

# Employee Handbook



**Bluebird Valuation**

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## Welcome to Our Company

**Effective Date: 08/01/2022**

It is our pleasure to welcome you to our company. We're an energetic and creative bunch, dedicated to high standards of excellence and quality. Bluebird Valuation (also known as "BB") believes you have the skills and the potential to help our company grow and succeed. We believe you will share our commitment to our mission, contribute to our overall success, and help us achieve our goals. In return, we hope to provide you with a sense of pride and accomplishment.

Every employee has an important role in our operations, and we value the abilities, experience, and background that you bring with you to our company. It is our Employees who provide the services that our clients rely upon and enable us to grow and create new opportunities in the years to come.

We are proud to say that as a Bluebird Valuation employee, you partner in our success to vigorously uphold our mission statement and quality policy daily. With the entire staff of Bluebird Valuation sharing our vision of superior quality and unparalleled customer service, we are confident that we are headed for continued success.

The executives believe in this company and are constantly pushing for continuous growth. We are in the infancy stage of growth with tremendous opportunities for advancement. We are a company that cares about our employees and our clients. We offer competitive pay and a fun team oriented working environment. We encourage a positive atmosphere and feel strongly that anything else is not conducive to a healthy work environment.

As with any great company, we are only as good as our employees. Therefore, the extensive interviewing and training processes are necessary. We feel the right combination of personality and training make the perfect counseling/customer service associate. The perfect Bluebird Valuation employee understands that not only do we exist because of the employees; we exist because of clients. These two concepts work hand in hand creating a comfortable and respectful environment for everyone. We offer a high-quality service. This corporation exists because we care about what we do. This knowledge will be shared with you throughout your training period. We hope you will make an important contribution to our future and that your employment proves mutually satisfying.

The following sections introduces you to our Company's history, purpose, and goals. Please read it carefully so that you can better understand who we are and what we do. We think we are a special place, made even more so by the hard work and dedication of our employees. Welcome to our team; we look forward to working with you!

## Company History

**Effective Date: 08/01/2022**

Bluebird Valuation is a countrywide real estate Appraisal Management Company (AMC). We are an organizational entity that acts as an external third party between lenders and appraisers.

Bluebird Valuation was a division of The Appraisal Firm which was established in 1998 with the goal of creating a statewide appraisal management company. The company concentrated on working with national, regional, and local credit unions and banks as a central place to order and receive residential, commercial, and agricultural appraisal reports. After 10 years of hard work, The Appraisal Firm became a five-state appraisal company.

In 2009, BLUEBIRD VALUATION officially emerged from The Appraisal Firm. The goal of Bluebird Valuation is to provide a nationwide appraisal management service for lenders, credit unions and community banks that conforms to current guidelines. Bluebird Valuation strives to make the transition into compliance with the new Federal Appraisal Guidelines simple, easy, and profitable. Bluebird Valuation does one thing and we do it well. We provide quality appraisals and ensure compliance to our clients.



## Company Goals, Values, and Beliefs

**Effective Date: 08/01/2022**

Our goal at Bluebird Valuation is simple: extraordinary quality and customer service. We accomplish this by observing a common set of values and by partnering with organizations that have the finest reputation for quality. There are no shortcuts; we believe that our goals are accomplished only with a real commitment from every employee.

Our values and beliefs require that we:

- Treat each employee fairly, providing opportunities to enhance how we improve our service.
- Treat employees and colleagues with respect; BLUEBIRD VALUATION does not tolerate discrimination of any kind.
- Encourage all managers and supervisors to involve employees in creative problem solving.

When problems arise, an important part of dealing with them is understanding how to avoid them in the future.

- Provide consistent leadership and competent on-the-job training.
- Maintain an open-door policy that encourages interaction and discussion; encourage ideas to improve the workplace and increase productivity.
- Provide effective and efficient corrective action to resolve customer service issues, ensure complete customer satisfaction, and avoid recurrence of those issues.
- Deliver competitive, outstanding service to our clients and partner with vendors who share that goal.
- Make "Do It Right the First Time" our team attitude to ensure continued growth and prosperity.

Our management team intends to provide you with all the support and the resources necessary to perform your job effectively. If, at any time, you need assistance or guidance, do not hesitate to ask any of the members of our management team. They are here to help you perform to the best of your abilities.

We believe that our greatest assets are creative, productive employees, empowered to make suggestions and think "outside the box." Your job, and the jobs of your colleagues, is to make decisions that align with our values and lead to the realization of our mission. The success of BLUEBIRD VALUATION is dependent upon how well we operate as a unified team. We must earn the trust and respect of our clients every day to prove ourselves worthy of their business.

## About this Handbook

**Effective Date: 08/01/2022**

We think that employees are happier and more valuable if they know what they can expect from our Company and what our Company expects from them. In the preceding sections, we introduced you to our Company's history, values, culture, and goals. We expect you to incorporate that information in your day-to-day job performance, striving to meet our Company's values in everything you do. The remainder of this Handbook will familiarize you with the privileges, benefits, and responsibilities of being an employee at our Company. Please understand that this handbook can only highlight and summarize our Company's policies and practices. For detailed information, you will have to speak with your supervisors or a member of our Employee Relations Team.

In this Company, as in the rest of the world, circumstances are constantly changing. As a result, we may have to revise, rescind, or supplement these policies from time to time. Nothing in this Handbook is a contract or promise. The policies can change at any time, for any reason, without warning. We are always looking for new ways to improve communications with our employees. If you have suggestions for ways to improve this Handbook or employee relations in general, please feel free to send feedback or to see our HR specialist at [HR@YourAmc.com](mailto:HR@YourAmc.com). This Handbook supersedes all previously issued Employee Handbooks and inconsistent verbal or written policy statements. No oral statements or representations can change the provisions of this Employee Handbook. No Manager has any authority to enter a contract of employment--express or implied--that changes or alters the at-will employment relationship. This Employee Handbook is the property of Bluebird Valuation and its partnering companies and may not be removed from the premises. All rights are reserved. No part of this Employee Handbook may be reproduced in any form or by any electronic or mechanical means, including information storage and retrieval systems, without permission in writing from the Compliance Director. Not all BLUEBIRD VALUATION policies and procedures are set forth in this Employee Handbook. We have summarized only some of the more important ones. If you have any questions or concerns about this Employee Handbook or any other policy or procedure, please ask your Manager or the Human Resource Director.

## Human Resources Department

**Effective Date: 08/01/2022**

Get to know your Employee Relations Team We are fortunate enough to have a wonderful department that is available to answer your questions, field your complaints, and make our Company run more smoothly. In fact, the policies in this Handbook often refer you to your Human Resource department for more information or to obtain help. The email address is [HR@Youramc.com](mailto:HR@Youramc.com).

## Employment is At Will

**Effective Date: 08/01/2022**

We are happy to welcome you to our Company. We sincerely hope that your employment here will be a positive and rewarding experience. However, we cannot make any guarantees about your continued employment at our Company. Your employment here is at will. This means that you are free to quit at any time, for any reason, just as we are free to terminate your employment at any time, for any reason, with or without notice, with or without cause. No employee or Company representative, other than Upper Management has the authority to change the at-will employment relationship or to contract with any employee for different terms of employment. Furthermore, the at-will employment relationship may only be changed in a written contract, signed by a member of Upper Management and the employee. Nothing in this Handbook constitutes a contract or promise of continued employment.

## Equal Employment Opportunity

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION is an Equal Opportunity Employer. This means that we will extend equal opportunity to all individuals without regard for race, religion, sex, national origin, age, disability, or veteran status. This policy affirms BLUEBIRD VALUATION's commitment to the principles of fair employment and the elimination of all existing vestiges of discriminatory practices.

To provide equal employment and advancement opportunities to all individuals, employment decisions at BLUEBIRD VALUATION will be based on merit, qualifications, and abilities. BLUEBIRD VALUATION does not base such employment decisions on race, religion, sex, national origin, age, disability, or veteran status. BLUEBIRD VALUATION will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in undue hardship.

This Equal Employment Opportunity policy governs all aspects of employment, including selection, job assignment, compensation, discipline, termination, and access to benefits and training.

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

BLUEBIRD VALUATION is compliant with all applicable Affirmative Action regulations.

For more information on Affirmative Action, employees may contact the Human Resource Director at [HR@YourAmc.com](mailto:HR@YourAmc.com).

## Recruitment

**Effective Date: 08/01/2022**

We know that we are only as good as our employees, so we search as widely as possible for talented and motivated individuals to fill vacant positions in our Company. We know that the marketplace is ever changing and that finding high-quality people is an evolving process. We encourage our employees to share with us their ideas about what more we can do to find and recruit talented and motivated individuals. We conduct all recruiting in a fair and nondiscriminatory manner. In addition to looking outside the Company for new hires, also look within. After all, we already know the value and quality of our current employees. We post all internal job openings on the Company Intranet. If you see a posting that interests you, we encourage you to apply for it by following our Internal Application Procedure below. We also encourage employees to recruit and refer external applicants for open positions. If you refer someone whom we eventually hire, we will thank you for your efforts with a referral bonus. See "Refer a New Hire; Get a Bonus!" below for details.

## Hiring Process

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION requires that all candidates for employment submit an employment application. Resumes, letters of recommendation, and other materials may also be required as part of the hiring process.

Applicants that submit employment applications found to include false or misrepresented information will no longer be considered for employment with BLUEBIRD VALUATION. If it is found that after hiring false or inaccurate information was provided on your employment application, you may be subject to discipline, up to and including termination of employment.

The Company will make conditional offers of employment to those we believe to be most qualified. BLUEBIRD VALUATION does not discriminate based on race, color, religion, sex, national origin, age or disability. Conditional offers depend on the applicant's consent to and successful passing of all necessary medical examinations as well as drug, background, and reference checks.

## Employee Referral Bonus Program

**Effective Date: 08/01/2022**

Our employees know our needs and Company culture better than anyone else and are often the best situated to find and recruit new employees to fill open positions within our ranks. To encourage employees to act as recruiters on our behalf, and to reward employees who help make a successful match, we operate an Employee Referral Bonus Program. We will give a referral award to any employee who refers an individual who we hire and stays employed with us for more than 90 days. If the referred employee does not successfully complete the 90 days of employment for any reason, the referring employee will not receive a referral reward. To find out more about the program, or to refer a potential application for an open position, contact our HR department.



## Internal Application Process

**Effective Date: 08/01/2022**

Sometimes, the best person for a job is right under our Company's nose. As a result, we encourage current employees to apply for vacant positions that interest them. We will post all internal job openings on the Company Intranet. To apply for a position, give a cover letter, current resume, and copy of the job posting to the HR Director at [HR@YourAmc.com](mailto:HR@YourAmc.com).

## Job Duties

**Effective Date: 08/01/2022**

As part of your initial orientation, you will learn the various duties and responsibilities of your job. You will be provided with a copy of the written job description for your individual position. The Company maintains certain expectations and standards applicable to your job position. Your Manager should review these with you.

It is expected that Employees will perform additional duties and assume additional responsibilities as needed by their Manager for the efficient operation of the Company.

To adjust to changes in our business, it may become necessary to modify your job description, add to or remove certain duties and responsibilities, or reassign you to an alternate job position.

## Nepotism

**Effective Date: 08/01/2022**

A familial relationship among employees can create an actual or at least a potential conflict of interest in the employment setting, especially where one relative supervises another relative. To avoid this problem, the Company may refuse to hire or place a relative in a position if favoritism or conflicts start to exist.

In other cases where a conflict or the potential for conflict arises, even if there is no supervisory relationship involved, the parties may be separated by reassignment or terminated from employment, at the discretion of the Company if conflicts begin to exist.

If two Employees marry, become related, or enter into an intimate relationship, they may be removed from a reporting relationship or in positions where one individual may affect the compensation or other terms or conditions of employment of the other individual if problems or conflicts begin to occur. The Company will attempt to identify other available positions, and the Employees will have 30 days to decide which individual will remain in his/her current position. If no alternate position is available, the Employees will have 30 days to decide which Employee will remain with the Company. If this decision is not made in the time allowed, the Company will make the decision.

For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship with the Employee is similar to that of persons who are related by blood or marriage.

## Criminal Convictions

**Effective Date: 08/01/2022**

The Company reserves the right not to hire or retain anyone that has been convicted of a criminal offense. Conviction of a crime that involves dishonesty may result in an automatic termination of employment. Before any decision is made, the nature of the crime and circumstances surrounding convictions will be considered.

