



## Sun Health Employee Association Frequently Asked Questions

To encourage staff to participate in our Employee Association, we have assembled the following Frequently Asked Questions to guide our staff.

### [Q: What is the Sun Health Employee Association \(the “Employee Association”\)?](#)

A: The Employee Association is an employee organization, supported by donations from Sun Health, its executives, directors, employees, residents and other friends, who donate money so that the Employee Association can be there for Sun Health’s employees when they are in need. Employees of Sun Health include employees of any entity, organization or community affiliated with Sun Health Services, LLC.

### [Q: How will the Employee Association raise money?](#)

A: Initial funding is anticipated to come from a number of sources, including Sun Health, its employees and members of its senior leadership team.

It is Sun Health's hope that each community will donate at least \$2,000 per year from employee-sponsored fund-raising efforts such as: employee auctions, bake sales, chili cook-offs, raffles, etc.

### [Q: Who is eligible to receive a grant from the Employee Association?](#)

A: Employees of Sun Health are eligible if they:

- are one of the following:
  - full-time employees
  - part-time employees, regardless of hours worked
- AND
- are or were employed by Sun Health for at least six continuous months\*

In the event of the death of an eligible employee or retiree, the deceased’s spouse or children may be eligible to receive a grant for up to one year from the date of death.

### [Q: How do I apply for a grant?](#)

A: After reading through the FAQs, if you believe you are eligible for a grant, you should contact Human Resources in your community or business unit. Human

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\* FMLA and maternity leave do not count toward the six month total, but do not restart the clock on the six months. (ex: Jane works from January 1, 2007-March 15, 2007, and then goes on maternity leave for six weeks, returning May 1, 2007. Jane is eligible for a need-based grant starting on August 15, 2007).

Resources will confirm that you are eligible based on the criteria listed in the FAQ “Who is eligible to receive a grant from the Employee Association?” above. If you are eligible, you would complete an application form and forward it to your Human Resources representative, who will confirm that the application is complete and includes all necessary back-up documentation. If information is missing, someone in Human Resources may contact you to obtain additional information.

Once your application is complete, all non-essential information that may identify your application will be removed. ***Your application will then be submitted anonymously to the Selection Committee.*** All efforts will be made to keep the request confidential.

[Q: What is considered a crisis or emergency situation?](#)

A: The applicant’s need for assistance must be attributed to or caused by an emergency, which means:

- The occurrence of any unexpected event or combination of circumstances that jeopardizes the individual’s health and welfare and that calls for immediate action, or
- Any pressing need following a sudden and unexpected happening, the occurrence of which was wholly unforeseen by the applicant.

Need for assistance may also be attributed to any undue hardship, which shall be defined as circumstances peculiar to the applicant’s situation, not deliberately caused by the applicant, which are of such magnitude or severity that it is unlikely that the applicant has sufficient resources to reasonably expect a favorable outcome through community or family resources.

“Need” exists when an applicant lacks resources to purchase the basic necessities of life or meet the contingencies created by an emergency situation.

- Examples of emergency situations which could be considered for assistance:
  - Fire;
  - Natural disaster such as flood, tornado, etc.;
  - Theft/loss of essential property, for example, as a result of an apartment fire or burglary or foreclosure NOT due to avoidable financial causes;
  - Significant loss of household income due to events such as robbery or emergency medical expenses;
  - Loss of transportation when a car is necessary to continue employment (does not cover car payments, insurance premiums, taxes or normal and customary maintenance and repair charges);
  - Death in immediate family (spouse, mother, father, children, legal guardian, mother-in-law, father-in-law, daughter-in-law, son-in-law, brother, sister), accompanied by other hardships, including but not limited to funeral or burial expenses, lodging and transportation of family members or employees to the funeral;
  - Loss of physical independence, due to accident, disease, etc.; and

- Illness or disability, for example, caring for a terminally ill member of the immediate family, that is not reimbursable by insurance or where insurance coverage does not apply. Normal health maintenance expenses are not eligible.
- Transportation to visit or care for an injured or seriously ill family member.
- The Selection Committee will consider each case individually; however, the following are examples of circumstances or events that may NOT be considered emergencies:
  - A non-medical leave of absence or vacation;
  - A marriage or divorce;
  - Income taxes or related penalties and interest;
  - Debt consolidation;
  - Dental expenses (annual visits or customary);
  - Attorney fees;
  - Loans;
  - Telephone or utilities charges;
  - Cable television; and
  - Payment to creditors (bank cards, department stores, oil companies, etc.).

[Q: What documentation is required?](#)

A: Applicants will be pre-screened for eligibility based on the criteria listed above and, if appropriate, will be asked to complete an application form and submit the following forms of documentation relating to the incident which has created the financial hardship, such as:

- Physician statement (including dates unable to work)
- Medical bills
- Accident reports
- Police or fire report
- Death certificate or invoice showing funeral, cremation or burial costs
- Pay stubs that document loss of income
- Plane tickets or other travel documents
- Repair invoices or receipts (estimates may be used, but final receipts should be provided after the fact)

[Q: Who will know that I have applied?](#)

A: The Human Resources representative at the applicant's community. Human Resources will perform the initial review of your application to confirm the information is complete. Human Resources will then remove any identifying information, and present the application to the Selection Committee. **Your application will not be placed in your personnel file. All efforts will be made to keep your request confidential.**

If your grant request is approved, the Employee Association must, by law, include your name, address and grant amount (but no details of the reasons for the grant) in its annual report filed with the IRS and available to others upon their request to the IRS or to the Employee Association.

