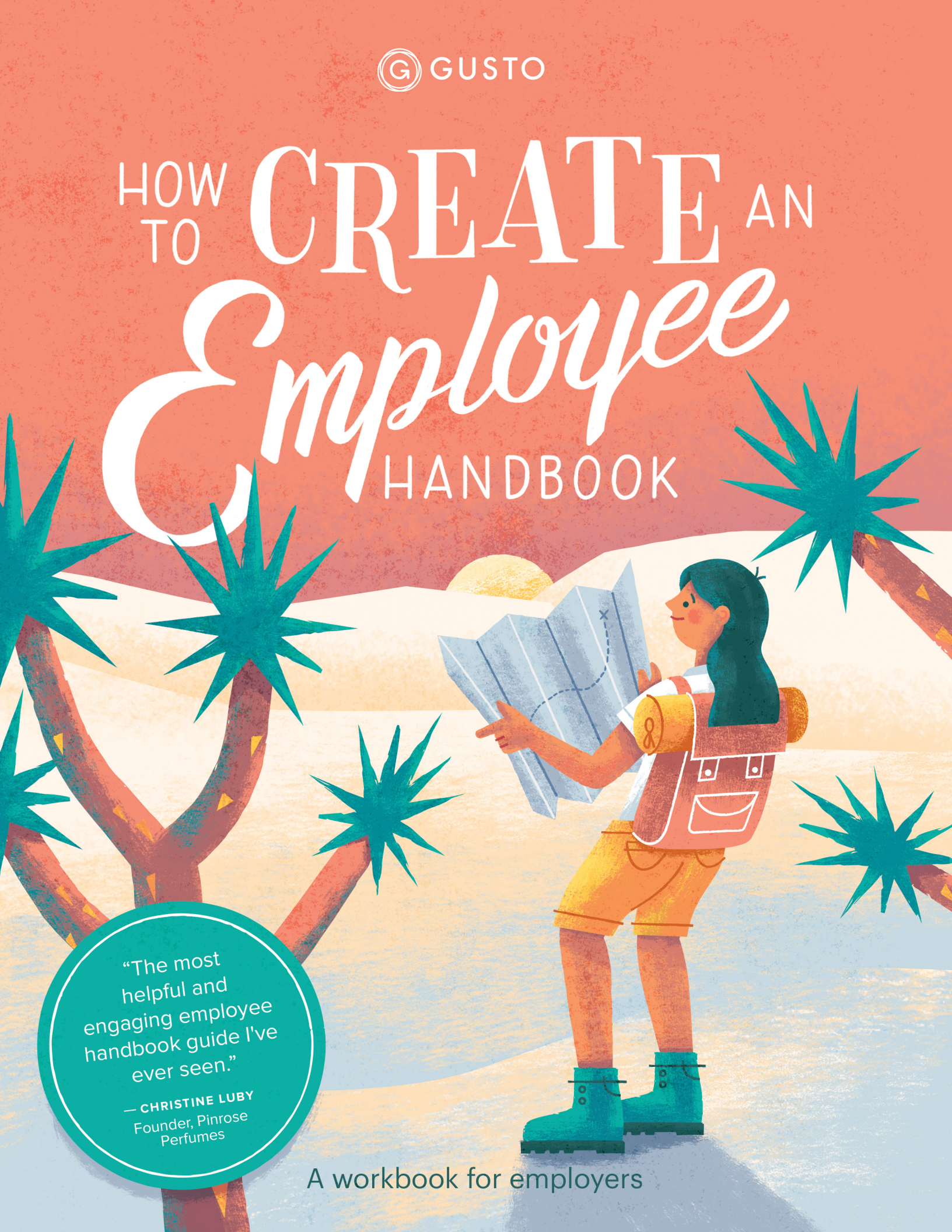GUSTO

HOW TO CREATE AN *Employee* HANDBOOK

"The most helpful and engaging employee handbook guide I've ever seen."

— **CHRISTINE LUBY**
Founder, Pinrose Perfumes

A workbook for employers

Credits

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Don't worry, we'll spare you the legal mumbo-jumbo. But please don't rip off any content without giving us appropriate credit and a link. :)

Thank you

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You've reached the final leg of the trip! From publishing to signing, here's how to put the finishing touches on your handbook masterpiece.

The BASICS

"I knew when I met you an adventure was going to happen..."

— A.A. MILNE

Why hello there!

Welcome to employee handbook land — the trusty legend you and your team need to find your merry little way. Unfortunately, as soon as you mention those two words, it can lead to successive yawning, blank stares, and immediate subject changes. Luckily, the guide you're holding in your hands will stop a handbook's sleep-inducing powers in their tracks. We'll show you all the ropes (and wires) so you can put together a compliant handbook that your team will actually want to read again and again.

In each chapter, you'll find step-by-step instructions on how to approach an array of policies and procedures, along with a map to find more information if you need it. Plus, we even turned this entire thing on its head. Comics, checklists, and other surprises will add some much-needed spice to this whole handbook shebang. Now, your handbook writing experience should feel a lot more like filling out a fun activity book instead of dealing with a giant chore giving you the evil eye.

Now, what are you waiting for? Find a comfy chair, cuddle up with this guide, and get your handbook on.
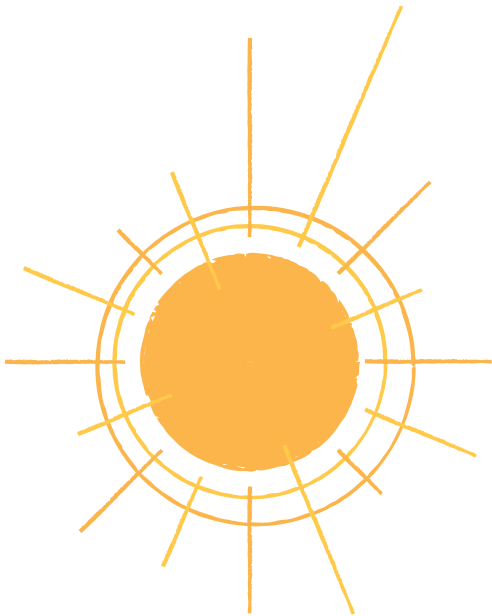
What is an employee handbook?

First, let's hash out the biggest question: What exactly *is* this giant thing we're talking about? Here goes: An employee handbook is your company's operating manual. It lets you paint a picture of what you expect from your team and then gives them the structure they need to put the pieces in place. Still confused? We've got you. It's like the crinkly packet of instructions you get when you buy DIY furniture. It's like the food-spattered cookbook you always flip to for a comforting meal. Contained within a handbook is the spirit of all those things, the only difference is the topic at hand.

Squeezed inside you'll find an introduction to your business, along with all the rules and policies your team needs to shimmer throughout the day. From a background on your company to background check details, employees should be able to flip to the table of contents and answer their biggest questions.

In a nutshell, here's what a handbook typically contains:

- The story of your company

- A statement on the relationship between your employees and you, the employer

- Legally required workplace notices and policies

- Other policies you want to spell out

Do you actually need one?

While there are no explicit laws that spell out the requirement, it's a best practice to have one in your arsenal of HR tools. As an employer, you need to share the expectations you have for your team, along with their rights and responsibilities. Then, you need to record that they actually read them. That's why it makes sense to package all of those to-dos into a handy little book (hence the name). Not to mention, if an employee ever tries to bring you to court, an airtight, updated handbook can be your best friend. And hopefully, it will deter that person from trying to sue you in the first place. Sweet deal, right?