## Background Checks

**Effective Date: 08/01/2022**

The Company recognizes the importance of maintaining a safe workplace with Employees who are honest, trustworthy, qualified, reliable, and nonviolent, and do not present a risk of serious harm to their coworkers or others. For purposes of furthering these concerns and interests, the Company reserves the right to investigate an individual's prior employment history, personal references, and educational background, as well as other relevant information that is reasonably available to the Company. Credit reports may be requested only regarding job applicants and Employees whose positions, department, or job duties involve the handling of money, valuables, confidential information, or trade secrets, and to those suspected of theft, extortion, embezzlement, or other crimes of dishonesty or fraud related to their employment, the Company, the Company's customers, the Company's Employees, or other parties or entities dealing with the Company. The Company may review an applicant's or an Employee's credit report and criminal background, if any. If a background check is conducted, the Company will comply with the federal Fair Credit

Reporting Act and applicable state laws, including providing the job applicant or Employee with any required notices and forms. Consistent with these practices, job applicants or Employees may be asked to sign certain authorization and release forms. Consistent with legal requirements, the Company reserves the right to require job applicants or Employees to sign the forms as requested as a condition of employment.

## Employee Orientation

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION's Employee Orientation Program is our way of welcoming and educating new employees. Our goal is to make new employees feel comfortable, informed about the company, and prepared to perform well in their position. Employee orientation is conducted by Human Resource Director.

The program includes an overview of our company history, as well as an explanation of our core values, vision, and mission. Our intention is to provide new employees with a clear understanding of our goals and objectives. In addition, the program will address benefits, company programs, standards, and provide employees with the opportunity to complete any necessary paperwork such as tax withholding forms, emergency contact forms and benefits paperwork. Employees may be presented with security and access codes, keys, and procedural information for use in performing their jobs. New employees will be introduced to staff throughout the company and acquainted with their personal workspace. During orientation, Management may meet with new employees to review their job descriptions and position scope, explain the BLUEBIRD VALUATION performance evaluation system, and answer any specific questions. Please feel free to answer any questions you might have about the Company during your orientation meeting. If additional questions come up after the meeting, you can ask your Supervisor or send an email to HR department at [HR@YourAmc.com](mailto:HR@YourAmc.com).

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## Introductory Period

**Effective Date: 08/01/2022**

The first 3 months or 90 days of continuous employment will no doubt be a learning experience. You will learn your job duties and responsibilities, get acquainted with your Manager(s) and fellow Employees, and familiarize yourself with the Company in general. We refer to this initial period of employment as your introductory period. This is also the time in which, you as the new employee, are being introduced to the organization and both parties can evaluate each other. Some employers refer to this time as a training period, orientation period, initial employment period, or even a "familiarization" period. It is a time for you decide if we are the right company for you and for us to decide if you are the right employee to fit our needs. The introductory period is a perfect way to decide if both parties are an exact match. During your introductory period, you will meet with your supervisor to go over you job goals and performance requirements. You will receive feedback on your performance and will be able to get any questions answered you might have.

While we understand that you will be learning a lot about your new job, you are still expected to perform satisfactorily and your performance will be reviewed closely. Also, please understand that completion of the introductory period does not guarantee continued employment and does not change the at-will nature of the employment relationship.

## Work Eligibility

**Effective Date: 08/01/2022**

Within three business days of your first day of work, you must complete federal Form I-9 and show us documentation proving your identity and your eligibility to work in the United States. The federal government requires us to do this. If you have worked for this company previously, you need only to prove this information if it has been more than three years since you last completed an I-9 for us or if your current I-9 is no longer valid. At your orientation with the HR department, you will receive a blank Form I-9 and instructions on completing it. If you did not, please contact the HR department at [HR@YourAmc.com](mailto:HR@YourAmc.com).



## Child Support Reporting Requirements

**Effective Date: 08/01/2022**

Federal and state laws require us to report basic information about new employees, including your name, address, and Social Security number, to a state agency called the State Directory of New Hires. The state collects this information to enforce child support orders. If the state determines that you owe child support, it will send us an order requiring us to withhold money from your paycheck to pay your child support obligations.

## Working Hours and Schedule

**Effective Date: 08/01/2022**

The Company is normally open for business from 8:00 a.m. to 7:00 p.m., Monday through Friday. You will be assigned a work schedule and you will be expected to begin and end work according to the schedule. To accommodate the needs of our business, it may be necessary to change individual work schedules on either a short-term or long-term basis.

## Paydays

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION employees are paid on a weekly basis. As required by law, BLUEBIRD VALUATION will deduct Federal Social Security and Income Tax from your paycheck each pay period.

BLUEBIRD VALUATION encourages its employees to take advantage of Direct Deposit of weekly pay; this service saves time and provides added security. With Direct Deposit, each paycheck will be automatically deposited to employees' checking or savings account per their instruction. Each payday, employees will receive a pay stub for their records.

For the purposes of calculating employee pay periods, the workweek is considered Monday at 12:00 a.m. through Sunday at 11:59 p.m. If a regularly scheduled payday falls on a weekend or holiday, employees will be paid. An employee's paycheck will not, under any circumstances, be given to any person other than that employee without appropriate written authorization. Paychecks may also be mailed to the employee's listed address upon request. Employees will receive their paychecks on Tuesday. If a payday falls on a holiday, you will receive your paycheck on the last workday immediately before payday.

## Advances

**Effective Date: 08/01/2022**

Our Company does not allow employees to receive pay advances for any reason.

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## Payroll Deductions

**Effective Date: 08/01/2022**

Your paycheck reflects your total earnings for the pay period, as well as any mandatory or voluntary deductions from your paychecks. Mandatory deductions are deductions that we are legally required to take such as federal taxes, Social Security taxes, family health coverage, back taxes, garnishments (including child support), for uniforms, for loss or destruction of company property from an employee's gross pay.

All deductions (other than statutory deductions) must be authorized by the employee. No other deductions will be made unless specifically authorized in writing by the employee.

Deductions will be itemized on the employee's paycheck stub after filling out a Wage and Deduction form. This form can be acquired by HR. Questions regarding payroll deductions should be directed to the Human Resource Director. If you have any questions about your deductions or wish to change your federal withholding form (Form W-4), please contact the HR department at [HR@YourAmc.com](mailto:HR@YourAmc.com).

## Wage and Salary Increases

**Effective Date: 08/01/2022**

Each employee's hourly wage or annual salary will be reviewed at least Annually. The employee review date is generally on, or about, the anniversary of employment or date of the previous review. Such reviews may be conducted more frequently under some circumstances (i.e., for a newly created position or following a recent promotion).

Any wage or salary increase will be determined on performance, attendance, BLUEBIRD VALUATION established salary matrix, or regional salary survey data. For more information on performance appraisals, employees may refer to the BLUEBIRD VALUATION Performance Evaluations policy in this handbook.

## Expense Reimbursement

**Effective Date: 08/01/2022**

Employees must be granted prior approval before incurring any company expenses. If the reimbursement amount is in excess of \$1.00, the expense report or request for reimbursement will be processed as an invoice or a form that will need to be signed in accounting. All completed reimbursement request forms should be submitted in a timely manner to accounting.

## Timekeeping

**Effective Date: 08/01/2022**

Government regulations require that BLUEBIRD VALUATION keep accurate records of hours worked by employees. Employees are required to clock in when they report to work and clock out when they leave. Accurately recording time worked is the responsibility of every employee. Time worked is the time spent on a job performing assigned duties. Please note that we do not include time spent on personal matters or extended breaks when calculating hours worked.

Timekeeping is a legal matter. Altering, falsifying, or tampering with time records or recording time on another employee's time record will result in disciplinary action, up to and including termination of employment.

Vacation days, sick days, holidays, and absences for jury duty, funeral leave or military training must be specifically noted on employee time records on the days on which they occur.



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## Wage Garnishments

**Effective Date: 08/01/2022**

A wage garnishment is an order from the court or a government agency directing us to withhold a certain amount of money from an employee's paycheck and send it to a person or agency. Wages can be garnished to pay child support, spousal support or alimony, tax debts, outstanding student loans, or money owed because of a judgement in a civil lawsuit. If we are instructed by a court or agency to garnish an employee's wages, the employee will be notified of the garnishment at once. Please note that we are legally required to comply with these orders. If you dispute or have concerns, about the amount of garnishment, you must contact the court or agency that issued the order.

## Pay Rate Schedule-Hourly Employees

**Effective Date: 08/01/2022**

The company has established pay rate schedules for hourly-paid employees based upon work classifications. The length of time in a classification is a general guideline only. Being employed by the company more than 1 or 2 years does not necessarily mean automatic promotion to the next highest level, for example.

Pay is determined by three primary factors:

- Your assigned work classification
- Step increases for years of service
- Individual performance

## Reinstatement

**Effective Date: 08/01/2022**

Employees who are re-employed by the company after termination will lose their original anniversary date for all purposes and be assigned a new date corresponding to their first day on the job after re-employment.

## Error in Pay

**Effective Date: 08/01/2022**

Every precaution is taken to ensure that employees are paid correctly. If an employee believes there is an error in their pay, they should fill out a notice of pay problem form and notify the Human Resource Manager at [HR@YourAmc.com](mailto:HR@YourAmc.com). The company will make every attempt to adjust the error immediately or no later than the employee's next pay period.

## Authorized Check Pick up

**Effective Date: 08/01/2022**

Your manager or Human Resource Director will distribute weekly checks.

If an employee is absent on payday and instructs someone to pick up his or her paycheck, a note signed by the employee authorizing the person must be provided before the check can be released. The person picking up the paycheck must show proper identification and sign for the check. This policy protects the employee and the company.

For convenience of the employee and Bluebird Valuation LLC, Paychecks can also be directly deposited in the employee's bank account if the employee chooses to do so.

## Direct Deposit

**Effective Date: 08/01/2022**

The Company provides direct deposit to all its employees. Direct deposit saves employees the hassle of going to the bank on paydays to cash or deposit their paychecks.

If you elect direct deposit, your paychecks will be directly deposited into your bank account. On paydays, employees will be provided with a pay stub, indicating amount earned for the pay period and applied deductions. Employees choosing to utilize this benefit must complete a Direct Deposit Authorization Form. To obtain this form, contact your Human Resource Director.

## Training and Professional Development

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION recognizes the value of employees' professional development and personal growth. Therefore, BLUEBIRD VALUATION encourages employees interested in job-specific training and continuing education opportunities to research such programs and consult Human Resource Director. Management approval must be obtained, in writing, prior to registering for the seminars or courses.

BLUEBIRD VALUATION firmly believes in developing employees by drawing on the knowledge and experience of its own talented workforce. To this end, BLUEBIRD VALUATION offers programs such as coaching and mentoring. Employees may consult Human Resource Director for more information on these types of programs.

## Employee Suggestion Program

**Effective Date: 08/01/2022**

To involve employees at all levels in the quest to improve operations and results, BLUEBIRD VALUATION uses an Employee Suggestion Program. Suggestions are evaluated regularly by a committee and considered for implementation. Employees whose ideas lead to implementation will be eligible for a reward. All suggestions can be sent to [HR@YourAMC.com](mailto:HR@YourAMC.com). For more information on the Employee Suggestion Program, employees may consult Human Resource Director.



## Company Property

**Effective Date: 08/01/2022**

We have invested a great deal of money in the property and equipment that you use to perform your job. It is a senseless and avoidable drain on this Company's bottom line when people abuse Company property, misuse it, or wear it out prematurely by using it for personal business.

We ask all employees to take care of Company property and to report any problems to Management. If a piece of equipment or property is unsafe for use, please report it immediately.

Please use property only in the manner intended and as instructed.

We do not allow personal use of Company property unless specifically authorized in this Handbook.

Failure to use Company property appropriately, and failure to report problems or unsafe conditions, may result in disciplinary action, up to and including termination.

For information on use of the voicemail system, see the Telephone Section of this handbook.

For information on use of computers, the Internet, and software, see the Computer/Internet/Software Section of this Handbook.

## Mail Machine Usage

**Effective Date: 08/01/2022**

It is not acceptable to use BLUEBIRD VALUATION postage or metering for your personal mail. The postage is intended only for official business-related mail.

Any employee found in violation of this policy will be subject to disciplinary action, up to and including termination.

## Telephones

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION telephones are reserved for business use only. All phone conversations occurring on Company Telephones are recorded and could be monitored at any time. Employees are not permitted to make outgoing personal calls, including local calls. All personal calls should be conducted on personal cell phones during breaks or by supervisor permission.

