

University of Louisville Staff Senate
SHARE Committee Report
February 2020

Members: Kari Donahue, Steven Lindsey, Kim Laun, Jennifer Stephens, Bonnie Dean and Sally Molsberger

Requests:

- No requests since last senate meeting.

Meetings:

- December 11, 2019:
 - Committee agreed that the award amount should be raised from \$500/request to \$1,000 and the maximum amount over a five-year period increased from \$2,000 to \$4,000.
 - Kari Donahue volunteered to work on a brochure that could be used for staff orientation, departmental posting and possible digital marketing
- Via email February 6, 2020: finalized new language on the current policy and application.

SHARE Program (Staff Help Assistance Relief Effort) Rules and Guidelines

STATEMENT OF PURPOSE

The purpose of the SHARE Program (Staff Help Assistance Relief Effort) is to provide financial assistance to University of Louisville staff who are unable to meet immediate, essential expenses due to a **temporary financial hardship** that resulted from an emergency situation (defined below under PROCEDURES).

This fund originates from employee contributions, donations, and various fund-raising campaigns organized by the Staff Senate SHARE Committee.

The SHARE committee will raise awareness and develop ongoing support throughout the university community to ensure and protect the future of the SHARE Program.

SHARE COMMITTEE

The SHARE Committee will consist of seven (7) Staff Senate members plus the Staff Senate Secretary/Treasurer. All committee members must be recommended and approved by the Staff Senate Credentials and Nominations Committee. The SHARE Committee has the following functions:

- Review SHARE Program assistance applications, discuss and make a decision by consensus on the recommended allocation of funding (maximum amount of assistance is \$1,000.00, pending available funds).
- Resolve issues relating to the donation or use of the SHARE Program.
- Make other recommendations concerning requests as needed.
- Review and update current SHARE procedures.

To maintain privacy and confidentiality for the SHARE Program applicant, SHARE Program meetings are closed to visitors.

PROCEDURES FOR ASSISTANCE

Qualifications

To meet eligibility requirements to apply for financial assistance from the SHARE Program, a staff employee of the University of Louisville must meet the following criteria:

- Full-time or 80% of full-time permanent employee status
- Part-time permanent employee status
- University permanent employee status of six months or more

Request for Assistance

To request financial assistance from the SHARE Program; an employee must complete an application. An application may be downloaded from <http://louisville.edu/staffsenate/staffresources-1>. If computer access is not available, a SHARE application can be obtained by contacting the Staff Senate Program Coordinator at 502-852-6713 or staffsen@louisville.edu. The application must be submitted to the Staff Senate Coordinator. Once the application is received, it will be verified for eligibility by the Staff Senate Program Coordinator or in case of the Coordinator's absence, the Staff Senate Chair, Vice Chair or Secretary/Treasurer.

In the event an eligible employee cannot personally seek an application, forms may be obtained by a designated representative; e.g. spouse, child, friend of the family, or co-worker with prior notification and approval of the beneficiary.

The name of the person making the request and all other identifying information included in the request and supporting documentation is considered **confidential**. This information **will not** be shared with SHARE committee members. Upon receipt of the application, the SHARE Committee may request that the Staff Senate Coordinator obtain additional information from the employee.

Family Member: For the purposes of this policy, a family member is a parent, grandparent, spouse, domestic partner, sibling, child (including foster child, stepchild, dependent child, independent child, and a child for whom one has legal guardianship).

Applications for financial assistance without an emergency situation will not be considered.

Additional rules and regulations are as follows:

- SHARE funds are not entitled. SHARE Program assistance is not offered for long-standing financial challenges.
- A SHARE financial assistance award cannot exceed \$1,000, pending the availability of funds.
- SHARE payments are made by credit card only; no payments to vendors are paid by check, transfers or cash.
- Assistance is limited to a household once within a 12-month period. Financial assistance is limited to no more than \$4,000 per eligible employee during any 5-year period.
- The SHARE Committee can approve/disapprove all expenditures and can determine the SHARE amount of assistance based on availability of funds.
- The SHARE Committee's decision is final, and is neither grievable nor appealable.

Determining Need

A determination of need exists when a UofL permanent staff member lacks resources to purchase the basic necessities of life or meet the contingencies created by an emergency situation. Verification of the emergency is necessary to determine need. Documentation or copies of the invoices or bills that are to be considered for payment should also be submitted with the application. The emergency situation must be **temporary** (*A temporary emergency is defined as a misfortune of the employee or an employee's immediate family member that prevents the employee from meeting normal monthly or annual expenses despite the employee's best efforts to pay; if remaining unpaid, these debts would jeopardize the employee's housing status, access to basic necessities, and compromise their safety or well-being*). An employee with long-standing financial challenges will not meet the temporary hardship requirement.

