hired after the effective date of this Agreement shall, not later than the thirtieth (30th) day following commencement of employment, become members of the Union in good standing and shall remain members in good standing during the course of their employment. Members in good standing shall be defined as employed members of the Union who tender periodic dues uniformly required by the Union as a condition of acquiring or retaining membership.

C. DUES DEDUCTION

The Employer will honor written assignments of wages to the Union for the payment of the Union's periodic dues when such assignments are submitted in a form agreed to by the Employer and the Union. The Employer will promptly remit periodic dues deducted pursuant to such assignments with a written statement of the names of the employees for whom deductions were made. Normally, the deduction will be made on the first pay period of each month for the then-current Union periodic dues. However, the Union and the Employer may make other arrangements by mutual consent. The Union will hold harmless the Employer against any claim which may be made by any person by reason of the deduction of Union membership fees, including the cost of defending against any such claim.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C im against the Employer by reason of failure to perform under this paragraph.

D. HOLD HARMLESS

The Union shall indemnify and save the Employer harmless from any and all claims, suits or other actions arising from this Section or complying with any request for termination of employment under this Section.

E. NOTIFICATION

At the time a new employee is hired, the Employer shall deliver to the employee a written notice stating that the Employer recognizes the Union as the collective bargaining agent for the employees subject to this agreement. The Employer shall deliver to the Union the names and addresses of all new employees covered by this Agreement. This shall be done by the 10th day of each month with respect to new employees hired during the previous month.

F. COPE CHECK OFF

The Employer agrees to deduct and transmit to the treasurer of Local 1021 Political Action Committee the amount specified from the wages of those Employees who voluntarily authorize such contributions on the forms provided for that purpose by the Local 1021 Political Action Committee. These transmittals shall occur monthly and be due by the fifteenth (15th) of the month for the previous month and shall be accompanied by a list of the names of those Employees for whom such deductions have been made and the amount deducted for each such Employee. Any Employee who authorizes such deduction and subsequently wishes to change the amount of the deduction or revoke the authorization may do so by informing the Employer in writing.

G. ORIENTATION

New members of the bargaining Unit shall receive a “new employee orientation” at the beginning of their employment with IOA. During the orientation, the new employee shall be provided with all information necessary to enroll in Employer provided Benefit and Retirement Plans. The Union shall provide a packet of information to be provided to newly hired members of the Bargaining Unit, as well as the names and contact information of any Union Shop Stewards and the Union Field Representative. The Union shall be notified of all such orientations and provided an opportunity to meet with the “new hires” at the end of the Employer’s presentation.

SECTION 3. MANAGEMENT RIGHTS

It is the duty and it is the right of the Employer to manage its operations and direction of employees. This includes, but is not limited to, the right to hire, transfer,

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arge employees, reduce hours, set employee shift schedules, disciplinary standards, and evaluate employee work performance. In addition, all of the rights, powers, authority, and prerogatives which the Employer has traditionally exercised, are expressly reserved to the Employer. The choice, control and direction of all supervisory and management staff shall be vested solely and exclusively in the Employer. The foregoing statements of the rights of management and of the Employer functions are not all inclusive and shall not be construed in any way to exclude other Employer functions not specifically enumerated, except when such rights are specifically abridged or modified by this Agreement.

In the event of any conflict between a provision of this Agreement and a written policy or procedure stated in the Employer's Employee Handbook, the provision of this Agreement shall prevail.

SECTION 4. LABOR-MANAGEMENT RELATIONS

A. UNION ACTIVITY.

The Employer agrees not to discriminate against any employee because of membership in the Union or because of activities on behalf of the Union. Union activities shall not interfere with the normal operation of the Institute on Aging.

B. NON-DISCRIMINATION.

Neither the Employer nor the Union shall discriminate for or against any employee because of race, color, age, religion or creed, gender or sex, sexual orientation, gender identity or expression, veteran status, marital status, citizenship, mental or physical disability or condition, income source, or housing status or any other characteristic protected by State or Federal law.

C. BULLETIN BOARDS.

The Employer shall furnish the Union space on one (1) bulletin board or a mutually agreed designated space for official notices of the Union, such as meetings, Union business, etc. Reasonable discretion shall be employed in the content of such notices. Such bulletin boards or mutually agreed upon spaces shall be provided at all IOA locations for employees covered under this agreement.

D. SHOP STEWARD.

(1) The Union shall notify the Employer of the name of the designated shop steward(s). The shop steward(s) shall deal with the representative of the Employer designated to handle union relations including grievances.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C op steward shall be to present grievances as defined in this Agreement to the designated Employer representative at the first and second steps of the grievance procedure as set forth in this Agreement.

(3) The shop steward shall perform his/her functions outside of his/her working hours on his/her own time.

(4) The shop steward shall not give directions to any employee, shall not advise, or recommend non-compliance with the order of any supervisor, but shall instead advise the employee of his/her rights under the grievance procedure.

C. LABOR MANAGEMENT COMMITTEE

The purpose of this Committee will be the improvement of communication and mutual understanding of the parties to this Agreement on issues of joint interest including but not limited to Agency Operations, Financial Status, Employee Safety and other mutually agreed upon topics. The yearly schedule for these Labor Management meetings will be set by mutual agreement and/or upon the request by either party.

The Committee shall be composed of representatives selected by the Union and representatives selected by the Employer. The time and place of such meeting shall be set by mutual agreement of the parties. Proper notice shall consist of a request to meet, a suggested time and place, and a proposed agenda for the meeting. The Committee's findings, if any, shall be advisory on the parties.

SECTION 5. COMPENSATION

A. PAYMENT OF SALARIES.

All salaries shall be paid on a bi-weekly basis. This salary payment is for salary earned during the two-week period immediately prior to the pay period. The Biweekly Payroll Schedule for the year is posted on the agency HR website. Any change in this provision requires written notification at least two (2) pay periods prior to the effective date of the implementation of the change in procedure.

B. SALARY STRUCTURES

Minimum Salaries shall be paid in accordance with the Salary Step Structure contained in Appendix A attached hereto and made part of this Agreement.

The Appendix A Step structures for CM I will comply with California State requirements for Exempt Minimum Salary. The CM I Step 1 shall be at least the CA Exempt minimum. The other steps in the CM I Step Structure will be increased to maintain the minimum 2% Step interval between steps. Any CM 1 Employee with a salary below the California State Exempt minimum will have their salary

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C ıpt minimum effective with the date of the California State requirement change.

When Step Structures are increased, the minimum 2% Step interval between Steps will be maintained.

C. SALARY INCREASES

The salary of the Employee will be increased upon the anniversary of their original date of hire, in accordance with the Step Structure in Appendix A. These anniversary salary changes will continue to occur until the Employee reaches the maximum of the Salary Step Structure. Should the current salary of an Employee reach the top Step of the Salary Step Structure, the base salary of the Employee shall not change. When an Employee has reached the range maximum (Step), the Employee will be eligible for a lump sum payment equivalent to a Step increase on their Anniversary date in lieu of a base salary change.

An employee's anniversary date shall remain unchanged after a promotion.

D. BILINGUAL PREMIUM.

Employees required to use a second language, including ASL for the deaf, in the performance of their duties for the employer shall be compensated at four percent (4%) over and above their regular salary for the duration of such assignment. It is agreed that employees who have the skill and who receive this premium will be reasonably available to co-workers to assist in translating orally or in writing for their clients. It is also agreed that employees who have the skill and who receive this premium can be assigned to translate program materials. If this translating assignment is a major project, additional compensation and/or a workload adjustment may be determined by the employee and their manager.

E. HIRING SALARY EXPERIENCE CREDIT

Placement of employees at the time of hire will be normally at the first salary step in the appropriate classification. Employees shall receive one (1) year of step credit on the Appendix A Salary Step Structure for each one (1) year of previous relevant experience up to a maximum of ten (10) years within their respective profession prior to their date of hire. Placement of any employees in any salary steps above the first salary step in the appropriate classification shall be based upon relevant experience of the employee in their particular field or discipline, or unusual competence or merit including specialized training. The determination of the Employer as to salary step placement of employee shall be conclusive. A grievance may be filed as to salary step placement and processed through Step III of the grievance process, but may not be referred to mediation or arbitration. New hires may be placed at a higher step than allowable under this section by mutual agreement and a written Memorandum of Understanding between the parties.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

If employees are required to visit clients in their homes and the employee is required to use their own automobile, mileage shall be reimbursed at the current IRS mileage rate commencing the first of the month following any IRS announcement changing the mileage reimbursement rate.

IOA also will reimburse authorized employees who are required to use public transportation in providing services to IOA clients or who are on other approved business. Reimbursement for required travel using public transportation will be at the actual transportation cost and must have the pre-approval of the employee's supervisor. Approved public transportation costs include Bus Passes and BART Clipper cards.

SECTION 7. ALTERNATIVE WORK ARRANGEMENTS

A. Alternative Work Arrangements provide IOA employees who have completed their Introductory Period with the ability to work alternative hours and/or from an alternative work location instead of IOA primary office location.

B. For purposes of this provision, "Alternative Work Arrangements" can be any of the following:

1. "Alternative Work Schedules" refers to work arrangements that are variations from the standard workweek including Administrative Days.

2. "Flextime" or "Flex Schedules" refers to fluctuating starting and ending times during the workday.

3. "Compressed Workweeks" refers to working the equivalent of a full-time week in fewer than five days. For example, a 9/80 work schedule which would mean working 8 nine hour workdays and one eight hour workday during an 80-hour pay period with one day designated as a day off or 4/40 which would mean working 10 hours a day during a 40-hour work week.

4. "Alternative Work Sites" refers to working from home or other IOA contracted locations.

C. PROFESSIONAL HOURS

The Employer and the Union agree that all work assignments are of a professional nature. As exempt professional employees, such work assignments require varying amounts of time and schedules depending upon the individual circumstances of each case or situation. It is recognized that employees may need to schedule work hours in accordance with the specific needs of IOA clients. In such situations, the employee may adjust

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k schedule on a temporary basis with timely notice to their supervisor.

D. QUALIFICATIONS

Having satisfactorily completed the Introductory Period of employment with IOA, an employee under the provisions of this Agreement shall be eligible to participate in Alternative Work Arrangements. All Care Managers and Nurse Care Managers covered by this Agreement who have "Professional Hours" shall be allowed to have Alternative Work Arrangements provided they have a written mutual agreement with their supervisor, manage their workload and maintain communication with their office and clients. Employees shall be required to attend meetings and trainings as designated by their Supervisor.

E. ADMINISTRATION.

The Alternative Work Arrangement shall be for a specified time period not to exceed one year. Approval can be given for an additional predefined period not to exceed a year. The approved Alternative Work Arrangement can be terminated based of the needs of the program. The Employee and Supervisor will meet to consider options before the decision to terminate the existing Alternative Work Arrangement is implemented for program needs or other reasons. Any new agreement between the Employee and Supervisor will be in accordance with this Section.