Because our telephone communications are an important reflection of our image to customers and the community, every employee should use proper telephone etiquette. Some examples of good telephone etiquette are always using the approved greeting, speaking courteously and professionally, confirming the information you have received from the caller, and only hanging up once the caller has done so.

Personal calls during business hours are discouraged except in cases of emergency. All personal telephone calls should be kept brief. To respect the rights of all employees and avoid disruption in the workplace, employees must inform family members and friends to limit personal telephone calls during working hours.

## Company Supplies

**Effective Date: 08/01/2022**

Only authorized persons may purchase supplies in the name of BLUEBIRD VALUATION. No employee whose regular duties do not include purchasing shall incur any expense on behalf of BLUEBIRD VALUATION or bind BLUEBIRD VALUATION by any promise or representation without express written approval. If you need supplies, please see your Supervisor. Supervisors will contact the HR Department.

## Holidays

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION observes the holidays below and will grant time off to all employees on the holidays listed below:

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

## Personal/Sick Days

**Effective Date: 08/01/2022**

Personal leaves of absence are without pay.

## Jury Duty

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION encourages employees to fulfill their civic responsibilities by serving jury duty when required. Employees must provide an immediate supervisor with a copy of their jury summons as soon as possible so that the supervisor may make arrangements to accommodate their absence.

Employees are required to report to work as permitted by the court schedule. If you are released from jury duty with at least four (4) hours remaining in your workday, you should return to work for the remainder of the day. Either BLUEBIRD VALUATION or the employee may request an excuse from jury duty if it is determined that the employee's absence would create serious operational difficulties.

## Standards of Conduct

**Effective Date: 08/01/2022**

Workplace rules and standards of conduct observed by BLUEBIRD VALUATION are essential to a healthy and productive workplace. All employees are urged to familiarize themselves with these rules and standards, as they will be held accountable for upholding them. Please be aware that any employee who disregards, or deviates, from any of these rules or standards will be subject to disciplinary action, up to and including termination of employment.

While not intended to be an all-inclusive list, the examples below represent behavior that is considered unacceptable in the workplace. Behaviors such as these, as well as other misconduct, may result in disciplinary action, up to and including termination of employment.

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



## Ethics and Conduct Policy

**Effective Date: 08/01/2022**

The successful business operation and reputation of BLUEBIRD VALUATION is built upon the principles of fair dealing and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

Our continued success is dependent upon our customers' trust, and we are dedicated to preserving that trust. Employees owe a duty to BLUEBIRD VALUATION and our customers to act in ways that will merit the continued trust and confidence of the public.

As an organization, BLUEBIRD VALUATION will comply with all applicable laws and regulations and we expect our directors, officers, and employees to conduct business in accordance with the letter, spirit, and intent of all relevant laws and to refrain from any illegal, dishonest, or unethical conduct.

In general, you should find that using good judgment, based on high ethical principles, will guide you to act appropriately. If you are unsure about the proper course of action, you should discuss the matter openly with your supervisor. If necessary, you may also contact the Human Resources Director for advice and consultation.

It is the responsibility of every BLUEBIRD VALUATION employee to comply with our Code of Conduct. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including possible termination of employment.

## Workplace Etiquette

**Effective Date: 08/01/2022**

Our Company strives to maintain a positive work environment where employees treat each other with respect and courtesy. Sometimes issues arise when employees are unaware that their behavior in the workplace may be disruptive to others. Many of these day-to-day issues can be addressed by politely talking with a co-worker to bring the perceived problem to his or her attention. In most cases, common sense will dictate an appropriate resolution. We encourage all employees to keep an open mind and graciously accept constructive feedback or a request to change behavior that may be affecting another employee's ability to concentrate and be productive.

The following workplace etiquette guidelines are not necessarily intended to be hard and fast work rules with disciplinary consequences. They are simply suggestions for appropriate workplace behavior to help everyone be more conscientious and considerate of co-workers and the work environment.

- Avoid public accusations or criticisms of other employees. Address such issues privately with your supervisor or those involved.
- Try to minimize unscheduled interruptions of other employees while they are working.
- Communicate by email or phone whenever possible, instead of walking unexpectedly into someone's office or workspace.
- Be conscious of how your voice travels and try to lower the volume of your voice when talking on the phone or to others in open areas.
- Keep socializing to a minimum and try to conduct conversations in areas where the noise will not be distracting to others.
- Minimize talking between workspaces or over cubicle walls. Instead, conduct conversations with others in their workspace.
- Try not to block walkways while carrying on conversations.
- Refrain from using inappropriate language (swearing) that others may overhear.
- Avoid discussions of your personal life/issues in public conversations that can be easily overheard.
- Monitor the volume when listening to voice mail, or a speakerphone that others can hear.
- Return copy machine and printer settings to their default settings after changing them.
- Replace paper in the copy machine and printer paper trays when they are empty.
- Retrieve print jobs in a timely manner and be sure to collect all pages.
- Keep the area around the copy machine and printers neat and orderly.
- Be careful not to take or discard others' print jobs or faxes when collecting your own.
- Clean up after yourself and do not leave behind waste or discarded papers.

Please contact your supervisor or the Human Resources Department if you have comments, concerns, or suggestions regarding these workplace etiquette guidelines.

## Meal and Rest Periods

**Effective Date: 08/01/2022**

Full-time employees are provided one (1) hour meal period Monday through Friday. Employees will be relieved of all active responsibilities and restrictions during meal periods and, as such, will not be compensated for that time. Meal periods at BLUEBIRD VALUATION are unpaid. Rest periods are paid by the Company.

Part-time employees are provided thirty (30) minutes meal period Monday Through Friday. Employees will be relieved of all active responsibilities and restrictions during meal periods and, as such, will not be compensated for that time. Meal periods at BLUEBIRD VALUATION are unpaid. Rest periods are paid by the Company

## Attendance and Punctuality

**Effective Date: 08/01/2022**

Employees are expected to arrive at work prior to their scheduled start times so that they may begin work at their scheduled start times. All time off must be requested in writing, in advance, as outlined in the BLUEBIRD VALUATION Time Off (TO) policy.

BLUEBIRD VALUATION considers excellent attendance to be the foundation of great performance and, as such, attendance is assessed during performance appraisals. All unapproved absences will be documented in employee personnel files. Excessive absence will result in disciplinary action, up to and including termination.

Absenteeism and tardiness place an undue burden on other employees and on the company, itself; BLUEBIRD VALUATION expects regular attendance and punctuality from all employees.

Employees unable to report for work for any reason must notify as early as possible, but always before their scheduled start time. Should occurrences of absence or tardiness become regular or excessive, disciplinary action may be taken, up to and including termination of employment. Requests for special work hours will be considered on a case-by-case basis, depending on both the needs of the employee and of BLUEBIRD VALUATION.

Employees are required to fill out a time off request form for vacation days, personal days, arrival late to work or early departure. The time off is not approved until the employee receives a copy of the time off request form signed by their supervisor and the HR Director. Any employee who takes time off without having the form signed, approved, and returned to them is considered in violation of the Attendance and Tardiness Policy and the employee will receive points for these unexcused absences and further disciplinary actions may be taken.

Absences are required to be approved. Once an employee has used all personal, sick and vacation days and cannot provide a medical note or exemption for the absence the time will not be approved. Sick requests will be required on a case per case basis, and we may require a medical note if the time extends behind the standard 24 to 48 hours.

**The policy will be as follows.**

- 1st offense - warning
- 2nd offense - probationary period
- 3rd offense - final warning
- 4th offense - termination of employment

## Dress Code

**Effective Date: 08/01/2022**

Our Company's objectives in establishing a business casual dress code, is to allow our employees to work in a comfortable workplace. Yes, we still need our employees to project a professional image for clients, potential employees, vendors, and community visitors

**Persons affected:**

All employees of this organization.

**Policy:**

Because all casual clothing is not suitable for the office, these guidelines will help you determine what is appropriate to wear to work.

- Clothing that works well for the beach, yard work, dance clubs, exercise sessions, and sports contests is not appropriate at work.
- Clothing should be pressed and never wrinkled.
- Clothing that is torn, dirty, stained or frayed is unacceptable.
- Jewelry, Makeup, Perfume and Cologne should be in good taste. Remember, that some employees are allergic to the chemicals in perfumes and make up, so wear these substances with restraint.

**Acceptable for Females:**

- Skirts/skirt suits (length cannot be more than 3 inches above the knee and should be at a length where you can sit comfortably in public).
- Pant/slacks, Pantsuits
- Polo shirts
- Leggings worn under a skirt only
- Jeans (plain jeans with no flashy content such as logos, glitter, etc.)
- Capris
- Bermuda pants (to the knee) of nice-looking dress pant material (no jeans please)
- Sneakers (white, black, tan, gray sneakers only with a small accent color)
- Loafers, Clogs Flats, and Dress heels
- Boots must be worn under pants and can only be black, brown, tan, gray, or white

**Acceptable for Males:**

- Pants/slacks, jeans, and suits.
- Blazers, sweaters, office appropriate jackets, polo shirts, or casual business shirts.
- Shirts with Collar
- Dockers, Leather deck type shoes, and Sneakers (white, black, tan, gray sneakers only with a small accent color)
- Jeans (plain jeans with no flashy content, such as logos, glitter, etc.)

**Inappropriate:**

- Shorts/skorts
- Mini skirts
- Sweats (shirts, pants, jackets)
- Exercise clothing, sport outfits, wind pants and terry cloth clothing
- Beachwear and jogging suits
- Sweat or athletic outfits
- Sports Jerseys
- Shirts with potentially offensive words, terms, pictures, cartoons, or slogans
- T-shirts, baby tees, or long-sleeved T-shirts
- Tube tops, spaghetti strapped tops, tank tops, or halter tops
- Overalls
- Baggy Clothing (i.e., oversized sweatshirts or jeans)
- Clothing exposing abdomen
- Revealing clothing
- Tight fitting clothing
- Clothing with rips or tears
- Beach, thong, gladiator, and flat sandals,
- Flip flops
- Stilettos (other than a pump or career type stiletto)
- Sneakers in any colors other than white, black, tan, gray, dark blue (No orange, red, green, yellow, etc. sneakers)
- Plaid or printed sneakers or flat shoes
- Hats/Bandanas/Sweatbands
- Spaghetti strapped dresses, beach dresses, or sun dresses
- Culottes
- Sweatshirts
- Boots colored other than brown, black, gray, white or tan.
- Boots worn over pants
- Ugg Boots
- Flashy athletic shoes
- Hats, visors

**Conclusion:**

When clothing fails to meet these standards, as determined by management, the employee will be asked not to wear the inappropriate item to work again, or they will be asked to go home to change into acceptable attire. Time absent from work due to this will not be paid. The employee is expected to return to work. If the employee fails to do so; further disciplinary action will be taken.

The above guidelines are to be followed for the entire workweek. No dress code can cover all contingencies so employees must exert a certain amount of judgment in their choice of clothing to wear to work. If you experience uncertainty about acceptable, professional business casual attire for work, please ask your supervisor.

**Definitions:**

**4.1 Corrective Action-Action completed when policy or procedure is in violation.**

**Responsibilities:**

**5.1 The Human Resource Department shall ensure that:**

- 5.1.1 All employees adhere to the current dress code.
- 5.1.2 Meets with all members of management to be sure they know what to look for and what is acceptable and unacceptable regarding Dress Code Policy.
- 5.1.3 Ensure Compliance to this policy
- 5.1.4 Ensure all new employees are aware of the dress code policy at the time of their new hire and during orientation.
- 5.1.5 Conduct all corrective actions when needed.

**5.2 Employees are expected to:**

- 5.2.1 To adhere to the guidelines of the dress code policy
- 5.2.2 Employees will be expected to sign Dress Code Policy upon hire date or if the policy changes and a new version is distributed.

**5.3 Management is expected to:**

- 5.3.1 Enforce the Dress Code Policy.
- 5.3.2 Communicate the policy and its importance thru emails, meetings, and one on ones when discussing point accrual.

**Procedures:**

Management reserves the right to use its discretion in applying this policy under special or unique circumstances.

Management reserves the right to amend or discontinue this policy at any time without notice.



## Employee Hygiene

**Effective Date: 08/01/2022**

We encourage the practice of appropriate employee hygiene within the workplace. This includes but is not limited to:

- Washing hands after using the restroom
- Limiting or abstaining from the excessive use of perfumes and colognes
- Appropriate use of deodorant
- Appropriate bodily cleanliness
- Kept hair
- Containment of communicable diseases
- The proper disposal of garbage
- Proper sanitation in eating areas
- Cleanliness of workspace

Managers and supervisors are responsible for interpreting and enforcing the hygiene policy at their discretion. This includes advising employees with inappropriate hygiene standards. Reasonable accommodation can be made in extreme circumstances.

