



# Kanopi Studios Employee Handbook

## DECLARATION

This employee handbook is available for your reference and understanding of the policies, philosophies, practices, and benefits of Kanopi Studios. **PLEASE READ IT CAREFULLY.** Upon completion of your review of this handbook, please sign the statement below, and return promptly through Adobe Sign.

### Agreement

I have received my copy of the Employee Handbook. I acknowledge that this is a living document, and may change without notice as our policies evolve.

The Employee Handbook describes essential information about Kanopi Studios, and I understand that I should consult my manager or Human Resources regarding any questions not answered in the Handbook. I have entered into my employment relationship with Kanopi Studios voluntarily and acknowledge that there is no specified length of employment. Accordingly, either Kanopi or I can terminate the relationship at will, with or without cause, at any time, so long as there is no violation of applicable federal or state law.

I understand and acknowledge that this Handbook is neither a contract of employment nor a legal document, and does not modify the "at-will" nature of my employment. I have reviewed the Handbook, and I understand that it is my responsibility to read and comply with the policies contained in this Handbook and any future revisions made to it.

Employee's Name:

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Employee's Signature:

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Date:

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## About This Manual

We are excited to welcome you to Kanopi Studios. We put this handbook together to help make navigating life at Kanopi just a little bit easier - while it contains the various policies and procedures that serve as general guidelines for everyone here - it also keeps the serious talk and the legal policies in one place.

We hope this Employee Handbook will: present fair, reasonable guidelines that promote the health and professional satisfaction of our employees; and to point us all toward success and exceptional performance. Whether this is your first day or you've been with us for years, we want you to know that you are important, valued, and integral to making Kanopi a dynamic and rewarding place in which to work.

There are several things to keep in mind about our Employee Handbook. Most importantly, it contains only general information and guidelines. It should not be considered an employment contract, or an amendment of the "at-will" nature of your employment. Also, it is a living document - the procedures, practices, policies, and benefits described here may be modified or discontinued from time to time. We will do our very best to update this Handbook with changes as they occur, but we are human, so forgive us if it takes a little time. Finally, this manual is not intended to address every possible application of, or exceptions to, every policy known to humankind. If you don't see something, say something!

As an employee of Kanopi Studios, you are crucial to our core mission; to bring a human-centric, data-driven approach to our design work. We want to make sure to give you every tool possible to succeed on that journey with us. We put this manual together as a quick, one-stop, go-to guide that will provide answers to many of the general, day-to-day questions you may have.

You may not find all the information here, but Kanopi's CEO, your manager, or even the employees you chat with today are ready and willing to help you out. All you have to do is ask.

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### Founding Partners

**Anne Stefanyk, CEO**

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Email: [anne@kanopistudios.com](mailto:anne@kanopistudios.com)

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### Human Resources

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## About Kanopi Studios

Kanopi Studios is a full-service web development company offering Drupal & WordPress Strategy, Development, Design and Support. Our policies may change from time to time to reflect changes in the workforce, employment trends, economic conditions, and legislation. But please know that any changes in policy will be consistent with the Company's approach to:

- Employing talented individuals whose creativity and imagination will support and contribute to achieving the Company's business objectives;
- Communicating the Company's standards and expectations in all aspects of employment including performance;
- Valuing diversity, ensuring equal employment opportunities, and providing a workplace that values mutual respect;
- Treating all staff, workers, contractors, and customers in a professional, non-discriminatory manner;
- Providing safe, effective working conditions; and
- Providing competitive terms and conditions in our workplace market.

## SECTION 1: GENERAL EMPLOYMENT INFORMATION

### Kanopi Values

We value human connection. We are **#BetterTogether**.

We value being **#Nimble** and helpful.

We value **#Clarity**.

We value that when something is complex, we **#OwnIt**.

We value contributing **#Trust** daily.

We value supporting our **#Community**.

We value expressing **#Gratitude**

- **All of our team members strive for excellence** both as individuals and as an organization. Our expectations should never fall short of excellence.
- **Our leaders are rarely picked; they choose to become leaders.** We are a collaborative group; we encourage drive and initiative. Ask not what Kanopi Studios can do for you, ask what you can do for Kanopi Studios.
- **We are a group of people with varying styles and backgrounds.** Despite these differences, the one factor that binds us is a commitment to a common goal of excellence.
- **Each of us pledges to be an effective communicator;** exercising a high degree of responsiveness with team members and clients.
- **We strive to be warm, compassionate, respectful human beings** who are positive and optimistic about life and work. We address conflict with compassion and kindness.
- **Each of us strives to make Kanopi Studios a great place to work.**

### Working Hours

*Given that we are a virtual company, with employees all over North America, what are Kanopi's working hours?*

We get this question all the time! Here's the way we've found it works for us:

In a perfect world, Kanopi's standard office hours are somewhere in the neighborhood of 9am-6pm in your respective time zone, with an hour taken for lunch. But, we work in a company with varying time zones - sometimes we even work with clients on the other side of the globe! So, the keyword when thinking about your working hours is **#Nimble**. We ask that all employees maintain a spirit of flexibility when working with teams and clients in other time zones, while making sure your schedule accounts for the working hours you should be



meeting for the week (40 for your standard Full-time Kanopian, but yours may vary if you are part time). This may mean you start at 7am, or 10am, or take a longer break mid-day then jump on later at night - again, if your manager and/or project teams are good with it, and we know how to locate you during those “standard” operating hours, we are flexible!

That said, please don't forget about work-life balance. If you feel that the hours you need to or are asked to work compromise your ability to live outside of work, talk to your PM or your manager right away!

Nice to know: We are Exempt employees, and therefore are not eligible for overtime or flextime unless specified in an individual employment agreement or upon the approval of Management.

### Lunch Periods

Employees are asked to take a 1-hour lunch break maximum for lunch within an 8-hour work day. If possible, you should strive to take lunch breaks between the hours of 11:00 am and 2:00 pm on a staggered schedule; this will reduce issues that may arise with co-workers or clients as a result of your absence. When leaving for lunch, you should update your whereabouts in the #in-out-around Slack channel, to ensure proper coverage.

### Break Periods

One of the joys of working for Kanopi is our flexibility! If you have personal business to take care of during the day, we are okay with that - we just ask, if you need to take extended breaks (longer than 15 minutes), that you notify your manager or work with your project teams to ensure that the time you're taking doesn't conflict with any urgent deadlines or client meetings. Also we ask that you notify our #in-out-around Slack channel, in case anyone is looking for you while you're out!

Please note: if your break is longer than a few minutes, or is taken outside of your lunch break, you may be asked to make up the hours that week, or submit a request for time off to account for extended break time.

### Inclement Weather/Emergency Situations

At times, employees may experience emergencies or unintended interruptions to their work day due to severe or inclement weather, power failures, or internet outages in their local areas. These events have the potential to disrupt company operations - so, should you experience issues of these types, please inform your manager and project teams as soon as possible by phone or email, and let folks know about your availability in the #in-out-around Slack channel. We ask that you do your best to resume work if possible from another location.

Should the emergency severely impact an employee's ability to work, and there is no ability to work from home or any other place, full-time employees will not have to take a vacation day to make up for the loss.

## Employment Status

All employees are either considered **nonexempt** or **exempt** under state and federal wage and hour laws. These designations do not guarantee employment for any specified period. The

right to terminate the employment-"at-will" relationship at any time is retained by both employees and by Kanopi Studios.

- **Nonexempt Employees:** are NOT exempt from the law's requirements concerning minimum wage and overtime, and are therefore eligible for overtime pay.
- **Exempt Employees:** are managers or professional, administrative, or technical staff who ARE exempt from the minimum wage and overtime provisions of the FLSA. All salaried Kanopi employees are considered "exempt" from eligibility for overtime pay.

Kanopi has established the following categories for all employees and contractors:

- **Full-Time:** Full-Time employees have completed the 30-day probationary period and are scheduled to work the company's full-time schedule of 40 hours per week. These employees are eligible for the full benefits package, subject to the terms, conditions, and limitations of each benefits program.
- **Regular, Part-Time:** Part-Time employees have completed the 30-day probationary period and are routinely scheduled to work less than 30 hours each week. Regular, part-time employees are not eligible for health benefits but are eligible for some of the fringe benefits offered by the company subject to the terms, conditions, and limitations of each benefits program.
- **Contract Workers:** are hired as interim replacements to supplement the workforce temporarily or to assist in the completion of a specific project and are provisionally scheduled to work hourly for a limited duration. Employment beyond any initially stated period does not in any way imply a change in employment status. Contract workers are not considered Company employees and should refer to their Contractor Agreement, or talk to the Director of Human Resources regarding the policies which impact them directly.

Contract workers are not eligible for company benefits unless explicitly stated otherwise in company policy or are deemed eligible according to plan documents.

## At-Will Relationship

We have a mutual "at-will" employment policy, meaning that employees do not have an obligation to work for us for any definite period. Employees have the right to collectively bargain and participate in concerted activities to improve working conditions, and may decide to end their employment at any time and for any reason, with or without cause.

Likewise, we reserve the right to dismiss employees, terminating employment at any time and for any reason, with or without cause. When appropriate, we will make every attempt to warn an employee if they are likely to be dismissed. Please read the "Employment" section thoroughly for a full description of our dismissal policy.

As a matter of courtesy, we ask all employees to give as much notice as possible if and when they do decide to leave Kanopi. Three weeks notice or more would help us plan for a smooth transition.

## Probationary Period for New Employees

New employees, or those starting a new position with different responsibilities, will serve a probationary period.

The purpose of the probationary period is to provide time to adequately assess a new employee's performance and suitability to the job and to allow the employee an opportunity to adjust to their new position. Throughout the probationary period, provide regular feedback to the employee on their progress. If there are concerns during this period, every effort must be made to discuss and resolve them promptly so an employee can adjust and demonstrate their suitability for the position.

Full-time employees must complete a probationary period of six months' full-time employment. Six months' full-time employment is regarded as being:

- 913 hours paid at straight time, or
- 12 months from the appointment date for situations when an employee's part-time work schedule would require more than 12 months to accumulate 913 hours

The following do not count towards the completion of a probation period:

- Workers Compensation Board claim or a rehabilitation trial return to work
- Annual leave or other leaves (with or without pay)
- Statutory holidays

## Employee Performance Reviews

At Kanopi, we eschew the traditional review process to employ a process of continual feedback. We operate using EOS (Entrepreneurial Operating System) - and as part of this we set "big rocks" to navigate toward and complete in the following quarter. Your manager will work with you via Interim reviews (aka 1:1 Meetings) to discuss your plan, talk about accomplishments or areas for course-correction, and hold planning sessions with all full-time and part-time employees to help craft strategies to complete plans. These discussions likely will not include any official written evaluations, but documentation will occur. We hope that our approach, while informal, will give you the tools you need to be strong support for our teams and our clients.

### Salary Adjustments

Reviews often carry with them the expectation of a salary increase - we base all salary increases on the performance of the company and the performance of the employee. To keep reviews focused and productive, we hold discussions about increases separately from review discussions.