F. EXISTING ALTERNATIVE WORK SCHEDULES

Alternative Work Schedules which were approved and in place prior to December 13, 2024 will be exempted from the provisions described in this Section and will continue to be administered under the agreement between the supervisor and the employee until such time as both parties agree to change the agreement. Any new agreement between the employee and supervisor will be in accordance with the provisions described in this Section.

G. WEEKEND WORK

If an employee is scheduled to work on a Saturday and/or a Sunday, the employee will be allowed time off during the week equal to the amount of time worked on the weekend. This time off will be scheduled a time mutually agreeable between the supervisor and the employee or no later than 90 days after the time worked.

H. PHYSICAL STANDARDS

The Employer will use its best efforts to see that employees shall continue to enjoy those physical perquisites currently provided. However, future

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changes may cause an employee to work in a different physical accommodation than currently provided. If Employees are required to move to work accommodations which may reasonably be considered to be less convenient, less spacious, or less well-appointed, they will receive prior notice. There will be a meeting with the employee(s) to discuss the reasons and requirements for the move.

SECTION 8. PROFESSIONAL DEVELOPMENT

GENERAL SUPPORT

IOA supports professional development efforts by employees covered by this Agreement. With prior discussion and agreement of the supervisor, IOA will reimburse the costs of professional development activities such as but not limited to conferences, workshops, institutes, classes, CEUs, licensures, certificate renewals or ASW requirements for up to five hundred ($500.00) dollars for an employee each fiscal year. The employee must provide a written description of the professional development activity and its cost. Also, the Employee must provide documentation of attendance and/or completion of the professional development activity in order to receive reimbursement.

Supervisor approval will depend on: (a) staffing and operational needs at the time of the request; and (b) the applicability of the proposed development experience to the employee's current position or future professional development at IOA.

B. LICENSURE

IOA will continue to be supportive of the efforts of employees covered by this Agreement who wish to obtain licensure as an LCSW or an LMFT although the position of social worker in this organization does not require a license. Support will include:

(i) Individual and group supervision by an LCSW, LMFT or Licensed Psychologist of the clinical hours the social worker must acquire in order to apply for the LCSW or LMFT license. If IOA does not have adequate internal staff to provide supervision after 30 days, IOA will seek to provide and/or pay for external supervision of clinical hours.

(ii) Payment for courses which the supervisor determines to be job related and fit within the department budget for training while taking into consideration the needs of other staff in the department as a whole, as well as the particular needs of the employee.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

Licensure requirements, Employees covered by this Agreement shall be eligible for a payment of one thousand two hundred ($1,200.00) dollars. The payment will be paid in two payments of six hundred ($600.00) dollars each at 6-month intervals after the Employee submits the appropriate licensure documentation to hradmin@ioaging.org.

(iv) Employees who are registered at their time of hire or who become registered will be eligible for supervision of clinical hours not later than 30 days after hire or registration.

(v) Supervisors within IOA and contracted Supervisors of IOA will establish a written Supervisory Agreement with the employee being supervised. This written Agreement will follow the guidance provided by BBS regarding certification of clinical hours and will include how the Supervisor will certify psychotherapy hours. Additionally, the Supervisor shall sign the necessary forms quarterly to ensure that candidates are remaining on track. The IOA shall offer an ASW support group to provide support in studying for licensing exams, organizing BBS forms and other necessary tasks to support success of candidates. Supervisors will utilize their professional assessment and judgement to determine the number or portion of hours in the caseload of an employee seeking clinical hour supervision. If the Employee being supervised cannot reach a satisfactory Agreement with the Supervisor providing clinical supervision, the Employee and the Supervisor will notify the immediate program supervisor/manager of the Employee. The immediate program Supervisor/ Manager will actively engage in seeking alternatives that could include providing Supervision from elsewhere within IOA or Supervision contracted by IOA.

C. PAID EDUCATIONAL DAYS/HOURS.

IOA shall provide 5 (five) paid educational days/ (40 hours) per fiscal year (July 1 to June 30) for each regular employee who attends an approved course, institute, workshop, or class including courses taken online from home. The employee must receive Supervisor pre-approval for use of Paid Educational Days/Hours. It is preferred that requests for Educational Days/Hours be received at least 2 weeks prior to the date of the educational event. The Supervisor will assess operational impact when determining approval for Paid Educational Days/Hours and based on this assessment will approve or disapprove the Employee request. The employee will submit verification of program completion or attendance for each Paid Educational Day program or activity. Paid Educational time may be used in hourly increments. Paid Educational days/hours shall be provided to Part Time employees on a pro-rata basis.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

The Employer recognizes that to maintain the highest level of professional performance and to aid in the retention of staff of demonstrated excellence, part-time employment is necessary and may be desirable in other cases. With the operating needs of the department in mind, the Employer, at its sole discretion, may grant such part-time employment at the request of the employees.

Employees hired before 10/1/13 and who work on a schedule of less than twenty (20) hours per week shall not receive any fringe benefits provided in this Agreement but shall receive a differential of nineteen percent (19%) above the salary rate for their classification in lieu of fringe benefits. Employees hired after 10/1/13 and who work on a schedule of less than thirty (30) hours per week shall not receive any fringe benefits provided in this Agreement but shall receive a differential of seventeen percent (17%) above the salary rate for their classification in lieu of fringe benefits.

SECTION 10. TEMPORARY EMPLOYEES

A temporary employee is one who is hired either part-time or full-time on a predetermined work schedule to work for a limited period which shall not extend beyond ninety (90) calendar days.

The ninety (90) calendar days may be extended by mutual agreement of the Employer and the Union, and the Union's agreement to such extension will not be unreasonably denied. In the event a temporary employee becomes a regular employee (i.e., eligible for benefits), the qualifying date for pay raises starts with his/her most recent date of continuous employment, and the qualifying date for fringe benefit eligibility and accrual is the date of reclassification to regular status. A temporary employee shall not be terminated solely to prevent his/her advancement to regular status when the temporary job continues in effect or for the sole purpose of keeping a regular job constantly staffed by temporary employees.

Temporary employees shall receive a differential above the salary rate for their classification in lieu of fringe benefits equal to the differential for part-time work as described in this Agreement.

SECTION 11. HOLIDAYS

A. HOLIDAYS DEFINED.

The following days shall be recognized as holidays: New Year's Day, Reverend Martin Luther King, Jr.'s Birthday, President’s Day, Memorial Day, Juneteenth,

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C Thanksgiving Day, the day after Thanksgiving Day and Christmas Day.

B. FLOATING HOLIDAY.

One Floating Holiday will be granted to employees. This Floating Holiday will not be carried over from calendar year to calendar year. In the event another union bargaining unit, manager, group of managers, or any other unrepresented employee(s) are granted additional floating holidays, employees covered by this Agreement shall also be awarded the equivalent number of floating holidays.

SECTION 12. VACATIONS

A. ACCRUAL RATES.

- 3 weeks (15 days) of vacation accrual from date of hire until completion of 4 full years.
- 4 weeks (20 days) of vacation accrual beginning on the 4th Anniversary Date of Hire until completion of 9 full years.
- 5 weeks (25 days) of vacation accrual beginning on the 9th Anniversary Date of Hire after completion of 9 full years.

Vacation accrual is limited to a maximum amount of two hundred and forty (240) hours.

B. ADVANCE VACATION REQUEST

IOA will, based on operational needs, call for employees to submit preferred vacation dates for designated vacation periods, such as the year-end Holiday period. Staffing for these designated periods will be resolved in favor of the most senior employee should a conflict in schedules arise between employees.

C. CASELOAD COVERAGE DURING VACATIONS.

The Employer is responsible for coverage during an employee's vacation and ensuring that tasks that must be done on a caseload are performed while an employee is on a vacation five (5) consecutive working days or longer. Such tasks may include home visits, telephone calls, client intake, care plan reviews, and MediCal redeterminations; or any other tasks necessary for program compliance and continuity of care.

Employees shall inform their supervisor of these tasks in writing at least three working days before going on vacation and develop an agreed-upon written coverage plan with their supervisor. The supervisor will make the final determination as to what tasks must be done. Employees who are unable to

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their Supervisor shall have the option of appealing to their Program Director for resolution.

The parties agree that the intent of Vacation Leave is to provide the employee a relief from their work duties. It is not the intention to require employees to "work faster/longer/more" before or after vacation, but to continue to work at a normal rate, before and after their vacation.

D. VACATION FOR PART-TIME EMPLOYEES.

Part-time employees on a schedule of twenty (20) hours or more per week shall accrue vacation on a pro rata basis.

SECTION 13. SICK LEAVE

A. SICK LEAVE ACCRUAL

Each Full-Time Employee shall accumulate eight (8) hours sick leave with pay for each calendar month of employment. Unused sick leave shall accumulate up to a maximum of two hundred forty (240) hours for full-time employees. Once an employee reaches the Sick Leave maximum, no further accrual of sick leave will occur until the employee's sick leave balance is reduced below the 240 Sick Leave maximum.

B. SICK LEAVE ELIGIBLITY

Upon date of hire, all employees begin to accrue sick leave. Employees under this Agreement may use paid sick leave as it accrues.

C. USES OF SICK LEAVE

Employees may use sick leave as it accrues.

Sick leave may be used for your own illness or injury or for the purposes of receiving medical care, treatment or diagnosis or preventative care, or if you are a victim of domestic violence, sexual assault or stalking and need to take time off for medical or other reasons related to the employee's health, safety and welfare and/or that of the employee's children, or for purposes of bone marrow or organ donation. Employees also may use sick leave to provide care or assistance to a family member or designated person, when the family member or designated person is ill, injured or receiving medical care, treatment or diagnosis or preventative care, for purposes of bone marrow or organ donation by a family member, or for any other purpose permissible under applicable law. For purposes of this provision, family member includes your child (biological, adopted, foster, step, legal ward), parent (biological, adoptive, foster, step or legal guardian or of your spouse or domestic partner), sibling, grandparent, grandchild, spouse, domestic

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

partner, a person who stood in loco parentis when you were a minor or to whom you stand in loco parentis, or any other person as defined under applicable law.

Non-exempt employees must use sick leave in minimum increments of thirty (30) minutes. Exempt employees may use sick leave in increments of four hours (time off of less than four hours will not be charged against an employee's sick leave balance).

Employees who are absent from work due to a qualified reason and who do not have any accrued sick leave may use vacation time or must take the time off without pay. Part-time employees may only receive sick pay for days when they are scheduled to work.