Business necessity does call for professional standards to protect a clean and non-distracting workplace. Questions or concerns should be handled by an employee's immediate supervisor or Human Resources at [HR@YourAMC.com](mailto:HR@YourAMC.com). Any employee may be sent home to correct a problem.

Our Company seeks to remain in compliance with all relevant state and federal laws.

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## Threatening, Abusive, or Vulgar Language

**Effective Date: 08/01/2022**

We expect our employees to treat everyone they meet through their jobs with courtesy and respect. Threatening, abusive, or vulgar language has no place in our workplace. It destroys morale and relationships, and it impedes the effective and efficient operation of our business.

As a result, we will not tolerate threatening, abusive, or vulgar language from employees while they are on the worksite, conducting Company business, or attending Company-related business or social functions.

If you have any questions about this policy, please contact your supervisor or the HR Department at [HR@YourAMC.com](mailto:HR@YourAMC.com). Employees who violate this policy will face disciplinary action, up to and including termination.

## Horseplay

**Effective Date: 08/01/2022**

Although we want our employees to have fun while they work, we don't allow employees to engage in horseplay which is fun that has gotten loud and boisterous and out of control. Horseplay disrupts the work environment and can get out of hand, leading to fighting, hurt feelings, safety hazards, or worse. Employees who engage in horseplay will face disciplinary action, up to and including termination.

## Fighting

**Effective Date: 08/01/2022**

Verbal or physical fighting among employees is absolutely prohibited. Employees shall not engage in, provoke, or encourage a fight. Those who violate this policy will be disciplined, up to and including termination.

## Sleeping on the Job

**Effective Date: 08/01/2022**

When our employees arrive at work, we expect them to be physically prepared to work through their day. Employees who sleep on the job dampen morale and productivity and deprive us of their work and companionship.

As a result, we do not allow any employees to sleep while at work in any area of the building. Employees who feel sick or unable to finish the day because of weariness should talk to the HR Department about using sick leave to take the rest of the day off. (See the Sick Leave Section of this Handbook for information about our sick leave policy.)

## Cell Phones

**Effective Date: 08/01/2022**

Cell phones have become a part of everyone's lives, however using them for personal use during working hours disrupts business and could potentially endanger our clients or employee's privacy.

Cell phones are permitted in the office, but no personal calls should be taken inside the office place. The break room can be used. Texting, watching videos, social media, or any other personal use of the device should not be used during work hours. We do understand there are circumstances in which a quick response is acceptable, but this should be kept to a minimum. Employees should be respectful of the company time and environment. Disrespect of paid company time will not be tolerated.

- Anyone who wishes to bring their cell phone to work must keep their phone in their desk bag or pocket.
- Phones are to be kept on either vibrate or silent mode while in the office.
- Phones are to be used strictly for IMPORTANT INBOUND calls only. Phones may be removed during breaks and lunch for use outside but must be replaced in the folder upon reentry into the building.
- You might also want to give your immediate family members our local number so that they may contact you in case of emergencies. As you should be aware, making or receiving casual calls, while on duty, is not permissible.
- Taking pictures of any kind while in the building is STRICTLY NOT PERMITTED.
- Cell phones should be not tampered with, showing other people pictures, or playing games while on company time.
- Under no circumstances are any long-distance phone calls to be made from any company phones for personal use.
- We do not allow cameras, video or audio recording equipment.

Anyone caught violating this policy for the first time could be sent home for the remainder of the day without pay.

- 1st offense - warning
- 2nd offense - probationary period
- 3rd offense - final warning
- 4th offense - termination of employment

## Workplace Relationships

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION realizes that in some circumstances, two employees may become involved in a personal non-work-related relationship. Although BLUEBIRD VALUATION does not expressly prohibit consensual relationships between two co-workers, we have developed guidelines relating to the issue.

Workplace relationships are permitted only under the following circumstances:

- Both parties must mutually consent to the relationship
- The relationship may not affect work performance (of those involved and of co-workers)
- The relationship does not negatively impact the work environment; and
- Involved parties must act professionally while on BLUEBIRD VALUATION premises.

Behavior that is construed as offensive, obscene, threatening, uncomfortable, or disruptive to other employees is prohibited.

If it is found that a workplace relationship results in decreased productivity among involved parties or that the relationship has negatively impacted the work environment, one or both parties may be transferred, asked to resign, and subject to disciplinary action, up to and including termination of employment.

If you are in a romantic relationship with a fellow employee, we ask that you disclose the relationship to your supervisor or the Human Resource Director at [HR@YourAmc.com](mailto:HR@YourAmc.com).

## Insubordination

**Effective Date: 08/01/2022**

This workplace operates on a system of mutual respect between supervisors and employees. Supervisors must treat their employees with dignity and understanding, and employees must show due regard for their supervisors' authority.

Insubordination occurs when employees unreasonably refuse to obey the orders or follow the instructions of their supervisors. It also occurs when employees, through their actions or words, show disrespect toward their supervisors.

Insubordinate employees will face discipline, up to and including termination.

We understand, however, that there will be times when employees have valid reasons for refusing to do as their supervisor says. Perhaps the employee fears for his or her safety or the safety of others. Perhaps the employee believes that following instructions will violate the law or pose some other problem for this Company. Or maybe the employee thinks that there is a better way to accomplish a goal or perform a task. When these issues arise, we do not ask that employees blindly follow orders. Instead, we ask that employees explain the situation to their supervisor. If, after hearing the employee's side, the supervisor continues to give the same order or rule, the employee must either obey or use the complaint procedures described in the Complaint Section of this Handbook.



## Solicitation and/or Distribution

**Effective Date: 08/01/2022**

Solicitation and/or distribution should be kept to a minimum and must be approved by management. If the process of distributing materials, goods, contest promotions, requests for donations or any other solicitation and/or distribution interferes with the work schedules of employees, it will be prohibited. No employee should ever feel pressured into participating in any promotional effort or action.

## Internal Communication

**Effective Date: 08/01/2022**

Effective and ongoing communication within our company is essential. As such, the company maintains systems through which important information can be shared among employees and management.

We use an Intranet to facilitate communication and share access to documents.

All employees are responsible for checking internal communications on a frequent and regular basis. Employees should consult their supervisor with any questions or concerns on information disseminated.

## Progressive Discipline

**Effective Date: 08/01/2022**

This policy describes the policy for administering equitable and consistent discipline for unsatisfactory conduct at BLUEBIRD VALUATION. We believe that the best disciplinary measure is the one that does not have to be enforced and comes from good leadership and fair supervision at all employment levels.

We also believe that it is in the best interests of BLUEBIRD VALUATION to ensure fair treatment of all employees and make certain that disciplinary actions are prompt, uniform, and impartial. The major purpose of any disciplinary action is to correct the problem, prevent recurrence, and prepare the employee for satisfactory performance in the future.

Although your employment is based on mutual consent and both you and BLUEBIRD VALUATION have the right to terminate employment at will, with or without cause or advance notice, BLUEBIRD VALUATION may use progressive discipline at its discretion.

Disciplinary action may call for any of four steps -- verbal warning, written warning, suspension with or without pay, or termination of employment -- depending on the severity of the problem and the number of occurrences. There may be circumstances when one or more steps are bypassed.

Progressive discipline means that, with respect to most disciplinary problems, these steps will normally be followed: a first offense may call for a verbal warning; a next offense may be followed by a written warning; another offense may lead to a suspension; and, still another offense may then lead to termination of employment.

BLUEBIRD VALUATION recognizes that there are certain types of employee problems that are serious enough to justify either a suspension, or, in extreme situations, termination of employment, without going through the usual progressive discipline steps.

While it is impossible to list every type of behavior that may be considered a serious offense, the Employee Conduct and Work Rules policy includes examples of problems that may result in immediate suspension or termination of employment. However, the problems listed are not all necessarily serious offenses, but may be examples of unsatisfactory conduct that will trigger progressive discipline.

By using progressive discipline, we hope that most employee problems can be corrected at an early stage, benefiting both employees and BLUEBIRD VALUATION.

## Customer Service

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION holds customer service to be one of our utmost company values. All employees are expected to act friendly, courteous, respectful, and polite when interacting with all clients and customers.

Examples of prompt and courteous customer service, include but are not limited to, the following actions:

- Answering the telephone before two (2) rings
- Transferring calls to the individual or department that is best fit to assist the caller
- Greeting clients and customers when they enter the building
- Assisting clients and customers as best you can
- Treating clients and customers as you expect to be treated

Even when not on company property, you still represent the Company and are required to behave appropriately and respectfully in your daily interactions.

Customer Service Representatives regards every person who contacts them, for any reason whatsoever, to be a valued customer.

Customer Service Representatives are committed to providing the best customer service possible and will endeavor to process each enquiry as quickly as possible.

Customer Service Representatives are committed to providing our customers with high quality service which meets their reasonable expectations.

Customer Service Representatives recognize that our customer's needs are as unique and varied as the individuals themselves. Business will be fair and completed in an appropriate time frame and our customers will be treated with honesty and integrity at all times.

Customer Service Representatives recognize that by providing high quality customer service we are helping to service our customers in the best possible way.

We will listen to our customers and try to provide the services that they really want. We will not assume that we know what they want; we will really find out and listen to the facts.

We will not give any customer the 'run-around'. If an individual cannot directly help a customer, it is their responsibility to ensure that they find someone who can and then put them in contact

with the customer. If the person who can help the customer is unavailable it is the responsibility of the person who receives the call to ring back the customer and advise them of a time when the appropriate person will help them.

Answers to any enquiry or complaint will be easy to understand. They will be clear, concise, and straight to the point and directly address the original enquiry or complaint.

All telephone enquiries or complaints will receive at least an initial response by the next working day.

All employees dealing with customers will identify themselves either verbally or in writing and when answering the phone will give their first name.

## Corrective Action

**Effective Date: 08/01/2022**

The purpose of this policy is to outline BLUEBIRD VALUATION's position on administering fair and consistent discipline for unsatisfactory conduct in the workplace. We strongly believe that the most effective approach to performance management is involves setting clear expectations for behavior, thus preventing disciplinary issues. This approach begins with good leadership and fair supervision at all employment levels.

Our collective best interest best interest lies in ensuring fair treatment of all employees and in making certain that, when needed, disciplinary actions are prompt, uniform, and impartial. The main purpose of any disciplinary action is to correct the problem, prevent recurrence, and provide the employee with the resources to improve in the future.

Although employment with BLUEBIRD VALUATION is on an at-will basis and both the employee and BLUEBIRD VALUATION have the right to terminate employment at any time, with or without cause, BLUEBIRD VALUATION may take corrective action at its discretion.

Corrective action involves the use of four steps - verbal warning, written warning, suspension with or without pay, and termination of employment - depending on the severity of the problem and the frequency of occurrence. There may be circumstances under which one or more steps are bypassed altogether.

Progressive discipline means that, in dealing with disciplinary problems, these steps will normally be followed: a first offense may warrant a verbal warning; a second offense may warrant a written warning; a third offense may warrant a paid or unpaid suspension; and a fourth offense may warrant termination of employment.

BLUEBIRD VALUATION recognizes that certain types of employee behavior are serious enough to justify either a suspension or, in extreme situations, termination of employment, without observing the above steps of progressive discipline. Though committed to a progressive approach to corrective action, BLUEBIRD VALUATION considers certain rule infractions and violations of standards as grounds for immediate suspension or termination of employment.

These include but are not limited to:

- Workplace violence
- Harassment
- Theft of any kind
- Insubordinate behavior

- Vandalism or destruction of company property
- Indiscretion regarding personal work history, skills, or training
- Divulging BLUEBIRD VALUATION business practices or any other confidential information
- Any misrepresentation of BLUEBIRD VALUATION to a customer, a prospective customer, the general public, or an employee

By using a system of progressive discipline, most disciplinary problems may be avoided or corrected at an early stage, to the mutual benefit of the employee and BLUEBIRD VALUATION.

## Cafe/Break Room

**Effective Date: 08/01/2022**

The company provides a kitchen break room for the benefit of its employees. Employees shall be responsible for the general cleanup of the area, including the washing of personal dishes and utensils.

All trash should be disposed of in the trash container. Recycle whenever possible.



## Personal Property

**Effective Date: 08/01/2022**

The company assumes no responsibility for personal property located on its premises. Employees are to use their own discretion when choosing to bring personal property into the workplace and do so at their own risk. Additionally, employees may not possess or display any property that may be viewed as inappropriate or offensive on company premises.