## Standards of Conduct

The work rules and standards of conduct for the Company are important, and the Company regards them seriously. All employees are urged to become familiar with these rules and standards. Employees are expected to follow the rules and standards faithfully in doing their jobs and conducting the Company's business. Any employee who deviates from these standards will be subject to disciplinary action, up to and including termination of employment. Inappropriate conduct includes, but is not limited to, the following:

- Material breach of the terms of the employment agreement or employee handbook
- Behavior or situations likely to bring the employee or the Company, into disrepute
- Theft or inappropriate removal or possession of company property, including intellectual property
- Falsification of records belonging to or concerning the Company or our clients
- Providing false or misleading information about personal work history, skills, or training
- Working or representing the Company while under the influence of alcohol or illegal drugs
- Disruptive or threatening behavior toward clients, colleagues, or while representing the Company
- Conduct leading to damage of company-owned or client-owned property, including intellectual property
- Sexual or other unlawful or unwelcome harassment
- Discrimination based on race, gender, religion, physical ability, sex or sexual identity, or any other protected class
- Retaliation of any kind
- Excessive absenteeism or any absence without notice
- Making false or offensive claims or statements while representing or working on behalf of the Company
- Internet or email abuse
- Illegal downloading of software
- Computer virus transmission
- Disclosure of business secrets or confidential information
- Unsatisfactory performance or conduct

## Disciplinary Action

The Company may take disciplinary action in situations where the Employee exhibits inadequate performance, misconduct, a breach of the employment agreement, a violation of the confidentiality agreement, or a violation of the policies outlined in the employee handbook. The Company will take the following actions in this order, depending on the severity of the infraction:

1. Give a formal verbal warning, placing details of the warning in the employee's file. The notice will remain on file unless the Company decides to remove it.
2. Give a final warning if the behavior continues, or there is further misconduct or poor performance. The final warning will state that further poor performance or misconduct will result in dismissal. It will also remain on file unless the Company decides to remove it.
3. If written warnings are ineffective, or if serious misconduct occurs in violation of company policy, immediate termination can occur without notice.

Refer to the "[Standards of Conduct](#)" section for more details.

## Employment Termination

Termination of employment is an inevitable part of personnel activity within any organization. Most of the time, reasons for termination are routine and voluntary. However, there are times that termination may be involuntary, occurring with or without warning.

Deductions equaling any outstanding financial obligations owed to the Company will deduct from the employee's final check. Insurance coverage continues through the end of the month of termination. Some benefits may continue after that time at the Employee's expense should the Employee elect to do so.

An exit interview may be conducted to collect information regarding the Employee's satisfaction during their employment and to ensure all closing affairs are in order.

### Return of Company Equipment and Assets

Employees must return all Kanopi-owned equipment in working condition. The cost of replacing non-returned items will either be deducted from the employee's final paycheck, or settled after termination is complete. All current work should be transferred to the appropriate people/person to ensure continuity of business/service prior to the Employee's last day. All records containing confidential information or passwords which you may have acquired during your employment should be transferred to your manager or [hr@kanopistudios.com](mailto:hr@kanopistudios.com).

### Unused Paid Time Off

Any unused paid time off will be forfeited and not paid at the time an employee leaves employment with the Company, unless state law requires us to do so.

## SECTION 2: JOINING KANOPI STUDIOS

### Onboarding – Forms to Complete and/or Sign

Several forms must be signed at the outset of the employment relationship. Please complete them as soon as possible and, where applicable, return to [hr@kanopistudios.com](mailto:hr@kanopistudios.com):

- Employment Offer Letter
- Employment Agreement
- Employment Verification and Tax Information
- Employee Manual
- Kanopi Bio Intake Form

### Working in a Distributed Company

Because we operate as a distributed company, Kanopi Studios maintains a business environment that does not confine employees to a particular physical location. All employees are able to do business from virtually any place in the world we wish to go; even geographically remote locations. This model aligns us with a desire to have greater work/life balance, flexibility, and diversity among our employees!

#### Scope and Suitability for Remote Work

- All employees must possess appropriate home office equipment to perform their jobs away from a traditional corporate worksite. Kanopi Studios will discuss hardware and software needs with each employee individually, and provide equipment appropriate to any agreement reached, as per company policy.
- Employees must be in compliance with all applicable IT, Security, Privacy, and Confidentiality policies and procedures, and must maintain working hours as per their particular employment arrangement, and/or Kanopi Studios' policies and procedures.
- Employees must demonstrate, and will be evaluated upon the following teleworking proficiencies:
  - Consistently and effectively working independently;
  - Communicating and maintaining availability during set office hours and/or for extended periods of time while working;
  - Reliably connecting via video chat, Slack, email, or phone with colleagues and clients from a work environment free of excessive noise or distraction;
  - Delivery of project-related updates, information, documentation, and deliverables to project teams, colleagues, management, and clients in a dependable, timely manner;
  - Independently carrying out priorities and tasks without face-to-face supervision;

- Maintenance of collective files, communications, and documentation in a manner that is easy for colleagues and management to access, update, and understand without excessive guidance;
- Demonstration of consistency, dependability, and responsibility by meeting attendance standards, delivering on project milestones and work assignments, and maintaining confidentiality as per Kanopi policies; and
- Accurately tracking time spent on tasks per Kanopi policies and procedures.

### **Communication and Accessibility**

Both communication and accessibility are critical to the successful operation of a distributed company. The following policy outlines expectations regarding your communications and accessibility while working for Kanopi.

- All Employees are expected to work a specific number of hours per week, per their employment agreement. They are also expected to maintain an online presence, either during standard hours, as outlined in our working hours section within their respective time zone. All employees are expected to be reachable during their working hours.
- Employees are expected to communicate availability throughout the day within our #in-out-around Slack channel, as well as communicating out of office status when out of the office for any reason.
- All employees must be accessible to clients they manage, and/or other members of their project teams during their agreed-upon business hours, regardless of work location.
  - Any outages of a personal nature or any issues regarding connectivity should be reported, as early in the workday as possible, to a manager, or to HR, and communicated as per Kanopi policy.
- Clients must be able to access their projects' main point of contact throughout the day. In the case of an employee outage, alternate arrangements must be communicated.
- Employees must notify the office via #in-out-around within Slack when leaving their telework site for longer than a few minutes during agreed-upon work hours.
- Employees are considered representative of the Kanopi brand, and therefore must conduct themselves in a professional, respectful manner with clients and colleagues, no matter the location, while conducting business for or on behalf of Kanopi Studios. Guidelines are as follows:
  - Employees should be mindful of their personal appearance and the appearance and overall cleanliness of their workspace when conducting Kanopi business.
  - While we are aware that life can overlap work, employees are asked to be circumspect when smoking, eating, and/or drinking (including alcoholic beverages) while attending video meetings.
    - Employees who choose to drink alcoholic beverages while conducting company business or attending company functions are expected to

behave professionally and in accordance with usual business standards and all company policies.

- If an employee appears impaired or puts Kanopi's business or clients at risk, they may be asked to stop working for the day, may be asked to leave the event, or may face disciplinary action or termination.
- Employees must report to meetings, return messages, and/or respond to emails promptly.
- Employees should be mindful of the time zones of their colleagues and clients and avoid scheduling meetings that will impede another employee's ability to have a personal life outside of the office.
- Employees may be asked to attend staff or client meetings outside the hours of an agreed-upon workday. So as not to inconvenience the project team, any issues with the timing of such meetings should be communicated and discussed as soon as possible before the meeting.

### **Manager Responsibilities**

The following are expectations of managers responsible for supervising teleworking employees:

- Advising all employees of Kanopi company policies, including all requirements and restrictions.
- Ensuring employee availability and communication during working hours.
- Demonstrating fair and equitable treatment of all employees regardless of telework location or working hours.
- Demonstrating effective, timely, video-first remote supervision and coaching when needed.
- Demonstrating proficiency with the technologies and tools necessary for remote supervision.
- Evangelizing and acting as an example of Kanopi's values during all interactions, communications, and professional events.
- Including all direct reports in office or professional events, conferences, or meetings, as appropriate.
- Reviewing, understanding, and enforcing policies and procedures specific to employees of Kanopi Studios.
- Kanopi Studios policies and procedures, thus ensuring compliance with employment expectations, and addressing any performance-related issues.
- Maintaining documentation related to clients and direct reports per Kanopi policies and procedures.



## Dependent Care and Other Non-Employment Responsibilities

Kanopi is sensitive to the fact that issues that may arise concerning dependent care or other personal obligations that may impact an employee's ability to telework. Any known issue that represents an ongoing disruption to the employee's ability to report to work during agreed-upon business hours should be discussed with management as soon as possible to avoid disruptions to our clients and business. Please note the following regarding employees' non-employment-related responsibilities:

- Telework is not a substitute for dependent care.
  - Employees should not set an expectation of being solely available or responsible for dependent needs during working hours, unless such an arrangement has been agreed upon with Kanopi management.
  - Although an individual employee's schedule may be modified to accommodate dependent care needs, the focus of the arrangement must remain on job performance and meeting business demands.
- Employees may not engage in work related to other jobs, businesses, or any other outside responsibilities during business hours, unless otherwise agreed upon by Kanopi management.
- Employees will manage personal obligations in a way that allows for the successful completion of all job-related tasks and responsibilities.
- An employee who needs to care for a sick dependent should plan to use sick leave for that period of time, or portion of the day.

## Use of Company Hardware & Equipment

Kanopi will provide hardware to employees to use during their tenure, based on employee-identified need, and configuring based upon the nature of their job responsibilities. If needed, laptop computers and associated cords will be provided to full-time employees. Such equipment will be paid for by and property of Kanopi Studios.

It is your responsibility to use care and good judgment to avoid the loss, damage, or destruction of Company-owned equipment. Such equipment should not be checked as luggage when traveling, nor should it be left unattended in vehicles or hotel rooms, even when locked. Hotels can typically provide a safe or other secure location for an employee's equipment and possessions; please plan to avail yourself of these facilities if you are unable to keep Kanopi property on your person.

If the Company determines that lack of adequate care and good judgment directly resulted in the loss, damage, or destruction of company-owned equipment in your possession, you may be responsible for costs associated with the repair or replacement of the equipment. Costs may include insurance deductibles or outright equipment replacement. If outright replacement of damaged equipment is required, the replacement equipment will follow the same terms of ownership. Please see our [Technology Policies](#) for more details

## **Personnel Files**

Employee personnel files include the following: job application, job description, resume, all signed onboarding documents, and/or records of participation in training events. Personnel files are the property of the Company and access to the information is restricted. Employees have the right to inspect their personnel files on reasonable notice and request copies of all employment-related documents they have signed.

Information and records relating to reviews, performance management, medical insurance or history, background checks or results, drug and alcohol dependencies and legitimate medical explanations provided to the Company shall be kept confidential to the extent required by law and maintained in secure files separate from personnel files. An employee may inspect only their own personnel file. Your manager, Human Resources, or a Principal has the right to be present while you read your file.

Information in an employee's personnel file is permanent, confidential, and up-to-date. The Employee should inform the Company immediately whenever there are changes in personal information such as address, telephone number, marital status, number of dependents, and person(s) to notify in case of emergency.

Personnel files are the property of Kanopi and may not be removed from the Company's premises, even if the employee is terminated.

## SECTION 3: COMPENSATION AND BENEFITS

### Salary and Wage Payments

The salary or wage outlined in your offer letter is considered confidential; please make every effort to treat it as such. Each employee's hourly wage or annual salary is up for review approximately once a year. Increases are determined based on performance, adherence to company policies and procedures, the ability to meet or exceed duties per the Employee's job description, and their successes in achieving performance goals. Although The Company's salary ranges and hourly wage schedules are subject to change on an ongoing basis, the Company does not grant "cost of living" increases. Performance is the key factor in determining the amount of an employee's wage increase.

Full details of the breakdown of your salary or wage payment appear on your paystub. Paystubs will be emailed directly to you through Justworks, our payroll company.

#### Paydays

All US employees are paid bi-monthly (on the 15th and the 30th of the month) unless otherwise agreed upon with Company Management.

### Benefits

Full-time, permanent employees who work more than 30 hours per week are eligible for Kanopi's Health, Dental, & Vision benefits. Benefits begin the first of the month following 30 days of employment. SO, if an employee starts working on January 14, for example, their benefits will start on March 1.

There are several plans to choose from (in some cases, geography dictates which plans are available to US Kanopians). Kanopi covers up to 100% of the employee premium portion of multiple Aetna plans for health benefits, Aetna and MetLife plans for Dental and Vision plans. Employees pay the difference in premium if they select a more expensive plan, or choose to include their partner, children, or family in their benefits selections.

