

The Heart of Financial Planning™

## FPA Policy for Equal Employment Opportunity/Unlawful Harassment

FPA is dedicated to the principles of equal employment opportunity in any term, condition or privilege of employment. We do not discriminate against applicants or staff members on the basis of age, race, sex, color, religion, national origin, disability or any other status protected by state or local law. This prohibition includes unlawful harassment based on any of these protected classes. Unlawful harassment includes verbal or physical conduct that has the purpose or effect of substantially interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment.

This policy applies to all FPA staff members and FPA volunteers (volunteers include all committee members and the board of directors) and non-staff members such as customers, clients, vendors, or consultants.

## Sexual Harassment

Because sexual harassment raises issues that are to some extent unique in comparison to other harassment, FPA believes it warrants separate emphasis.

The association strongly opposes sexual harassment and inappropriate sexual conduct. Sexual harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, when:

- Submission to such conduct is made explicitly or implicitly a term or condition of employment;
- Submission to or rejection of such conduct is used as the basis for decisions affecting an individual's employment; or
- Such conduct has the purpose or effect of substantially interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment.

All FPA staff members and FPA volunteers are expected to conduct themselves in a professional and businesslike manner at all times. Inappropriate sexual conduct that could lead to a claim of sexual harassment is expressly prohibited by this policy. Such conduct includes, but is not limited to, sexually implicit or explicit communications whether in:

- Written form, such as cartoons, posters, calendars, notes, letters, e-mail;
- Verbal form, such as comments, jokes, foul or obscene language of a sexual nature, gossiping or questions about another's sex life, or repeated unwanted requests for dates;
- Physical gestures and other nonverbal behavior, such as unwelcome touching, grabbing, fondling, kissing, massaging, and brushing up against another's body.



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## **EEO/Harassment Complaint Procedure**

If you believe there has been a violation of the EEO policy or harassment based on the protected classes outlined above, including sexual harassment, please use the following complaint procedure. FPA expects staff members and volunteers to make a timely complaint to enable FPA to promptly investigate and correct any behavior that may be in violation of this policy.

Report the incident to the Human Resources Department of FPA or your immediate supervisor, who will promptly investigate the matter and take appropriate corrective action. Your complaint will be kept as confidential as practicable. If you feel you cannot go to either of these individuals with your complaint, you should report the incident to the executive director or associate executive director.

If FPA determines that a staff member or volunteer's behavior is in violation of this policy, appropriate disciplinary action will be taken against the offending employee/volunteer, up to and including termination of employment, or volunteer service.

FPA prohibits retaliation against a staff member or volunteer for filing a complaint under this policy or for assisting in a complaint investigation. If you perceive retaliation for making a complaint or your participation in the investigation, please follow the complaint procedure outlined above. The situation will be promptly investigated.

## Acknowledgment

As a volunteer of FPA, I acknowledge that I have read, understand and agree to comply with FPA's unlawful harassment policy as evidenced below:

Signature

Date

Printed Name