## Parking

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION provides parking for employees in the building parking lot. There should be ample space for all employees. Employees may only park in open spaces or those designated for use by BLUEBIRD VALUATION and should only take up one spot when parking.

## Lost & Found

**Effective Date: 08/01/2022**

Any items found within the facility should be delivered to the Human Resource Director. The Human Resource Director will keep the item until it is claimed by its rightful owner.

In the event an item is not claimed within 10 days, the Human Resource Director will make a posting of the missing item on bulletin boards. If the item is not claimed within 30 days, it will first be offered to the finder, and if refused will be discarded.

BLUEBIRD VALUATION is not responsible for lost or stolen personal items.

## Food and Beverages

**Effective Date: 08/01/2022**

The company sometimes has visitors in the office. The company's surroundings should always reflect a professional appearance. Eating at your desk is acceptable, if it consists of snacks that are not messy and closed beverage containers. Eating and drinking should be done unobtrusively and, in a manner, to prevent damage to valuable company equipment and other property. All employees are personally responsible for keeping the area around their workstation clean and presentable. Please take a few minutes each day at the end of the week to clean up your areas and get things ready for your next business day. Employees are also responsible for returning meeting areas to a clean and presentable condition after use.

## Teamwork

**Effective Date: 08/01/2022**

We expect all employees to work together to meet work-related goals. It is expected that each person will do their part to avoid situations that disrupt other team members or intentionally sabotage the efforts of other employee teams or departments.

Teamwork is dependent upon the efforts of all group members. We believe our success is a result of the teamwork found within our employees. Teamwork means each member pulls their weight, works toward a common goal, and helps one another when in need.

If you believe another team member is not acting according to this policy, please contact your supervisor.

## Housekeeping

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION expects all employees to keep work areas, break rooms, and BLUEBIRD VALUATION property clean and well-maintained always. The use of the break room and BLUEBIRD VALUATION facilities is a privilege and proper care is required.

The break room and coffee station are available for employee use. Employees are permitted to use the refrigerator, microwave, toaster oven, and coffee maker. Employees are expected to clean all areas after using them.

Employee workspaces are also expected to be kept neat and orderly. Prior to leaving for the day, all employees are required to tidy up their work area and return all items to their proper location.

Any employee found to be contributing to unsanitary conditions will be subject to discipline, up to and including immediate termination of employment. Questions regarding this policy should be directed to your immediate supervisor.

## Job Performance Expectations

**Effective Date: 08/01/2022**

Each and every employee contributes to the success or failure of our Company. If one employee allows his or her performance to slip, then all of us suffer. We expect everyone to perform to the highest level possible.

Poor job performance can lead to discipline, up to and including termination.

## Training and Professional Development

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION is committed to the personal and developmental growth of all its employees. To this end, BLUEBIRD VALUATION not only prepares their new hires to succeed with the Company, BLUEBIRD VALUATION also continually teaches, develops, and improves current employees' skills to constructively respond to today's on-going business challenges. Employee training and development is essential in responding to the rapid business changes that occur due to continual economic fluctuations, global economy, enhanced technology, and cultural and demographic factors. BLUEBIRD VALUATION strongly encourages the training and development of employees to aid them in improving their ability to succeed at the current position, and to prepare them for career advancement.

Some training programs are required for all employees, such as sexual harassment training, training on company policies and procedures as well as computer training. Employees required to attend these training sessions will be paid for their time spent in the program.

In addition, we encourage employees interested in job-specific training and continuing educational opportunities to research such programs and consult Human Resource Director. Management approval must be obtained, in writing, prior to registering for the seminars or courses.

BLUEBIRD VALUATION firmly believes in developing employees by drawing on the knowledge and experience of its own talented workforce. To this end, BLUEBIRD VALUATION offers programs such as coaching and mentoring. To obtain more information on these types of programs, employees may consult with Human Resource Director.



## Performance Evaluations

**Effective Date: 08/01/2022**

Within the first two days of employment, job change or promotion, each employee will receive a job description, or set of job objectives, that details the requirements and expectations of the position for which the employee was hired. These objectives are the criteria by which our company will measure job performance during regular performance evaluations. During each evaluation, job objectives will be reviewed and revised if needed. Supervisors are responsible for discussing and clarifying objectives with employees. Employees must sign a statement acknowledging agreement with, and understanding of, these objectives.

Performance evaluations are normally conducted annually from the date of hire. All performance evaluations are based on merit, achievement, and performance measured against job objectives.

Wage increases may be based upon this review, as well as past performance and degree of improvement; dependability; attitude; cooperation; need for disciplinary action; adherence to all employment policies; and employee status within a given pay range. Supervisors will review and discuss pay range and status within that range during performance evaluations. If promoted, employees may be eligible for an increase as dictated by the pay range of the new position.

Supervisors will conduct performance evaluations and planning sessions with all full-time and part-time employees. Supervisors and Human Resources may conduct informal performance meetings and planning sessions more often if they choose.

Performance evaluations and planning sessions are designed for the supervisors and employees to discuss current job tasks; encourage and recognize achievement; and discuss positive, purposeful approaches for meeting professional goals. Together, supervisors and employees create action plans to improve performance and develop skills.

## Promotions

**Effective Date: 08/01/2022**

Promotions within the company may be based on such factors as quality of work, prior job performance, experience, educational background, attendance, and the ability to work well with others.

Our Company policy is to promote from within when we have personnel fully qualified to perform the duties of the position.

## Job Expectations

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION utilizes job descriptions to communicate company expectations regarding each position. Job descriptions are updated as frequently as is possible. In some cases, we may ask for help from the employee in drafting an accurate description of the position.

Job descriptions are by no means comprehensive or absolute. Employees may be asked to perform duties not explicitly listed in their job descriptions. Employees refusing to perform requested duties may be subject to disciplinary action, up to and including termination of employment.

All job descriptions are accessible on the company's intranet.

## Safety

**Effective Date: 08/01/2022**

Bluebird Valuation LLC is committed to the safety of its employees and its property and equipment. To this end, we will utilize a safety program in our daily activities. Disregard of any company safety rule and regulation may result in disciplinary action including termination of employment.

It is necessary that the company establish safety rules and regulations to be observed by all employees at all times. Should a safety regulation be modified so that an employee's safety is something less than it should be, the employee should inform the Human Resource Department at HR@YourAMC.com.

All questions concerning the reason for doing something in a certain manner may be asked of any member of management at any time.

Employee's decisions should always be guided by the company's commitment to safety. Should a hazardous situation or condition exist, and a decision must be made on safety or production, safety concerns should always take precedence over production.

It is the responsibility of each manager and supervisor to see that every employee at Bluebird Valuation is provided with safe working conditions, all safety regulations are observed, and employees use good common sense to protect themselves as well as others. Management and supervisors will periodically inspect working conditions and may suspend all work activity until an unsafe condition is corrected.

The most important part of safety is the employee his or herself. It is the responsibility of each employee to abide by the safety rules; these rules are made for your protection. Employees are expected to report any personal injury immediately, however minor. Report all dangerous conditions and practices to the Human Resource Department.

## Safety Rules

**Effective Date: 08/01/2022**

Besides the following listed safety rules, each employee should make themselves familiar with the workplace and check if there are any additional special safety rules in the designated work area.

- First aid supply kits are provided in the work area.
- Know where the fire extinguishers are located and how to use them.
- All defective materials or tools must be brought to the attention of the supervisor and not remain on the job.
- Wear clothes suited for the job.
- Practice good housekeeping. Keep work area clean and free from stumbling hazards, clutter, grease, etc.
- Learn to lift the correct way. Bend knees. Keep back erect. Get help for heavy loads.
- No scuffling or horseplay on the job.
- Do not run within the work area.
- Employees must be sure that their actions do not endanger other employees, or damage company or personal property

Employees must advise management of all accidents, injuries or illnesses that occur while at work. All accidents, injuries or illnesses that occur while at work must be reported immediately no matter how slight they may appear.

We will provide the proper forms for reporting job related accidents, injuries and illnesses. Failure to report these occurrences may be cause for disciplinary action.

In the event of a vehicular accident involving a company owned vehicle or while on company business, employees should report all information immediately to management.

In no instance should responsibility for an accident be expressed to anyone until the proper person in the company has been notified and permission has been obtained to make statements.

Our company strives to provide a clean, hazard-free, and safe environment for employees in accordance with the Occupational Safety and Health Act of 1970. Each employee is expected to take an active role in maintaining this safe environment. Employees must observe all posted safety rules and adhere to all safety instructions. Workspaces must be kept neat, clean, and organized.

Each employee is required to comply with all safety rules observed by BLUEBIRD VALUATION, assist in maintaining a hazard-free environment, immediately inform management of any accidents or injuries, and report any unsafe equipment, working conditions, processes, procedures, or

potential breach of safety to a supervisor or Human Resources Director.

Any employee may report safety violations or injuries anonymously to Compliance & Human Resources if he or she is not the injured or violating party. No employee will be punished or reprimanded for reporting safety violations or hazards.

Any deliberate or ongoing safety violation, or creation of a safety hazard by an employee, will be dealt with through disciplinary action by the company, up to and including suspension or termination.

Work-related accidents are covered by Workers' Compensation Insurance, pursuant to all applicable state and local laws.

We provide information and assistance to employees on workplace safety and health issues via internal communication, such as:

- Training sessions
- Team meetings
- Bulletin board postings
- Memorandums
- Miscellaneous written communication

Employees are expected to obey safety rules and exercise caution and common sense in all work activities. Employees must immediately report any unsafe conditions to their supervisor or Your Employee Relations Team. Employees who violate safety standards, cause hazardous or dangerous situations, or fail to report or - if appropriate - remedy such situations, may be subject to disciplinary action up to and including termination of employment.

In the case of an accident that results in injury, regardless of how minor the injury may appear, employees must notify their supervisor or their Human Resource Director.

## Workplace Security

**Effective Date: 08/01/2022**

Access to the building and office will be by your assigned Key FOB only. You will use your card to enter all areas. It is every employee's responsibility to help keep our workplace secure from unauthorized intruders. Every employee must comply with these security precautions. When you leave work for the day, please do all of the following:

- Log out
- Push in your chair
- Punch out

After-hours access to the workplace is limited to those employees who need to work late. If you are going to be working past our usual closing time, please let your supervisor know.

Employees can have an occasional visitor in the workplace, but workplace visits should be the exception rather than the rule. If you are anticipating a visitor, please let your supervisor or the HR Manager know. When your visitor arrives, and is cleared by the security desk, you will be notified.

Employees and Visitors must always wear an identification badge when they are in our workplace. Visitors can get a badge at the HR department. They must return the badge when they leave Company premises.

Do not leave your visitor unattended in the workplace. If you have a visitor, you must always accompany your visitor. This includes escorting your visitor to and from the entrance to our Company. They will only be permitted in our break area.

If you are the last to leave the workplace for the evening, you are responsible for doing all of the following:

- Shutting off the lights
- Turning off the Coffee pot
- Checking all back doors
- Setting Security Alarm

If you have questions about any of these responsibilities, please talk to your supervisor.

## Smoking

**Effective Date: 08/01/2022**

The Company does not encourage employees to smoke either on the job or during outside working hours. It is our responsibility to provide a workplace free from secondary smoke and therefore we have established a smoking policy in all company facilities. Areas outside of working spaces have been established where employees may smoke during a break.

No smoking will be allowed in the office area at any time. No smoking is allowed in the breezeway between the suites or in front of any entry door. This policy is for the health and safety of all employees. Smoking will be allowed only in the designated areas outside. Your cooperation is requested, as this policy must be rigidly enforced to comply with company health and safety requirements and to maintain proper insurance coverage for our building. This policy applies equally to all employees as well as to our customers and visitors.



## What to Do in an Emergency

**Effective Date: 08/01/2022**

In case of an emergency, such as a fire, earthquake, or accident, your priority should be your own safety. In the event of an emergency causing serious injuries, IMMEDIATELY DIAL 9-1-1 to alert police and rescue workers of the situation.

If you hear a fire alarm or in case of an emergency that requires evacuation, please proceed quickly and calmly to the emergency exits. The Company will hold fire drills to familiarize everyone with the routes they should take. Remember that every second may count, don't return to the workplace to retrieve personal belongings or work-related items. Once you have exited the building, head towards the front or exit door.

(For our Company's policy on workplace violence, see the Health and Safety Section of this Handbook.)