### Short-term Disability

Full-time, permanent employees who work more than 30 hours per week are eligible for Kanopi's Short-term Disability benefit. This benefit is offered through MetLife, and the premium is 100% paid for by Kanopi.

### 401(k)

Full-time, permanent employees who work more than 30 hours per week are eligible for Kanopi's 401(k) plan. This retirement plan is available via Guideline following 90 days of employment with Kanopi. At that time, employees will be auto-enrolled at a contribution rate of 5%. In the interest of equity with our Canadian employees, who are not provided an equivalent benefit, Kanopi does not make employer contributions to the 401(k).

## Remote Stipend

Whether we find ourselves working seaside or lakeside, by the woods or near the mesa, at Kanopi we believe that setting a completely virtual company up for success requires support in a number of ways. One of those ways is to provide our employees with an annual Remote Stipend allowance for use toward improving and outfitting a home office space. Starting on their first anniversary, employees will receive \$300/year to use toward their own home office equipment, furniture, or materials.

### Qualifications

Beginning on their first anniversary at Kanopi, employees will receive \$300 per year (in their local currency) to use toward home office equipment. As of their third anniversary, this amount will increase to \$500 per year.

Examples of home office equipment include:

- external monitor
- keyboard
- chair
- microphone
- webcam
- desk
- mouse

A solid rule for purchase is: as long as the folks reviewing your purchase look at the receipt and say, “Yes, this belongs in an office,” it will be approved.

### Steps to Track Purchases for Reimbursement

This stipend is managed through Harvest Expenses. Please follow these steps:

- In Harvest, select the “Expenses” link in the top menu bar
- From there, select the “+ New Expense” button
- Choose the “Full Time 20XX” Project
- Choose the “Remote Stipend” Category
- Add details in the notes about what the item is, the vendor name, and enter the cost.
- Attach a digital copy of the receipt to the expense. Please note: this step is mandatory in order to receive reimbursement

- De-select “This expense is billable”
- Select “Save Expense”

### **Please Note**

- Items submitted without receipts will not be reimbursed.
- Reimbursements will occur on the employee’s paycheck as an added line item within 30 days of submission.
- Any items totaling more than \$300 in a year from the employee’s 1st- or 2nd-anniversary date, or \$500 in a year following the employee’s 3rd-anniversary date will not be reimbursed.
- Any amount granted but unused before the employee’s next anniversary will not carry over to the next year.
- Reimbursements do not cover items like internet connections or co-working spaces.

### **Paid Time Off**

Full-time Kanopians receive several “buckets” of time off each year - personal days (aka appointment/bereavement), sick days, and vacation days. Each time off type is explained in more detail below.

Please note: No paid time off can be taken until after a probationary period of 90 days, with the exception of statutory holidays. All time off types should be logged in both Harvest and Justworks.

#### **Personal Days and Sick Days**

Personal days should be used for appointments or unexpected time off (such as bereavement). Sick days should be used when employees are unable to report to work due to illness.

- All full-time employees receive three personal days and five sick days per calendar year.
- Personal Days and Sick Days are prorated in the first year based upon your date of hire, and reset on January 1.
- Both personal and sick days must be used by December 31st, and do not roll over to the following year, unless state law requires us to do so.
- Employees who use more than two consecutive sick days may be required to submit a doctor’s note.
- Contractors are not paid for taking personal or sick days.
- Unused personal or sick days are not paid out upon termination of employment.

## Vacation Days

Every full-time employee receives a bucket of vacation days to use throughout the year during their tenure at Kanopi.

- Vacation days are prorated based upon the date of hire, accrue per pay period through the year, and roll over/begin accruing again on January 1 each year.
- Following your 2nd work anniversary, you will receive an additional 5 days of Vacation Days per year, which will be prorated based upon your start date in the 2nd anniversary year only, then will accrue with all other time off starting on January 1 the following year.
- Up to 10 days of accrued, unused vacation hours will roll over year-to-year, with a total cap of 20 days total. Here are some items to note:
  - Your total vacation time caps at a maximum balance of your annual accrual plus 10 days worth of accrued, unused, rolled-over vacation time from the previous year.
  - The total hours that accrue and roll over are based upon the hours you work per day/week. For the purposes of simplification, if you are granted 10 vacation days, and work 40 hours per week, 10 days = 80 hours. A maximum cap in this scenario would be 20 days = 160 hours. If you work 35 hours per week, 10 days = 75 hours. A maximum cap in this scenario would be 20 days = 150 hours, and so on.
  - If you reach your maximum rollover cap, you will not accrue additional vacation days until you have taken vacation days.
  - The amount of hours that equal up to ten days for you, or roll over year to year are based upon the hours per day/week you work, and/or the amount of time off you've taken.
- Vacation requests must be submitted via Justworks. Once approved within the system, you will receive email notification.
  - Ideally, at least two-four weeks' notice is required but the more advance notice, the better.
  - Please make arrangements for proper coverage of your duties while on vacation.
- Upon approval, you must update the holiday calendar (and, ideally, your personal calendar) with the dates.
- Unused vacation pay will be forfeited and not paid at the time of termination of employment unless state law requires us to do so.
- Contractors do not receive vacation days.

## Holidays

The Company offers the following holidays as paid time off to US employees:

- New Year's Day
- Martin Luther King Day
- Presidents Day
- Memorial Day
- Juneteenth (optional)
- Independence Day
- Labor Day
- Indigenous Peoples' Day
- Veterans Day
- Thanksgiving Day
- Thanksgiving Friday
- Christmas Eve through New Year's Eve

### **Please Note**

Voluntarily working on a holiday date does not automatically qualify employees for future comp time. If a project or client emergency requires an employee to work during a Kanopi paid holiday, employees should speak to their manager. At a manager's discretion, an employee may receive "comp time" per Kanopi's Comp Time Policy.

## Requesting Paid Time Off

The following is the process for requesting time off:

- Submit your request via Justworks
  - From your Justworks dashboard, select "Time Off"
  - Enter the Time Off type (vacation, sick, or appointment/bereavement), the date range, and custom hours, if needed
  - Enter details about the time off request, for context
  - Select "Submit Request" button to submit

- Your request will be reviewed by the management team, and will be accepted and approved by Erin Linkins if there are no conflicts.
- You will receive an email, confirming your request approval or denial (additionally, within Justworks, you will see a grey “pill” icon that reads “Pending” will change to a green “pill” icon that reads “Approved”
- If approved, please enter your date range on Kanopi’s Holidays/Time Off Google Calendar (and your personal calendar, to ensure you are booked as out of the office)

## **Jury Duty**

Kanopi recognizes that jury duty is a civic responsibility of our employees. Employees must provide a copy of the jury duty summons to HR and your manager within one day of receiving the summons.

Occasionally, the summons to jury duty will occur at a time of the year when your absence might have a significant impact on clients or projects. In these instances, you may ask HR to write a letter on your behalf to the court requesting the postponement of your jury duty.

Kanopi provides paid leave during your jury service for 5 days in a calendar year. At the end of 5 days, you may use your accumulated vacation time if you wish to be paid while continuing on jury duty. You may also take the additional jury duty time as an unpaid. No overtime payments are made during the time that you serve on a jury.

In no case will your employment be affected if you perform jury duty. You will not be harassed, threatened, or cajoled into getting out of jury duty and your same job will be available upon your return.

## **Training and Professional Development**

The Company recognizes the value of professional development and personal growth for employees. Therefore, employees interested in continuing education and job-specific training are encouraged to research such opportunities further and get approval before signing up for the seminars or courses. Please see our [Conference and Professional Development Policies](#) for more information

## **US Parental Leave Policy**

### **Purpose**

Kanopi Studios recognizes that bringing a baby into your life is a life-changing event that is full of challenges and rewards, and we seek to be as supportive as possible during this exciting time. Therefore, the purpose of this guide is to provide an outline of Kanopi’s Parental Leave Plan and to help you in your planning for the future.



## Eligibility

All full-time permanent employees who have been employees in good standing with Kanopi for one year are eligible to participate in the Kanopi Studios Parental Leave Plan. The benefit provided depends on whether you are a **Primary Caregiver** or a **Secondary Caregiver**.

**Primary Caregiver** is defined as someone who has given birth to a child or is taking primary responsibility for the care of a child, immediately following the birth of the child or becoming a parent through foster care or adoption. There can only be one primary caregiver per household of the child.

**Secondary Caregiver** is defined as the parent who has secondary responsibility for the child within the first year of the child's birth, foster care, or adoption.

All leave under this Plan shall run concurrently with any other available and applicable state or federal leave, including, but not limited to, state parental leave or disability leave.

It is this policy's intention to lead you through all the benefits for both Primary and Secondary Caregivers.

## Primary Caregiver Leave

- Kanopi Studios allows up to 12 weeks of unpaid leave for approved Primary Caregivers.
- Of the 12 weeks, Kanopi Studios will provide a portion of paid leave, based upon tenure, under the following model:
  - Up to 2 years of employment: paid leave for 2 weeks
  - 2-5 years of employment: paid leave for 4 weeks
  - 5+ years of employment: paid leave for 6 weeks
- You may apply Short Term Disability (STD) leave, state parental leave, or any unused sick days and any unused accrued vacation days to further extend the paid portion of your parental leave.
- The remaining balance of the 12-week leave will be taken as unpaid leave.
- Should you wish to extend your leave beyond 12 weeks, please submit a plan for review and approval.
- Kanopi Studios will additionally reimburse a Primary Caregiver for up to \$500 of take-out food purchased during the first 10 days following the birth, fostering, or adoption of their child. This includes online grocery delivery, e.g. Uber Eats or Postmates. Expenses must be submitted within 30 days of the employee's return from parental leave.

## Secondary Caregiver Leave

- Kanopi Studios will provide unpaid leave for 6 weeks for all Secondary Caregivers following the birth, fostering, or adoption of your child.

- Of the 6 weeks, Kanopi Studios will provide a portion of paid leave, based upon tenure, under the following model:
  - Up to 2 years of employment: paid leave for 2 weeks
  - 2+ years of employment: paid leave for 4 weeks
- You may apply state parental leave, or any unused sick days and any unused accrued vacation days to further extend the paid portion of your parental leave.
- Should you wish to extend your leave beyond 6 weeks, please submit a plan for review and approval.
- Kanopi Studios will reimburse a Primary Caregiver for up to \$250 of take-out food purchased during the first 10 days following the birth, fostering, or adoption of their child. This includes online grocery delivery, e.g. Uber Eats or Postmates. Expenses must be submitted within 30 days of the employee's return from parental leave.

### Additional Details

- Paid Parental Leave benefits are calculated based on your base salary rate at the time of the start of your parental leave.
- Years of service are calculated based off of an individual's hire anniversary date with Kanopi Studios on the expected due date or actual delivery/arrival date – whichever occurs first. Should another employment anniversary occur that moves an employee into the next bracket of parental leave, the leave amount will be prorated accordingly.
- Total leave time and return to work date must be agreed and communicated to management and HR prior to going on leave. Employees out on leave who would like to discuss modifying their return to work date after their parental leave has begun must contact HR with as much advance notice as possible.
- Employees may use Short Term Disability STD leave (for individuals giving birth), state parental leave (where applicable), or unused sick days and any unused accrued vacation days to further extend the paid portion of their parental leave.
- Any unused paid parental leave benefits are forfeited 12 months following the birth or adoption date, may not be used for purposes outside of childcare, and will not be paid out if unused or upon termination of employment.
- The above paid leave benefits may only be used once per calendar year, irrespective of whether multiple children are born or adopted in the same calendar year (e.g., giving birth to twins does not double the available paid leave).