While HR pros already know handbooks are a must, we wanted to see what people actually do. So we surveyed over 300 small business owners and HR mavens about their practices surrounding employee handbooks. To add a little spice to this guide, we've peppered these stats throughout. See if you can spot them! 👀

Employers who have an employee handbook
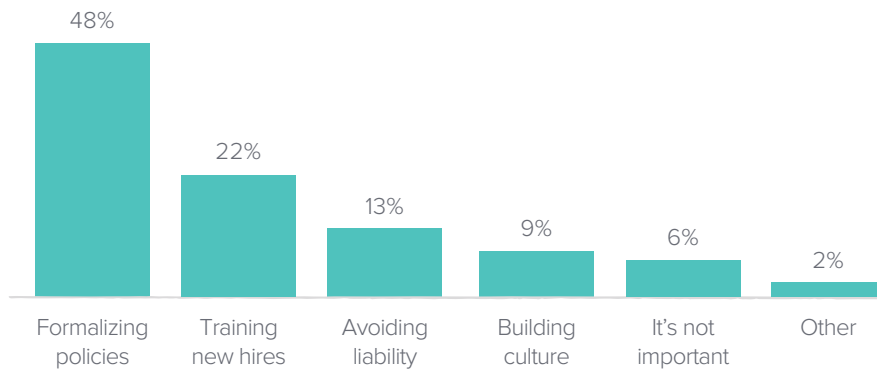
25%

Companies with
1-9 employees

89%
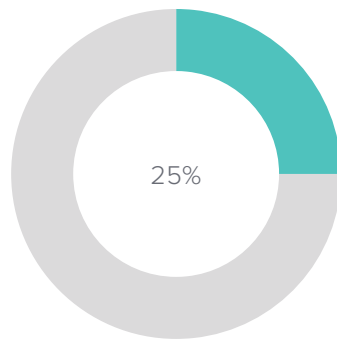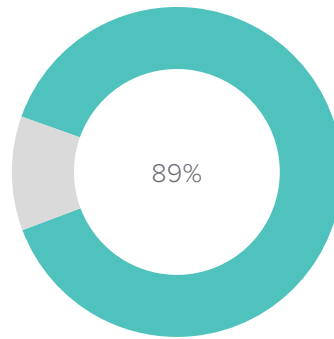
Companies with
10-200 employees

Why should you make a handbook?

Employee handbooks aren't just flashy coffee table accessories. They serve a bunch of purposes, ranging from safety kits to culture blueprints. However, we found that the top reasons employers cite are to avoid liability and to train new hires.

What's the most important reason for having an employee handbook?

| Formalizing policies	Training new hires	Avoiding liability	Building culture	It's not important	Other
48%	22%	13%	9%	6%	2%

Here are some more big reasons why you should think about having a handbook of your very own:

It shields your company from shenanigans. Oh, the power of the written word. A well-written and well-followed handbook will pack a serious punch in any legal proceedings. It's evidence that your company doesn't discriminate and knows and follows federal and state laws. When drafted correctly, a handbook isn't seen as a legal contract, which is why it's so important to do your research and get professional help in drafting one.

Larger companies are much more likely to get professional help with their handbooks. In fact, over three out of four companies with 50 to 100 employees have lawyers or HR experts develop their handbooks, compared to 46 percent of companies with nine or less employees.

Employers who get professional handbook help

46%

Companies with
1-9 employees

78%

Companies with
10-200 employees
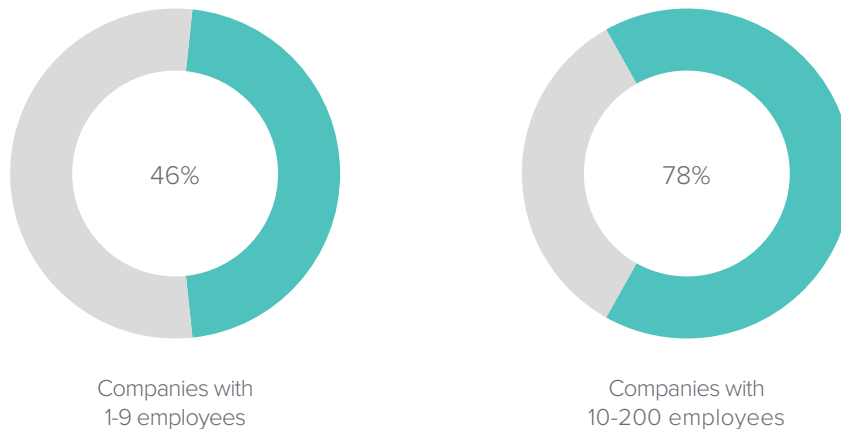
- **It can help you satisfy a bunch of state requirements.** There aren't any federal requirements for having an employee handbook, but many policies can vary dramatically from state to state. Think Hamilton-level drama. And in each state, there are specific notice requirements that can often be met by slipping a carefully written policy into your handbook.

- **It's the first step in building a great culture.** Nearly 90 percent of small employers believe that promoting a community feeling at work is key to their success. Let your culture radiate inside all the policies you're so thoughtfully putting together. Employee handbooks aren't strictly culture manifestos, however, you can definitely string the two together to create one powerful guide.

- **It opens up the lines of communication.** With everything neatly laid out in one central place, employees can dart straight to the person in charge or the exact document they need. A solid handbook is also a great conversation starter. The National Labor Relations Board, or NLRB, advises employers to be clear that handbook policies aren't meant to stop people talking about the terms and conditions of their job. Instead, a handbook is a surefire way to get the conversation party started.

- **It's the most comprehensive guide your team will ever read.** Yes, your own company handbook is even better than the guide before you (hi there!). This is because it is (or should be) written specifically for your business. It loops together all the rules your team needs to be successful at work, along with reasons why working at your company rocks so hard. Think of it this way — a handbook is a motivational poster, a high five, and a group hug all rolled into one. Plus, it helps new hires warm up to the company quickly since they can find their answers in a jiffy.

What makes a good handbook? Here's your checklist:

According to common wisdom (and maybe Flannery O'Connor), a good handbook is hard to find. That is, unless you know what to look for. Your book will make your company bestseller list if and only if it protects you from possible liability while keeping your employees excited to head to work each day. Here are some big things to cross off your list as you're crafting (and rolling out) your prizeworthy guide.

☐ Make it straightforward

The National Adult Literacy Survey found that the average American adult reads between a seventh to eighth-grade reading level. It's imperative your team understands what they're reading without having to hightail it to the HR department for crib notes, so make sure you write at a level everyone can understand.

PRO TIP

Pretend your company is a person. Are they quirky? Buttoned-up? Flesh out their personality traits, write them on a sticky note, and put it in a place you can refer to as you're creating your handbook. Then, use those traits to talk to your team straight up.

☐ Include the essentials

There are a handful of policies and clauses that every handbook needs to have in the bag. They include:

☐ At-will employment

☐ Equal employment opportunity

☐ Sexual and other unlawful harassment

☐ Corrective action

☐ Pay periods

☐ Overtime

☐ Payroll deductions

☐ Drug and alcohol use

☐ Reasonable accommodations

☐ Accommodations for nursing mothers

☐ Confidentiality

☐ Inspections and searches

☐ State leaves

PRO TIP

Include an explicit disclaimer that says your handbook is not an employment contract, which will help limit your legal liability.

☐ Get compliant

Double-check your state's laws to be sure your handbook reflects them. One size does not fit all when it comes to local employment regulations. Then, get the entire handbook reviewed by a lawyer or an HR compliance expert so you can ensure it's totally legit (and legal!) in your city and state.

PRO TIP

Just do it.

☐ Stay compliant

Review your handbook at least once a year to make sure you address any changing regulations from the NLRB, the Equal Employment Opportunity Commission (EEOC), and other government bodies and pieces of legislation. Why all the changes? Labor laws need to stay current and mirror what's going on in our world, whether that be evolving laws on data privacy or added LGBTQ protections. And if you make any

changes to your handbook, be sure to include a revision date so people know when the handbook has been updated.

PRO TIP

Add a disclaimer that says all policies in your current handbook replace all older versions. Additionally, include a sentence informing folks that policies can also change at any time (but that you will swiftly communicate updates when they happen).

☐ Designate clear owners

As you're crafting your handbook, make sure that each policy has an assigned owner. For example, you can write down "see the HR Manager" in your dress code policy so employees who have questions about what they can wear know exactly who to turn to. From creation to compliance upkeep, define all the roles so there's no confusion about what folks have to do.

PRO TIP

Use people's titles instead of their actual names so you don't have to reissue the handbook every time someone leaves your company or changes roles.

☐ Give everyone a copy

It's not cool to make people jump through hoops to get their hands on the latest edition. Send the handbook to employees as soon as they arrive on their first day. This includes full-timers, part-timers, interns, and anyone else that you employ. Independent contractors should not receive a copy.

PRO TIP

Don't give your handbook out before an employee's first day, since it will create wage liability for you. They'll have plenty of time to dig into it as when they officially begin.

☐ Don't use it as a replacement for <u>onboarding</u>

You can't just hand your team a handbook and be done with it. The handbook is one planet in the entire solar system of support your employees need to ace the whole work thing. Do it justice, but make sure other areas are well-developed too.

PRO TIP

Make signing your handbook one step of the onboarding process that everyone has to complete once they've had time to read it on their first day.

the Readable HANDBOOK

Page-turners are game-changers. A few years ago, Zappos turned their handbook into an actual comic book called *Zap!*, which they created by getting input from a committee of employees (oh, and the HR department too).