If you miss more than five consecutive workdays, IOA may require you to provide a health care provider's note verifying the absence. IOA also reserves the right to request a release whenever it deems appropriate, consistent with applicable laws. If such certification is not provided, the Agency reserves the right to withhold payment of sick pay benefits.

Sick leave hours earned and unused or Extended Sick Leave hours are not payable to an employee upon termination from IOA. An employee who is rehired within one year will have their sick leave balance (as of date of termination) reinstated, up to a maximum of 80 hours.

No employee may be retaliated against for using sick leave as provided for in this policy, or for exercising any of the rights provided by applicable law regarding paid sick leave.

San Francisco employees covered under this Agreement may use paid sick leave when they or a member of their family are ill or injured or for the purpose of receiving medical care, treatment, or diagnosis.

In addition to using paid sick leave as specified above, if an employee has no spouse or registered domestic partner, he or she may designate one person for whom the employee may use paid sick leave to aid or care for the person.

Employees have 10 work days to make this designation upon hire, and thereafter have the right to make or change the designation on an annual basis during open enrollment.

D. VERIFICATION OF ILLNESS.

The employer may require reasonable proof of illness sufficient to justify the employee's absence from work for the period claimed. When reasonable proof is required in the form of a health provider certificate, the following

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

oyer may require the employee to submit a health provider certificate as proof of illness when the employee's absence from work is for a period of five (5) or more full consecutive workdays. The Employer may not require the employee to submit a health provider certificate as proof of illness when the employee's absence from work is for a period of less than five (5) full consecutive workdays. However, the Employer may require the employee to submit a health provider certificate as proof of illness if the employee's record demonstrates a pattern of sick leave usage. A pattern of sick leave usage for purposes of this paragraph means that the employee has utilized sick leave on three (3) or more separate occasions during the six (6) month period immediately prior to the current usage of sick leave. The Employer shall give notice to any employee whom the Employer believes meets these criteria, if such a pattern is determined. In all cases, the Employer may require the employee to submit a health provider certificate as proof of illness during an employee's first year of employment.

E. SICK LEAVE ON A HOLIDAY

If an employee is absent on paid sick leave and a holiday occurs during such absence, the employee shall receive the holiday pay and the day shall not be charged against the sick leave hours of the employee.

F. SICK LEAVE WHILE ON VACATION

An employee becoming sick or injured while on vacation is eligible to utilize unused sick leave provided the employee provides proof of illness or injury.

G. EXHAUSTION OF SICK LEAVE

When the accumulated sick leave of the employee has been exhausted, the employee may request to use vacation hours to cover the sick leave deficit. Such requests must be submitted to the supervisor for approval in the Workday system.

H. INTEGRATION WITH SDI and WORKER'S COMPENSATION

The payment of sick leave shall not affect or limit an employee's right to the full weekly disability benefits to which he or she may be entitled under the California State Disability Insurance (SDI) provisions. In cases where an employee is eligible to receive disability benefit payments, the employee shall receive his/her full disability benefit payment plus such portion of his/her earned sick leave pay that shall aggregate to an amount equal to but not exceeding the employee's regular rate of pay. In cases of industrial injury entitling an employee to Workers' Compensation Insurance payments, the same method of integration with sick leave shall apply.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

I. EXTENDED SICK LEAVE (ESL) BANK

1. Employees may use ESL hours for any sick leave exceeding seven days (7) days.

2. Sick leave hours earned and unused or Extended Sick Leave hours are not payable to an employee upon termination from IOA.

J. RESTORATION OF SICK LEAVE AFTER LAYOFF

3. Employees working 20 hours a week or more who are laid off shall have their accrued sick leave balance restored if they are returned to a work schedule of 20 hours a week or more within fifteen (15) months of commencing the layoff.

4. Employees working 20 hours a week or more who are involuntarily reduced to a work schedule of less than 20 hours a week shall have their accrued sick leave balance restored if they are returned to a work schedule of 20 hours a week or more within two (2) years of the commencement of the reduction in hours.

5. Employees working 20 hours a week or more who voluntarily request a work schedule of less than 20 hours a week have no right to have their sick leave balance restored, if at any time they are returned to a work schedule of 20 hours a week or more.

K. SICK LEAVE FOR PART-TIME EMPLOYEES.

All employees who are designated as less than an FTE shall accrue sick leave on a pro rata basis.

SECTION 14. GROUP INSURANCE PLANS

A. THE PROGRAM

1. For Employees hired before October 1, 2013, the Employer will offer health, dental, vision and other employee benefits to employees working a regular schedule of twenty (20) hours per week or more. For new employees hired after October 1, 2013, the Employer will offer health, dental, vision and other employee benefits to employees working a regular schedule of thirty (30) hours per week or more. Employees meeting this threshold are referred to in this Section as regular employees.

2. **Maintenance of Benefits:**
IOA and SEIU 1021 are committed to managing costs associated with the provision of health benefits to IOA employees. However, the parties recognize that benefit levels and associated plan costs are subject to market forces that may require changes to benefit levels and plan costs to manage overall health benefits costs for IOA and Employees. Accordingly,

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nent and before making any material change to health plan coverage, costs, difference card, benefit levels, insurance carriers, or a change in dates of open enrollment for the subsequent plan year, the Employer will provide advanced notice to the Union, and upon a timely request by the Union (no less than ten (10) business days after the Union's receipt of the notice), the parties agree to meet and bargain in good faith.

Timing of Notice to Union of any Material Changes: IOA will notify the Union no less than sixty (60) days prior to the first date of open enrollment of any implementation of proposed material benefit changes referenced in this Section 14.A.2.

IOA Employees covered by this Agreement will not pay more in benefit share costs than other IOA Employees for the same plan.

B. COVERAGE

Coverage under the IOA Group Benefit plans shall be limited to benefits-eligible employees. This coverage will be effective on the first day of the first full month following employment in regular status. There shall be an annual open enrollment period for the Benefit Enrollment Year during which employees will choose the Benefit Plans offered by IOA. If the employee fails to make Group Benefit Plan elections, the Group Benefit Plan elections will be selected by IOA on behalf of the employee. IOA will select the lowest cost Group Benefit Plan, when there is a choice of Group Benefit Plans.

Unless a change occurs during the term of this Agreement, IOA Benefits Plan year begins July 1st and ends June 30th with enrollment typically 45 days prior to the beginning of the plan year.

C. MEDICAL PLAN

During the term of this Agreement, Health Plan Premiums for employee-only coverage will be shared on an 80/20 cost basis with IOA paying at least 80% and employees paying no more than 20% of the health plan premium costs.

During the term of this Agreement, Health Plan Premiums for Dependent coverage will be shared as follows: the Employer will pay at least 70% of total medical premium and Employee will pay no more than 30% of total premium for the base plans. The Employer will contribute at least $125 per month towards all other medical dependent coverage.

If a medical plan buy-up option is available during the term of this Agreement, IOA will contribute at least the same dollar amount that it contributes to the base plan towards all levels of employee and dependent coverage. The additional premium cost between the base plan and buy-up plan will be covered by the employee.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

ive Medical Plan Benefits coverage and to be compensated one dollar ($1.00) for each regular work hour up to a maximum of Two Thousand Eighty Dollars ($2,080.00). This will be paid on a biweekly payroll basis based on the number of hours worked during that pay period.

Difference Card allowances will be 100% employer funded. Difference Card allowance for Kaiser plans will be $2,500 and the Difference Card allowance for UHC plans will be $3,000.

D. VISION PLAN.

During the term of this Agreement, Vision Plan Premiums will be shared on a 90/10 basis. IOA will pay 90% of the Vision Plan premium and Employees will pay 10% of the premium. The Employer will contribute the Employee Only vision plan dollar amount towards all levels of dependent coverage.

E. DENTAL PLAN

During the term of this Agreement, Dental Plan Premiums will be shared on a 90/10 basis. IOA will pay 90% of the Dental Plan premium and Employees will pay 10% of the premium The Employer will contribute the Employee Only dental plan dollar amount towards all levels of dependent coverage.

F. LIMITATION ON BENEFITS AND COVERAGE.

Any Group Benefit Plans described in this Section are subject to the terms, conditions, provisions and limitations of the plan or carrier who is contracted by IOA to provide the Group Benefit Plans, as such these terms, conditions, provisions, and limitations are presently in effect or they may be modified subsequently by the carrier. These limitations are subject to the contractual provisions between IOA and the Benefit Plan carrier.

G. UNEMPLOYMENT AND DISABILITY COVERAGE.

The Employer will cause employees to be covered by unemployment and disability compensation in accordance with the terms of the California Unemployment Insurance Code.

H. GROUP LIFE INSURANCE COVERAGE.

The Employer will provide each regular employee hired before October 1, 2013 and working on a regular work schedule of not less than twenty (20) hours per week, and each regular employee hired after October 1, 2013 and working on a predetermined work schedule of not less than thirty (30) hours per week, with a group life insurance policy in an amount equal to one times the employee's budgeted straight time annual earnings including double indemnity for accidental death and dismemberment. The Employer will pay the premiums for

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C ill be effective on the first day of the month following employment as a regular employee.

I. LONG TERM DISABILITY COVERAGE.

The employer shall provide long term disability insurance as follows. Long Term Disability provides benefits for employees who are out on illness disability after a period of 90 days. The 90-day elimination period indicates the length of time the employee must be disabled prior to becoming eligible to receive plan benefits. The duration of benefits is to age 65 and provides coverage for 60% of monthly salary to a maximum monthly benefit of $7,500. If an employee is disabled for 180 days and is receiving disability benefits and dies, the plan administrator will pay the benefit to the survivor/dependent to help support their immediate costs associated with loss of income. This benefit is equal to three times the employee's gross monthly benefit and is payable to the survivor/dependent.

J. CAFETERIA BENEFIT PLAN.

The Employer offers a flexible benefits plan which allows benefited eligible employees to choose among a group of benefits consisting of pre-tax-salary reduction(s) to cover dependent care assistance, medical reimbursement, and premium conversion. The plan is funded by the employee's voluntary salary reduction contributions and complies with the provisions of the IRS Code Section 125. Employees may, at their option, enroll in this plan at their own expense.

K. BENEFITS COVERAGE UNDER FMLA.

The Employer will maintain group insurance coverage for an employee who is otherwise eligible for Family and Medical Leave as set forth in this Agreement and who takes leave without pay pursuant to that paragraph for 1.) the birth or placement of a child for adoption or foster care; 2.) to care for an immediate family member (spouse, domestic partner, child or parent) with a serious health condition; or 3.) to take medical leave when the employee is unable to work because of a serious health condition. Such coverage shall be provided for up to twelve (12) work weeks if such insurance was provided before the leave without pay was taken. The Employer shall continue to bear the cost of such group insurance coverage to the same extent set forth in those paragraphs of this Section. After the (12) work weeks IOA can terminate group insurance coverage which will initiate a COBRA event.