### FAQs

#### **I've just informed my manager I will be going on Parental Leave, what are my next steps?**

- If you haven't already spoken with HR, please make sure to reach out to the HR manager.

- After contacting HR, your first parental leave discussion will be scheduled. During this meeting, HR will walk you through your leave plan and you will also be asked to:
  - Confirm whether you are the Primary or Secondary Caregiver
  - Discuss the due date of your child
  - Discuss your parental leave paid allowance and subsequent Paid Time Off supplement
  - Discuss STD or state supplements
  - HR will talk you through a draft pay schedule. Please remember that all pay schedules are due to change based on a number of factors, including but not limited to: delivery date, number of days' vacation or sick leave you take before going on leave, etc.
- All Kanopi Studios leave payments are paid via direct deposit on the Kanopi Studios pay schedule (every 2 weeks on Friday).
- All leave must be taken within 12 months following the birth or adoption date. Any unused leave will be forfeited after 12 months.

#### **Do I have to work right up to my expected due date or expected date of adoption?**

- As a Primary Caregiver, you may start your parental leave prior to the due date for delivery or adoption, as dictated by individual need or the guidance of a healthcare professional.
- In the case of Secondary Caregivers, you can start your leave on or following the date of birth, fostering, or adoption.

#### **Can I use some of my accrued vacation time to bolster my paid leave?**

- Yes, you may apply any unused accrued vacation days to your parental leave to extend the number of days that are paid.

#### **Can you tell me more about Short Term Disability Leave (STD)?**

- STD Leave will only be activated in conjunction with childbirth.
- You will need to be enrolled in the STD benefit plan in order to take advantage of it. You may do this during Kanopi's open enrollment if you haven't already.
- You will need to submit STD paperwork in conjunction with the birth of your child.
- STD will kick in 7 days following the birth of your child. The 7-day waiting period can be covered by PTO or primary caregiver parental leave.
- STD will cover you for approximately 6 weeks total (or 8 if you have a C-section), following a 7-day waiting period. The benefit must be used consecutively.

- 60% of your pay is effectively covered for the duration of your STD period, and paid by the STD plan.
- Your STD will run concurrently with your parental leave plan, including the paid period of your parental leave. You will not receive more than 100% of your salary at any time while on leave.

**Is there any paperwork that I have to complete in order to be enrolled in STD?**

- Yes. Our STD is provided through [PROVIDER]. HR will supply you with this form approximately 1 month prior to your due date. HR can help you complete the form, however, due to the personal nature of the content asked you will need to complete the form.
- If you would like the form on an earlier date, HR can supply you with an example at your request.

**Will I receive STD payments through my regular pay process (direct deposit on the 15<sup>th</sup> and end of each month)?**

- No. [PROVIDER] will pay you directly, likely via a physical check, which will be delivered to your home address. This payment does not go through Kanopi Studios payroll.
- This check takes out taxes for FICA but does not withhold any federal or state income tax. Therefore, be on the lookout for a W2 from [PROVIDER] when tax season rolls around.
- Notify HR immediately if you have not received payment.

**Can you tell me about state parental leave?**

- Some states offer a supplement for the birth of and/or bonding with a child, both for Primary and Secondary Caregivers. Please reach out to HR for more details.

**Do I continue to accrue vacation while I am on parental leave?**

- Yes, during the period of your paid leave. However, if you are on unpaid leave at any point you will not accrue vacation during that period.

**During my period of leave there will be a few Kanopi Studios holidays, will this be added to my period of leave?**

- No, during Parental Leave you are not eligible for Kanopi Studios holidays, nor will statutory holidays extend your parental leave.

**What about other benefits like my medical insurance payments or 401(k)? Will contributions still continue?**

- Kanopi Studios will continue to pay its portion of the health insurance premium for the period of your Parental Leave, provided you continue to pay your share of the premiums.

- If you end up taking any unpaid leave, you must send us premium payments before the beginning of each month to maintain coverage. This can also be settled prior to going on leave. Let HR know what your preference will be.
- As long as you are on leave paid by Kanopi, you will continue to contribute to your 401(k) plan. Your contributions will stop during any unpaid leave period. Deductions will continue once you return to work.

### **How do I go about enrolling my new child on my medical insurance?**

- The hospital should provide a “Birth Letter,” which will include a confirmation of the date of birth and full name. You’ll get this well before a social security card or birth certificate. Please forward this to HR within 48 hours of birth.
- In the case of adoption, you will need to supply a copy of the Decree of Adoption within 30 days the adoption becoming final.
- Once you have the official birth certificate and social security number please forward them to HR to finalize your child’s enrollment in benefits.
- Don’t forget to also adjust tax forms if needed and adjust any benefits where you would like to make your child your dependent.

### **Will I be required to complete timesheets during my leave?**

- Not exactly. We will work together ahead of time to enter your time in Harvest and account for your leave!
- Your time off will be plotted according to the schedule communicated and agreed upon prior to the start of your leave.

### **Will I have access to my Kanopi Studios email while on leave?**

- This is up to you. Most parents taking this time off retain access. That said, this is time to focus on your family - you are not required to check or respond to work-related emails during your time off.

### **What is the process if I wish to request additional unpaid leave or return to work on an adjusted work schedule?**

- If you want to modify your leave while you are still out, please talk to your manager and HR with as much advance notice as possible before your scheduled return date. Project requirements will be taken into account, but each request will be addressed and Kanopi Studios will try to be as accommodating as possible.

## SECTION 4: TOOLS

### Daily Communications: Slack

At Kanopi, we use Slack all day, every day as a communication tool for the company as a whole, for our project teams, for varying interest groups, and individually. It's the first place we say "hi" in the morning, and the last place we say "bye" at the end of the day. We share everything from project updates, to important information, to videos of our kids and furbabies - so learning how to use Slack in a way that makes sense for you and for Kanopi is what this policy hopes to cover!

It is important to note that Slack is an asynchronous tool - just because we are using a direct messaging tool as a means to communicate doesn't mean that people can always get back to us in real-time! Please try to be considerate of others' needs to be heads-down, and let them know within the message if your ask has urgency or a deadline.

#### Slack Best Practices and Etiquette

##### Setting up Slack

- If you've never used Slack, it may be helpful to read through Slack's [Onboarding Checklist for New Users](#) and [How to get Started](#)
- When you start working for Kanopi, you will be set up in our Slack account - [kanopi.slack.com](https://kanopi.slack.com)
- We ask that you set your Slack Channel up according to the Kanopi Color Scheme:
  - Go to Preferences > Sidebar Theme > Custom Theme, then paste the following:
  - #3E873D ,#94D60A ,#30752F ,#FFFFFF ,#266C24 ,#FFFFFF ,#FFFFFF ,#OC563E

##### Best Practices

- Use the **#in-out-around** channel to tell us when you are in for the day, stepping out during the day, or leaving for the day (and don't forget to set yourself as "available" or "away")
- Use the **#random** channel for general messages and visibility. Think of this as Kanopi's water-cooler, if you will
- Use the **#kanopi\_chat** channel for company wide general messages and visibility. Think of this as Kanopi's office intercom
- Set your personal notifications to notify you when you are mentioned by another person
- There are ways to be specific when messaging - you can use:

- **@NAME** to direct your message to a specific person within a channel
- **@channel** to direct your message to an entire channel (please - use this sparingly...)
- **@here** to direct your message to team members in a channel who are currently active
- **@mgmt** to only message people in the management group within a channel
- **@pm** to notify the project managers
- **@design** to notify the creative crew
- **@devs** to notify the developers, **@drupaldevs** for the Drupal developers, **@wordpress** to notify the WordPress developers

## Etiquette

- Keep messages concise - Kanopi team members are always multitasking!
- **Mute your notifications** when you are on a video or phone call, so the other people you are talking to aren't distracted
- Make sure to set yourself to **Active** when you are online, and **Away** when you step away, so that team members know if you are online
- There are specific channels relating to topics (i.e. clients, employee landing pages/"lands", or entertainment); be sure to post in the appropriate and relevant channel for the topic
- If you really like something someone says - try reacting with emojis! It helps the OP see you've read their note, and it's one less notification for an already-busy person
- Mute channels that aren't essential. Knowing others may have their channels muted to all but direct mentions, always use the person's @ tag so they'll get an alert and see your question/comment
- There may be times when a voice or video call is the better way to go! Let the person know you'd like to jump into a quick call, type /zoom and jump into a meeting!
- Set a Status as much as possible so at-a-glance people can see if you are online but in a meeting or heads down

## Slack Hacks

- To set reminders for yourself, type **/remind me at [time & date] to [ task]**
- Anything of great importance can be added to Teamwork or Evernote - add the Teamwork or Evernote integrations to do this
  - Once you're connected, select the 3 dots / tool icon to take a note or set up a task

- **Shift + Esc** will clear **all** your notifications
- On Macs, **Apple Command + K** will open a search bar where you can type the channel or person you wish to write your conversation in (no more sidebar scrolling)

### Your 'Land'

All Developers and Designers are assigned a "land" in slack that is specific to them. All managers and PMs are assigned to that 'land' - it is a place where those individuals can reach out to you, you can reach out to them, and all managers can see what the other managers are asking you for.

*Note: If you need to send a private message outside of your 'land,' you can 'direct message' individuals or groups by selecting the + next to 'Direct Messages' and typing the names of folks you'd like to talk to.*

### Kanopi Common Rooms on Slack

- #being-human
- #brag
- #cool-recipes
- #entertainment
- #kanopi\_chat
- #kanopi\_website
- #kanopi-muzak
- #kanopi-book-club
- #in-out-around
- #random-chat
- #Dev
- #opensource-camps
- #fitness-n-health
- #resourcing
- #support
- #thanks (this channel is directly related to "[HeyTaco!](#)")
- #kanopi-pets
- #ravelers-n-crafters
- #true\_crime
- #scrum

### HeyTaco! in Slack

In order to recognize others' contributions, have a little fun, and celebrate, we use "HeyTaco!" in Slack. Every employee received 5 virtual "tacos" to give out to those folks within the company we are particularly grateful for. Here's how it works!

- Click on the #thanks channel in Slack
- Gift tacos to the person or people you are grateful to, making sure to tag the person, add up to 5 taco emojis, and use one of our core value hashtags to name the value most aligned with your thanks.



- For example: @anne - thanks so much for being awesome! :taco: :taco:  
#BetterTogether
  - This example uses up 2 of your 5 tacos.
- For more than one person: @anne @jill - thanks so much for being awesome!  
:taco: :taco: #BetterTogether
  - This example uses up 4 of your 5 tacos.

Each month, a \$25 gift card of choice is gifted to the person who gives the most tacos, and the persons who receive the most tacos for each of our core values.

In the event of a tie, we pick the person who has given the most tacos and hasn't already won in another category.

## Time-tracking: Harvest

Accurately recording time in Harvest (our time-tracking tool) each week is the responsibility of all billable employees. "Time worked" refers to the actual time spent on a project, performing assigned duties. "Personal time" refers to the time you take for vacation, sick, or personal leave.

If you are billable, it is your responsibility to not only accurately document how your hours are spent throughout the day in real-time, but also to include thorough documentation notes associated with time entries. This is critical to business operations because Project Managers and executive leadership must be able to ensure accurate forecasting, and pull accurate budget reports for clients at a moment's notice. For projects with extended timelines, time logged against tasks impact the percentage complete and can directly affect these timelines if tasks are progressing slower/faster than expected. Therefore, we ask that all employees log hours and related documentation daily.

**PLEASE NOTE: It is not necessary for employees to "Submit Week for Approval" at any time.** We run reports that are not based upon "submitted time."

Harvest timesheets do not include breaks, but should include sick, personal, or vacation hours taken (see descriptions below). Time should be logged in real time, or by the end of the day at the very latest. Authorized personnel will review time records each week, if not daily, and will let you know if they have questions. Timely logging of hours ensures Project Managers have an accurate understanding of project budgets, and that the Operations Team can create and send invoices on time.