Emergency Situations

Only requests for *emergency situations* will be accepted. Each application will be considered on an individual basis. Upon report of such an emergency, the Committee will direct the individual to Human Resources for additional services. This would include UofL's Employee Assistance Program – Human Development Company, (502) 589-4357 or (800) 877-8332.

The SHARE committee will consider each case individually; however, the applicant should be able to demonstrate that all available avenues for assistance have been exhausted (this would include setting up payment plans, reducing the minimum payments, or requesting a discount for services). The following examples include, but are not limited to, circumstances or events that may or may not be considered emergencies:

Acceptable

Lost or Stolen Funds - Assistance may be requested because of lost or stolen funds. Such assistance shall be limited to the actual need (up to \$1,000). A copy of a police report must be furnished to the Committee.

- *Following a Disaster* - If the eligible employee has immediate need due to devastating circumstances as a result of a disaster (includes severe weather-related occurrences). Financial assistance (up to \$1,000) shall be granted as soon as possible to alleviate immediate expenses.
- *Medical/Dental Care* - Upon recommendation by the Committee, financial assistance up to \$1,000 may be allocated to an eligible employee as a result of extended illness or incidental expenses resulting from an illness or emergency situation. Medical bills may be eligible if the medical provider does not offer a payment plan; applicant must provide documentation that all efforts to establish a payment plan with the provider is denied.

- *Death in the Immediate Family* - Assistance (up to \$1,000) may be provided to relieve an eligible employee of immediate financial concerns. Immediate family is defined as spouse/domestic partner, children, and parents.
- *Utilities* - If the requested emergency assistance is within the guidelines, payment for past due basic utilities (electricity, gas, and water/sewer) will be considered for payment.

Not Acceptable

- Finance a leave of absence or vacation
- Moving expenses
- Finance a marriage, divorce, child support, or adoptions
- Pay income taxes or related penalties and interest
- Debt consolidation/Attorney fees
- Loans, bankruptcy (foreclosures)
- Telephone (to include cellphone or internet service)
- Cable television
- Payment of creditors (credit cards, or non-sufficient funds (NSF))

Supporting documentation must be included with the request for financial assistance from the SHARE Program. This would include copies of outstanding itemized statements and invoices. Additional information can be requested from the SHARE Committee. These documents can only be submitted to the Staff Senate Program Coordinator who will ensure that all confidential information is hidden or deleted before being distributed to the SHARE Committee.

Allocation of SHARE Program Funds

In order to determine whether the problem presented is within the scope of the SHARE Program, the following questions will be considered by the Committee: Is the applicant eligible for these services?

- Has a determination of need been established?
- Can the problem be better handled by Human Resources?

Once an application for financial assistance meets the qualifying criteria, it is the SHARE Committee chairperson's responsibility to contact and convene the SHARE Committee to determine approval and the recommended SHARE amount of assistance to be provided, pending the availability of funds.

The request for SHARE assistance must be voted on and approved by the SHARE Committee. It is the responsibility of the SHARE Committee chairperson to notify the Staff Senate Program

Coordinator, the Staff Senate Secretary/Treasurer and/or the Staff Senate Chair or Staff Senate Vice-Chair the recommendations of the SHARE Committee and the confirmation of payment terms. The Staff Senate Program Coordinator will be responsible for informing the applicant of the SHARE Committee's decision and making payment arrangements. The applicant will be notified within 24 hours of the committee's decision and payment will be made within 15 days of the decision.

Payment will be made by credit card only, directly to the vendor, company, or organization designated by the eligible employee. Any processing fees or surcharges will be included in the award.

SHARE PROGRAM FUNDS

SHARE program funds are a pool of money donated by University of Louisville employees and/or University departments that may be allocated to eligible University staff.

Contributions to the SHARE Program are voluntary and UofL employees may contribute to the SHARE Program in the following ways:

- Payroll deduction
- Personal check made payable to University of Louisville (SHARE in memo)
- Cash donations
- Fundraising events
- UofL on-line giving
- Kroger Community Rewards Program

To make a contribution to the SHARE Program by payroll deduction, send an email to the UofL Payroll Service Account (payroll@exchange.louisville.edu). Once the contribution has been entered into the payroll system, the donation will appear on the employee's payment stub.

Donations to the SHARE Program in the form of a personal check or cash should be made through one of the following representatives: Staff Senate Program Coordinator, Chair Staff Senate, Staff Senate Vice-Chair or Staff Senate Secretary/Treasurer.

Repayment of SHARE Awards

The Staff Senate Emergency Assistance Fund has no requirements for the repayment of SHARE awards. ***Repayment is encouraged*** and welcomed once the recipient's crisis has passed and financial stability has been achieved. Repayment aids the Staff Help Assistance Relief Effort fund in assisting others. Repayments or donations may be made through payroll deduction or direct gifts to the fund through the Staff Senate.