L. SHORT TERM DISABILITY INSURANCE

Effective 7/1/99 the Employer shall provide short term disability insurance as follows. Short term disability insurance enhances State Disability Insurance. Payment includes 60% of the employee's salary up to a maximum weekly

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

ns after eight consecutive days of illness and continues for 13 weeks. The employee should file for Short Term Disability at the same time they file for State Disability so payments can be coordinated.

M. CAFETERIA OR FLEXIBLE BENEFITS

During the period of this contract should IOA expand, develop, or implement a program for Cafeteria of Flexible Benefits that includes the allowing for eligible employees to make choices in the types of coverage listed in this section, the Union will agree to meet with IOA management to discuss and consider such a program for implementation for members of the Union. Changes resulting from expanding benefits selections, or allowing expanded choice between options, can only be made by mutual agreement between the Union and the Employer.

SECTION 15. RETIREMENT PLAN

The Employer will provide pension benefits for employees who were hired before September 17, 2009, subject to this Agreement pursuant to the "Retirement Plan for Hospital Employees" adopted by the Affiliated Hospitals of San Francisco on December 21, 1965, insofar as such plan is applicable to employees covered by the Agreement between Institutional Workers Local 250 (now known as UHW) and Institute on Aging. Both the Employer and the Union agree to be bound by said Plan as presently in effect (June 30, 1990) and as hereafter amended in accordance with its provisions relative to amendment.

SECTION 16. LEAVES OF ABSENCE

A. LEAVES OF ABSENCE

IOA recognizes that all employees may be required to be on a leave of absence for some unseen reason, be it personal, medical, or to care for an eligible family member. IOA recognizes and complies with all applicable state and federal laws and regulations. IOA will ensure all employees are properly informed about their rights under state and federal laws and regulations regarding Leaves of Absence. This Section 16 addresses all leaves of absence except Sick Leave, which is covered in Section 13 of this Agreement. This Section does not attempt to list all leaves or all details of leaves that employees may be eligible for; however, the Employer's Handbook does list a number of leaves and related details and eligibility requirements not contained in this Section.

B. REQUESTS AND APPROVAL FOR LEAVES

Unless otherwise specified in this Section 16, all requests for a leave of absence should be in writing or through the WorkDay system and submitted in advance to the employee's supervisor and designated Human Resources Representative. Approval or denial of a leave shall be provided to the employee

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

ess days from receipt of initial request. All requests for leaves of absence shall contain the requested beginning and end date of the leave, and any additional information as required. The Employer may require documentation that describes when the employee will be able to return to work if the Leave is for other than personal reasons.

Employees may also be entitled to additional types of Leaves of Absence which are described in the IOA Employee Handbook and shall be granted only by agreement between the employee and the supervisor of the employee in coordination with the appropriate Human Resources Department representative when necessary.

C. PERSONAL LEAVES FOR FULL-TIME EMPLOYEES

Full Time Employees who have been employed over 90 days may be granted unpaid time off, for compelling personal reasons provided such time off does not, in IOA's sole discretion, adversely affect the normal conduct of business.

D. FAMILY MEDICAL LEAVE AND CALIFORNIA FAMILY RIGHTS

The federal Family and Medical Leave Act (FMLA) and California Family Rights Act (CFRA) provide up to 12 work weeks of unpaid family or medical leave within a 12-month period, under the following conditions:

- The employee has more than 12 months of service (the 12 months of employment must have accumulated within the previous seven years).
    - The 12 months are not required to be consecutive.

- The employee has worked at least 1,250 hours during the previous 12-month period before the leave commences; and
- The employee works at a location where the employer has at least 50 employees within 75 miles (FMLA only).
- The FMLA and CFRA also provide 26 weeks of leave for an employee who is the spouse, son, daughter, parent or next of kin for a covered military servicemember who requires care.

The amount of leave available to any employee will be measured backward from the date an employee first commences any family or medical leave.

The CFRA is similar to the FMLA and runs concurrently in all cases where both FMLA and CFRA apply. Because pregnancy is not considered a serious health condition under CFRA, CFRA does not run concurrently with FMLA during pregnancy disability leave. The CFRA provides time off for personal illness, to attend to the illness of a family member and in connection with the birth or adoption of a child.

Reasons that Qualify for Leave:

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

to care for the newborn child within one year of birth.

- Placement with the employee of a child for adoption or foster care and to care for the newly placed child within one year of placement.
- To care for a family member who has a serious health condition.
- A serious health condition that makes the employee unable to perform the essential functions of their job (excluding leave taken for disability on account of pregnancy, childbirth or related medical conditions which is covered separately as protected pregnancy disability leave and which runs concurrently with FMLA but not CFRA).
- Any qualifying exigency arising out of the fact that the employee's spouse, son, daughter, or parent is a covered military member on "covered active duty;" or
- Twenty-six work weeks of leave during a single 12-month period to care for a covered servicemember with a serious injury or illness if the eligible employee is the servicemember's spouse, son, daughter, parent, or next of kin (military caregiver leave).

For purposes of this provision, a "family member" for FMLA leave is defined as an employee's:

- Spouses (opposite or same sex) (FMLA & CFRA)
- Domestic Partner (CFRA only)
- Child
- Parent, Parent-in-law, or a designated person (FMLA & CFRA)
- Grandparent, Grandchildren and Siblings (CFRA)

Definition of a Serious Health Condition: A serious health condition is generally defined as an illness, injury, impairment, or physical or mental condition that involves either inpatient care in a hospital, hospice, or residential medical care facility; or continuing treatment by, or under the supervision of, a health care provider, including but not limited to treatment for substance abuse.

The full description is contained on the required Certification of Health Care Provider form, available from the Human Resources Department.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than three (3) consecutive calendar days combined with at least two (2) visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy (FMLA only), or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

An employee's own incapacity due to pregnancy is covered as a serious health condition under FMLA but not under CFRA.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

eave Entitlements: Eligible employees with a spouse or domestic partner, son, daughter, or parent on active duty or call to active-duty status in the National Guard or Reserves in support of a contingency operation may use their 12-week leave entitlement to address certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings.

FMLA also includes a special leave entitlement that permits eligible employees to take up to 26 weeks of leave to care for a covered service member during a single 12-month period. A covered service member is a current member of the Armed Forces, including a member of the National Guard or Reserves, or a veteran who has a serious injury or illness incurred in the line of duty on active duty that may render the service member medically unfit to perform their duties for which the service member is undergoing medical treatment, recuperation, or therapy; or is in outpatient status; or is on the temporary disability retired list.

For leave to care for a covered service member, the 12-month period begins on the first day of the leave, regardless of how the 12-month period is calculated for other leaves.

More information on FMLA military leave may be obtained from the Human Resources Department hradmin@ioaging.org or by calling (415) 650-0448.

FMLA/CFRA Notice and Certification: As soon as an employee realizes the need for a family or medical leave, they should contact their supervisor/manager or the Human Resources department at hradmin@ioaging.org or by calling (415) 650-0448.

Employees seeking to use leave pursuant to this paragraph, may be required to provide 1) 30 days advance notice if the need for such leave is foreseeable, 2) medical certification of need, 3) periodic medical recertification and 4) periodic reports during such leave. Employees eligible for such leave under this Paragraph may receive twelve (12) work weeks of family and medical leave without pay within twelve (12) months of previous family medical leave taken.

When both parents are employed by IOA and request simultaneous leave for the birth or placement for adoption or foster care of a child, IOA will not grant more than a total of 12 workweeks family/medical leave for this reason (unmarried parents may have greater rights under the FMLA.)

Intermittent Use of FMLA/CFRA Leave: FMLA/CFRA leave may be taken intermittently in blocks of time, or by reducing the normal weekly or daily

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

is for the employee's own serious health condition or that of an employee's family member, the reduced leave schedule must be medically necessary as determined by the attending health care provider. The smallest increment of time that will be used when non-exempt employees use accrued sick time to cover for otherwise unpaid family/medical leave, is sick time of thirty (30) minutes.

Any leave taken for the birth, adoption, or foster care placement of a child does not have to be taken in one continuous period. Leave taken for the birth or placement of a child will be granted in minimum amounts of two weeks. However, the Agency will grant a request for a leave (for birth/placement of a child) of less than two weeks' duration on any two occasions. IOA may also grant additional requests for leave lasting less than two weeks at its discretion. Any leave taken must be concluded within one year of the birth or placement of the child with the employee.

Use of Paid Benefits While on FMLA/CFRA Leave: FMLA/CFRA leave is unpaid. However, when an employee has sick leave or vacation benefits accrued, the following shall apply:

Sick Leave: As set forth in Section 13 of this Agreement, for an absence due to the employee's own serious health condition, including pregnancy, they are first required to use any accrued sick leave for the otherwise unpaid portion of the leave. When an employee must be absent to care for an ill family member or for purposes of bonding with a new child, the employee may elect to use accrued sick leave for the otherwise unpaid portion of the leave. In cases when an employee has exhausted accrued sick leave, accrual for sick leave will discontinue.

Use of Accrued Vacation: For any FMLA/CFRA absence, except for the employee's own pregnancy, and after sick leave benefits have been exhausted, the employee is required to use any accrued vacation benefits, as applicable, for the otherwise unpaid portion of the leave. If no sick leave benefits were available at the start of the leave, then the employee is required to begin using any accrued vacation benefits (except as specified under Using Accrued Sick Leave in Section 13 of this Agreement). Employees disabled due to pregnancy, childbirth or related conditions may elect to, but are not required to, use any accrued vacation benefits for the otherwise unpaid portion of their leave. In cases when an employee has exhausted accrued vacation, accrual for vacation will discontinue.

In all cases where an employee is receiving paid benefits (sick pay or vacation pay) from IOA, the employee may elect to have such benefits be coordinated with any California State Disability Insurance (SDI) or California Paid Family Leave (PFL) benefits the employee may be eligible for during their leave, such that the employee's total compensation will not exceed their regular earnings.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

see the appropriate section of this handbook.)

In cases when an employee has exhausted accrued vacation, accrual for vacation will discontinue.

Employees Working in San Francisco: An employee may also be eligible for supplemental compensation pursuant to the San Francisco Paid Parental Leave Ordinance during a FMLA/CFRA leave for bonding with a new child.

Effect of FMLA/CFRA Leave on Vacation and Sick Leave Benefits: Employees on FMLA/CFRA leave will not accrue vacation or sick leave during any part of the leave when they are not receiving compensation from IOA (note that supplemental compensation paid under the SAN FRANCISCO PAID PARENTAL LEAVE PROVISION is not considered IOA compensation).

Effect of FMLA/CFRA Leave on Holiday Benefits: Holidays occurring during an employee's leave of absence are unpaid.