The expectation is that most most billable employees track toward 80% billability for their working hours during the week, which means:

- All employees are accountable to log their total maximum working hours each week (this may not always be 40 hours, depending on your employment agreement, so consider that total as the max number of working hours for you).

- If you have been resourced for non-billable or internal work, report that clearly to your manager.
- You have categories (see below) for non-billable items, please be sure you use those appropriately.
- If you take Vacation, Sick Time, or Personal Time, those hours should be logged to the correct time off bucket in Harvest, and also submitted through Justworks (for US employees) or Humi (for CAD employees).
- Please work to meet your target billable hours within that time:
  - Using a 40 hour per week employee as an example: 33-35 billable hrs per week, with an absolute minimum 32 hrs billable.
- While the management team works hard to keep everyone resourced, you have a responsibility to be proactive and make noise if you do not have enough work.
  - Please use your “land” or other appropriate Slack channels to help all managers see your availability.
- You must associate all hours with a project in Harvest as either Billable (to the client) or Internal/Non-Billable Resource (administrative or company-related tasks).
  - For non-billable categories “Email / Slack...” for example, please do not pre-fill time blocks - continue to track time accurately, so we understand your real-time workload.
- All projects are set up with your Kanopi email address - once added, all your projects will automatically show up in your account for time tracking.
- Please log your time in Harvest by the end of each day in manageable entry blocks with substantial supporting documentation, meaning:
  - If you are spending significant blocks of time on one project (e.g. more than 6 hrs), break the time entry into smaller entries (e.g. 3, 2-hour entries) including a short description and the ticket number/details for each.
  - It is not necessary to write paragraphs of documentation, just a strong sentence or two. We need to be able to track and report to the client at any point, which will help us keep a handle on the client, and help keep them out of your hair.
- You will meet with your PM regularly. In this meeting, you share what you did yesterday, what is on the agenda for today, and whether or not you feel blocked.
- Inform your PM as soon as you uncover more scope, a change, an oddity or even a gut feeling that is going to impact the project.

- Make sure that Email, Teamwork, phone, Slack, or other methods of communication are prompt and/or sent within a reasonable time frame (no longer than one business day).
- Post comments and replies regarding the project in a group chat on Slack to avoid siloed conversations.
- Read threads and emails sent to you proactively; look at them before any meetings, and come to meetings prepared with questions and thoughts.

### Using the Harvest Widget in Teamwork

Harvest is Kanopi's time tracking tool, and provides the necessary data for invoices that are sent to clients. A desktop App is available for Harvest, but for any client work it is strongly suggested that time be logged through the Harvest widget within Teamwork tasks. This suggestion is an important one as any time logged to a task in Teamwork then creates a link to that task with the time log in Harvest. This is helpful for management when reviewing logs and can be far more useful and accurate than just adding the ticket ID to Harvest time logs.

- Inline with each task in Teamwork is an orange Harvest button - this will log time for that task with the corresponding project in Harvest. Once you select the icon, the Harvest widget will pop up and you can accurately track the time spent in Harvest.
- Taking this step ensures that anyone can select a ticket in Teamwork and see the amount of time worked against the estimate, without having to do any analysis or reporting. So if there are 5 hours allotted for a task, and anyone needs to see how much time is left, this function allows one to see how much time has already been logged, rather than requiring manual calculation of time from previous entries.
- When starting a timer in Teamwork, be sure to check that the hours are logged to the appropriate bucket in Harvest. For example, if the work is Development related then the time should be logged to the Development bucket in Harvest. Selecting the appropriate bucket ensures the project budget is reflective of the hours logged to date.
- All time should be logged as the work is being performed, or entered in as close an approximation as possible. **As we bill clients by the minute, we want the hours logged to be reflective of the actual time worked versus rounding up.**
  - This is also true of the "Emails/Slack/Teamwork Review..." task. Emails or messages that are relevant to projects should be tracked against that project, but when tracking time for internal communications, please also track in real-time, with a maximum allotment of 1 hour per day rather than automatically maxing out the task at 1 hour each day.
- If you are asked to contribute to a project in Harvest that you do not see in your Harvest timer, be sure to reach out to Management to be added to the project.

- If at any time you have questions or concerns about logging hours, please reach out to the Management Team.

## Booking Travel

In order to simplify Kanopians' business travel experience and reduce confusion surrounding travel, we collaborate on the travel booking process. All employees traveling on behalf of Kanopi Studios must book all company travel using these guidelines.

### Guidelines and Best Practices for Bookings

- Review and choose several flight and accommodation options that make the most sense for your upcoming business travel.
- Contact [Morgan Eck](#) to discuss options - she will go through the process of booking flights and hotels for you based upon Kanopi's budget and using a Kanopi payment method.
- Flights should be booked as Round Trips.
- If you are sharing a room with another staff member - be sure to connect both parties with one room!
- Once booked, please ask Morgan to add all your upcoming travel to your Google Calendar as a separate entry for all your travels.
- For any policy-related questions feel free to contact our Kanopi Admin-Ops team at [hello@kanopistudios.com](mailto:hello@kanopistudios.com).
- Please review our [policy on submitting expenses](#) for guidance on expenses related to travel.

## Project Management: Teamwork

In order to stay on the same page with all of the projects moving through Kanopi Studios, we use [Teamwork](#). Teamwork creates a foundation for project management and team collaboration around tasks, and allows us to work with each other and our clients in real-time on all of the moving parts of a project. Every Kanopi employee will be set up with a Teamwork account on their first day of work, and are expected to familiarize themselves with the platform. Some important notes include:

- Kanopi team members will be added to projects they will be contributing to. In the event you are asked to work on a project you do not have access to in Teamwork, be sure to notify the relevant Project Manager to get access.
- If a client contact has a Teamwork account, all communication should take place through the Teamwork messaging system. This is so a paper trail exists for key conversations around the project, and so that all team members can reference this information as needed. Email is not necessarily accessible to all.

- Like messaging, all files and external links referenced throughout the course of the project should be added to the project's File and Link section respectively. This is for ease of use, and so that any team members added to the project can easily track down these resources.
- When appropriate, be sure to use the privacy settings when sending messages, adding comments to tasks, or uploading files and links. This ensures these items are seen only by the appropriate individuals.
- Ensure your tasks are up to date and accurately reflect the status of the work. Teamwork can quickly become cluttered and make it difficult for other Kanopi team members, and clients to get a sense of where the work currently stands. Keeping your tasks up to date makes sure that your latest work is clearly visible to others.
- Be sure to consult with your Project Manager to better understand the appropriate workflow of tasks for your project.

## SECTION 5: CONFERENCE AND PROFESSIONAL DEVELOPMENT POLICIES

### Conference Attendance Policy

#### Purpose

Employees are encouraged to attend conferences in order to deepen their professional knowledge, spread the word about Kanopi Studios to potential employees or clients, and network within our industry. The following policy outlines guidelines for any employee ("the Employee") who might attend a conference under the Kanopi Studios ("the Company") name, as a representative of the Company (as an employee or contractor) and/or at the expense of the Company. This policy should be read in conjunction with the Company's [Expense Reimbursement Policy](#), which outlines how and under what circumstances expenses should be submitted and will be paid to the Employee, and by the Company.

Please note: Attending a conference as a speaker does not automatically change the terms of the following conference policy. At Kanopi's discretion, management may send employees to additional conferences that align with Kanopi's strategic marketing initiatives.

#### Conference Attendance Budget

Kanopi will reimburse each employee up to \$2000 total per calendar year for the cost of conference expenses relevant to employees' current professional path and/or responsibilities. Please note the following:

- This benefit goes into effect 90-days following the employee's date of hire, unless otherwise approved by Kanopi management.
- Conference budgets are "use it or lose it" within 1 calendar year (January - December) and will be prorated during first year at Kanopi.
- Conference budgets do not roll over, and employees are not paid out any part of the budget that is unused.
- Kanopi will allocate a maximum of 5 days' paid leave to cover employee outages while attending approved conferences.
- Conference dollars and paid leave will not be re-allocated for other purposes if they are unused.

If conference costs exceed the allocated budget, the employee may do one of several things:

- Cover the overage personally, or
- ask that management review and assist with the overage. Reviews will be done on a case-by-case basis, and do not guarantee that Kanopi will cover the overage.

## Conference Attendance Approval

An employee wishing to avail themselves of this benefit must submit a request at least 4-6 weeks in advance via email to their manager. PLEASE NOTE: conference approval is 'first come, first approved' - you must receive explicit approval from your manager in order to consider a conference request approved.

Our hope is that conference attendance will speak to Kanopi's pillars, meaning that attendance will:

- Contribute to our subject matter expertise within the industry;
- present Kanopi as an environment encouraging knowledge sharing and inclusion; and
- promote business development opportunities for the company.

When submitting a request, the email must include the following details:

- Name of the organization;
- full amount of ticket price;
- Timeline
- link to the dues & membership page of the website;
- a brief description of any presentation submissions; and
- a brief description of both the professional justification for, and benefits obtained as a result of this expense.

After confirming that the request has met all the requirements of this policy, the employee's manager will forward the email to Operations staff with a quick note of support for the request. Final approval will be communicated to the employee; following approval, individuals may obtain reimbursement by submitting an expense report with proof of payment attached.

## Travel and Expenses

Please review the Company's [Expense Reimbursement Policy](#) for more information regarding the following:

- Process for submitting expenses;
- Expense approval;
- Reimbursement when using ground transportation, or while using a personal vehicle for approved business duties (including parking and mileage costs);
- Team or group meals and individual meal per diem;
- Non-reimbursable items; and
- Time-tracking.

Any expenses that may be outside the scope of typical expenses (such as picking up the tab) should be discussed and pre-approved by the employee's manager.

### **Paid Leave and Conference Attendance**

Kanopi will allocate a maximum of 5 days' paid leave to cover employee outages while attending approved conferences. Employees must use PTO or unpaid time off for any days needed to cover additional time off related to conference attendance.

### **Conference Policy and Community Contrib**

We know that some of our employees spend their personal time doing open source work to make WordPress and Drupal better! In order to encourage those efforts, we've created a separate policy regarding Kanopi's support for our employees' community contrib work. [You can find that policy here!](#) Sprinting or contribution work is required of developers who are attending events on their training budget. Please talk to your manager if you have any questions about the ways we will commit to fostering your endeavors while you give back.

### **Code of Conduct**

Acting as a representative of the company means that an employee's conduct for the duration of the conference, whether as an attendee or a booth attendant, reflects upon the Company and on the community as a whole. By agreeing to attend or work a conference at the expense of the Company, the Employee agrees to the following:

- Attending scheduled conference sessions on time and in full.
- Being an active participant in any scheduled conference proceedings.
- Reporting to sessions, functions, or their position at the booth on time, alert, and with a presentable outward appearance.
  - For purposes of clarification, "presentable outward appearance" means the Employee should be neatly groomed, business casual or Kanopi-branded attire, and be clear-headed and tidy while attending conference-related events.
- Keeping in mind that they are functioning as a representative of the Company at all times during a conference, including their personal time. Therefore, it is important to assume and maintain a high level of personal responsibility and professionalism, including:
  - Following all local laws, rules, and instructions;
  - Behaving in a professional and dignified manner while attending conference-related activities;
  - Using good judgment, even while conducting activities on the employee's own time; and
  - Being mindful and responsible if consuming alcohol or other substances.