Please refer to our Emergency manual for a detailed outline of procedures.

## Emergency Closing

**Effective Date: 08/01/2022**

On occasion, emergency situations - such as severe weather, power failure, or natural disaster - may disrupt company operations. The decision to close or delay regular operations will be made by BLUEBIRD VALUATION. If a decision is made to close or delay regular operations, employees will receive notification from BLUEBIRD VALUATION.

Time off from scheduled work due to emergency closings will be unpaid for all non-exempt employees.

## Medical Emergencies

**Effective Date: 08/01/2022**

If an employee requires medical attention due to injury or illness while at work, the employee's emergency contact (usually a family member) will be contacted to transport the employee to the appropriate facility.

If an emergency arises that requires an emergency medical service to evaluate the injury/illness of an employee on-site, the employee will be responsible for any charges incurred of an ambulance, etc. Furthermore, no other BLUEBIRD VALUATION employee will be responsible for transporting another employee to an emergency facility, due to safety and liability issues.

A physician's "permission to work" notice may be required prior to the employee's return to work.

## Violence

**Effective Date: 08/01/2022**

We are committed to preventing workplace violence and making Bluebird Valuation LLC a safe place to work. This policy explains our guidelines for dealing with intimidation, harassment, violent acts, or threats of violence that might occur during business hours or on our premises at any time.

You are expected to treat your co-workers, including supervisors and temporary employees, with courtesy and respect always. You should not fight, play tricks on others, or behave in any way that might be dangerous to other people. We do not allow firearms, weapons, and other dangerous or hazardous devices and substances on the premises of the company without proper authorization.

We do not allow behavior at any time that threatens, intimidates, bullies, or coerces another employee, a customer, or a member of the public. This includes off-duty periods. We do not permit any act of harassment, including harassment that is based on an individual's sex, race, age, or any characteristic protected by federal, state, or local law.

You should immediately report a threat of violence or an act of violence by anyone to your supervisor or another member of management. If you report a threat of violence, give every detail you can.

Be sure to immediately report any suspicious person or activities to a supervisor. Do not place yourself in danger. If you see or hear trouble or a disturbance near your work area, do not try to see what is happening or try to stop it.

We will promptly and completely investigate all reports of violent acts or threats of violence. We will also promptly and completely investigate all suspicious people and activities. We will protect the identity of a person who makes a report when practical. Until we have investigated a report, we may suspend an employee, either with or without pay, if we think it is necessary for safety reasons or to do the investigation.

If you commit a violent act, threaten violence, or violate these guidelines in another way, you will be subject to disciplinary action, up to and including termination of employment.

If you are having a dispute with another employee, we encourage you to talk it over with your supervisor. Bluebird Valuation LLC wants to help you work out problems before they become more serious and possibly violent. We will not discipline you for bringing these types of problems to our attention.

## Health-Related Issues

**Effective Date: 08/01/2022**

Employees who become aware of any health-related issue, should notify their supervisor and the Human Resource Director of their health status as soon as is appropriate. This policy has been instituted strictly to protect the employee.

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

A leave of absence may be granted on a case-by-case basis. If the need arises for a leave of absence, employees should notify their supervisor and the Human Resource Director at [HR@YourAMC.com](mailto:HR@YourAMC.com).

## Life Threatening Diseases in the Workplace

**Effective Date: 08/01/2022**

Employees with life-threatening illnesses, such as cancer, heart disease, and AIDS, often wish to continue their normal lives, including work, to the degree that they can. Bluebird Valuation LLC wants to help these employees to work if they continue meeting acceptable performance standards.

As in the case of other disabilities, we will make reasonable accommodations in accordance with all legal requirements to allow qualified employees with life-threatening illnesses to perform the essential functions of their jobs.

Medical information on any employee is confidential. Bluebird Valuation LLC will take reasonable precautions to protect medical information from inappropriate disclosure. Managers and other employees have a responsibility to respect and maintain the confidentiality of employee medical information. Anyone inappropriately disclosing medical information is subject to disciplinary action, up to and including termination of employment.

## Telephone Monitoring & Recording

**Effective Date: 08/01/2022**

All phone calls occurring on company premises are recorded. We also reserve the right to monitor live calls made or received on Company Telephones. Therefore, no employees should expect that conversations made on Company telephones will be private.

To avoid personal/private calls being monitored or recorded, all personal or private calls should be made during breaks or with supervisor permission on personal cell phones, or outside of work all together.

All employees will be asked to read the telephone monitoring & recording policy and sign an acknowledgment form at the time of employment or if at any time the policy changes.

See Use of Company Property Policy: Telephones

## Electronic Monitoring

**Effective Date: 08/01/2022**

We may conduct electronic monitoring on our employees to ensure quality control, employee safety, security, and customer satisfaction.

Computers furnished to employees are the property of BLUEBIRD VALUATION as such, computer usage and files may be monitored or accessed. We retain the right to conduct searches at any time. This includes the right to search individual computers or files, even if protected by password. Any employee that attempts to obtain or alter a password for the purpose of accessing restricted files will be subject to disciplinary action up to and including termination.

Phone conversations may also be monitored to ensure quality customer interactions and to improve upon customer service practices.

Because we are sensitive to the legitimate privacy rights of employees, every effort will be made to guarantee that workplace monitoring is done in an ethical and respectful manner.



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## Monitoring and Searches

**Effective Date: 08/01/2022**

The employee's work output, whether it be documents, computer files, prototypes, products, or any other work product, belongs to BLUEBIRD VALUATION. The assumption should be that work output is constantly subject to review by management, whether it is stored electronically, on paper or in any other form. In addition, company assets including computers, desks and cabinets are subject to search or investigation.

### **E-Mail and Computers**

E-mail and other computer files are to be used for business purposes only. Use of BLUEBIRD VALUATION computer assets for personal reasons is strictly prohibited and all computer passwords must be available to management at all times. Management reserves the right to enter, search and monitor the computer files or e-mail of any employee, without advance notice, for business purposes, such as investigating theft or fraud, disclosure of confidential or proprietary information, personal abuse of the system or monitoring workflow or productivity of employees.

## Using the Internet

**Effective Date: 08/01/2022**

Internet access to global electronic information resources on the World Wide Web is provided by BLUEBIRD VALUATION to assist employees in obtaining work-related data and technology. The guidelines in this policy have been established to help ensure responsible and productive Internet usage.

All Internet data that is composed, transmitted, or received via our computer communications systems is considered BLUEBIRD VALUATION property and, as such, is subject to disclosure to law enforcement agencies or other appropriate third parties. Consequently, employees must always ensure that the information contained in Internet e-mail messages and other transmissions is accurate, appropriate, ethical, and lawful.

The equipment, services, and technology provided to access the Internet always remain the property of BLUEBIRD VALUATION. As such, BLUEBIRD VALUATION reserves the right to monitor Internet usage, retrieve and read any data composed, sent, or received through our online connections and stored in our computer systems.

Data that is composed, transmitted, accessed, or received via the Internet may not contain content that may be considered discriminatory, offensive, obscene, threatening, harassing, intimidating, or disruptive to any employee or other person. Employees using BLUEBIRD VALUATION equipment are forbidden to access any restricted services or websites. These include, but are not limited to, those that promote or relate to pornography, gambling, illegal activity, racism, promotion of violence, or gender degradation. Violation of these terms may result in disciplinary action, up to and including termination of employment.

While Internet use is intended to assist in job-related activities, incidental and occasional brief personal use is permitted, within reasonable limits.

Abuse of Internet access provided by BLUEBIRD VALUATION in violation of law or BLUEBIRD VALUATION policies will result in disciplinary action, up to and including termination of employment. Employees may also be held personally liable for any violations of this policy.

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## Computer Usage & E-Policies

**Effective Date: 08/01/2022**

We provide employees access to computers to assist in carrying out your work responsibilities. Computer equipment may not be used for personal use without permission from management. All use of computer and equipment must be in accordance with this policy.

It is forbidden to install any programs, including games, online services, and screensavers, to a company computer without the written permission of your supervisor.

The copying of programs from company computers is prohibited, unless you are specifically permitted to do so, in writing, by Upper Management.

Internet access and e-mail communication systems are provided to BLUEBIRD VALUATION employees to assist you in performing your job duties. Employees must act ethically and responsibly when using the Internet and e-mail systems. All Internet data is the property of BLUEBIRD VALUATION and, as such, we reserve the right to monitor Internet usage, retrieve and read any data composed, sent, or received through our online connections and stored in our computer systems.

Data that is composed, transmitted, or retrieved via the Internet may not contain content that may be considered discriminatory, offensive, obscene, threatening, harassing, intimidating, or disruptive to any employee or other person.

Employees using company equipment are forbidden to access any restricted services or websites. These include, but are not limited to, those that promote or relate to pornography, gambling, illegal activity, racism, promotion of violence, or gender degradation. Please see word related document: EPOLICIES for more description of each.

Violation of this policy may result in disciplinary action, up to and including termination of employment.

## Personnel Files

**Effective Date: 08/01/2022**

Employee personnel files maintained by BLUEBIRD VALUATION include, but are not limited to, the following:

- Job application
- Job description
- Resume
- Copies of notices to employees regarding benefits
- Salary history
- Disciplinary reports, warnings, and other records
- Performance evaluation documentation
- Records of coaching and/or mentoring
- All related contracts (employment, non-compete, etc.)

Personnel files are the sole property of BLUEBIRD VALUATION and access to information contained therein is restricted. Management personnel of BLUEBIRD VALUATION with a legitimate reason to view the file will be permitted to do so.

Employees who wish to view their own files should contact Human Resource Director. With reasonable advance notice, employees may view their own personnel files on company premises and in the presence of Human Resource Director.

## Changes in Personal Information

**Effective Date: 08/01/2022**

It is important that the personnel records of the company be accurate and current. To avoid issues with benefit eligibility or legal compliance, BLUEBIRD VALUATION expects that all employees will promptly notify Human Resource Director of any change in name, home address, telephone number, marital status, number of dependents, or any other pertinent information subject to change. Questions regarding a specific change of status should be directed to the immediate supervisor and/or the Human Resources Department when such changes are anticipated or desired.

### **PROVISIONS:**

**I. Change in the terms of employment of any person is to be promptly reported to the Human Resources Department by the Department Head/Supervisor.**

**II. CHANGES IN STATUS (limited examples):**

- a. Salary change.
- b. Change in position title, faculty rank, or paygrade, if applicable.
- c. Change in hours or other period of work.
- d. Intra-departmental position transfer, promotion, or demotion.
- e. Inter-departmental position transfer, promotion, or demotion.
- f. Various types of leaves of absence.
- g. Reductions of force/layoff.
- h. Termination/Resignation/Retirement.

Such status changes may not be made without approval of both Supervisors and/or Department Head. No employee may be approached about an inter-departmental transfer without the interested Supervisor/Department Head first consulting with the employee's present Supervisor/Department Head.

**III. PROCEDURES FOR RECOMMENDING A CHANGE IN STATUS:**

- a. Salary Change – Title or other Employment Status – Work Period Change. Recommendation shall be initiated by the Supervisor/Department Head showing present and proposed status and indicating reasons for recommended change.
- b. Leaves of Absence
  - i. Requests for leaves of absence shall be made in writing and be initiated by the employee and forwarded to the Supervisor/Department Head to show present status and proposed leave of absence status.

- ii. The written leave request should state the reason for leave of absence status and whether it is requested as paid or unpaid.
- iii. The leave request also must indicate the anticipated date of return.
- iv. Requests for leaves of absence must be forwarded to Human Resources for approval.
- c. Reduction in Force
  - i. Recommendation for an employee to be put on “Lay-Off” status shall be initiated by the Supervisor/Department Head.
  - ii. The recommendation should state the reason for lay-off and the anticipated date of reinstatement of the employee to the position, if known.
  - iii. All reduction in force for Classified Staff shall be in accordance with appropriate controlling Board Procedure and/or State laws.
  - iv. All reduction in force for Faculty shall be in accordance with appropriate controlling Board Procedure and/or State laws.
- d. Termination/Resignation
  - i. Any recommendation for the termination of employment shall be initiated by the employee’s Supervisor and/or Department Chairperson and must be supported in writing to the Executive Director Human Resources prior to any consideration of the circumstances leading to the recommendation. In all cases involving potential termination of employment, due process procedures must be followed. The employee shall be notified of the University’s intent to terminate their employment and shall receive an opportunity to address same at a “Pre-termination meeting to be set by the University and held at the employee’s request.
  - ii. All resignations shall be reported to the Human Resources Department immediately upon receipt/notice of same.