Effect of FMLA/CFRA Leave on Group Health Benefits: An employee taking family medical leave will be allowed to continue participating in any health and welfare benefit plans in which they were enrolled before the first day of the leave (for a maximum of 12 workweeks, or 26 workweeks for a military family leave to care for a covered service member) at the level and under the conditions of coverage as if the employee had continued in employment for the duration of such leave.

IOA will continue to make the same premium contribution as if the employee had continued working. The employee is solely responsible for the same benefit premium contributions as if the employee had continued working while they are on a leave of absence. If your paycheck while out on leave of absence cannot cover the benefit premiums we will need to collect via check or payment plan when returned.

Employees on family/medical leave who are not eligible for continued paid coverage may continue their group health insurance coverage in conjunction with the COBRA guidelines. Employees should contact their supervisor or Human Resources for further information. Premium payment arrangements will be discussed with you at the time you enroll in COBRA.

E. PREGNANCY DISABILITY LEAVE AND POTENTIAL TRANSFER

An employee who is disabled due to pregnancy, childbirth or a related medical condition is entitled to up to four months, or seventeen (17 1/3) weeks of unpaid Pregnancy Disability Leave (PDL). The leave does not have to be taken in one continuous period.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

is that the employee is, in the opinion of their health care provider, unable to perform one or more of the essential functions of their job or unable to perform these functions without undue risk to themselves, their baby or other persons. Time off needed for prenatal or postnatal care, severe morning sickness, doctor-ordered bed rest, gestational diabetes, preeclampsia, loss or end of pregnancy, post-partum depression, childbirth, and recovery from childbirth is all covered by your PDL. The preceding list of conditions is not exclusive, but this leave is not available for child rearing.

An employee is also eligible to transfer to a less strenuous or hazardous position or to less strenuous or hazardous duties, if such a position or duties are medically advisable and such a transfer can be reasonably accommodated. IOA may also require the employee to transfer temporarily to an alternative position with equivalent pay and benefits if it is medically advisable for the employee to take intermittent leave or work at a reduced schedule.

PDL is unpaid. However, an employee taking PDL must first use any sick leave they may have accrued at the beginning of the otherwise unpaid portion of the leave. The employee, at their option, may then substitute any accrued vacation. To request a PDL, the employee must submit a Time Off Request form and a doctor's statement verifying the existence and anticipated duration of the disability to their immediate supervisor. Employees who are able to do so should request the leave and obtain the doctor's certification of disability in advance of the leave.

An employee covered by IOA's group health insurance plan will remain covered by the plan for the duration of the pregnancy disability leave consistent with the Agency's PDL provision and all applicable laws.

Vacation and sick leave benefits will accrue only during the portion of the leave while the employee is receiving compensation from IOA, i.e., sick pay or vacation. Holiday benefits are not paid during a PDL. Employees will continue to be eligible for all other benefits consistent with the Agency's provision on family/medical leaves of absence.

An employee returning to work from a pregnancy disability leave will be reinstated to their former position if they are able to perform all of the essential functions of their job, with or without reasonable accommodation. Under certain circumstances, reinstatement to the same or equivalent position may not be possible due to business conditions. Employees may be eligible to receive compensation during the pregnancy disability leave under the applicable state's disability insurance (SDI) program and/or under the Agency's short and long-term disability insurance program.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

from a pregnancy disability leave, an eligible employee may request an additional twelve (12) weeks of unpaid leave in accordance with the FMLA/CFRA.

F. DISABILITY ACCOMMODATION LEAVE

Under the Americans with Disabilities (ADA) act and the California Fair Employment and Housing Act, under some circumstances IOA may provide an employee with an unpaid leave of absence as a reasonable accommodation of a mental or physical disability. IOA may require medical certification for such leaves. It is the employee's obligation to inform a manager of the need for such leave. IOA will meet with the employee to discuss the leave and other possible alternatives to accommodate the disability, and it will offer reasonable accommodation, if available. The duration of the leave normally should not exceed 180 calendar days, but may be longer on a case-by-case basis.

G. JURY DUTY, WITNESS DUTY AND SUBPOENAS

The IOA will provide employees time off to serve, as required by law, on a jury or grand jury if the employee provides reasonable advance notice. Where the time off is for jury duty, the employee will be paid their normal straight-time earnings without adjustment, for a maximum of thirty (30) working days. The employee must provide verification of jury service.

Employees serving as witnesses will be paid their normal straight-time earnings if required to be a witness or required by a subpoena to appear in court relating to IOA's business. Exempt employees will continue to receive their full salary if they perform any work during the workweek in which they are absent due to serving as a witness.

An employee called for jury duty (or subpoenaed to appear as a witness in a judicial procedure, not including arbitration, arising out of the employee's employment and in which the employee is not a party) will receive normal straight-time earnings as jury duty pay. As a condition to jury pay the employee must notify the Employer as soon as reasonable after they receive notice to report (normally within 24 hours) and must cooperate in trying to be excused if the Employer so desires. Also, as a condition to receiving jury pay, the employee must produce a receipt from the Jury Commissioner that they have been called or served, if such receipts are provided.

H. LEAVE FOR INDUSTRIAL ILLNESS OR INJURY

As an exception to Paragraph B of this Section 16, a leave of absence for an industrial injury or illness shall not be more than one (1) year and shall be granted regardless of length of service following completion of ninety (90) days of employment. It may be extended only by agreement between the employee

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

yer may require reasonable proof of disability and reasonable proof that the employee will be able to return to duty within the time for which the leave is requested.

I. FUNERAL LEAVE AND BEREAVEMENT LEAVE

When a death occurs in the immediate family of an employee, the employee shall be entitled to a leave of absence of five (5) days off from work, with three (3) of those days being paid, and with two (2) of those days being unpaid. Not all five days must be taken at once. “Immediate family”, for the purpose of this paragraph, is defined as spouse, domestic partner, parent, parent- in- law, child, child or parent of domestic partner, a domestic partner, sibling or grandparent. If an employee has no natural parents living, their legal guardian, if any, may be deemed an alternate for purposes of this section.

If additional time is needed, an employee may elect to use vacation time. All bereavement leave must be taken within 90 days (three months) of the death unless otherwise approved by the Division Vice President and Chief People Officer.

At its discretion, IOA reserves the right to require evidence to support the employee’s request for bereavement leave

J. OTHER LEAVES OF ABSENCE

Leaves of absence for other reasons shall be granted only by agreement between the employee and the Employer, and the Employer agrees that its consent to such leaves of absence for other reasons shall not be unreasonably withheld.

K. NON-FORFEITURE OF ACCRUED RIGHTS

By reason of such leave of absence, the employee shall not forfeit any accrued rights under this Agreement, but likewise, the employee shall not accrue any rights during such leave.

L. RETURN TO DUTY

In order to return to duty from a medical leave, an employee must provide the Employer with a signed doctor’s authorization in advance. When an employee returns to duty, in compliance with an authorized leave of absence, the employee shall be reinstated in the same classification in which the employee was employed before the absence, unless conditions at the Employer or for the employee due to work restrictions have so changed that it would be unreasonable to reinstate the employee in the same classification. In this event, the Employer will reinstate the employee in a classification as nearly comparable to the employee’s original classification as is reasonable

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C ould a dispute arise over such a change in classification, the Employer agrees to meet with the Union for the purpose of discussing the change.

M. ADJUSTMENT OF ANNIVERSARY DATE

1. An employee on leave of absence pursuant to this Section by reason of industrial injury or illness shall not have their anniversary date adjusted for purposes of this Agreement when the leave of absence is less than one (1) year's duration. If such employee's leave of absence is one (1) year or more, his/her anniversary date may be adjusted for the full period of the leave of absence.

2. An employee on leave of absence pursuant to this Section by reason of a non-industrial disability (injury or illness) shall not have his/her anniversary date adjusted for purposes of this Agreement when the leave of absence is less than six (6) months' duration. If such employee's leave of absence is six (6) months or more, his/her anniversary date may be adjusted for the full period of the leave of absence.

3. An employee on leave of absence pursuant to this Section for any other reason shall not have their anniversary date adjusted for purposes of this Agreement when the leave of absence is less than thirty (30) days. If such employee's leave of absence is thirty (30) days or more, his/her anniversary date may be adjusted for the full period of the leave of absence.

SECTION 17. HEALTH AND SAFETY

The Employer will comply with applicable Federal and California laws and regulations pertaining to occupational safety and health. Likewise, it is the duty of each employee to comply with all health and safety regulations required by Federal and California laws and regulations, as well as Health and Safety policies of the Employer. In the event an Employee detects any safety or health hazard it shall be promptly reported to the Employer. The Employer shall then have a reasonable period of time to remedy the situation. If in the judgment of the employee or the Union, the Employer shall thereafter fail to completely remedy the situation, the employee or the Union shall be free to contact The State of California Department of Industrial Safety, Division of Occupational Safety and Health (Cal/OSHA) for appropriate action. There shall be no adverse action taken against any Employee for such a report. Disputes concerning conditions of health and safety within the IOA shall not be subject to the complaints, grievance, and arbitration procedures of this Agreement, but shall be subject to the applicable administrative procedures established by federal and California laws.

IOA is committed to the health, safety, and general well-being of its Employees. Additionally, IOA recognizes that the demographics of the client

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

ously changing. From time to time, Employees covered by this Agreement may be exposed to environmental health and safety issues while working with IOA demographically diverse clients. As a result, the training and supervision of our workforce must take into account those demographic changes.

During the term of this Agreement, IOA management will engage in a process, working with Employees covered by this Agreement, to create field health and safety protocols to mitigate risks and maximize employee health and safety. These protocols may include, but not be limited to:

- Review of existing health and safety protocols to identify gaps and opportunities.
- Identification of potential health and safety risk factors when seeking to serve new demographic clients.
- Development of additional health and safety training and orientation for new hires and existing staff.
- Development by Program Directors and Clinical Supervisors of health and safety protocols, with defined resources as needed, for their respective programs.
- Development by Care managers of a client specific health and safety plan with their direct supervisor with a follow-up evaluation of its efficacy.
- Reporting of immediate and emergent health and safety issues to the clinical supervisor and/or Human Resources, as needed.
- Program Directors and Clinical Supervisors will conduct a bi-annual debrief with care management, occupational therapy, and nurse care managers to evaluate the effectiveness of safety protocols and plans.

Periodic discussion and review of the protocols, activities and accomplishments of this Section shall be part of the regular Labor Management Meetings described in this Agreement.