## Attending Conferences - Roles and Responsibilities

While attending a conference, or working a booth on behalf of the Company, employees should assume the following responsibilities, and follow their associated processes:

### Attending Conference Sessions

- While attending conference sessions, you must:
  - Show up on time to each session
  - Take notes while in attendance or share ideas, learnings, etc with Kanopi
  - Report back to the Kanopi Team about what you learned

### Booth Duties

- Each Kanopi Team member attending a conference will be assigned to work at the Kanopi booth during specific timeframes. The following are responsibilities that team members must adhere to:
  - Arrive to the booth in a timely manner at the beginning of your shift
  - Booth setup, including monitor hookup, setting out tchotchkes, business cards, etc.
  - Laptop or monitor setup, when needed for branded presentations
  - Talking to potential contacts throughout each shift
  - Booth cleanup at the end of each day - removing garbage, putting materials under the table, and properly storing valuables
- Employees should remember to keep all conversations, even those with colleagues, professional. There should be no eating or consuming alcohol or other illegal substances while working the booth.

### New Contacts / Leads / Business Cards

All contacts should be processed in real time by sending an email with the card to [sales@kanopistudios.com](mailto:sales@kanopistudios.com) - if that is not possible, you must email them in within 3 business days of conference completion.

- The Employee should:
  - Write context of the contact on the back of the card (potential developer, support client, RFP coming, etc)
  - For hot leads that require immediate follow up (sales lead, partner, talent, etc), the Employee should photograph the contact's business card, then email to [sales@kanopi.com](mailto:sales@kanopi.com), including any relevant notes / follow up activities.

Failure to comply with the guidelines outlined in this policy may lead to disciplinary action or termination.

## Submitting Expenses

The Company will reimburse contractors and full-time employees for some expenses, as per the policy below. Expenses not outlined below will be discussed on a case-by-case basis; employees and contractors should make no assumption of approval if they have not followed the guidelines outlined below.

Contractors and employees must submit an expense form in order to be reimbursed. All receipts must be submitted to [accounting@kanopistudios.com](mailto:accounting@kanopistudios.com) along with the expense form within 21 days of purchase, or 14 days following conference or business-related travel. Expenses submitted after that time period will not be accepted for reimbursement.

The following rules apply to expense reimbursement:

- Contractors must receive express written permission for all expenses prior to expense form submission. NO EXCEPTIONS.
- Employees may submit up to four (4) paid hours per day for any Kanopi-related ground transportation travel relating to client meetings and company errands.
- Reimbursement while using a personal vehicle for approved business duties, including:
  - Parking costs: as long as a receipt is submitted in line with the expense reimbursement procedure for short-term parking only (daily for the purpose of transportation to and from an event per day)
- Travel via Uber or taxi:
  - Will be covered by Corporate Credit Card account owners (Anne, Jill, Darlyne and Kat), if they are present at the time of travel.
  - Should be submitted as part of an expense form, including associated receipts.
- Travel via personal transportation (per government standard):
  - For US Employees: will be reimbursed at a rate of \$.58 USD per mile driven
- Team or group meals will be covered by Principals (Anne or Jill) if they are present at the time of the meal.
  - Meals occurring on days of business travel that are not covered by Kanopi directly should be submitted using the Employee Expense Form, and will be reimbursed at the following rates per day (not including charges for alcoholic beverages):
    - Breakfast - \$10

- Lunch - \$15
- Dinner - \$25
- Any food and travel receipts are to be retained and submitted to [accounting@kanopistudios.com](mailto:accounting@kanopistudios.com) no later than two weeks from the end of the conference or business trip for reimbursement.
- Employees will not be reimbursed for alcoholic beverages.

### Receipt Imaging Requirements

1. Expense receipt images should be sharp, clear, and legible. Dark or blurry images are not acceptable.
2. Expense receipt images must be true, authentic representations of the original receipts or documents.
3. Expense receipts and supporting documentation must be individually imaged and attached to the expense report. Multiple receipts should not be grouped and scanned to a single image.

### Non-Reimbursable Items

The following items are not reimbursable for Contractors or Full-Time Employees without express written authorization:

- Fees related to missed flights or ground transportation, or related overnight accommodations if the original travel itinerary was missed as a result of employee error (oversleeping, sightseeing, personal errands, etc.)
- Long-term/overnight parking where the vehicle is idle for several days in between.
- Fines related to parking, towing and traffic violations
- Expenses related to the set-up or upkeep of a personal office environment, including but not limited to furniture, office supplies, or utilities
- Expenses related to mobile phones, monthly internet, or mobile networks
- Fees for rented co-working spaces
- Passport fees (for new or renewed passports)
- Expenses related to animal boarding
- Expenses related to childcare
- Expenses incurred by spouses or other non-employees who accompany our employees on their travels
- Unauthorized service upgrade (e.g. business class or hotel rooms)

- Personal services (massages, beauty treatments, etc.)
- Personal purchases (gifts, clothes, etc.)
- Lost personal property (e.g. luggage)

### **Time Tracking (Full-Time Employees Only)**

Please log all-time in Harvest under the following categories when attending conferences and in-person client meetings:

- Approved Travel - travel to a conference or client meeting
- Training - attending training sessions
- Marketing - working in the Kanopi booth

### **Community Contribution Policy**

Kanopi encourages employees to give back to the Drupal and WordPress communities in whatever way is meaningful to them. We provide some time on the clock during the workweek for these initiatives — they are that important —but we also have rewards available to the contributions employees make on their own time. So read on for details as to how you can get involved, give back... and earn fabulous prizes!

#### **Contribution During the Workweek**

Kanopi allows our employees to log one hour per week during the workweek to community contrib work. This time should be billed in Harvest to the task Full Time 2019 > Community / Training (max 4 hours per month). Please note, this hour per week does not count toward the Contrib Program Rewards mentioned below in this policy.

What can you do with your one hour per week? So many things! Try these [30-minute contribution ideas](#) for starters. Kat White or AmyJune Hinline are also full of ideas on ways to help.

#### **Contribution Outside of the Workweek**

We appreciate that sometimes making an impact requires employees to invest their personal time. And we want to reward Kanopians for giving back to the community! So in the long term, contribution work that employees do on their own time earns them opportunities to garner fabulous prizes (and some bragging rights, too).

We are already paying attention, so if you've got community time you've contributed outside of the workweek this year, feel free to submit it via Geekbot in Slack.

#### **Please Note**

- Communication is key! Please remember to speak with your manager, and ensure that contrib activity is approved and counting toward your hours per quarter.

- Communication is key! Please remember to speak with your manager, and ensure that contrib activity is approved and counting toward your hours per quarter.  
\*\* We reserve the right to deny a contrib activity request based on business needs.
- Employees will not be paid out for unused reimbursements, and will not be permitted to allocate funds elsewhere.

## Contrib Policy FAQs

What is a ProDev Day?

Think of it as a vacation day or an appointment day that's dedicated to professional development. So just like you'd take a half day to go to the dentist, you can take a half day to attend a webinar.

What if I'm not billable right now and have too much free time?

You may spend more time on your community work if you are completely out of billable tasks. However, this must be approved by your manager. Please do not log contrib time in excess of your target 40 hours per week in Harvest; doing so skews reporting for management and makes it difficult for us to get a sense of actual utilization across the company.

If I'm meeting my billable and workweek goals, can I log contributions over four hours a month to Community work?

Sure! We love to see what you're working on in the community, and it's helpful to have a sense of how much time you're spending in this area. But again, please don't bill in excess of 40 hours a week (see above). When it comes to calculating hours spent on contrib work across the company toward rewards, we'll use Geekbot in Slack for our calculations -- not Harvest.

But I have nothing to contribute. I'm not a ... What can I do?

If you're not a ... that, you're still a "something else. And that something else is awesome. So there's always a way you can contribute.

For Coders

- Forum presence
- Open sourcing Kanopi code and/or utilities
- Issue Resolution/Patch submission
- Module maintainer status
- Contribution Sprints
- Attending DUG meetings

For Writers

- Documentation updates

- Blog posting (technical, d.o cross-linking, solving common problems)
- Documentation maintainer status

#### For Speakers

- "Speakers" is an all-inclusive group. Everyone who touches Drupal and supports the creation and maintenance of Drupal projects can speak about their experience
- Local DUG presentations
- Camp sessions/presentations/panels
- Conference sessions/presentations/panels
- Submitting any kind of session

#### For Planners

- Organizing DUG events
- Organizing Camps
- Volunteering at events
- Facilitating BOF Sessions

#### How do I report activity done on my own time (and rack up points)?

Talk to Geekbot! Send it a DM in Slack that says report contrib and it'll hook you up. Geekbot will ask you the following questions:

- How have you contributed lately?
- Please give me details (pictures, links, etc)!
- How much time did you spend on your contribution?  
All you have to do is send Geekbot the links, photos (we love photos) or documentation associated with your contributions. Depending on the activity type, we'll credit you with a number of points. And when you're ready, you can spend those points to earn fabulous prizes!  
And while we said not to bill more than 1 hour of Kanopi timesheet time in the average week (for idle time, again, talk to your manager first) -- we want all of your contrib time in Geekbot! Rack it up!!

#### What are the contribution tiers (and prizes!)?

Minimum Tier - The Online Learner (2-6h per quarter)

Two hours of extra ProDev time and a \$100 contribution-related fee reimbursement



Medium Tier - The Workshopper (6-12h per quarter)

Half a ProDev day and a \$250 contribution-related fee reimbursement

Maximum Tier - The Happy Camper (12h+ per quarter)

One extra ProDev day and a \$500 contribution-related fee reimbursement

## SECTION 6: LEGAL POLICIES

### Equal Employment Opportunity (EEO)

At Kanopi, we believe a variety of backgrounds, experiences, and voices make for a better workplace. We strongly and enthusiastically encourage people of color, individuals who identify within and beyond the LGBTQ+ spectrum, women, and people with disabilities to apply for any open position we have. We are committed to interviewing and hiring qualified candidates regardless of any protected status, including but not limited to: religious beliefs, age, race, creed, marital status, gender, sexual orientation or identification, ethnic origin, family status, veteran status, military service or affiliation or disability. This commitment applies to all areas of the work environment, all employment activities, resource allocation, and all employment terms and conditions. Selection criteria and procedures aim to ensure that employees are selected, promoted, and treated fairly, based on relevant merits and abilities.

### Affirmative Action Policy

In support of Diversity in the workplace, Kanopi is committed to a policy of nondiscrimination and equal employment opportunities. Our policy is to ensure that the recruitment, selection, retention, compensation, training, transfer, promotion, and all terms and conditions of employment of all employees are made on the basis of Job-related qualifications and job performance and in conformance with the principle of equal employment opportunity for all.

It may be necessary to change these policies from time to time to reflect changes in the workforce, employment trends, economic conditions, and legislation. However, any changes in policy will be consistent with the Company's approach to:

- Employing talented individuals whose creativity and imagination will support and contribute to achieving the Company's business objectives;
- Communicating the Company's standards and expectations in all aspects of employment including performance;
- Valuing diversity, and assure equal employment opportunity and a workplace where relationships are based on mutual respect;
- Treating all staff, workers, contractors and customers in a professional, non-discriminatory manner;
- Providing safe, efficient working conditions; and
- Providing competitive terms and conditions in our workplace market.

Any policy changes will be fully consulted on and communicated to all staff through normal communication channels.

### Americans with Disabilities Act (ADA)

Kanopi is committed to ensuring equal employment opportunity for qualified individuals with disabilities. The Americans with Disabilities Act (ADA) and the Americans with Disabilities



Amendments Act, known as the ADAAA, are federal laws that prohibit discrimination against qualified applicants and individuals with disabilities. The ADA defines “disability” as a physical or mental impairment that substantially limits one or more of the major life activities of an individual, a record or such impairment, or being regarded as having such an impairment. The Company recognizes its duty to provide reasonable accommodations to qualified individuals with known disabilities. It is the policy of Kanopi to comply with all federal and state laws concerning the employment of persons with disabilities and to act in accordance with regulations and guidance issued by the Equal Employment Opportunity Commission (EEOC). Furthermore, it is our company policy not to discriminate against qualified individuals with disabilities in regard to application procedures, hiring, advancement, discharge, compensation, training, or other terms, conditions, and privileges of employment.