Was it all just fun and games? Not quite. Zappos cracked the code on building a handbook that was both useful and a gripping read. And you can too by following a few simple rules. Remember that your guide shouldn't look exactly like the Zappos example. Instead, it's about making your handbook reflect what your company is all about.

Once you feel confident about the handbook creation process, the next step is to think about how you can write a guide that's both compelling and compliant all in the same shot. Here, we've laid out some tips to help you achieve that perfect mix.

The policy part

Before you officially begin writing your handbook, it's important to sketch out the policies you're going to fold in along with your reasoning for including them. Consider writing a brief outline that lists everything out, and then shop it around to the team for feedback.

How many policies should you swirl in? We found that larger companies generally have larger lists of handbook policies (no surprise there). In fact, 41 percent of companies with 1-9 employees don't have policies for any of the topics listed below, compared to only seven percent of those with 10-200 employees.

Policy	1-9 employees	10-200 employees
Work hours	31%	62%
Workplace safety	29%	69%
Company mission and values	26%	53%
Dress code	22%	56%
Use of company equipment	22%	49%
Salary and bonuses	20%	53%
Lunch and break periods	19%	53%
Substance abuse	18%	49%

Policy	1-9 employees	10-200 employees
Email and internet usage	18%	50%
Disciplinary action	16%	61%
Social media	16%	43%
Data privacy	16%	46%
Travel and expensing	16%	41%
Performance reviews	15%	56%
Termination and offboarding	13%	41%
Bullying	11%	36%
LGBTQ rights	5%	23%
None of the above	41%	4%

While outlining your policies, here are some pointers to follow:

☐ Be clear on when a policy will come into play

It's important to write policies that can be applied to a mishmash of different circumstances and at the discretion of multiple managers.

☐ Have the policies actually echo what your company does

A policy that isn't followed can be worse than having no policy at all. This is because it makes your rules unreliable in terms of what you actually practice. It can also expose you to liability.

☐ Order your policy groupings in a way that makes sense

"One of these things is not like the others / One of these things just doesn't belong." Word to the wise — don't turn your handbook into a Sesame Street sing-along. This is an example of one popular way to string things together:
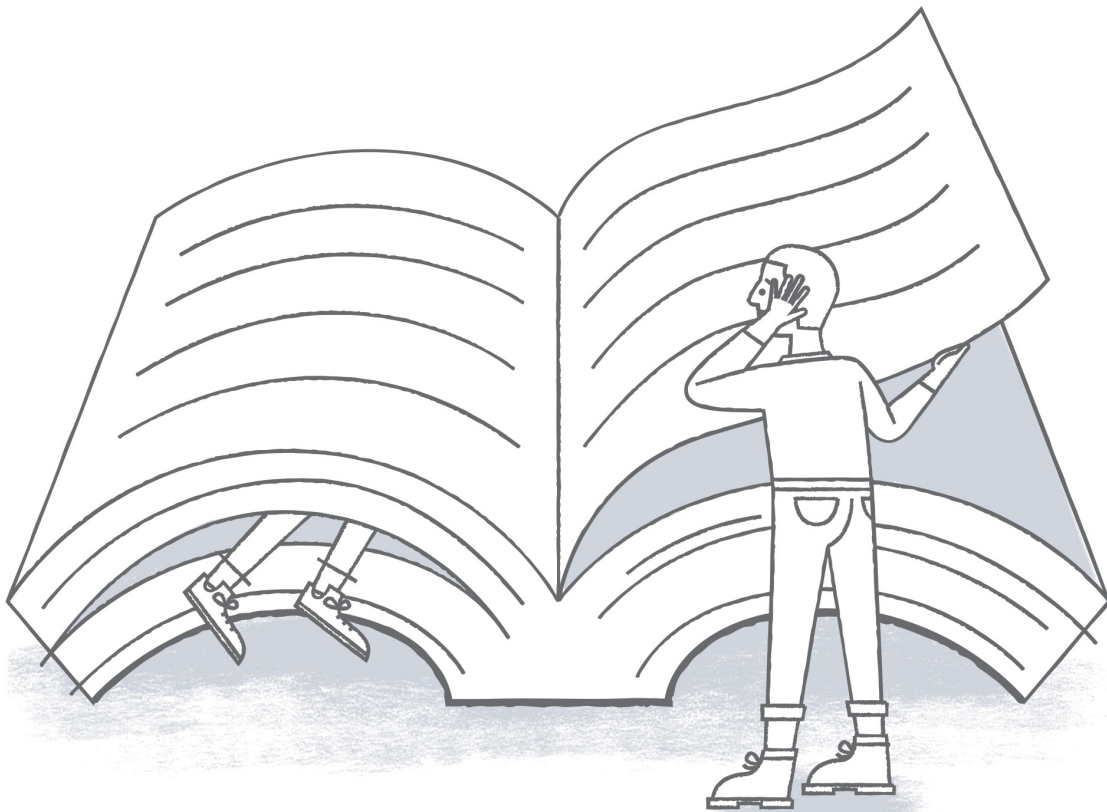
1. Employment
2. Conduct and behavior
3. Compensation
4. Benefits
5. Health safety and security
6. Workplace guidelines
7. Employment separation
8. Acknowledgment page

☐ Keep it in order

Most HR pros would agree that the grouping (and order) on the previous page is a common way to go about things. However, it's still open to debate. For example, some people would say that it's better to start with the more positive sections first, like benefits and compensation. Really, it's a choose-your-own-adventure game, and there's no right or wrong answer.

☐ Avoid the no-nos:

- **NDAs and non-competes:** These two forms are legally binding contracts, and are therefore completely forbidden in handbook world. Create and sign these separately.

- **Saying you need "just cause" to let someone go:** Odds are, your employees are at-will. Including the "just cause" terminology will only make things more complicated if you have to let someone go.

- **Referring to a role as "permanent:"** This kind of language can also mess up the at-will relationship.

- **Using the word "probationary:"** This word can imply that a person's employment status will change once they get out of their "probationary period" (often their first 90 days). Try using a synonym like "introductory" instead.

"Employee etiquette rule #1: Don't squish your coworkers with the handbook."

The creation part

So your policy outline is raring to go. The next question is: How do you bring the policies you just read about to life? Easy. Through your handbook's language, design, and thoughtfulness. These things make up the grand entrance to people's entire experience. As you break out the pencil packs, here are a few things to think about.

SIDE NOTE

Keep these pointers in mind, but don't sweat if you still have legal-ish language in there. Every company and voice are different, and you'll want to do whatever feels most authentic.

☐ Be consistent

Consistency is key. Do you call your cafeteria a lunchroom? A cafe? Or maybe just "that place where we all chow down?" Make sure that however it's referenced, it has the same name in every nook and cranny of your handbook.

For areas where you're not talking about state or federal requirements, a dash of flexibility can be empowering. Consider using words like "may," "generally," and "typically" instead of "will," "are," or "must" when addressing things that aren't as obvious.

☐ Be human

Hey, the first part of HR begins with this word, so let's make it count. Inject some honesty into your handbook by pretending you're talking to your best friend. Once you're in a good place with certain sections, read them aloud and see if it feels similar to how you'd explain it to said friend. This can help you keep the straightforward, personable tone alive.

☐ Be a storyteller

Think about the books you keep coming back to. The ones that are dog-eared, have cracked spines, and that you've lent over and over to everyone and their mother. Most likely, they told a story that touched you so much you had to share it with others. Mesh real stories into your handbook by providing examples of how the team thinks about certain topics, and why.

☐ Be true to who you are

If you already have a mission statement and values, then hop on over to them. Your handbook is a living, breathing document that should animate those handcrafted words. For example, if the value of ownership is important to your team, explain how that comes out through your flexible work policy.

☐ Be helpful

If you were a new hire, would you find it useful? The best thing you can do as a handbook magician is to pull out the exact information people are craving. Ask a recent hire for their feedback to see where you're excelling and where you could tighten things up.

☐ Be concise, but thorough

We found that the most common handbook length ranges from 11 to 20 pages, regardless of the company size. However, if your handbook is under 30 pages, it's important to revisit why it's so skinny. If your handbook is long-winded, yes, it can intimidate people, but you also want to pack it with everything you need. You may want to add crib notes at the beginning of lengthy sections so people can get the gist and then read more at their leisure.