# Security Incident Management Policy and Procedures

**Effective Date: 08/01/2022**

## 1. Introduction

Bluebird Valuation is responsible for the security and integrity of all data it holds. The company must protect this data using all means necessary by always ensuring that any incident which could cause damage to Bluebird Valuations assets and reputation is prevented and/or minimized. There are many types of incidents which could affect security:

- A computer security incident is an event affecting adversely the processing of computer usage. This includes:
  - loss of confidentiality of information
  - compromise of integrity of information
  - denial of service
  - unauthorized access to systems
  - misuse of systems or information
  - theft and damage to systems
  - virus attacks
  - intrusion by humans
- Other incidents include:
  - Loss of ID badge/s
  - Missing correspondence
  - Exposure of Uncollected printouts
  - Misplaced or missing media
  - Inadvertently relaying passwords
  - Loss of mobile phones and portable devices

## 2. Purpose

The management of security incidents described in this policy requires the Collateral to have clear guidance, policies, and procedures in place. Fostering a culture of proactive incident reporting and logging will help reduce the number of security incidents which often go unreported and unnoticed – sometimes, over a long period of time and often without resolution. The purpose of this policy is to:

- Outline the types of security incidents
- Detail how incidents can and will be dealt with
- Identify responsibilities for reporting and dealing with incidents
- Detail procedures in place for reporting and processing of incidents
- Provide Guidance

### 3. Scope

This policy applies to:

- Employees, elected members, partner agencies, contractors, volunteers, and vendors
- All departments, personnel, and systems (including software) dealing with the storing, retrieval and accessing of data

### 4. Policy Statement

Bluebird Valuation has a clear incident reporting mechanism in place which details the procedures for the identifying, reporting, and recording of security incidents. By continually updating and informing employees, elected members, partner agencies, contractors, volunteers, and vendors of the importance of the identification, reporting and action required to address incidents, Bluebird Valuation can continue to be pro-active in addressing these incidents as and when they occur.

All employees, elected members, partner agencies, contractors, volunteers, and vendors are required to report all incidents – including potential or suspected incidents, as soon as possible via the Incident Reporting procedures. The types of Incidents which this policy addresses include but is not limited to:

#### **Computers left unlocked when unattended**

Users of Collateral computer systems are continually reminded of the importance of locking their computers when not in use or when leaving computers unattended for any length of time. All Collateral employees, elected members, partner agencies, contractors, volunteers, and vendors need to ensure they lock their computers appropriately - this must be done even though Collateral computers are configured to automatically lock after 10 minutes of idle time. Discovery of an unlocked computer which is unattended must be reported via the Collateral's Incident Reporting procedures.

#### **Password disclosures**

Unique IDs and account passwords are used to allow an individual access to systems and data. It is imperative that individual passwords are not disclosed to others – regardless of trust. If an individual needs access to data or a system, they must go through the correct procedures for authorization – initially through the individual's line manager. If anyone suspects that their or any other user's password has been disclosed whether intentionally, inadvertently, or accidentally, HR must be notified through the Collateral's Incident Reporting procedures. Under no circumstances should an employee allow another employee to use their user account details – even under supervision.



### **Virus warnings/alerts**

All Desktop, laptop, and tablet computers in use across Bluebird Valuation have Antivirus (including Anti-Spyware/Malware). For the most part, the interaction between the computer and antivirus software will go unnoticed by users of the computer. On occasion, an antivirus warning message may appear on the computer screen. The message may indicate that a virus has been detected which could cause loss, theft, or damage to data. The warning message may indicate that the antivirus software may not be able to rectify the problem and so must be reported by the user to the HR Desk as soon as possible.

### **ID Badges**

It is essential for us to identify individuals and wearing ID badges helps us to do this. If your ID badge is lost, you must report this to HR immediately.

### **Data loss/disclosure**

The potential for data loss does not only apply to portable media it also applies to any data which is:

- Transmitted over a network and reaching an unintended, unauthorized recipient (such as the use of e-mail to send sensitive data)
- Intercepted over the internet through non- secure channels
- Posting of data on the internet whether accidental or intentional
- Published on the Collateral website and identified as inaccurate or inappropriate
- Conversationally – information disclosed during conversation
- Press or media – unauthorized disclosure by employees or an ill-advised representative to the press or media
- Data which can no longer be located and is unaccounted for on an IT system
- Unlocked and uncollected printouts from Multi-Function Devices (MFDs)
- Paper copies of data and information which can no longer be located
- Hard copies of information and data accessible from desks and unattended areas

All Collateral employees, elected members, partner agencies, contractors, volunteers, and vendors must act responsibly, professionally and be mindful of the importance of maintaining the security and integrity of Collateral data always. Any loss of data and/or disclosure whether intentional or accidental must be reported immediately using the Collateral's Incident Reporting Procedures.

**Personal information abuse**

All person identifiable information – i.e., information which can identify an individual such as home address, bank account details etc.... must not be disclosed, discussed, or passed on to any person/s who is not in a position of authority to view, disclose or distribute such information. Any abuse/misuse of such person identifiable information must be reported through the Collateral's Incident Reporting procedures.

**Physical Security**

Maintaining the physical security of offices and rooms where data is stored, maintained, viewed, or accessed is of paramount importance. Rooms or offices which have been designated specifically as areas where secure information is located or stored must have a method of physically securing access to the room – e.g., a combination key lock mechanism. Lower / floor level windows could also provide access to the room/office and must also be securely locked – particularly when the room is left unattended. Rooms which have not been secured should not be used to store sensitive and personal information and data - concerns about any rooms/office which should be securely locked or access restricted must be reported.

**Logical Security / Access Controls**

Controlling, managing, and restricting access to the Authority's Network, Databases and applications is an essential part of Information Security. It is necessary to ensure that only authorized employees can gain access to information which is processed and maintained electronically.

**Missing correspondence**

Data or information which has been sent either electronically or physically which cannot be accounted for e.g., not arrived at the intended destination via physical post, sent electronically, sent for printing but no printed output retrieved etc.... must be reported.

**Found correspondence/media**

Data stored on any storage media or physically printed information which has been found in a place other than a secure location or a place where the security and integrity of the data/information could be compromised by unauthorized viewing and/or access e.g., unlocked printouts, discarded CD (media), must be reported.

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## **Loss or theft of IT/information**

Data or information which can no longer be located or accounted for e.g. cannot be found in a location where it is expected to be, filing cabinet etc.... or which is known/or suspected to have been stolen needs to be reported immediately.

### **5. Responsibilities**

It is the responsibility for all Collateral employees, elected members, partner agencies, contractors, volunteers, and vendors who undertake work for Bluebird Valuation, on or off the premises to be proactive in the reporting of security incidents. The Bluebird Valuation Incident Reporting procedures are in place to prevent and minimize the risk of damage to the integrity and security of Bluebird Valuation's data and information.

It is also a responsibility of all individuals and handlers of Bluebird Valuation data and information to ensure that all policies and procedures dealing with the security and integrity of information and data are followed.

### **6. Compliance with legal and contractual obligations**

*The Data Protection Act (1998)* requires that personal data be kept secure against unauthorized access or disclosure.

*The Computer Misuse Act (1990)* covers unauthorized access to computer systems.

### **7. Breaches of Policy**

Breaches of this policy and/or security incidents are incidents which could have, or have resulted in, loss or damage to Bluebird Valuation assets, including IT equipment and information, or conduct which is in breach of the Bluebird Valuation security procedures and policies.

All Collateral employees, elected members, partner agencies, contractors, volunteers, and vendors have a responsibility to report security incidents and breaches of this policy as quickly as possible through the Collateral's Incident Reporting Procedure. This obligation also extends to any external organization contracted to support or access the Information Systems of the Collateral. In the case of third-party vendors, volunteers, consultants, or contractor's noncompliance could result in the immediate removal of access to the system. If damage or compromise of the Bluebird Valuation systems or network results from the noncompliance, the Collateral will consider legal action against the third party. The Collateral will take appropriate measures to remedy any breach of the policy through the relevant frameworks in place. In the case of an employee, infringements will be investigated under the disciplinary procedure and progressed as appropriate.

**Incident Reporting and Management Procedure & Reporting via the Service Desk**

Security incidents and breaches can be reported by telephoning the HR Service Desk on 954-495-4218.

A representative will log the details of the call in the call logging system based on the information given by the caller. Callers are advised to give as much information as possible. The representative will log the call and any further progress or information about the incident will be dealt with by the Information Security Manager or nominated departmental representative.

**Reporting via E-mail**

Security breaches may be reported via e-mail to the Admin Desk however, wherever possible, confidential, or personal identifiable information should not be contained in the e-mail e.g., logon passwords.

## Medical Records

**Effective Date: 08/01/2022**

All medical records, if any, will be kept in a separate confidential file within Human Resources. BLUEBIRD VALUATION maintains this information in the strictest confidence and may not disclose or use medical information about an employee without the employee first having signed an authorization form permitting such use or disclosure.

## Training and Training Records

**Effective Date: 08/01/2022**

Your Department Supervisor, Human Resource Director, and Compliance Director will be responsible for the overall development of your knowledge of the company. Your program will cover corporate history, philosophy, policies, benefits and new employee files and documentation. We will be responsible for your orientation and training as it applies to introducing you to your specific job and department. We may also select a coworker to server as a sponsor to facilitate your transition.

After your training, your supervisor will ask you to evaluate your orientation and training for us to be successful in having programs that are effective. When you successfully complete your training, you will receive a certificate of completion for finishing our program. The Compliance Department will maintain your training records.

## Drug Testing

**Effective Date: 08/01/2022**

As part of our efforts to keep this workplace safe and free of illegal drug use, we may conduct random and intermittent drug tests of employees in positions where the safety or security of the employee or others is an issue. In addition, we may ask any employee, regardless of job responsibilities, to submit to a drug test in the following circumstances:

- When we suspect that the employee is under the influence of illegal drugs.
- When we suspect that the employee has been involved in the sale, purchase, use, or distribution of illegal drugs on the worksite or while performing job duties.
- When the employee has been involved in an accident or incident offsite but while on company business, or
- When the employee has violated a safety rule.

## Policy Against Alcohol and Illegal Drug Use

**Effective Date: 08/01/2022**

This Company is committed to providing a safe, comfortable, and productive work environment for its employees. We recognize that employees who abuse drugs or alcohol at work or who appear at work under the influence of illegal drugs or alcohol harm both themselves and the work environment. As a result, we prohibit employees from doing the following:

- Appearing at work under the influence of alcohol or illegal drugs
- Conducting Company business while under the influence of alcohol or illegal drugs (whether or not the employee is on work premises at the time)
- Using alcohol or illegal drugs on the worksite
- Using alcohol or illegal drugs while conducting Company business (if the employee is on work premises at the time)
- Possessing, buying, selling, or distributing alcohol or illegal drugs on the worksite
- Possessing, buying, selling, or distributing alcohol or illegal drugs while conducting Company business (if the employee is on work premises at the time).

Illegal drug use includes more than just outlawed drugs such as marijuana, cocaine, or heroin. It also includes the misuse of otherwise legal prescription and over-the-counter drugs.

This policy covers times when employees are on call but not working and times when employees using Company equipment.

Employees who violate this policy may face disciplinary action, up to and including termination.

We do not prohibit employees from consuming alcohol at social or business functions that we sponsor where alcohol is served. Even at these functions, however, employees may not consume alcohol to the point of intoxication or to the point where they endanger their own safety or the safety of others. In addition, employees cannot consumer alcohol if they will be returning to work that same day.



## Inspections to Enforce Drug and Alcohol Policy

**Effective Date: 08/01/2022**

This Company reserves the right to inspect employees, their possessions, and their workspaces to enforce our policy against illegal drug and alcohol use.

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## Substance Abuse Policy

## Pregnancy & Maternity Leave Policy

**Effective Date: 08/01/2022**

Bluebird Valuation is firmly committed to protecting the rights of expectant mothers and complying with Title VII of the 1964 Civil Rights Act as amended by the Pregnancy Discrimination Act of 1978.

Bluebird Valuation's policy is to treat women affected by pregnancy, childbirth or related medical conditions in the same manner as other employees unable to work because of their physical condition in all employment aspects, including recruitment, hiring, training, promotion and benefits.

Further, Bluebird Valuation fully recognizes eligible employees' rights and responsibilities under the Family and Medical Leave Act, applicable state and local family leave laws, and the Americans with Disabilities Act. Paid leave may be substituted for unpaid maternity leave in accordance with Bluebird Valuation paid-leave substitution provisions of Bluebird Valuation's FMLA policy for all full-time employees.