It is your responsibility to inform the Company if you are disabled and feel that an accommodation is needed in order for you to perform the essential functions of your position. If you feel that such an accommodation is needed, please talk to your manager, Kanopi’s Director of Human Resources, or a Kanopi Principal.

## Domestic Partnerships

The Company recognizes domestic partnerships in the following way:

- Domestic partners are defined as Same-sex couples or opposite-sex couples who:
  - Officially registered with any state or local registry, and
  - verify their relationship in the same manner as spouses
- All policies which apply to spouses apply equally to domestic partnerships
- All policies which apply to children or stepchildren apply equally to the children of domestic partners
- All family-related policies and benefits apply to spouses and domestic partners equally

## Policy Against Harassment, Bullying, and Violence

Kanopi is committed to providing a workplace free of harassment based on factors such as race, color, religion, national origin, political affiliation, ancestry, age, physical disability, mental disability, medical condition, marital status, sexual orientation, gender identity and expression, family care or medical leave status, or veteran status. The Company strongly disapproves of and will not tolerate harassment among its staff or harassment by its employees or non-employees with whom Kanopi has a business, service, or professional relationship.

**Workplace harassment** includes offensive conduct that either creates a hostile or offensive work environment or results in an adverse employment decision (such as being fired or demoted). **Sexual harassment** includes unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature. **Bullying** includes repeated, health-harming mistreatment of one or more targets by one or more perpetrators. It is abusive conduct (oral or interfering with the work of another) that is threatening, humiliating, or intimidating or prevents work from getting done.

We strongly disapprove of and will not tolerate workplace harassment, sexual harassment, or bullying of, toward, or by our employees or any persons with whom Kanopi has a business, service, or professional relationship.

Workplace or sexually harassing behavior includes but is not limited to:

- Verbal, physical, written, or visual conduct or content that creates intimidating, offensive, or hostile working conditions.
- Behavior that interferes with work performance, or implies that submission to the conduct is either an explicit or implicit condition of employment.
- Employment decisions based upon submission to or rejection of harassing behavior.
- Impeding or blocking another's movement or otherwise physically interfering with work.
- Any behavior that creates an intimidating, hostile, or offensive work environment.
- Sharing slurs, jokes, pictures, drawings, cartoons, statements, or gestures interpreted as offensive, lewd, or discriminatory.

Bullying behavior includes, but is not limited to:

- Spreading malicious rumors, gossip, or innuendo.
- Excluding or isolating another socially.
- Intimidating, threatening, or abusing another person.
- Undermining or deliberately impeding a person's work or professional growth.
- Establishing impossible guidelines or deadlines that will set up the individual to fail.
- Withholding necessary information or purposefully giving the wrong information.
- Assigning unreasonable duties or workload in a way that creates unnecessary pressure.
- Yelling or using profanity.
- Criticising a person persistently or continuously.
- Belittling a person's opinions.

Employees who experience or witness the behavior outlined in this section are asked to report the behavior as outlined in the "Reporting Harassment, Bullying, or Violence" section as quickly as possible. Any employees or contractors engaged in harassing behavior, sexual harassment, or bullying will be subject to an immediate, thorough investigation, as outlined in the "Investigation" section below, which may result in disciplinary action, including dismissal.

### **Workplace Violence**

Likewise, we are committed to providing a safe, violence-free workplace and strictly prohibit our employees, consultants, clients, visitors, or anyone else engaging in a company-related

activity from behaving violently or threateningly. As part of this policy, we seek to prevent workplace violence before it begins and reserve the right to call out behavior that suggests a propensity towards violence even before any violent act occurs.

Please note - just because Kanopi is a virtual company does not mean we do not have to be mindful of workplace violence. We believe that prevention of workplace violence begins with recognition and awareness of potential early warning signs and established procedures for responding to any situation that presents the possibility of violence.

Workplace violence includes, but is not limited to:

- Threatening, physically aggressive, or violent behavior, such as intimidation of others or attempts to instill fear in others.
- A propensity toward violence, which can include a demonstrated pattern of belligerent speech, excessive arguing or swearing, threats, sabotage, or refusal to follow company policies and procedures.
- Destruction of company property or causing physical damage to the facilities.
- Bringing weapons or firearms of any kind on company premises or while conducting company business.

## **Reporting Workplace Issues, Harassment, Bullying, or Violence**

We want all Kanopi employees to enjoy an inclusive workplace that is harassment-free and violence-free. One of the ways we foster this environment is to encourage you to voice issues or concerns you may have without fear of consequence or retribution. In some instances, it might make sense to advise the offender that their behavior is unwelcome or offensive and to request that it stop. However, it is never necessary for you to speak directly to an offender - you may also email or verbally report the incident to your manager. If your manager is the offender, or you are not comfortable discussing the conflict with them, you may contact Erin Linkins, our Director of Human Resources. We would like to stress that you are not required to notify your manager if they are the offender in question.

Regardless of the nature of the offense, HR will be responsible for investigating and documenting the matter. Employees should notify investigators if any restraining order is in effect, or if a potentially violent non-work related situation exists that could result in violence in the workplace.

### **Investigation**

We take all reports of sexual harassment, harassment, bullying or workplace violence seriously and commit to conducting thorough, prompt, and confidential investigations. Investigation of a particular incident may include individually interviewing the accuser, the target (if different from the accuser), accused, and any third-party witnesses, and will take into consideration any other potentially relevant information. We will similarly investigate acts of violence or harassment at professional events, by clients, or by vendors. We will do our very best to maintain the confidentiality of the reporting employee and the details of the investigation but

we may need to disclose results in appropriate circumstances (for example, to protect individual safety).

If we find that sexual harassment, harassment, or violence has occurred, we will take appropriate corrective action. The action will depend on the particular facts of the incident but may include written or oral warnings, probation, reassignment of responsibilities, a performance improvement plan, suspension, or dismissal. If the perpetrator of unwanted behavior is a manager, the employee should report the incident to the most senior member of staff they are comfortable talking to, or to HR, who will investigate and advise the employee as needed.

If the harassment or violent behavior is that of a client, vendor, or similar non-employee, we will take appropriate corrective action in an attempt to ensure that such behavior stops immediately, or we will end the relationship with that person or entity as necessary.

We will not tolerate retaliation in any form against any person who exercises their right to make a complaint. Acts of retaliation should be reported to the employee's manager, a member of the management team, or HR immediately. On investigation, if we determine that an act of retaliation has occurred, we will take appropriate corrective action, which may include termination.

## **Non-Disclosure/Confidentiality**

The protection of confidential business information and trade secrets is vital to the interests and success of the Company. Such confidential information includes, but is not limited to:

- Employee and compensation data, including personnel records, salary information, commissions, bonuses, and any details of employment offer letters or employment contracts;
- Financial information;
- Marketing strategies;
- Pending projects and proposals;
- Future potential client relationships;
- Proprietary production or business-related processes specific to the Company;
- Proprietary client information; and
- Conversations of a confidential nature between any persons associated with the Company.

All employees are required to sign an employment agreement as a condition of their hire.

Employees who improperly use or disclose trade secrets or confidential business information will be subject to disciplinary action, including termination of employment and legal action, even if they do not benefit directly from the disclosed information.



## SECTION 7: EMPLOYEE COMMUNICATIONS

### Email Correspondence

The Company's equipment and resources are intended for the use of serving our customers and in conducting the Company's business. All email correspondence with company domains are intended for business and productivity purposes only. Any use of these email addresses that negatively impacts or reflects the Company, may result in employment termination. Email may not be used for the following reasons at any time:

- Making unauthorized promises in an e-mail
- Making statements concerning race, sexual orientation, disability or religion
- Using the e-mail system to support inappropriate activities
- Sending large attachments to many recipients in the organizations
- Using another person's e-mail account without permission
- Sending non-work related messages that, if released to the public, may hurt the organization

E-mail may be monitored and reviewed regularly for quality assurance. By signing this agreement, every employee acknowledges and understands that the Company reserves the right to monitor and track email use as it sees fit.

### When We Disagree

Successful resolution of a dispute requires an open and honest exchange of information, a willingness to see a situation from a different perspective, and an appreciation for the challenges and expectations of the parties involved. We ask that employees who disagree communicate with a respectful tone when addressing conflict, differences of opinion, or providing/receiving feedback. We feel it is ineffective to be anything but clear and objective when talking about someone's work or someone personally.

We feel that employees should first try to work together to try and resolve their differences, if possible. However, should a discussion or situation merit mediation, please speak with HR for assistance.

### Open Door Policy

Kanopi has an open door policy that encourages employee participation in all decisions affecting them and their daily professional responsibilities. Employees who have job-related concerns or complaints are encouraged to talk them over with their manager, Human Resources, or our CEO. We believe that employee concerns are best addressed through this type of informal and open communication.

Employees are encouraged to raise work-related concerns as soon as possible after the events that cause the concern. Employees are further encouraged to pursue discussion of their work-related concerns until the matter is fully resolved. Although Kanopi cannot guarantee

that in each instance the employee will be satisfied with the result, we will attempt in each instance to explain the result to the employee if the employee is not satisfied. We will also attempt to keep all such expressions of concern, the results of its investigation, and the terms of the resolution confidential. However, in the course of investigating and resolving the matter, some dissemination of information to others may be appropriate or legally necessary.

## **Social Media Policy**

We live and breathe digital communications, both on behalf of our clients and for ourselves. But, like it or not, your social media presence has the potential to reflect on Kanopi's brand. This policy exists to help keep matters straight between the "you" in your social media presence, and the "Employee" while you work for Kanopi. We hope to provide guidelines for keeping that brand professional when facing our clients, prospective hires, colleagues, and the rest of the known digital universe.

### **Social Media, Defined**

"Social media" means any site meant for online social connection and commentary, including but not limited to Facebook, Instagram, Twitter, Snapchat, etc. This policy is in addition to and complements any existing Kanopi policies regarding the use of technology resources. Kanopi employees are (obviously) free to publish or comment via social media per this policy and are subject to this policy to the extent they identify themselves as a Kanopi employee (other than as an incidental mention of place of employment on topics unrelated to Kanopi). All uses of social media must follow the same ethical standards that Kanopi employees must otherwise follow. This policy will not restrict or be intended to limit employees' rights under the NLRA. Kanopi assumes no liability for loss, damage, destruction, alteration, disclosure, or misuse of any personal data or communications transmitted over or stored on Kanopi's technology resources. Kanopi accepts no responsibility or liability for the loss or non-delivery of any personal communications or any personal data stored on any company property.

### **Social and Personal Privacy**

Employees are under no obligation to "friend" Kanopi's CEO, employees, or clients to share or give access to personal information posted online. But, it is important to make sure that your privacy settings reflect your level of comfort with what is being viewed by the public in general. In other words, if you don't want your clients, co-workers, supervisors, or anyone else at the company to see your content, protect yourself and make it private. That said, remember that just because you block specific people from your profile, that does not mean they will not see what you post through a third party who has access.

Employees should be mindful that, during the RFP process, some potential contracts may contain specific rules and regulations regarding social media connections between clients and contractors. Employees, therefore, should consider the possible implications of sending or accepting communications or relationships via social media. When in doubt, please consult with your manager, HR, or our CEO to determine the appropriateness of connecting and communicating with a potential or current client.

## **Social and Professional Privacy**

There may be occasions in which employees choose to or are asked to set up or use social media accounts on Kanopi's behalf. Any account established for us, even those managed on an employee's own time and equipment, should be considered the property of Kanopi, and ownership of the account turned over to Kanopi if and when employment ends, voluntarily or otherwise. If employees collectively share passwords for company social media accounts, ownership of the site as Kanopi property is implicit. Employees should follow the rules and policies governing social media, technology, and Internet usage within our employee manual.