☐ Be a graphics fiend

Which would you rather read?

vs.
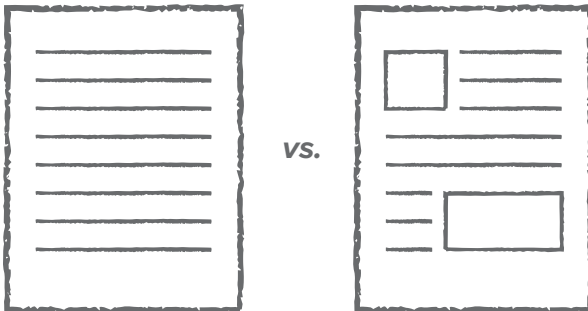
Most likely it's the one on the right. Sprinkle photos, illustrations, charts, cartoons, and anything else that will illustrate the points you're making while stopping people from hitting the "snooze" button. Plus, it's not that hard. Instead of using random stock photos, just ask your team if you can take a few candid snaps of them around the office, which will feel way more genuine. Just avoid using any copyrighted material, and you'll be good.

The NITTY Gritty

Once you have the basics down, get ready to graduate to the next section — the filling. In this section, we'll explain the essential policies and procedures you'll want to marinate on as you're crafting your guide.

Your company story

It's a rainy day, hot cocoa is steaming on the shelf, and you're in the mood for a scintillating read. You shimmy a book off the shelf, flip it open, and cozy up with it splayed on your lap. Now, think back to how the book begins. Usually it introduces the characters, the setting, and hints at something big that will set the whole story in motion. This is exactly what you have to do as you pen your handbook.

First, tell your company story — starting with your history. This section of your handbook is what should grab readers from the get-go, and then get them stoked to be a part of your adventure. It's the intro credits to a movie where they're the stars.

"You're what we're famous for."

— THE NEIMAN MARCUS EMPLOYEE
   HANDBOOK, CIRCA 1970

How to get started

There are probably a smorgasbord of things you'd want to include in your introductory section. To start, focus on what is most important for newbies to know. Namely, it's your mission, the values that shepherd you through it all, and your vision for what could be. Your story should answer three main questions:

Who are you and what do you do?

———————————————————————————————————————

Why does this all matter?

———————————————————————————————————————

Why should others care too?

———————————————————————————————————————

As you sculpt your vision, pull from your company's history and your founders' or owners' backgrounds. This will give your employees a sense of the inspiration that drives the company and what they're ultimately working toward.

Who are you helping?

———————————————————————————————————————

Where do you fit in the marketplace?

———————————————————————————————————————

What makes you different from other companies in your space?

———————————————————————————————————————

Joining the team

Before your new hire ever shimmies into the office, there are a few basic rules you need to lay out before them. This section provides a snapshot of what those rules are so you can stay compliant, all while ensuring everyone feels pumped about strolling into work each day.

At-will employment clause

Will you know what at-will employment means? Not if we don't talk about it. Essentially, this clause tells people that both you and your employee have the ability to crumple up your relationship at any point. Sound drastic? Not quite.

Think back to your first crush — the one that made you feel all woozy inside. How weird would it have been if that was it? If no one could ever end it because you were forced to remain in the relationship forever. If you think about it, at-will status is one of the basic tenets of any real employment relationship that aims to do what's best for each side. The fact of the matter is that you should be able to leave whenever you want, and for any reason. And both sides should be able to make that call.

If there isn't an agreement clearly stated, then this type of employment is assumed in all states besides the Treasure State (also known as Montana). Here's an example of a sample at-will clause that you can use as a model:

> *"Keep in mind that [your company] is an at-will employer. This just means that either party can end the relationship at any point for any reason, with or without notice."*

Equal Employment Opportunity statement

This statement allows you to state something particularly awesome — that you believe in the power of equality. Here, you'll want to include a complete list of all the kinds of people, or protected classes, that your EEO statement safeguards. You also want to drizzle in a sentence that states people will never be discriminated against for any job-related aspects because they're in one of those protected classes. Some classes like race and gender are protected at the federal level, but you'll also want to include the classes that are outlined by your state, since most states have added to the federal list, along with classes in any state where you do business.

So what should you definitely wrap into your EEO statement? Don't forget to incorporate sexual orientation and gender identity into your protected categories list. These two aren't written into the federal laws but are interpreted and enforced by the EEOC as included

in the "sex" class. The Pregnancy Discrimination Act also requires you to add pregnancy to your list. Sure, putting this together can sound daunting at first, but have no fear. It's important for everyone to understand the classes and characteristics that could lead to some icky (and very serious) harassment claims.

Conflict of interest statement

Getting conflicting opinions on conflict of interest statements? Well, we're going to break it down for you. A conflict of interest is when someone gets personal benefits from a decision made in their professional role.

Take Darlene, for example. Let's say her brother is a vendor, and every time she hires him for a gig, Darlene receives 10 percent of what he was paid. Oh, Darlene. In the eyes of the law, that would be a clear conflict of interest. To nip these situations in the bud (and to keep Darlene from spiraling out of control), you can include the following language, courtesy of Meeting Professionals International:

> "As an employee, you are expected to act at all times in the Corporation's best interests and to exercise sound judgment unclouded by personal interests or divided loyalties. Both in performing your duties at Corporation and in your outside activities, you should avoid the appearance as well as the reality of a conflict of interest."

Confidentiality agreement

L.A. (er, HR) confidential? Some employers choose to wedge a confidentiality agreement into their handbooks to prevent any film-worthy drama from cropping up. Specifically, this agreement stops employees from sharing secrets with outsiders, like financial data or the recipe to your secret sauce. Weaving it into the handbook allows the team to sign it at the same time they sign their acknowledgment form. However, it's not all a cakewalk. You have to tread lightly because the NLRB has narrowed their definition of what is considered confidential information. NDAs and non-competes are considered contracts, and the latter is also not enforcable in certain states, such as California. If you're interested in one or both of these policies, talk to an employment attorney in your state.

General details for new hires

A little overview can be a huge lifesaver. This section includes things like how to get to the office, a breakdown of what the team looks like, and other essentials that can help make those nerve-wracking early days a heck of a lot less stressful. It's not wise to give your handbook to any employee before their start date, so be sure this is worded in a way that helps people on day one and beyond.

Here are some things you may want to add:

- Google Maps link to the office
- Parking maps
- Team org structure
- Key contact information
- Anything else that's super helpful

Standard of conduct

This section is about all the wild and not-so-wild ways people act at work. Some of these policies might sound odd to talk about at first, but it's usually better to include them in case someone is curious about what they can actually do. It's sort of like your (more than) 10 commandments. Thou shalt not steal, be mean, sleep in the office, and... have a huge rager at the office after hours? If you have a list of things that aren't cool to do, make sure you spell it out here.

"We will never implement any sort of expectations around what you wear, but we maintain all rights to mock your collection of double deep v-necks."

— ZAARLY'S EMPLOYEE HANDBOOK

Dress code

You're strutting through the front door in your ~~Sunday~~ Monday best and all eyes look up. But what happens when everyone is in jeans and hoodies and you look like you're ready to go on national television? Whether you're in business casual or super casual (or don't even wear shoes, like Gusto 😉), knowing what to wear can take a huge weight off someone's (blazered or boleroed) shoulders.

You can be as detailed or as general as you want to — it really depends on what your culture is like. For example, if you meet with clients and prefer people to dress up for those meetings, state it here. Some companies just have a basic "don't smell bad" sentence, which can become a more common problem than you might think.

Anti-discrimination policy

Yes, you have to tell people not to suck.

The Civil Rights Act of 1964 bans the discrimination of all kinds of people and requires employers to make sure none of their employees are discriminated against. In this section, you want to clearly explain that anyone who treats someone differently because of their age, race, religion, gender, sexual orientation, or anything else on the list of protected groups is violating the company policy. The areas are usually outlined as well, including things like employment opportunities, evaluations, benefits, and other work milestones. It also says what will happen if people engage in discriminatory behavior, along with where they can go and who they can talk to if they feel like they've been a victim of workplace discrimination.

Anti-harassment policy

This is your space to state that harassment doesn't fly at your company. Since it's the single most important policy you can have as an employer (even more so than an at-will statement!), make sure it's ultra polished.

First, write out what harassment means — any physical or verbal behavior that offends, intimidates, or creates a hostile work environment for a protected group. Then, write out

what happens if anyone engages in this type of behavior, including a note that retaliation is a no-no. And finally, include clear next steps for where people can report any harassment that occurs, and how you as an employer will investigate the claim.

States also have specific requirements for harassment policies, so skate on over to your state labor website for any updates you need to pack in.