[Q: What happens after I apply for a grant?](#)

A: The Selection Committee will meet as frequently as necessary to review applications in order to provide employees with a timely response. A Human Resources representative will present your anonymous application to the Selection Committee, and they will determine whether you are eligible to receive a grant, and for what amount. The following questions will be considered by the Selection Committee:

- (a) Is the applicant eligible for a grant?
- (b) Is the grant necessary?
- (c) Can the problem be better handled by a community agency specializing in that particular field?

In some cases, the Selection Committee will need additional information to evaluate your application. The Human Resources representative will follow up with you if additional information is needed.

The Human Resources representative will notify you of the Selection Committee's decision within three business days after such decision is made.

[Q: Who makes the decision as to whether or not applicants receive any grants and how much?](#)

A: The Selection Committee makes all decisions as to who receives a grant, unless the Selection Committee is ineligible because of a conflict of interest or unless the Selection Committee is unable to reach a decision. If the Selection Committee is unable to act upon a grant request, the Board of Directors of the Employee Association will make the decision. The Selection Committee approves or denies requests in its judgment according to established criteria listed in the Selection Committee charter and by operation of the Committee, and its decisions are final.

The Selection Committee may be made up of Sun Health employees and members of the Sun Health leadership. Only a minority of the members of the Selection Committee may be management employees of Sun Health at any time. The Board of Directors will attempt to build a balanced Selection Committee by considering geographic diversity in selecting members of the Selection Committee. If you are interested in participating, please contact your Human Resources representative.

[Q: How long does it take to receive the funds if the Selection Committee approves an applicant?](#)

A: When a request for assistance is approved, checks will be made to the most appropriate payee, to be determined in the Selection Committee's discretion. Checks

are usually made payable directly to your creditor on your behalf and are issued within one week after the Selection Committee considers and approves the grant request. Once the checks are issued by the Employee Association, the employee will be notified and asked to make arrangements to pick up the check or to have it mailed.

[Q: What limits apply to the Employee Association?](#)

A: There are limits on the amount of a single grant, the number of times an employee may apply for or receive a grant. These limits are designed to maximize the assistance the Employee Association can provide to all employees.

- The maximum amount of a grant is \$600.00. An employee may not receive more than that amount in any 12 month period. This limitation is necessary in order for the Employee Association to respond to as many individual applications as possible.
- As a general rule, the grant may not exceed the demonstrated need based on the application.
- An employee may not apply for a grant more than once every six months.

[Q: If an employee suffers a financial hardship due to a spouse who lost his/her job, poor financial management, divorce, or other similar circumstances, does this qualify for consideration for a grant?](#)

A: It depends. The event that led to the financial hardship must be unexpected and outside of the control of the employee, meaning that it could not have resulted from the employee's (or family member's) own action or inaction. For example, a lay-off due to a company downsizing as opposed to employment termination for misconduct.

[Q: If an applicant's situation qualifies yet he or she has other resources to draw from \(such as savings, insurance, retirement\), can he or she still receive a grant from the Employee Association?](#)

A: Possibly. The Selection Committee may ask to see financial information so that the Committee can understand an applicant's ability to meet the emergency through cash flow, savings or other means. This is because our Employee Association has a limited budget and there may be times when the Employee Association cannot accommodate all grant requests. In such cases, it may be necessary to make difficult decisions based on which of our applicants has the greatest need. The Selection Committee may consider an applicant's financial means in its decision-making process.

[Q: What happens if my application is denied?](#)

A: You will be notified by the Human Resources representative within three business days of when the Selection Committee makes such a decision. You will receive a notification in writing listing the reasons for denial. You will not be permitted to reapply for six months after the date of your application. Your request for assistance will not be retained in your personnel file.

[Q: How can I help the Employee Association?](#)

A: You can help the Employee Association in many different ways! You can make a contribution to the Employee Association by making a financial donation, supporting the fundraising efforts such as bake sales and employee auctions. You can get together with co-workers and plan Employee Association fundraisers. You can volunteer to serve on the Selection Committee when there is an opening. Most importantly, you can remind your co-workers about the Employee Association when they are in need!

Q: [Is my donation to the Employee Association tax-deductible?](#)

A: No. Because the Employee Association is not a 501(c)(3) charitable organization under the IRS regulations donations will not be tax-deductible.

Q: [If I receive a grant from the Employee Association, do I need to pay taxes on it?](#)

A: No. Under the IRS regulations, a grant is treated as a gift and is not taxable income.

Q: [Who are the members of the Employee Association Selection Committee?](#)

A: The Employee Association consists of at least 7 members who are employees of Sun Health or its affiliates and represent each of the Sun Health Senior Living entities. Each community is expected to elect an employee or two to serve a two-year term on the Selection Committee. Ideally, when a community has two members each serving a two year term, the election of those members will alternate years to provide the Association with some stability and experience.

Q: [How do I become a member of the Employee Association Selection Committee?](#)

A: Each year, each community should solicit candidates for the community during the month of November. Employees should notify Human Resources of their desire to serve on the committee. Once a list has been created, the community will provide an opportunity for an election of the committee member(s) to represent their community during the month of December.

The term of the Selection Committee Members will be from January 1-December 31 of the following year, which results in a two-year term.

Q: [Are there any requirements to being a member of the Employee Association Selection Committee?](#)

A: The Employee Association Selection Committee Members must have worked for Sun Health at least 6 months at the time of their nomination (December). In addition, members should be good communicators and in good-standing (no written discipline or a poor performance evaluation within last 6 months). And, most importantly, flexible and available to participate in telephone conferences upon short-notice to vote upon grant requests.