SECTION 18. INTRODUCTORY PERIOD, DISCIPLINE AND DISCHARGE

A. INTRODUCTORY PERIOD

The Introductory period for employees covered by this Agreement is six (6) months from date of hire. Upon promotion to another classification within the bargaining unit, employees will serve a new Introductory period. If the promoted employee fails during this Introductory period as determined by the Employer, they shall be restored to their previous classification at the former salary in the Program from which they were promoted if that position is vacant at the time and the employee has the requisite skills for the position.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

The Employer shall not discipline or discharge an employee except for just cause. This provision does not apply to Employees under this Agreement who have not completed their Introductory Period.

C. COPIES OF DISCIPLINARY ACTIONS.

The Employer will provide employees with a copy of any written disciplinary action. If it is impossible to provide a copy to the employee in person, the Employer may comply with the requirement by mailing a copy to the employee at the employee's last known address (by certified mail, return receipt requested). The Employer shall not utilize written reprimands to support a personnel action, suspension, or discharge unless the employee was provided copies.

SECTION 19. PERSONNEL FILES

A. PERSONNEL FILES.

An employee may, upon written request, inspect certain designated items contained in their own personnel file. Items which may be inspected are those that are used or have been used to determine the employee's qualifications for employment, promotion, additional compensation, or termination or other disciplinary action. IOA Human Resources policies and procedures as stated in the IOA Employee Handbook are compliant with federal and state laws and regulations on personnel files. Employees should consult the IOA Employee Handbook for any other questions concerning their rights to access their Personnel File.

B. EMPLOYEE SIGNATURE.

The signature of an employee on any document contained in their personnel file only means that the employee has received a copy of these documents and does not mean agreement with the content of the document.

C. EMPLOYEE REBUTTALS.

The employee may place in their personnel file written rebuttal comments regarding an evaluation, disciplinary action or other documentation pertaining to the employee. Employee rebuttal comments shall be made a permanent part of the document responded to. Any copies provided to the employee or other agreed upon parties must contain the written employee rebuttal.

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D. LETTERS OF COMMENDATION OR COMPLAINT.

The Employer agrees to use its best effort to see that copies of letters of commendation and/or complaint are provided to the employee in a timely fashion. Such letters may be placed in the employee's personnel file at the Employer's or employee's request. In the event that the Employer places a letter of complaint in the employee's personnel file, the employee will be so notified and the employee may file a written rebuttal comment as described in Paragraph C above.

SECTION 20. GRIEVANCE PROCEDURE

PROCEDURE.

If an employee, the Union, or the Employer has a grievance or complaint concerning the meaning, enforcement, or application of the terms of this Agreement, including a discharge case, it shall be taken up in this manner:

1. For Employees Informal Discussion with Immediate Supervisor

An employee having a grievance may first discuss it with the employee's immediate supervisor, or the next level in management, to try to work out a satisfactory solution in an informal manner. The employee may have a representative at this discussion.

A. Step I Immediate Supervisor.

If a solution to the grievance, satisfactory to the employee and the immediate supervisor is not accomplished by informal discussion, the Union may pursue the grievance further. The Union shall submit a written statement of the grievance to the immediate supervisor. The immediate supervisor will make every effort to arrive at a prompt resolution by investigating the issue. He/she shall respond in writing within ten (10) calendar days.

B. Step II Department Head/Designee.

If the grievance is not satisfactorily resolved in Step I, the written grievance shall be advanced, containing a specific description of the basis for the claim and the resolution desired, and submitted to the department head or their designee within fifteen (15) calendar days of receipt of the Step I response. The parties shall meet within fifteen (15) calendar days, unless a mutually agreed upon alternative is established. The department head/designee shall respond in writing, within fifteen (15) calendar days of receipt of the written grievance, or within ten (10) calendar days of the date the meeting is held, whichever comes later, to the grievant and the Union, specifying their reason(s) for concurring with or denying the grievance.

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Step III CHIEF PEOPLE OFFICER or Designee.

If the decision of the department head/designee is unsatisfactory, the Union may, within fifteen (15) calendar days after receipt of the Department's decision, submit the grievance in writing to the Chief People Officer or designee. The Chief People Officer or designee shall have fifteen (15) calendar days after receipt of the written grievance in which to review and seek resolution of the grievance and respond in writing. Subject to applicable law, the Chief People Officer or designee shall have authority to settle grievances at this step.

D. Step IV Mediation

If any such grievance or complaint has not been settled by any of the procedures described in Steps I to Step III, the question may, at the request of either party, be submitted to Mediation by a Mediator from the FMCS or another source to be selected by the representatives of the Employer and the Union. If the parties agree, the recommendations of the Mediator shall be final and binding on all concerned. The Mediator may award damages for any breach of this Agreement. The Employer and the Union shall each pay one-half (1/2) of the costs of mediation, including the fees of the Mediator and the other expenses of the mediation proceeding, but not including compensation or cost of representation, advocacy, or witnesses for either party.

1. POWER OF THE MEDIATOR

The Mediator shall have no power to add to, to subtract from, or to change any of the terms or provisions of this Agreement. The jurisdiction of the Mediator shall extend solely to the meaning, enforcement, and application of the Agreement itself. Without limitation upon the foregoing, if either party shall give notice of a desire to modify this Agreement, the Mediator shall have no power to determine what modifications or changes, if any, should be made in the Agreement or otherwise to decide any question with respect thereto, other than the sufficiency and effect of the notice itself. The Mediator can propose options and alternatives to the Employer and the Union to gain agreement between the Employer and the Union. The Employer and the Union shall each pay one-half (1/2) of the costs of mediation, including the fees of the mediator and the other expenses of the proceeding, but not including compensation or costs of representation, advocacy.

E. Step V Arbitration.

If any such grievance or complaint has not been settled by any of the procedures described above, the question may, at the request of either party, be submitted to arbitration by an arbitrator to be selected by the representatives of the Employer and the Union. The award of the arbitrator shall be final and binding on all concerned. The arbitrator may award damages for any breach of this Agreement, but no such award of damages shall be made for any period earlier than the date

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first presented. The Employer and the Union shall each pay one-half (1/2) of the costs of arbitration, including the fees of the arbitrator and the other expenses of the arbitral proceeding, but not including compensation or costs of representation or advocacy.

1. **POWER OF THE ARBITRATOR**.

The Arbitrator shall have no power to add to, to subtract from, or to change any of the terms or provisions of this Agreement. Their jurisdiction shall extend solely to the meaning, enforcement, and application of the Agreement itself. Without limitation upon the foregoing, if either party shall give notice of a desire to modify this Agreement as provided in this Agreement. The arbitrator shall have no power to determine what modifications or changes, if any, should be made in the Agreement or otherwise to decide any question with respect thereto, other than the sufficiency and effect of the notice itself. The Employer and the Union shall each pay one-half (1/2) of the costs of arbitration, including the fees of the arbitrator and the other expenses of the arbitral proceeding, but not including compensation or costs of representation, or advocacy.

F. STALE GRIEVANCES.

No grievance or complaint shall be considered unless it has been first presented in written form within thirty (30) days of the alleged occurrence thereof.

2.) For the Employer and the Union Informal Discussion between the Employer and the Union

When the Employer or Union has a grievance the first effort for resolution will be between the Union Representative and the Head of Human Resources to try to work out a satisfactory solution in an informal manner. The Employer and Union may have designated representatives who can provide material information to informally resolve the issue at this discussion.

A. Step I

If a solution to the grievance is not accomplished by informal discussion, the Employer and the Union may pursue the grievance further. Either party shall submit a written statement of the grievance to the other party. The Responding party will make every effort to arrive at a prompt resolution by investigating the issue and providing a response in writing within ten (10) calendar days.

B. Step II

If the grievance is not satisfactorily resolved in Step I, the written grievance shall be advanced, containing a specific description of the basis for the grievance and the resolution desired. This action must be submitted within fifteen (15) calendar days of receipt of the Step I response. The parties shall meet within fifteen (15)

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C agreed upon alternative is established. The parties shall, within fifteen (15) calendar days of receipt of the written grievance, or within ten (10) calendar days of the date the meeting is held, whichever comes later, respond in writing to the grievant party, specifying the reason(s) for concurring with or denying the grievance.

C. Step III Agency Head or Designee.

If the Step II is unsatisfactory, the Union may, within fifteen (15) calendar days after receipt of the decision, submit the grievance in writing to the Agency Head or designee. The Agency Head or designee shall have fifteen (15) calendar days after receipt of the written grievance in which to review and seek resolution of the grievance and respond in writing.

D. Step IV Mediation

If any such grievance or complaint has not been settled by any of the procedures described in Steps I to Step III, the question may, at the request of either party, be submitted to Mediation by a Mediator from the FMCS or another source to be selected by the representatives of the Employer and the Union. The recommendations of the Mediator shall be final and binding on all concerned. If the parties agree, the Mediator may award damages for any breach of this Agreement. The Employer and the Union shall each pay one-half (1/2) of the costs of mediation, including the fees of the Mediator and the other expenses of the mediation proceeding, but not including compensation or cost of representation, advocacy, or witnesses for either party.

1. POWER OF THE MEDIATOR

The Mediator shall have no power to add to, to subtract from, or to change any of the terms or provisions of this Agreement. The jurisdiction of the Mediator shall extend solely to the meaning, enforcement, and application of the Agreement itself. Without limitation upon the foregoing, if either party shall give notice of a desire to modify this Agreement, the Mediator shall have no power to determine what modifications or changes, if any, should be made in the Agreement or otherwise to decide any question with respect thereto, other than the sufficiency and effect of the notice itself. The Mediator can propose options and alternatives to the Employer and the Union to gain agreement between the Employer and the Union. The Employer and the Union shall each pay one-half (1/2) of the costs of mediation, including the fees of the mediator and the other expenses of the proceeding, but not including compensation or costs of representation, advocacy.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

If any such grievance or complaint has not been settled by any of the procedures described above, the question may, at the request of either party, be submitted to arbitration by an arbitrator to be selected by the representatives of the Employer and the Union. The award of the arbitrator shall be final and binding on all concerned. The arbitrator may award damages for any breach of this Agreement, but no such award of damages shall be made for any period earlier than the date when the grievance or complaint was first presented. The Employer and the Union shall each pay one-half (1/2) of the costs of arbitration, including the fees of the arbitrator and the other expenses of the arbitral proceeding, but not including compensation or costs of representation or advocacy.

1. POWER OF THE ARBITRATOR.

The Arbitrator shall have no power to add to, to subtract from, or to change any of the terms or provisions of this Agreement. Their jurisdiction shall extend solely to the meaning, enforcement, and application of the Agreement itself. Without limitation upon the foregoing, if either party shall give notice of a desire to modify this Agreement, the arbitrator shall have no power to determine what modifications or changes, if any, should be made in the Agreement or otherwise to decide any question with respect thereto, other than the sufficiency and effect of the notice itself. The Employer and the Union shall each pay one-half (1/2) of the costs of arbitration, including the fees of the arbitrator and the other expenses of the arbitral proceeding, but not including compensation or costs of representation, or advocacy.

