



**Family and Romantic Relationships at Work Policy - Management Plan**

On October 23, 2018, the Monterey County Board of Supervisors adopted a policy on Family and Romantic Relationships at Work. The policy prohibits employees from directly supervising related persons as defined in the policy. The policy also provides that it is best practice that employees not indirectly supervise related persons, but provides for exceptions on a case-by-case basis. If a department cannot remove a conflict for operational reasons in an indirect supervision situation, the department “shall formulate a management plan to address the indirect supervisory relationship while minimizing impact on the employees involved.”

The Choose an item. (department) has learned that Click or tap here to enter text. (Related Subordinate) and ( (Related Supervisor) are related persons as defined in the policy.

- Related Supervisor indirectly supervises Related Subordinate.
- Related Supervisor does not currently supervise Related Subordinate, but the department intends to make Choose an item. change that would result in Related Supervisor assuming an indirect supervisory role regarding Related Subordinate.

The department’s Personnel Analyst or Human Resources Manager and Department Head has evaluated the relationship between Related Supervisor and Related Subordinate and has determined that Choose an item. with the policy. For operational reasons, however, the department has determined that it cannot remove the conflict.

Management Plan Procedure Section VI. of the policy requires the department to prepare a management plan in such a situation. The plan allows Choose an item. by reassigning employment decisions for Related Subordinate to someone other than Related Supervisor, as identified below, so that Related Supervisor does not make, participate in making, or influence any employment decisions regarding Related Subordinate.

**I. EMPLOYEE INFORMATION**

Related Subordinate			
Name:		Job Title:	
Employee I.D. Number:		Department:	<u>Choose an item.</u>
Division/Unit:			
Related Supervisor			
Name:		Job Title:	
Employee I.D. Number:		Department:	<u>Choose an item.</u>
Division/Unit:			

**II. SITUATION ASSESSMENT**

Describe the <u>Choose an item.</u> reporting relationship between Related Subordinate and Related Supervisor, and identify all supervisors in the chain of command between them.
Explain why it is not operationally feasible to remove the reporting relationship between Related Subordinate and Related Supervisor.

**III. CONFLICT RESOLUTION PLAN**

Check all employment decisions Related Supervisor currently makes, participates in making, or might influence regarding Related Subordinate.	
<input type="checkbox"/>	Assigning work
<input type="checkbox"/>	Preparing, conducting, or contributing information to a performance evaluation
<input type="checkbox"/>	Initiating an administrative investigation or discipline
<input type="checkbox"/>	Promoting, transferring, re-assigning or layoffs
<input type="checkbox"/>	Approving overtime or any other compensated time
<input type="checkbox"/>	Approving vacation, sick, or other leave time
<input type="checkbox"/>	Granting or denying permission to attend a conference or other work-related event
<input type="checkbox"/>	Approving reimbursement for work-related expenses
<input type="checkbox"/>	Other, describe below:
Identify the employee who will make, participate in making, or otherwise influence the above-selected employment decisions regarding Related Subordinate in place of Related Supervisor. If multiple employees are assigned to make decisions the plan must identify each of them.	
Name:	Job Title:
Employee I.D. number:	Department: Choose an item.
Division/Unit:	

Provide below any additional information about how the reporting structure will be modified, or the reason it does not need to be modified.

Explain how the management plan minimizes impact on the related persons.

#### IV. OTHER TERMS OF THE MANAGEMENT PLAN

The department may periodically review, revise or revoke the management plan based on operational or other considerations, including but not limited to, changes in department staffing or the related persons' relationship status.

The management plan does not create a right by either related person to a particular assignment or reporting structure and can be changed or revoked by the department without notice.

Any violation of the management plan is a violation of the policy itself.

#### V. AGREEMENT AND APPROVAL

##### Related Subordinate

I have received the management plan, understand its terms, and agree to comply with it.

Full Name:

Signature:

Date:

##### Related Supervisor

I have received the management plan, understand its terms, and agree to comply with it.

Full Name:

Signature:

Date:

##### Employee Making/Participating in Making Employment Decisions for Related Subordinate Instead of Related Supervisor

I have received the management plan, understand its terms, and agree to comply with it.

Full Name:

Signature:

Date:

<b>Related Subordinate's Direct Supervisor</b>	
I acknowledge receipt of the management plan.	
Full Name:	
Signature:	Date:

<b>Approved by Department Personnel Analyst or Human Resources Manager</b>	
Full Name:	
Title:	
Department:	
Signature:	Date:

<b>Approved by Department Head</b>	
Full Name:	
Title:	
Department:	
Signature:	Date:

<b>Concurrence by County Administrative Officer or Designee</b>	
Full Name:	
Title:	
Department:	
Signature:	Date:

cc: Personnel File (Related Subordinate)  
 Personnel File (Related Supervisor)