"We ask that you don't: Throw sand. Be selfish. Disparage others. Talk shit. Make promises you don't keep. Say it can't be done."

— CRISPIN PORTER + BOGUSKY'S EMPLOYEE HANDBOOK

Substance-free workplace policy

This part is where you tell people that they can't buy or sell illegal drugs at work, can't use alcohol or drugs at work, and can't possess either one. If an employee takes prescriptions drugs, that is totally acceptable.

Need folks to pass a drug test before joining or if you have any suspicion? Some states have an accordion folder of conditions your policy has to satisfy. Furthermore, certain federal contractors and recipients of federal grants are required to have a Drug-Free Workplace policy that meets the requirements of the Drug-Free Workplaces Act. So do a little digging and see what makes the most sense for your team.

Taking disciplinary action

Okay, you have all these rules laid out in your handbook. But what happens when someone rolls their eyes and says "whatever"? Well, first off, it's not the end of the world, because as part of your excellent handbook prep, you'll be ready to take care of the situation in a snap. Use this section to explain why someone might get in trouble, along with what happens in the worst-case scenario — a termination of the relationship.

To start, write out the set of corrective actions that exist, and note that the action taken in a given circumstance will be appropriate for the severity of the infraction (or in other words, bad behavior). For example, you can have verbal or written warnings (and explain whether they come with or without pay), performance improvement plans, demotions, and ultimately, dismissals. Be sure to state that these are rough guidelines, because there are no blanket protocols that apply across the board. Every situation should be judged on a case-by-case basis, and an overly detailed list of consequences will prevent you from making the best decision for each unique scenario.

Make sure this part of your handbook comes after the sections that give people context on what would equal an infraction. It's also important to clearly communicate that violating any of your handbook policies could also be grounds for discipline.
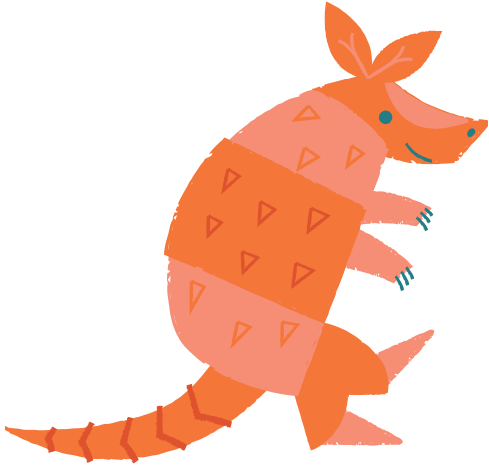
Office environment

If this section were a room, it would be a bright, airy lobby. Here, you want to help people grab a cup of coffee, hang up their coats, and be themselves. This happens by painting an accurate picture of your environment and how people should interact with it. Specifically, this includes details like when people should show up, how they should take care of their stuff, and what they can expect from you on the safety front. After you're done, you'll be able to wave your magic wand and reveal a space that's both compliant and makes people feel at home.

"Bring in the toilet-shaped coffee mug. Unveil that tattoo you never remembered getting. Take a phone call from your honey without running to the restroom. You're one of us. It's what makes us all interesting. What's that smell? Is it new person? No, you stepped in something this morning. Good, you're real. Stay that way."

— 22SQUARED'S EMPLOYEE HANDBOOK

Work hours

In this chapter, you want to be crystal-clear on when people are expected to be at work, where they're expected to work, and how much time they get for things like lunches and breaks (you can sink your teeth deeper into mandatory meal and rest periods in the compensation chapter).

Will your team have to work weekends or after hours on some days? It's also important to define the actual work week as seven consecutive days, so you can figure out how much overtime to pay people. Otherwise, you may get in a sticky situation if people have to work beyond Monday through Friday.

For most folks, understanding the actual work hours of a place can be an adjustment. Let's say Lucy just started a new gig and is planning on leaving at 5pm every day. If most of the office doesn't head out until 7pm, it can feel weird for her to just leave simply because it says the workday runs until 5pm in the company handbook. And that's why it's so important to make sure reality is also documented. If certain people or teams like to stay later, come in later, or vice versa, call that out while being clear about everyone's expectations. You don't want new hires to second-guess themselves on when they should come and go.

What about WFH?

Work that WFH magic. If you have flexible work or work-from-home policies, then write it out explicitly, along with how you expect your pajama-ed employees to stay connected to each other during the day. If people can't work from home every single day, write out how many days are allowed and the process for taking those days. Psst... over-explaining is your friend here.

Lunch and break periods

Give yourself a break and read this section. Besides recommending delicious places for your team to eat, you may want to set guardrails around when people can take lunch along with other break periods. According to the FLSA, if breaks are under 20 minutes, they should be paid, and a reasonable amount of time needs to be provided for mothers' nursing breaks. If you have a more flexible work environment, you may want to skip part of this, but check with your state and HR expert to make a final call.

Keeping the workplace safe

Remember those neon hall monitor suits from school? This section is sort of like that. Here, you'll want to detail policies that are meant to keep people feeling safe at the office. Namely, there are two things to get familiar with in terms of workplace safety:

1. OSHA rules

2. Emergency readiness prep

Let's start with OSHA. This government agency literally wrote the book on how employers can keep their teams safe at work. It covers everything from fall prevention to asbestos exposure to the Zika virus (and much more). The bulk of your duties as an employer are to ensure your team is properly trained, have the right tools to do their jobs, have workstations that are easy to access, and that you have clearly posted the Department of Labor's free "OSHA Job Safety and Health: It's the Law" poster. The poster gives your team information on how to report any health and safety issues they spot.

If you have any other office hazards or regularly work with dangerous materials, you'll have to follow more detailed protocols, so be sure to scan through the OSHA rules on your own.[8] Once you pull together your lineup, write them all down so employees know how you're complying with this hefty (but important) piece of legislation.

Next up: Emergency readiness. This is a must for folks living in earthquake, tornado, hurricane, and other zones that experience gnarly weather patterns. You'll want to write out what people should do if an emergency happens, along with who the points of contact are. Illustrate the entire experience from evacuation to communication, along with any practice drills that people need to attend. Do you have go-bags for people? Tell people where they can find them and perhaps schedule a training on how to use what's inside. Include a map for folks who are new to the office and might be unsure of where that secret 9 ¾ Harry Potter staircase is truly located.

ADA accommodations

Now, onto the Americans with Disabilities Act, or ADA. No, this isn't another Broadway musical. Basically, this Act says that as an employer you can't discriminate against folks because of a disability. You also need to provide both applicants and employees with "reasonable accommodations" so they can access the workplace and do their essential job duties.

If you're in business for fewer than 20 weeks a year (like a Halloween costume store), or have 14 or fewer full-time employees, then the ADA rules don't apply. That being said, you'll still want to make sure your office environment is accessible and welcoming to all sorts of people.

Modern-day uses for office supplies

The label maker

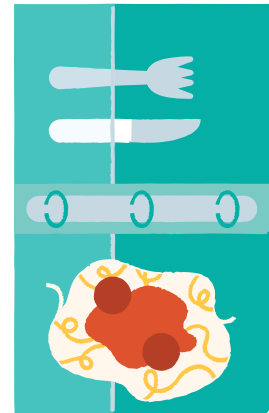The perfect tool to help you leave passive-aggressive notes to your team.

The stamp collection

Ward off unwanted office romances before they ever start.

The notebook

Disposable plates for days. Just pull off the top sheet and you're good to go.

The white-out

Give yourself a professional makeover in seconds.
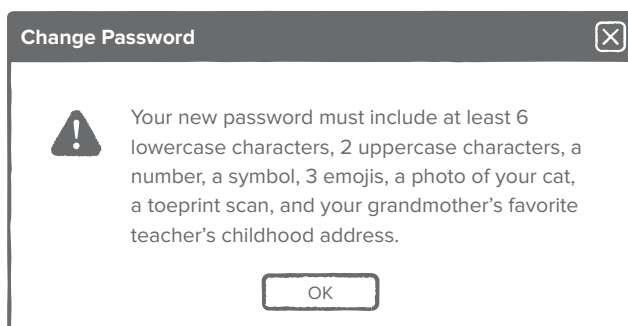
The three-hole puncher

Use the leftover punchouts to add a little pizzazz to an employee's birthday cake.

The coffee cups

Noisy office? Styrofoam cups make for great noise-cancelling headphones.