F. STALE GRIEVANCES.

No grievance or complaint shall be considered unless it has been first presented in written form within thirty (30) days of the alleged occurrence thereof.

SECTION 21. PREMIUM CONDITIONS

It is understood that the provisions of this Agreement relating to hours, wages and working conditions are intended to establish minimum terms for the hiring of employees subject to this Agreement; that so long as the Employer meets these minimum terms with respect to such employment, it has fully performed its obligations under this Agreement; and that this Agreement is not intended to preclude or discourage the hiring of employees under terms more favorable to them, and accordingly, if any employees are hired under more favorable terms, this shall be a matter of individual arrangement with such employees and such arrangements may be established, eliminated, or changed at any time without relation to this

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C be notified in writing of any more favorable terms granted under this Section.

SECTION 22. REDUCTIONS IN FORCE OR HOURS

A. ALTERNATIVES TO LAY OFF.

In the event that any reduction in force or hours appears necessary or warranted, the Employer agrees first to meet with the Union for the purpose of discussing possible alternatives to such proposed reduction in force or hours. Whenever possible, necessary reductions in force or hours shall be accomplished by attrition.

B. VOLUNTARY REDUCTION OF HOURS.

In the event a reduction of hours, as opposed to a reduction in force, appears practicable, the Employer shall first contact all employees in the reduced program (program as used in this Agreement is defined as an organizational unit of the Employer with a separate budget and/or funding source) with similar background and skills to determine if any such employees will voluntarily reduce their hours.

C. SENIORITY ON LAY OFF.

Should the above provisions fail to accomplish the necessary reduction of hours and/or force, then any further reduction of hours and/or force shall be accomplished on the basis of seniority in the job classification of the affected Program.

For the purposes of this Agreement, seniority is defined as beginning with the initial date of hire into a classification covered by this Agreement as listed in the salary schedule attached hereto and made part of this Agreement.

D. AFFIRMATIVE ACTION IMPACT.

The application of seniority in this Section shall be waived in the event that its application shall have a disproportionate impact on the Employer's affirmative action program. The use of such waiver to the seniority principle shall not be unreasonably applied by the Employer. Furthermore, an employee shall lose all seniority rights under this Section upon being discharged for cause, voluntarily resigning, being on layoff status for a period exceeding twenty (20) months or failing to return to work following authorized leave of absence.

E. RECALL FROM LAY OFF.

Employees whose hours have been reduced pursuant to this Section shall be offered any available increases in hours in the classification before new employees are hired in that classification, provided they satisfy the regulatory requirements and possess the requisite language skills required by the job at the time of the recall. Employees laid off pursuant to this Section shall be re-employed in inverse order of layoff.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

yee in person or by telephone, the Employer may post a notice of recall to the employee at the employee's last known address (by certified mail, return receipt requested). The employee must accept the recall offer by the end of the second (2nd) business day after receiving the notification.

F. NOTICE OF LAY OFF.

The Employer will give the employee four (4) weeks' notice or four (4) weeks' pay in lieu thereof when an employee is to be laid off by reason of a reduction in force. The Employer will endeavor to give longer notice when feasible, but there shall be no penalty for failure to do so. An employee who intends to resign his or her employment will endeavor to give the Employer a minimum of four (4) weeks' notice of such intention.

SECTION 23. STRIKES AND LOCKOUT

There shall be no strike, work stoppage or other interruption of work during the life of this Agreement by the Union or employees; however, it is expressly understood that this sentence does not apply to sympathy strikes. During the life of this Agreement, there shall be no sympathy strike by the Union. Furthermore, the Union will not threaten to engage in any activity prohibited by this Article. Similarly, there shall be no lockout by the Employer during the life of this Agreement. Informational picketing is not prohibited if the Union provides a timely 8(g) notice; if its activity is limited to such picketing; and if the Union's 8(g) notice and other communications clearly say that its activity will be limited to such picketing.

SECTION 24. JOB POSTING AND NOTICE TO UNION

IOA prefers to hire from within whenever possible. The Employer shall also post these vacancies on its Web Site and communicate within the Department when vacancies occur. When vacancies occur subject to this Agreement, the Employer shall notify the Union office by email and shall afford it an opportunity to send applicants for the position. The Employer shall employ the person, who in its judgment will make the best employee based on the requirements for the position. The Employer shall be the sole judge of the qualifications and experience of any applicant selected for a vacant position covered by this Agreement.

SECTION 25. SUBCONTRACTING

During the term of this Agreement the Employer may, at its sole discretion, enter into a contract, subcontract, partnership, or other business arrangement whereby the services presently performed by employees under this Agreement may be provided, in whole or in part, by another employer or entity that is not a party to this Agreement.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C . oyer to convert existing employees in this bargaining unit to independent contractor status. However, this does not prevent an employee from being part of a contractor or sub-contractor entity along with others either as an employee or an owner of such entity.

The Employer shall not lay off or reduce the hours of existing bargaining unit members or eliminate existing bargaining unit positions as a result of a contract, subcontract, partnership, or any other business arrangement as contemplated above. The Employer shall not convert existing employees in the bargaining unit to independent contractor status.

This section is not meant to prevent the Employer from laying off or reducing the hours of employees, if necessary, under the stated terms of this Agreement when an existing contract or other source of funding for the services they provide is reduced or cut.

SECTION 26. CHANGE IN OWNERSHIP

In the event of an agreement that will lead to a change in the ownership of IOA, the Employer will notify the Union as soon as practicable. Upon written request from the Union, the Employer will meet and discuss the effects, if any, of the change upon the members of the bargaining unit.

SECTION 27. SAVINGS CLAUSE

Should any part hereof or any provisions herein be declared invalid by a court of competent jurisdiction, such invalidation of such part or portion of this Agreement shall not invalidate the remaining portions hereof and the remaining portions hereof shall remain in full force and effect for the duration of the Agreement.

SECTION 28. TERM OF AGREEMENT

This Agreement shall become effective December 14, 2024, and shall remain in full force and effect to and including September 30, 2027. However, the parties further agree that either party may send a written notice, at least ninety (90) days prior to September 30, 2027, notifying the other party of its desire to bargain over all or some of provisions of this Agreement.

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

FOR INSTITUTE ON AGING

FOR SEIU 1021

Laurie Panian - CPO **Signature:** **Date:**	**Francesca Giuliani – CMII** **Signature:** **Date:**
Paul Chichester – ER/LR Director **Signature:** Signed by: Paulding Chichester 663F4E3980664C4... **Date:** 6/20/2025	**Caolan Hyland – CMII** **Signature:** Signed by: Caolan Hyland D0565CD098AF44D... **Date:** 7/18/2025
	Vivien Wong – CMIII **Signature:** **Date:**
	Priscilla Corrbaribuas – CMI **Signature:** **Date:**
	Jessica Inouye – Field Representative **Signature:** DocuSigned by: 65BC338FB8DE4AE... **Date:** 9/10/2025
	Sandra Rivera – CMI **Signature:** Signed by: Sandra Rivera 4FF4FC696E2F4E1... **Date::** 7/18/2025
	Laura Horihan – Occupational Therapist **Signature:** Signed by: Laura Horihan 08F595CBAEFC405... **Date:** 6/20/2025
	Oumar Fall – SF Field Director **Signature:** DocuSigned by: Oumar Fall EE9A40A8C9DA4D4... **Date:** 6/25/2025
	David Canham – Executive Director **Signature:** DocuSigned by: David Canham 35487423365A4D2... **Date:** 6/20/2025

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Appendix A
SALARY STEP STRUCTURE
EFFECTIVE December 21, 2024

Care Manager I		Care Manager II		Care Manager III	
Step 1	$71,797.00	**Step 1**	$84,077.00	**Step 1**	$93,303.00
Step 2	$73,233.00	**Step 2**	$85,759.00	**Step 2**	$95,170.00
Step 3	$74,698.00	**Step 3**	$87,475.00	**Step 3**	$97,074.00
Step 4	$76,192.00	**Step 4**	$89,225.00	**Step 4**	$99,016.00
Step 5	$77,716.00	**Step 5**	$91,010.00	**Step 5**	$100,997.00
Step 6	$79,271.00	**Step 6**	$92,831.00	**Step 6**	$103,017.00
Step 7	$80,857.00	**Step 7**	$94,688.00	**Step 7**	$105,078.00
Step 8	$82,475.00	**Step 8**	$96,582.00	**Step 8**	$107,180.00
Step 9	$84,125.00	**Step 9**	$98,514.00	**Step 9**	$109,324.00
Step 10	$85,808.00	**Step 10**	$100,485.00	**Step 10**	$111,511.00
Step 11	$87,525.00	**Step 11**	$102,495.00	**Step 11**	$113,742.00
Step 12	$89,276.00	**Step 12**	$104,545.00	**Step 12**	$116,017.00
Step 13	$91,062.00	**Step 13**	$106,636.00	**Step 13**	$118,338.00
Step 14	$92,884.00	**Step 14**	$108,769.00	**Step 14**	$120,705.00
Step 15	$94,742.00	**Step 15**	$110,945.00	**Step 15**	$123,120.00
NOTE: (*) This is at least the California Minimum Salary for an Exempt Employees					

Effective December 21, 2024:
CMI: 5%
CMII: 12%
CMIII: 5%
Nurse Care Manager: 5%
Occupational Therapist: 5%
Social Work Assistant: 5%

Effective the first day of the first full workweek in October 2025: 2%
Effective the first day of the first full workweek in October 2026: 1.75%

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

Appendix A
SALARY STEP STRUCTURE
EFFECTIVE December 21, 2024

Nurse Care Manager		Occupational Therapy		Social Work Assistant	
Step 1	$116,040.00	**Step 1**	$114,249.00	**Step 1**	$28.37
Step 2	$118,361.00	**Step 2**	$116,534.00	**Step 2**	$28.94
Step 3	$120,729.00	**Step 3**	$118,865.00	**Step 3**	$29.52
Step 4	$123,144.00	**Step 4**	$121,243.00	**Step 4**	$30.12
Step 5	$125,607.00	**Step 5**	$123,668.00	**Step 5**	$30.73
Step 6	$128,120.00	**Step 6**	$126,142.00	**Step 6**	$31.35
Step 7	$130,683.00	**Step 7**	$128,665.00	**Step 7**	$31.98
Step 8	$133,297.00	**Step 8**	$131,239.00	**Step 8**	$32.62
Step 9	$135,963.00	**Step 9**	$133,864.00	**Step 9**	$33.28
Step 10	$138,683.00	**Step 10**	$136,542.00	**Step 10**	$33.95
Step 11	$141,457.00	**Step 11**	$139,273.00	**Step 11**	$34.63
Step 12	$144,287.00	**Step 12**	$142,059.00	**Step 12**	$35.33
Step 13	$147,173.00	**Step 13**	$144,901.00	**Step 13**	$36.04
Step 14	$150,117.00	**Step 14**	$147,800.00	**Step 14**	$36.77
Step 15	$153,120.00	**Step 15**	$150,756.00	**Step 15**	$37.51