Posts made on Kanopi's behalf, whether during the workday or on personal time, whether on Kanopi's equipment or an employee's equipment, should be considered the property of Kanopi, and subject to the policies governing Kanopi's technology usage and applicable confidentiality agreements. Employees should have no expectation of privacy regarding anything that may pass through or be accessed through company servers, including but not limited to emails, instant messages, or Internet usage history.

## **Maintaining Confidentiality**

Industry reach is important and encouraged, but not at the expense of confidentiality. We ask that employees not share details about our business practices or financial information, nor any unpublished details surrounding current or potential clients, business interactions, or client projects that are either active or in the pipeline.

## **Honesty**

If you are online as a representative of Kanopi, do not post or comment anonymously, use false or misleading pseudonyms or screen names, and do not post information of a false or misleading nature. Use your real name, be clear who you are, and identify that you work for Kanopi. If you are posting personal opinions within a professional forum, when reasonable, you can further protect yourself by posting a disclaimer such as, "the views expressed in this forum are my own, and are not intended to reflect the views of Kanopi Studios."

## **Appropriation**

Never repurpose or quote someone else's work without attributing such work to the original author/source, and never repurpose, post, quote, or otherwise present Kanopi's work in public without the express written consent of Kanopi's CEO.

## **Respectful Commentary and Discourse**

Postings by employees should never demean or denigrate our clients, business practices, or other employees, regardless of either person's position in the company. Speaking of behaviors or attributes in the abstract is okay, and criticizing a client, business practice, or the company may be understandable and even welcome during an internal conversation, but doing so in the social space may be perceived as unprofessional and could potentially be destructive. If you see misrepresentations in the media, it is appropriate to point them out to the offending party. But, remember that you are representing Kanopi when doing so, and therefore should always conduct yourself respectfully and factually.



## Enforcement

Using a social media forum to disparage, threaten, harass, or embarrass Kanopi, our clients, Kanopi employees, or the public in general, is ill-advised and may be investigated or punishable by disciplinary action, termination for cause, or legal action.

## SECTION 8: TECHNOLOGY POLICIES

### Technology Use Policy

Kanopi Studios may provide or support technology resources so that employees can perform their jobs within a distributed company model. Employees and contractors have a responsibility to use resources for Company business in a manner that enhances the value of our work to our clients and the tech community, and is respectful of the privacy of the Company, its employees, its contractors, and its clients. Failure to follow the Company's policies regarding its technology resources may lead to warnings and/or dismissal.

While this policy encapsulates the topline information employees need to know, a complete version of Kanopi's security policy lives [here](#).

### Technology Resources Definition

"Technology Resources" consist of:

- The content of internal and external electronic communications;
- Company-related networks, drives, and related offerings; and
- Business-related hardware and software, either provided to or assigned to employees or contractors, including (but not limited to):
  - Laptops and associated hardware;
  - Peripheral equipment such as keyboards, external monitors, and mice;
  - Computer software, including software that grants access to the Company's internal and external services; and
  - Email, apps, messaging platforms, and associated cloud-based files and data.

### Limits of Liability / Indemnity Provision

The Company assumes no liability for loss, damage, destruction, alteration, disclosure, or misuse of any personal data or communications transmitted over or stored on Kanopi's technology resources. The Company accepts no responsibility or liability for the loss or non-delivery of any personal email, private messages, video communications, or any personal data stored, viewed, or manipulated using the Company's technology resources. The Company strongly suggests that employees and contractors use discretion when storing personal data on any of Kanopi's technology resources.

Contractors and employees shall defend, indemnify and hold the Company, its officers, officials, employees, and clients harmless from any and all claims, injuries, damages, losses, or

suits including attorney fees, arising out of or resulting from the acts, errors, or omissions of the contractor or employee in performance of this Agreement, except for injuries and damages caused by the sole negligence of the Company.

### **Improper Use of Technology Resources**

The Company does not tolerate discrimination, harassment, or illegal activities in any form, or for any reason. Under no circumstances may employees or contractors use Kanopi's technology resources to transmit, receive, or store any information that is discriminatory, harassing, or defamatory in any way (e.g., sexually explicit or racial messages, jokes, cartoons). Similarly, Kanopi's technology resources may not be used to transmit, receive, or store any pirated or otherwise illegally obtained or unlicensed software or content. Employees and contractors should be mindful of activities that could be construed as a conflict of interest or in direct violation of client or other contracts, or of their own Noncompete Agreement. Incidents occurring in violation of the Company's policies will be investigated on a case-by-case basis, and may result in prosecution or termination of employment or contract.

### **Ownership of and Access to Technology Resources**

Employees' access to company data will be limited and granted based on user profiles defined by the Company. All data transmitted in the course of doing business for the Company, and using the Company's hardware, network, email network, and/or cloud systems is considered company property, regardless of the content. The Company reserves the right to access all of its technology resources including its hardware, network, email network, and cloud systems at any time, at the discretion of the Company's owners.

### **Privacy**

Although Kanopi does not wish to examine the personal information or communications of its employees or contractors, on occasion the Company may need to access employees' or contractors' technology resources, including work files, emails, storage drives, or communications. Individuals working for and on behalf of Kanopi should understand, therefore, that they have no right of privacy with respect to any messages or data created or maintained on or through Kanopi's technology resources. The Company may, at its discretion, inspect all files or messages on any of its technology resources at any time for any reason. The Company may also monitor its technology resources at any time in order to determine compliance with its policies, for purposes of legal proceedings, to investigate misconduct, to locate information, or for any other business or legal purpose.

### **Passwords**

Kanopi strongly urges employees and contractors to password-protect their technology resources using strong network passwords, and dual-factor authentication wherever possible. All those doing business with and for the Company should establish and maintain passwords on all systems and software, and strive to maintain confidentiality surrounding those passwords. This means that neither employees nor contractors should share passwords or otherwise make passwords public (e.g. writing the password on a note carried on their person), and must not access colleagues' files without authorization or a legitimate business reason.

Password protection on Kanopi's technology resources should not be considered a guarantee of privacy.

For purposes of clarification, strong network passwords might be anywhere from eight to fifteen characters long, and include a combination of upper- and lower-case letters, numbers and symbols. Passwords should ideally be rotated regularly, and a new password should not repeat previous passwords.

### **Deleted Information**

Deleting or erasing data, documents, or messages maintained on Kanopi's technology resources in an attempt to hide them is, in most cases, ineffective. Therefore, employees or contractors who delete or erase information or messages should not assume that information no longer exists.

### **Software Use**

All employees may use their own software on Kanopi technology resources. Kanopi provides a limited suite of software tools to employees for business use as required by their job functions. Kanopi advocates for the use of open-source, free software wherever possible, and may deny requests for additional software if a viable open-source solution exists. If your position requires the use of specialized software, please escalate the need to your manager immediately.

### **Hardware Use**

Kanopi provides needed hardware to our employees, which is to be returned upon termination and will be repurposed in future when new employees join the team. As such, we ask that employees make every effort to take care of and protect Kanopi hardware by using protective covers or sleeves, and make every effort to secure hardware when possible. Hardware upgrades may occur on a 3-year cycle, which is managed by Kanopi HR, and discussed on a case-by-case basis.

Lost, stolen, or damaged hardware that is the property of Kanopi Studios will be investigated and replaced on a case-by-case basis, and may incur employee cost. In the event of termination of employment, all Kanopi-owned hardware must be returned to the Company immediately, unless other arrangements have been made. It is highly suggested that employees enable device trackers on their hardware, in the event it is lost or stolen.

Kanopi does not provide hardware to contractors.

### **Acceptable Business and Personal Use of Technology Resources**

One of the Kanopi's goals is to foster a work environment that encourages our staff to have the flexibility to use the tools that help them be the most efficient and effective in getting work done for our clients. We understand that, in a distributed work environment, the likelihood is high that you may also want to use your Kanopi-issued device for personal reasons, whether or not you are otherwise engaged in doing company work.

For purposes of clarification, the Company defines "acceptable business use" as activities that directly or indirectly support Kanopi's business or clients. The Company defines "acceptable

personal use” as reasonable personal communication or recreation, such as gaming, messaging, or personal Internet usage.

If there is a significant concern about security or appropriateness of content or applications, employees may be asked to refrain from using certain applications or protocols during work hours/while in video conferences.

### **Inappropriate Use of Technology Resources**

While using Kanopi’s technology resources, or while working on the Company’s behalf, devices may not be used at any time to:

- Transmit illicit materials;
- Unlawfully transmit proprietary information;
- Harass or discriminate against others;
- Engage in business activities that may be considered competitive or in violation of an employee’s signed policy agreements; and/or
- Engage in activities that compromise Kanopi’s business, or the business of our clients.

### **Using Personal Devices**

Employees and contractors may use personal devices to access any of Kanopi’s technology resources, including but not limited to email, calendars, shared drives, data, and messaging tools. Any personal devices should be considered supported by this policy.

- Employees and contractors should adhere to the following protocols when using personal devices:
  - Create separate work accounts for tools and online applications, using a dual-authenticated Google Apps login.
  - Use a dual-authenticated login for your Github account to gain access to Kanopi’s code repository.
  - Password protect any and all devices, even personal hardware, if you intend to conduct Kanopi business on them.
- Individuals within the Company may be able to assist with personal device issues related to work and company-based connections or apps, but employees should not maintain the expectation that any and all hardware or software issues on personal devices can be fixed by our resources.
  - Employees and contractors are liable for all costs associated with the repair, maintenance, and use of personal devices.
  - Employees and contractors assume full responsibility for risks while using personal devices, including, but not limited to the partial or complete loss of personal data due to an operating system crash, errors, bugs, viruses, malware,

and/or other software or hardware failures, or programming errors that render the device unusable.

- Knowing that employees and contractors will take personal devices outside of designated teleworking environments, it is strongly recommended that the devices themselves are password protected following the manufacturer's best practices. We also strongly recommend that your personal device lock itself with a password or PIN if it's idle for more than five minutes.
  - In the event that a device is lost or stolen, the only ability the Company may be able to recommend to safeguard company data is via a remote wipe. Employees should report lost or stolen devices to HR as soon as possible after the loss, prepare to discuss the work-based applications and data on personal devices, and understand that the Company assumes no liability for personal data that may be lost during a remote wipe.
- The Company reserves the right to disconnect devices or disable technology resources without notification. In the event of an employee's voluntary or involuntary termination, or the end of a contract, the Company may restrict employee or contractor access to company data. HR will make every effort to work with employees to selectively wipe company information from personal devices, when and if applicable, prior to or shortly after the employee's last day. The Company will make every effort to protect personal data, but assumes no liability for personal data that may be lost when an employee is disconnected from technology resources.
- Employees or contractors should use all business-related devices in an ethical manner at all times and adhere to company policies and standards of conduct as outlined in all Kanopi agreements and policy documents.

## Security

Given that personal devices travel outside the walls of your home or our offices, we strongly advise that employees protect their devices in the following ways:

- Set your device to lock itself with a password or PIN if it's idle for more than 5 minutes.
- Use full drive encryption, if it is available.
- Configure your device for remote administration, so you can delete the contents if it is lost or stolen.
- Report lost or stolen devices to HR or your manager as soon as possible after a loss, and prepare to discuss the work-based applications and data on personal devices.
- In the event of an employee's voluntary or involuntary termination, we will immediately restrict employee access to company data.

## Risks/Liabilities/Disclaimers

- We reserve the right to disconnect devices or disable services without notification.

- We ask employees to use devices ethically at all times and adhere to the company's acceptable use policy as outlined in this manual.
- Employees are liable for all costs associated with their own devices.
- We grant and limit employees' access to company data based on user profiles defined by our CTO.
- Kanopi reserves the right to take appropriate disciplinary action up to and including termination for noncompliance with this policy.