Change Password   ⊠

⚠   Your new password must include at least 6
    lowercase characters, 2 uppercase characters, a
    number, a symbol, 3 emojis, a photo of your cat,
    a toeprint scan, and your grandmother's favorite
    teacher's childhood address.

                    [OK   ]

Use of company equipment

This section is why you *can* have nice things. How should people use their shiny new computers, headphones, or any other equipment you give them to do their jobs? Tell your team how you expect them to keep your property safe, secure, and just plain nice. For instance, you may want to require folks to lock up laptops or desk drawers when they're not around, take home laptops over long vacations, sign up for a specific password service, or other protocols that can help prevent security flare-ups.

You may also want to explicitly state that your equipment is the company's property, the company can access what's on any of the phones or computers, and of course, that it's for work use only (sorry, side hustlers).

Communication policies

Time to shake it up a bit. This section of your handbook is all about the flow of communication, which is how your team talks to people at work and those in the outside world. Really, there's one kernel of truth in whatever you throw in this section — use your common sense.

Email

Whether your team is at inbox zero or inbox infinity, email is a minute-by-minute rite of passage for many workers. Here you can explain that an employee's email is for company use only. Private information can't be shared over this medium, and folks should limit personal use. People should also know that you have the right to access anything sent using company email and devices. You can also throw in a line about what will happen if someone abuses the "Reply All" feature (besides getting side glares from other teammates).

"Be real and use your best judgment"

—ZAPPOS
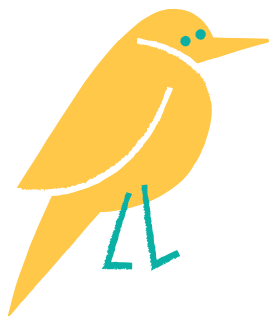
Social media

Practically every living soul has some kind of social media profile flickering somewhere. The question is, how do they keep what they say on those profiles from interfering with work or promoting your business in a way that's not okay? To keep issues away, many companies choose to say the following to their teams:

- Be clear about your connection to the company if the conversation is related to our space

- Be clear that your views are yours only

- Your actions reflect the company, so use common sense

- Feel weird about anything? Talk to our social media or PR team

As an employer, you're limited by the NLRB as to what you can specifically ask your team to say or not say, particularly around privacy rights and allowing workers to organize. So, if your team uses social media to raise work-related issues, that's often within their rights. Offer resources and guidelines, but keep these protections top of mind.

Compensation & performance reviews

You can bet this section is one that employees will flip back to frequently, so clarity and

transparency are key. Here's where you can lay out your philosophies and policies around pay decisions, performance reviews, and life's big moments like promotions and transfers. The goal is for people to understand what is expected of them and what they can expect from the company. And while we might be cruising into drier terrain now, bear with us. You don't want a lack of detail on paycheck deductions to be the straw that breaks the camel's handbook.

Payroll schedule

Payroll is the foundation for employee compensation, so your company's payday schedule is a pretty handy detail for employees to know.

Legal requirements around payroll schedules can vary a lot from state to state, so read up and get specifics on your own state's rules about how often you need to distribute paychecks. Will workers be paid every other week (bi-weekly)? Or will they be paid twice a month (semi-monthly), like in California and Illinois? Some states mandate weekly payment, and some, like Washington and Oregon, require only monthly.

Let employees know how many pay periods there are in a year at your company. You should also outline your legal obligations regarding overtime pay, specific pay schedules, time-keeping records, and meal and rest breaks. Be sure you comply with any applicable state wage and hour laws, in addition to federal requirements.

It's up to you whether or not you want to mention how many times a year you'll bring in surprise donuts for the team. (Disclaimer: Donuts don't count as legal compensation.)
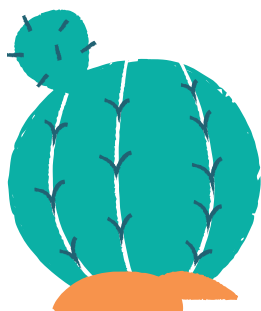
Paycheck deductions

Yep, that nice, clean salary figure or hourly rate isn't quite the number that comes home with each paycheck. That's why your team should know exactly what's being taken out of their paychecks and where it's going. To make it clear about how that remaining chunk is being distributed, you can list out applicable deductions, both mandatory and elective. You can also break out pay stubs into sections to give folks a better understanding of what everything means.

Your handbook should spell out all the practices that your company engages in with regard to pay, noting that you will make good-faith efforts to correct any mistakes. It's also important to talk about how you handle deductions (or what happens if an improper one is made), to minimize legal liability. Called a safe harbor provision, this step protects you if you ever make a deduction mistake that then changes one of your employee's exempt job classification (which could affect things like their eligibility for overtime or health coverage). Having the freedom to correct mistakes allows you to then jump in and fix the error without jeopardizing a person's status. See more about this in the next section.

Because your handbook can't address every possible compensation question or situation, you should also provide a process and a contact (like a superstar on your HR team) if your employees object to any deduction or have questions about why it was taken. Of course, be sure to also check your state law to see what they have to say about all those minuses.

Job classification details

At its heart, job classification helps you define and evaluate how people are paid and how many hours they work. In the end, it makes it easier for employees to grasp the mechanics of their role, and it helps you stay compliant with overtime pay and minimum wage.

Depending on the type of employment you offer, you should be able to describe the rules and expectations of what each status requires:

- Exempt vs. nonexempt
- Part-time, full-time, temporary, seasonal, per-diem, and on-callWhy include all this in your handbook? While job classifications don't have any impact on titles or pay scale, they do indicate how a person is paid (hourly, salary, exempt, non-exempt), and how many hours they work in a week. If your employees have questions about any of these (admittedly, it's a vast territory), you can also introduce a process for people to talk to HR and work out an understanding of their specific classification.

Salary and bonuses

Money makes the business world go 'round. While surprise thank-you gifts and other employee celebrations can be a lot of fun, you want to avoid any miscommunication when it comes to people's regular paychecks. In this section, write out your methods of payment.

- Do you mail paper checks or offer direct deposit?
- Where can employees view their pay stubs and W-2s?
- How often will employees be paid?

Once you've mapped out an overall structure, you can move into the types of

compensation packages you offer, including whether employees are eligible for bonuses or stock options and how the performance appraisal process works (see performance reviews in the next section).

If you do write out a detailed company policy for advancement or annual adjustments, be sure it's something you can stick to and that your managers will agree with and pass on to their teams. If you overpromise or go back on what you say, you might find yourself with unhappy employees, frustrated that they don't know how to advance.

Performance reviews

Performance reviews are an excellent way to communicate expectations to your team, along with what they can expect from you in return. In your handbook, you can lay out the format for how reviews go, how manager and peer feedback are collected, and how frequently. Similar to setting advancement expectations, refrain from including performance review policies or schedules that are purely aspirational. It's best to only put this into the handbook when you know for sure that you'll stick to it.

Think through these aspects to begin:

☐ How **casual** or **formal** will reviews be?

☐ How is feedback **collected**?

☐ **Who contributes** their feedback?

☐ How will the review itself be **conducted**? Online? In person?

☐ **When** will employees be reviewed? Annually, quarterly, at the anniversary of their hire?

☐ What's the **purpose** or end goal of the review?

☐ What's the **focus** of the review? What aspects will employees not be evaluated on?

☐   What is the **impact** of review results on the person's responsibilities or compensation?

Promotions and transfers

If your company were a board game, what are the moves a player has to take to get a promotion? How do they avoid all the chutes and instead head for those sky-high ladders?

This area will describe how your company addresses internal mobility. Are transfers allowed? How about relocation? How much will you cover in reimbursement costs for employee relocations — housing, moving costs, insurance coverage, airfare? Will salary be adjusted as a result of a transfer? By how much or by what percentage? Depending on the type of company you have, there can be a lot of rules to the game. Write out the means of leveling up so players can dive right in.

Travel and expense policy

Employees will have a suitcase full of questions about what they can count as work and travel expenses. How much can they spend on a hotel per night? What about smaller expenses — that bagel they grabbed at the airport before their flight to a conference, or the doughnuts they bought their team the day after a late night deadline? Aim to be specific here, with some leeway, as new situations will undoubtedly arise as your team ventures out into their worldly excursions.

Benefits

If this chapter were an emoji, it would be this: 🎉. Here is your spot to list out the perks you offer your team and explain how they match up with the values you celebrate. There's no need to go into an extravagant amount of detail here, but you'll want employees to get a taste of the various benefits they can choose from. Start with the essentials, like health insurance, and then cover the icing-on-the-cake benefits, like company car access or phone discounts. Your job is to get people to leave this section feeling both in the know and extremely taken care of.