Pregnant employees may continue to work until they are certified as unable to work by their physician.

When the employee returns to work, she is entitled to return to the same or equivalent job with no loss of service or other rights or privileges. Should the employee not return to work when released by her physician, she will be considered to have voluntarily terminated her employment with Bluebird Valuation.

## Nondisclosure / Confidentiality

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION requires all employees to sign a confidentiality agreement as a condition of employment due to employees' potential access to information that is confidential and/or intended for company use only. All employees are required to maintain such information in strict confidence. This policy benefits employees by protecting the interests of BLUEBIRD VALUATION and protecting confidential, unique and valuable information from competitors or others.

Should an occasion arise in which an employee is unsure of his or her obligations under this policy, he or she must consult Human Resource Director. Failure to comply with this policy could result in disciplinary action, up to and including termination of employment.

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

- Any material developed using company resources and/or time

Employees who improperly use or disclose any type of confidential business information will be subject to disciplinary action and/or legal action, even if they do not personally benefit from the disclosure of such information.

## Outside Employment

**Effective Date: 08/01/2022**

Employees may hold outside jobs in unrelated businesses or occupations if the employee meets the performance standards of their position with our company. Unless an alternative work schedule has been approved by BLUEBIRD VALUATION, employees will be subject to the company's scheduling demands, regardless of any existing outside work assignments.

BLUEBIRD VALUATION's office space, equipment, and materials are not to be used for purposes related to outside employment.

## Affirmative Action

**Effective Date: 08/01/2022**

We are committed to fully complying with the Americans with Disabilities Act (ADA) and ensuring equal opportunity in employment for qualified persons with disabilities. All employment practices and activities are conducted on a non-discriminatory basis.

Reasonable accommodation is available to all disabled employees, where their disability affects the performance of essential job functions. All employment decisions are based on the merits of the situation in accordance with defined criteria, not the disability of the individual.

Qualified individuals with disabilities are entitled to equal pay and other forms of compensation (or changes in compensation) as well as in job assignments, classifications, organizational structures, position descriptions, lines of progression and seniority status.

We do not discriminate against any employee or applicant because they are related to or associated with a person with a disability. We will follow any state or local law that provides individuals with disabilities greater protection than the Federal ADA.

This policy is neither exhaustive nor exclusive. We are committed to taking all other actions necessary to ensure equal employment opportunity for persons with disabilities in accordance with the ADA and all other applicable federal, state, and local laws.

## Sexual and Other Unlawful Harassment

Effective Date: 08/01/2022

BLUEBIRD VALUATION will not, under any circumstances, condone, tolerate, or allow conduct which may constitute sexual harassment on the part of its management, supervisors or non-management employees. It is our policy that all employees have the right to work in an environment free from unlawful harassment of any kind.

Any employee found to be engaged in any form of sexual harassment may be subject to disciplinary action, up to and including termination of employment.

Sexual harassment may be defined as:

- Conditioning employment upon employee's submission to unwelcome sexual advances or requests for sexual favors;
- Basing an employment decision upon an employee's submission or rejection of unwelcome sexual advances, requests for sexual favors or verbal or physical conduct of a sexual nature; or
- Creating an intimidating, hostile or offensive working environment or atmosphere through:
  - Verbal conduct, including calling employees by terms of endearment; using vulgar, kidding or demeaning language; or
  - Physical actions which may offend or interfere with an employee's work performance.

We at BLUEBIRD VALUATION encourage healthy fraternization among employees; however, employees - especially those in management and supervisory roles - must be sensitive to acts of conduct which may be considered offensive by other employees and must refrain from engaging in or permitting such conduct.

It is expressly prohibited for any employee to retaliate against another employee(s) who brings sexual harassment charges or assists in investigating charges. Any form of retaliation is considered a direct violation of this policy and may result in disciplinary action, up to and including termination of employment. No employee will be discriminated against, or discharged, for incurring or assisting in the investigation of a complaint of sexual harassment.

BLUEBIRD VALUATION is committed to providing a work environment that is free of all types of discrimination and unlawful harassment. Actions, words, jokes, comments, or any other conduct related to one's sex, race, ethnicity, age, religion, or any other legally protected characteristic will not be tolerated.

Any employees who believe that they, or any other employee, have been the victim of harassment are expected to report it immediately. Employees may raise concerns and make reports without fear of reprisal.

Any supervisor who becomes aware of possible harassment should promptly advise BLUEBIRD VALUATION management and Human Resource Director, who will handle the matter in a timely and confidential manner.

## Anti -Bullying Policy

**Effective Date: 08/01/2022**

Bluebird Valuation LLC prohibits acts of harassment or bullying. A safe and civil environment is necessary for employees to achieve the high standards we expect. Demonstration of appropriate behavior, treating others with civility and respect, and refusing to tolerate harassment or bullying is expected of all employees.

### **What Is Bullying?**

Bullying is repeated, health-harming mistreatment of another employee. Generally, bullying:

- Consists of any gesture or written, verbal, graphic, or physical act (including electronically transmitted acts - i.e. Internet, cell phone, personal digital assistant (pda), or wireless hand held device) that is reasonably perceived as being motivated either by any actual or perceived characteristic, such as race or religion; or a mental, physical, or sensory disability or impairment; or by any other distinguishing characteristic, or is based on an association with another person who has or is perceived to have any of these characteristics.
- Substantially interferes with work, opportunities, benefits, of one or more employees, sometimes through actual sabotaging of work; and
- Adversely affects the ability of an employee to function at work by placing the employee in reasonable fear of physical harm or by causing emotional distress.

Since bystander support can encourage bullying, we prohibit both active and passive support for acts of harassment or bullying. Employees should either walk away from these acts when they see them, or constructively attempt to stop them. In either case, employees should report incidents to the designated authority.

BLUEBIRD VALUATION prohibits reprisal or retaliation against any person who reports an act of harassment or bullying.

Violators of this antibullying policy will be subject to appropriate consequences up to and including discharge.



## Whistleblower Protection

**Effective Date: 08/01/2022**

This policy is designed to protect employees and address BLUEBIRD VALUATION commitment to integrity and ethical behavior. In accordance with Whistleblower Protection regulations, BLUEBIRD VALUATION will not tolerate harassment, retaliation, or any type of discrimination against an employee who:

- Makes a good faith complaint regarding suspected Company or employee violations of the law
- Makes a good faith complaint regarding accounting, internal accounting controls, or auditing matters that may lead to incorrect, or misrepresentations in, financial accounting
- Provides information to assist in an investigation regarding violations of the law; or
- Files, testifies, or participates in a proceeding in relation to alleged violations of the law.

Negative employment sanctions, such as demotion or termination, as a result of an employee's decision to provide good-faith information regarding violations of the law, will not be tolerated. In addition, discrimination, threats, and harassment is prohibited.

Anyone violating this policy will be subject to discipline, up to and including termination of employment.

## Open Door Policy

**Effective Date: 08/01/2022**

Employees are encouraged to share their concerns, seek information, provide input, and resolve problems/issues through their immediate supervisor, and, as appropriate, consult with any other appropriate member of management toward those ends. Managers and supervisors are expected to listen to employee concerns, to encourage their input, and to seek resolution of their problems/issues. As always, we ask that you follow the chain of command and give your supervisor the respect of trying to solve your problem or issue first. If your issue does not get resolved, you of course can see any member of management you feel comfortable with. If you would just like to discuss something to get someone's feedback or opinion, any member of the management team would be happy to meet with any employee in order to see how we can help.

## Employee Relations

**Effective Date: 08/01/2022**

BLUEBIRD VALUATION believes that the work conditions, wages, and benefits it offers to its employees are competitive with those offered by other employers in this area and in this industry. If employees have concerns about work conditions or compensation, they are strongly encouraged to discuss these concerns openly and directly to their supervisors or the Human Resource Director.

Our experience has shown that when employees deal openly and directly with supervisors and peers, the work environment can be excellent, communications can be clear, and attitudes can be positive. We believe that BLUEBIRD VALUATION amply demonstrates its commitment to employees by responding promptly and effectively to employee issues.

## Employee Grievances

**Effective Date: 08/01/2022**

It is the policy of our company to maintain a harmonious workplace environment that is free from intimidation or harassment. BLUEBIRD VALUATION encourages its employees to express concerns about work-related issues, including workplace communication, interpersonal conflict, occupational health and safety, and allocation of work.

Employees are encouraged to raise such concerns with their supervisors on an informal basis in the first instance. If not resolved at this level, an employee must submit in writing a signed grievance immediately to the department head. This written grievance must: identify the policy or regulation which is believed to have been violated; contain a brief statement of the facts or evidence surrounding the grievance; and include a proposed resolution.

After review of the written grievance, the BLUEBIRD VALUATION will hold a meeting with the employee, the immediate supervisor, and any other individuals who may assist in the investigation or resolution of the problem. All discussion of grievances will be confined to those involved with and who can assist with the resolution.

A written decision will be given to the employee stating the resolution and appropriate action regarding the grievance. The grievance is not considered resolved until both parties agree.

BLUEBIRD VALUATION assures that all employees filing a grievance or complaint can do so without fear of retaliation or reprisal.

## Final Paychecks

**Effective Date: 08/01/2022**

Bluebird Valuation LLC will determine if the terminated employee has any other outstanding debt owed the company and whether the individual has in their possession any company property (e.g., credit cards, manuals, tools, etc.).

After a full accounting of the employee's and the company's accounts (as determined by the company) is completed, a final paycheck will be issued to the employee in accordance with state law.

The company will issue a check, which is designated as the final payment for all services rendered.

## Termination of Employment

**Effective Date: 08/01/2022**

Termination of employment is an inevitable part of personnel activity within any company. Below are some examples of the most common circumstances under which employment is terminated:

- **Resignation** - Voluntary termination of employment initiated by an employee.
- **Termination** - Involuntary termination of employment initiated by BLUEBIRD VALUATION.
- **Layoff** - Involuntary employment termination initiated by BLUEBIRD VALUATION for non-disciplinary reasons.
- **Retirement** - Voluntary termination of employment by an employee upon eligibility for retirement.

Non-exempt employees who intend to terminate their employment with BLUEBIRD VALUATION are expected to give BLUEBIRD VALUATION a minimum of Two (2) weeks written notice. Exempt employees are expected to give a minimum of Two (2) weeks written notice.

Since employment with BLUEBIRD VALUATION is on an at-will basis, both the employee and BLUEBIRD VALUATION have the right to terminate employment, with or without cause, any employee whose employment with BLUEBIRD VALUATION is terminated for any reason shall return all files, records, keys, and any other materials that are property of BLUEBIRD VALUATION. No final settlement of employee pay will be made until all items are returned in acceptable condition. The cost of replacing items which are not returned will be deducted from the employee's final paycheck. Furthermore, any outstanding financial obligations owed to BLUEBIRD VALUATION will also, be deducted from the employee's final paycheck.

Employee benefits will be affected by termination of employment as follows: All accrued vested benefits due to the employee and payable at termination will be paid. Some benefits may be continued at the employee's expense if the employee elects to do so. The employee will be notified of the benefits that may be continued and of the terms, conditions, and limitations of such continuation.

## Reduction of Work Force

**Effective Date: 08/01/2022**

If a reduction in the company's work force becomes necessary, the number of employees over and above those needed to perform the available work will be laid off. In determining those employees to be retained, consideration will be given to the quality of each employee's past performance, the need for the position held by the employee and, with all other factors being equal, the length of service of each employee.

## Exit Interviews

**Effective Date: 08/01/2022**

We will hold an exit interview with every employee who leaves the Company, for any reason. During the interview, you will have the opportunity to tell us about your employment experience here, what you liked, what you didn't like, and where you think we can improve. We greatly value these comments.

The exit interview also gives us a chance to handle some practical matters relating to the end of your employment. You will be expected to return all Company property at the interview. You will also have an opportunity to ask any questions you might have about final paychecks, references, or any other matter relating to your employment.



## References

**Effective Date: 08/01/2022**

When we are contacted by prospective employers seeking information about former employees, we will release the following data only: the position(s) the employee held, the dates the employee worked for our Company, and the employee's salary or rate of pay.

If you would like us to give a more detailed reference, you will have to provide us with a written release, a consent form giving us your permission to respond to a reference request. We will respond only to written reference requests, and we will respond only in writing. Please direct all reference requests to the Human Resource Department at [HR@YourAMC.com](mailto:HR@YourAMC.com). No other Manager or Employee is authorized to release references for a current or former Employee.