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

Appendix A
SALARY STEP STRUCTURE
EFFECTIVE OCTOBER 4, 2025

Care Manager I		Care Manager II		Care Manager III	
Step 1	$73,233.00	**Step 1**	$85,759.00	**Step 1**	$95,170.00
Step 2	$74,698.00	**Step 2**	$87,475.00	**Step 2**	$97,074.00
Step 3	$76,192.00	**Step 3**	$89,225.00	**Step 3**	$99,016.00
Step 4	$77,716.00	**Step 4**	$91,010.00	**Step 4**	$100,997.00
Step 5	$79,271.00	**Step 5**	$92,831.00	**Step 5**	$103,017.00
Step 6	$80,857.00	**Step 6**	$94,688.00	**Step 6**	$105,078.00
Step 7	$82,475.00	**Step 7**	$96,582.00	**Step 7**	$107,180.00
Step 8	$84,125.00	**Step 8**	$98,514.00	**Step 8**	$109,324.00
Step 9	$85,808.00	**Step 9**	$100,485.00	**Step 9**	$111,511.00
Step 10	$87,525.00	**Step 10**	$102,495.00	**Step 10**	$113,742.00
Step 11	$89,276.00	**Step 11**	$104,545.00	**Step 11**	$116,017.00
Step 12	$91,062.00	**Step 12**	$106,636.00	**Step 12**	$118,338.00
Step 13	$92,884.00	**Step 13**	$108,769.00	**Step 13**	$120,705.00
Step 14	$94,742.00	**Step 14**	$110,945.00	**Step 14**	$123,120.00
Step 15	$96,637.00	**Step 15**	$113,164.00	**Step 15**	$125,583.00
NOTE: (*) This is at least the California Minimum Salary for an Exempt Employees					

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Appendix A
SALARY STEP STRUCTURE
EFFECTIVE OCTOBER 4, 2025

Nurse Care Manager		Occupational Therapy		Social Work Assistant	
Step 1	$118,361.00	**Step 1**	$116,534.00	**Step 1**	$28.94
Step 2	$120,729.00	**Step 2**	$118,865.00	**Step 2**	$29.52
Step 3	$123,144.00	**Step 3**	$121,243.00	**Step 3**	$30.12
Step 4	$125,607.00	**Step 4**	$123,668.00	**Step 4**	$30.73
Step 5	$128,120.00	**Step 5**	$126,142.00	**Step 5**	$31.35
Step 6	$130,683.00	**Step 6**	$128,665.00	**Step 6**	$31.98
Step 7	$133,297.00	**Step 7**	$131,239.00	**Step 7**	$32.62
Step 8	$135,963.00	**Step 8**	$133,864.00	**Step 8**	$33.28
Step 9	$138,683.00	**Step 9**	$136,542.00	**Step 9**	$33.95
Step 10	$141,457.00	**Step 10**	$139,273.00	**Step 10**	$34.63
Step 11	$144,287.00	**Step 11**	$142,059.00	**Step 11**	$35.33
Step 12	$147,173.00	**Step 12**	$144,901.00	**Step 12**	$36.04
Step 13	$150,117.00	**Step 13**	$147,800.00	**Step 13**	$36.77
Step 14	$153,120.00	**Step 14**	$150,756.00	**Step 14**	$37.51
Step 15	$156,183.00	**Step 15**	$153,772.00	**Step 15**	$38.27

Docusign Envelope ID: 8FB5694E-5C54-475D-BA3F-D48BBFED8B8C

Appendix A
SALARY STEP STRUCTURE
EFFECTIVE OCTOBER 3, 2026

Care Manager I		Care Manager II		Care Manager III	
Step 1	$74,515.00	**Step 1**	$87,260.00	**Step 1**	$96,836.00
Step 2	$76,006.00	**Step 2**	$89,006.00	**Step 2**	$98,773.00
Step 3	$77,527.00	**Step 3**	$90,787.00	**Step 3**	$100,749.00
Step 4	$79,078.00	**Step 4**	$92,603.00	**Step 4**	$102,764.00
Step 5	$80,660.00	**Step 5**	$94,456.00	**Step 5**	$104,820.00
Step 6	$82,274.00	**Step 6**	$96,346.00	**Step 6**	$106,917.00
Step 7	$83,920.00	**Step 7**	$98,273.00	**Step 7**	$109,056.00
Step 8	$85,599.00	**Step 8**	$100,239.00	**Step 8**	$111,238.00
Step 9	$87,311.00	**Step 9**	$102,244.00	**Step 9**	$113,463.00
Step 10	$89,058.00	**Step 10**	$104,289.00	**Step 10**	$115,733.00
Step 11	$90,840.00	**Step 11**	$106,375.00	**Step 11**	$118,048.00
Step 12	$92,657.00	**Step 12**	$108,503.00	**Step 12**	$120,409.00
Step 13	$94,511.00	**Step 13**	$110,674.00	**Step 13**	$122,818.00
Step 14	$96,402.00	**Step 14**	$112,888.00	**Step 14**	$125,275.00
Step 15	$98,331.00	**Step 15**	$115,146.00	**Step 15**	$127,781.00
NOTE: (*) This is at least the California Minimum Salary for an Exempt Employees					

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Appendix A
SALARY STEP STRUCTURE
EFFECTIVE OCTOBER 3, 2026

Nurse Care Manager		Occupational Therapy		Social Work Assistant	
Step 1	$120,433.00	**Step 1**	$118,574.00	**Step 1**	$29.45
Step 2	$122,842.00	**Step 2**	$120,946.00	**Step 2**	$30.04
Step 3	$125,299.00	**Step 3**	$123,365.00	**Step 3**	$30.65
Step 4	$127,805.00	**Step 4**	$125,833.00	**Step 4**	$31.27
Step 5	$130,362.00	**Step 5**	$128,350.00	**Step 5**	$31.90
Step 6	$132,970.00	**Step 6**	$130,917.00	**Step 6**	$32.54
Step 7	$135,630.00	**Step 7**	$133,536.00	**Step 7**	$33.20
Step 8	$138,343.00	**Step 8**	$136,207.00	**Step 8**	$33.87
Step 9	$141,110.00	**Step 9**	$138,932.00	**Step 9**	$34.55
Step 10	$143,933.00	**Step 10**	$141,711.00	**Step 10**	$35.25
Step 11	$146,812.00	**Step 11**	$144,546.00	**Step 11**	$35.96
Step 12	$149,749.00	**Step 12**	$147,437.00	**Step 12**	$36.68
Step 13	$152,744.00	**Step 13**	$150,386.00	**Step 13**	$37.42
Step 14	$155,799.00	**Step 14**	$153,394.00	**Step 14**	$38.17
Step 15	$158,915.00	**Step 15**	$156,462.00	**Step 15**	$38.94

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APPENDIX B

PRINCIPLES APPLICABLE TO HIRING AND ADVANCEMENT OF CARE MANAGERS

CONTEXT:

The professional development and total compensation programs of Institute on Aging are designed to reinforce and align with our mission, values, and business strategy. Our programs are intended to attract, motivate, and retain talented employees. IOA aspires to be ahead of the market for selected positions to meet our current strategic, client service, geographic and operating requirements. In the future to achieve this aspiration by growth and expansion into new geographic and market areas, IOA will need to determine the staffing structures that to respond to new and future operating requirements and commitments. A diverse range of Staff competencies, educational backgrounds and specialized professional experiences will be needed to meet these emerging mission aligned opportunities.

DEFINITIONS:

A. Care Manager I.

1. **Care Manager I.** Has a BA or BS in Social Work or another appropriate major with entry level experience.

B. Care Manager II

1. **Care Manager II.** Has a Masters in Social Work or another appropriate Masters level degree such as an MPH, MFT with additional or specialized work experience such as psychology, counseling, or geriatrics. Alternatively, in lieu of a Masters degree, an employee may qualify for a Care Manager II position with a BA or BS in Social Work or another appropriate major and a minimum of two (2) years of relevant social work experience and the ability to demonstrate autonomous work in conceptualizing and formulating biopsychosocial assessments, identifying care needs and necessary interventions, and then executing effective care interventions.

    i. For clarity, Care Manager II placement on the Salary Step structure is determined on the basis of the number of full years of relevant experience that is beyond the minimum requirements of the position. Care Manager II placement is based on years of relevant experience for those with the required Masters degree, or years of relevant experience beyond the two (2) required years used in lieu of the required Masters degree.

    ii. Any employee classified as a Care Manager II who thereafter achieves a Masters in Social Work, or another appropriate Masters level degree such as an MPH or MFT, shall thereafter, be elevated two additional steps on the Salary Step structure.

2. **Medical Social Worker:** Has a Masters in Social Work from a CSWE accredited school of social work with additional or specialized work experience such as psychology, counseling, or geriatrics.

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C. Care Manager III

Care Manager III. Has a Masters in Social Work or another appropriate Master level major such as MPH, MFT with additional or specialized work experience such as psychology, counseling, or geriatrics.

Lead Medical Social Worker. Has a Masters in Social Work from a CSWE accredited school of social work with additional or specialized work experience such as psychology, counseling, or geriatrics. They also serve as a peer mentor, subject matter expert in social work and provide the social work department with clinical and administrative support.

CMIII Focus Areas: This designation is at the discretion of the Employer and will depend on the employee's initiative, skill, level of program responsibility and demonstrated excellence in at least one of the following:

Program Development. Performing background research, organizing material and/or personnel and identifying agency and community resources necessary to implement a new or revised program on behalf of the Employer.

Interdisciplinary Education. Assessing, designing, and evaluating instructional materials and conducting educational programs for agency staff.

Staff Development. Mentoring junior staff or student interns and/or providing necessary supervision for LCSW/LMFT candidates.

Advanced Practice Function. Acquiring a specialized competency or training in order to serve or practice in a specialty program or function.

APPLICATION OF PRINCIPLES:

The above definitions govern the classification in which the employees covered by this Agreement at the time of hire and through levels of professional development by the Institute on Aging.

The methods for placement of any employees in any salary steps above the first salary step is described in Section 5.E.: Hiring Salary Experience Credit.

Transitions between job classifications are not automatic, including promotions, demotions, or other changes. The Employer has the sole discretion to determine if a vacancy exists, and if so, the appropriate classification for any such vacancy.

After hiring, the employee will be increased to the next step in the range of their classification upon the anniversary date of their hire until the maximum of the salary range is reached under the applicable section of this Agreement.