Unsure about which benefits you should offer? Learn more about the top perks employees want in the guide we wrote with Glassdoor.

At-a-glance section outlining your benefits package

When new folks join the team, it can feel a bit discombobulating. Luckily, that's why cheat sheets were invented. A good rule of thumb is to include a synopsis of the most pertinent benefits to-dos, timelines, and resources for employees to visit as they please. You may want to leave this part out if your open enrollment changes every year, or if it isn't likely to coincide with your handbook review schedule.

Things to include:

1. Who is eligible for benefits?

   _____

2. How long do employees need to wait before coverage starts?

   _____

3. What percentage of the premium is covered by you, the employer?

   _____

4. What's the group policy number?

   _____

5. Who can people get in touch with if they have any other questions?

   _____

Health, disability, life, and workers' comp insurance information

If you do decide to go with a summary section, use this space to write out more details on what you offer and why you offer it. For example, providing health insurance is an amazing way to show you care about your team's total well-being. Write out what your benefits philosophy is, and how the programs you offer make those beliefs shine through.

Then, get into some more specifics. If you allow people to pick from various plans, write out what those options are and where they can go for additional information. It's important to make note of when people are eligible to enroll in each of the various plans, which usually occurs during open enrollment or if they experience a qualifying life event, like having a baby or getting married. You may consider having a special orientation on the different aspects of your benefits package, in addition to rolling out a separate overview altogether.

"Our sick leave policy is pretty stringent, so you might want to check on your cubicle neighbor from time to time to make sure he's still breathing."

Retirement plans

Saving for retirement may feel like a dusty piggy bank lost forever in your closet. But really, it's an incredible way for you to help your team plan for whatever life has in store. Use this space to explain what you offer on the savings front, whether it's a 401(k), SEP-IRA, or SIMPLE-IRA, along with ways people can get involved. Do you offer pensions after a number of years of service? Add this in too. You'll want to write down instructions for signing up, eligibility details, any contribution matching you offer, along with example scenarios of how contributions and matching interplay with employees' paychecks.

PTO

PTO is one oh-so-exciting acronym. It stands for paid time off, which is the set of holidays, vacation, and sick days that you offer to employees in exchange for all the energy they bring to their jobs. Describe whatever is reflected in your policy, and add in examples of other scenarios that might arise. To get your PTO juices flowing, here are some ideas of what you can include:

- **What holidays do you observe?** List out all the holidays you observe, and whether or not your office will be open on those days. Are these holidays paid? Hopefully yes, but you should say for sure.

- **How can people earn vacation time?** If there's an accrual policy, explain how it works, and if you have unlimited vacation, call it out here. Being super specific will help you in the long run.

- **How can people request time off?** Outline the procedure for booking time off, and include links for relevant forms, along with timelines and the titles of those who are in charge of approvals.

- **What happens if people don't use all of their PTO?** First off, it's a bummer. In 2015, Project Time Off found that over 50 percent of Americans didn't use 658 million of their vacation days. Argh. You can allow people to carry over unused days into the following year, and/or you can also put a cap on how much people can earn. If caps and carryovers aren't your thing, consider paying out unused vacation time. Each state has a lot to say about this matter, so be sure to see if there are any requirements already in place before you roll out this part of your policy.

- **How much time do you suggest people take?** This one is more suited for a culture that embraces unlimited vacation, but it's an important one. Give people guidelines on how much time to take off, along with examples of people around the company who have used their PTO to do cool things. Did Robin save a flock of robins from extinction? Did Sydney fly to Sydney? Create a bulletin board or email newsletter that collects stories from the team. This will prevent people from feeling scared about taking time off, and actually encourage them to do it themselves.

PTO and beyond: Other leave policies

Leave your leave policies to the state. Why's that? Because many states could write a book on all the specifics floating around. This section is important to get just right because it not only applies to tons of people, it also varies dramatically by state. Like, a lot. To give you a sense of what we're talking about, California alone has more than 20 types of leave, including literacy leave, child school discipline leave, and more. However, here's a (nonexhaustive) list of some of the policies you'll want to have on your radar:

- **Parental leave:** Babies on the brain? If you have 50 or more employees, the Family and Medical Leave Act (FMLA) is there to help your team through this incredible experience. Have less than 50 people on staff? You can still use the FMLA guidelines as a template for setting up a meaningful parental leave policy for your team.

- **Sick leave:** This type of leave is designed for anyone who is under the weather and doesn't want to cough on everyone in the office.

- **Voting:** Does your team don "I voted" stickers every election day? If not, you may want to think through your voting leave policy. Breeze through this rundown of state laws from FindLaw to see what your requirements are, and then decide what you'd like to do to encourage this patriotic act.

- **Military leave:** This one comes from USERRA, or the Uniformed Services Employment and Reemployment Rights Act. It's fairly clear-cut and tells employers that they need to offer service members their jobs once they return from either military service or training.

- **Jury Duty:** The jury is no longer out on how jury duty should be handled. Basically, you can't punish an employee for doing their civic duty (in fact, you should promote it!). Since jury duty is a state issue, be sure to brush up on your requirements. You can also read about a few jury duty dos and don'ts for both you and your employees.

- **But wait, there's more!** These are just the tip of the leave iceberg. Leave policies are all state-specific, so make sure you chat with a pro before swimming too far into this section.

When someone leaves

Saying goodbye is never fun, yet in many cases, it can be the best way to change something that's simply not working out. This section is your place to explain what happens when people leave the team, whether it's of their own accord or not. When talking about leaving, lead with the heart and leave no stone unturned.

"Don't leave! This company is designed to be a great place to work and the kind of company where people are happy to spend their entire careers. We love you and want you to stay forever. BUT, if you are thinking of leaving…"

— TRELLO'S EMPLOYEE MANUAL SAMPLE BOARD

Offboarding basics

It's crucial to make the offboarding process as detailed as possible so it can happen as smoothly as possible. Specifically, be sure to include answers to the three biggest questions employees will have:

• **When will I get my final paycheck?** Paychecks aren't so cut and dry. The federal government says employers need to hand employees their last check on or before the regular payday for the last pay period in which they worked. However, states also have their own special set of rules that override the federal ones. Shuffle on over to your state labor website to see what the deal is.

PRO TIP

While coming up with the final paycheck, don't forget to check if your state requires you to pay out any unused benefits, like vacation time that never got taken.

- **Will I have an exit interview?** Exit interviews can be a great way to provide closure. In most cases, these are conducted when people quit on their own, since they haven't yet communicated the intricacies behind their decision. In the interview, you can go over specifics like when they'll get their last paycheck, severance, and their options with benefits continuation. However, the majority of the meeting can be spent collecting feedback about the person's team, manager, and what would make your company a better place to work.

  . Glassdoor put together some sample exit interview questions to give you a head start.

- **How does COBRA work?** When someone is laid off or fired, things can feel a bit slippery (as expected). Therefore, it's important to pony up details on what people can expect in regards to benefits. COBRA is a federal program that allows people to continue on their current health insurance plans until they find new jobs. It's designed for companies with 20 or more employees, but many states also have mini-COBRA laws that apply to even smaller teams. Print out all the appropriate forms, have a summary page at the top, and be ready to help your team navigate this crucial next step for their health coverage.

  . This guide will help you figure out all of COBRA's twists and turns.

Policy grab bag

The cool thing about writing your own book? You can include as much or as little as you'd like. Have some labyrinthine parking situation? Want to educate folks on your educational assistance program? Be our guest.

Some more ideas of what you can tie into your very own book:

- Access to employee files
- Adoption assistance
- Affirmative action
- Bulletin board access
- Business gifts
- Childcare
- Company car
- Company goals
- Conflict resolution
- Diversity policy

- Employee assistance programs
- Lost and found
- Mailroom location and rules
- Media relations
- Moonlighting
- Mother's room logistics
- Moving expenses
- Open-door policy
- Pay advances

State-specific policies

Once you plant the seeds for your handbook, you'll want to go through with a fine-tooth comb (maybe bamboo?) to weed out anything that doesn't move your handbook forward. Or, anything that's just plain wrong. The biggest place where people make mistakes are in the policies that are state-specific, like leave and PTO. To prevent a mess, keep a close eye on how the following policies are interpreted by your state:

☐ **Family and medical leave:** Federal FMLA leave is all fine and dandy, but your state might require you to offer more (go, states!).

☐ **Paying out unused vacation time:** This one gets a bit fickle. Some employers allow people to borrow vacation days even if they haven't accrued them yet. And that's just the start. Some states require that vacation is paid out at termination, regardless of what the employer policy says.

☐ **The final paycheck:** You're dealing with the tumult of an employee leaving when you realize you also have to cut them a paycheck. Similar to the vacation time one, the state has laws to ensure people get paid quickly and fairly. You know the drill — head to your state website for more.

☐ **Short-term disability:** Some states require you to provide this while others don't. Simple as that.

☐ **Employee file access:** Do employees have the right to see their personal personnel files? Your state makes the final call.

☐ **Jury duty leave:** When your team gets that suspenseful letter in the mail, they shouldn't have to worry that their job is in jeopardy. States agree, and some require employers to pay employees for a portion of the time spent being a good citizen.

Let's Do This Thing

Go ahead, give yourself a hand(book). #SorryNotSorry But seriously, you should now be ready to put together a document that will help you run a tight ship, and that your team will proudly read and get some serious life (and entertainment) value out of.

How to publish your handbook

Are you a Google Docs or Word kinda person? No shame in that. For some employers, making the handbook a bit flashier than black-and-white print is the fun part. However, keep in mind that you'll need to reorder your stack of handbooks whenever you update it.

Whether you go paperless or printed, you'll also need a good way to both distribute your handbook and communicate any updates to your team — handbooks aren't so handy if no one is reading it. Unveil the guide in an all-hands meeting, circle up with an email, mention it in your team's chat forum or Slack channel, send extra copies by carrier pigeon — there's no such thing as over-communicating here.

Below, we've collected a few places — from book publishers to ebook publishers — where you can put your words into the hands of the masses.

	Hardcover	Softcover	ebook
Blurb	✓	✓	✓
bookbaby	✓		✓
Lulu	✓		✓
Nook Press	✓		
Print Ninja	✓	✓	

Once your team has their new reading material in hand, the last thing you'd want is for your thoughtfully crafted book to gather dust on a shelf because your employees find it irrelevant or too dry. We know how spine-tinglingly fascinating handbook material is, but sometimes these policies can use the help of big, bold visuals or a conversational writing style to keep them fresh.

Playing with different formats

If you want to get really creative, try out different ways of incorporating some color into your handbook. For example:

- The Motley Fool made their handbook into an interactive website.

- Zingerman's Community of Businesses threw in some cut-out finger puppets of its two founding partners.

- Portuguese design company Memória Visual riffed off children's books and an extended metaphor of space travel.

However you decide to innovate — creating an online video, hiring classically-trained scribes to calligraph your books by hand, or baking your handbook into a pie (actually, let's rethink the hygienics of that one), there are no shortage of ways to innovate and express your brand voice through your company's handbook.

The acknowledgement page

The final bow on your handbook masterpiece comes in the form of the acknowledgment page. On this page, your employee gives you their signature and says that they received the document and accept all the rules laid out inside. Your job? Storing a copy of that page for your records. Every time you update your handbook, you'll need to ensure that your team submits a new acknowledgment page, since the information they're agreeing to will have changed.

Include a version number, publishing date, and a note that the handbook people are holding is the crème de la crème (i.e. it trumps all previous versions). Paste this same information on the acknowledgment page too so you can easily track which versions people have reviewed or not.

There are three main ways you can give your team the acknowledgment page:

Handbook format	Signature page format
PDF	Digital e-sign service
PDF	Paper
Paper	Paper

If you're distributing the handbook electronically, HelloSign and DocuSign are two free options you can use to collect signatures. An HR platform like Gusto can also help you digitally manage your handbook, so employees can have one central place to view and fill it

out. Consider passing out at least a few paper copies in communal areas so employees can easily access it.

Ready to get this signing party started? Here are two acknowledgment page templates that will help you do the trick.
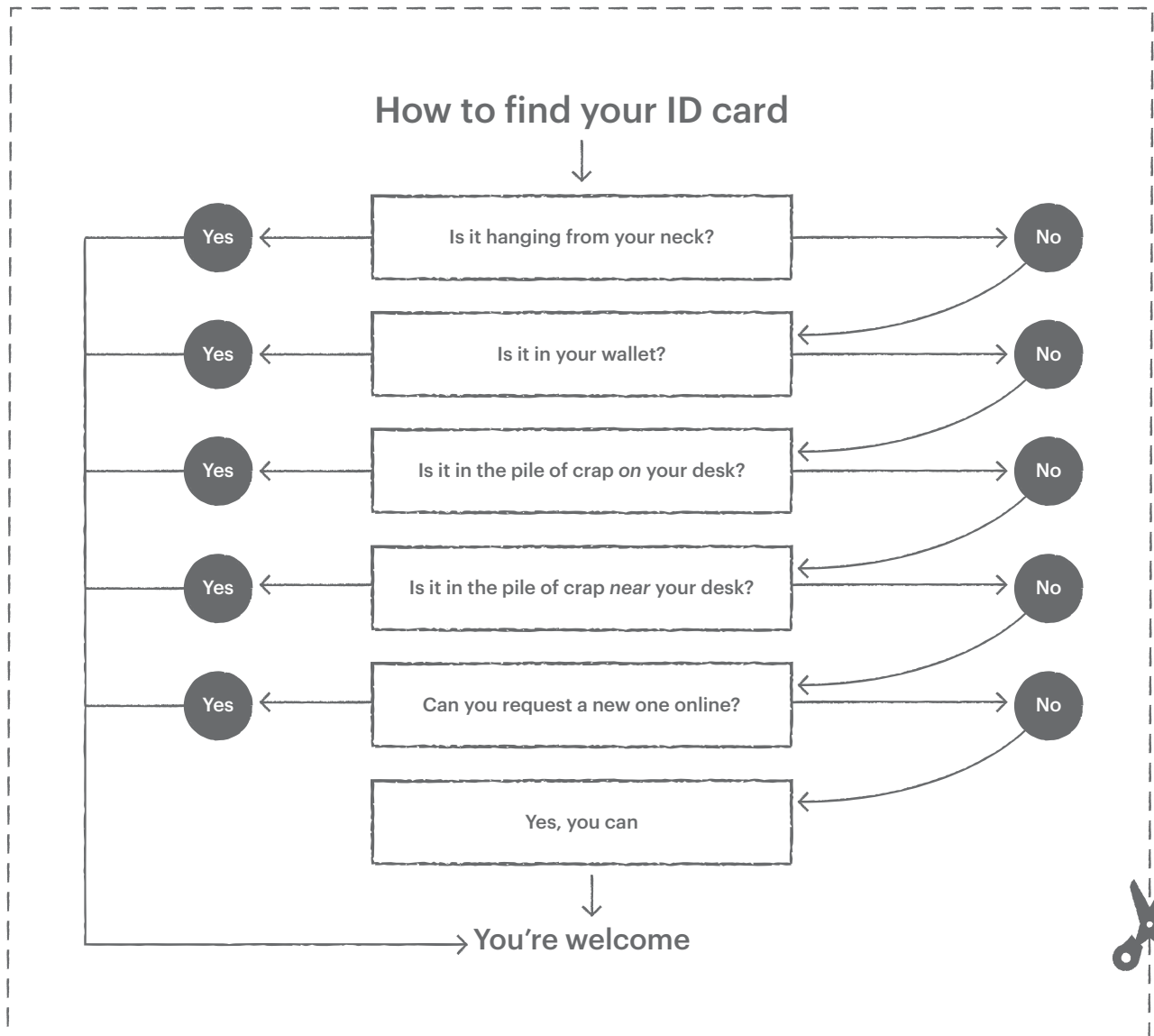
Sample acknowledgment pages

- SHRM's Acknowledgment and Receipt Template

- LegalZoom's Acknowledgment Form and Guide

You made it!

Congrats on mastering the employee handbook. It's one of the most crucial things you'll need to know about as an employer, and now, you can proudly show off your handiwork for everyone to see. Just don't forget to have an HR pro or employment attorney review your work before it struts into the limelight.

Wait, what's that mumbling we just heard? Someone has a question? Well, we couldn't just leave you with one of the biggest HR questions still at large. Here is the most frequently asked question you'll get from your team, along with a simple guide for getting it right.

How to find your ID card

Is it hanging from your neck? — Yes / No

Is it in your wallet? — Yes / No

Is it in the pile of crap *on* your desk? — Yes / No

Is it in the pile of crap *near* your desk? — Yes / No

Can you request a new one online? — Yes / No

Yes, you can

You're welcome

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