

# GLOBAL SCHOLARS STAFF POLICY MANUAL

Effective January 2024

# GLOBAL SCHOLARS

## STAFF POLICY MANUAL

This manual has been developed to provide information about policies, procedures, and benefits related to employment with Global Scholars (including programs doing business as Cooperative Studies and the Society of Christian Scholars).

Our policies are designed to encourage freedom, personal growth, and fair and equitable treatment without discrimination. These written policies and procedures help to assure uniform and equitable practices for all employees. It is your responsibility to become familiar with the contents of this manual. As no manual can cover all situations that might arise, this manual is intended to provide you with general guidelines. Specific questions or problems not adequately addressed here should be directed to the appropriate department.

The policies here are the full, final, and updated policies currently in use. However, the Global Scholars' Leadership Team may, from time to time, modify, delete, or add policies as the need arises. If and when this occurs we will let you know as soon as possible.

THIS EMPLOYEE POLICY MANUAL DOES NOT AND IS NOT INTENDED TO CREATE A CONTRACT OF EMPLOYMENT BETWEEN ANY EMPLOYEE AND GLOBAL SCHOLARS. UNLESS OTHERWISE SET FORTH IN A WRITTEN CONTRACT OF EMPLOYMENT BETWEEN AN EMPLOYEE AND GLOBAL SCHOLARS, EMPLOYMENT IS AT-WILL AND MAY BE TERMINATED AT ANY TIME FOR ANY REASON BY EITHER THE EMPLOYEE OR GLOBAL SCHOLARS.

IN THE EVENT OF ANY CONFLICT BETWEEN THIS MANUAL AND THE TERMS OF ANY WRITTEN CONTRACT OF EMPLOYMENT, THE WRITTEN CONTRACT SHALL BE THE CONTROLLING DOCUMENT.

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# WELCOME

*Global Scholars (including programs doing business as Cooperative Studies and the Society of Christian Scholars) is a religious and educational organization (Christian) with a missional motivation. We seek to serve all “Christian academics” serving in pluralistic or open enrollment universities and research organizations. Each of these terms is necessary, and they are together sufficient to identify those we seek to work alongside. By “Christian” we declare they must be true followers of Christ, identified as those who can affirm and are seeking to grow in living out the realities of the Global Scholars’ Statement of Faith in community with other followers of Christ. By “academics” we denote all those God has called and equipped to serve, in professional posts within the academy, be that in roles as teachers, researchers, or administrators. We are pleased that you have joined the Global Scholars Team. We hope you will realize that God in his sovereignty has called you to this place.*

*Global Scholars is a total team effort, which requires the skills and dedication of many people, both those in the administrative office as well as those who serve in a variety of places around the world. When we work together, we can maximize our efforts for greater Kingdom impact than if we worked in isolation. You are an important part of the team!*

*You would not be here if the gifts and skills you bring were not considered to be essential to the total ministry of Global Scholars. It is our hope and prayer that you too will sense that God has brought you to Global Scholars for the purpose of fulfilling the Great Commission through the particular gifts the Lord has given you to share as we serve Christ in the universities of the world.*

*No matter our role at Global Scholars, the priority of our lives and work is to live and work “as for the Lord Jesus Christ.” If we keep that in mind, our days will be guided by him and all that we do will be done in His strength. It is in that spirit that we hope all will diligently work and give their service unto the Lord.*

*We trust that you will be blessed by your employment with Global Scholars*

*For Christ and the Gospel,*

*Dr. Stan W. Wallace*

*President and CEO*

# SECTION 1: MINISTRY ESSENTIALS

## **1.1 POLICY: STATEMENT OF MINISTRY ESSENTIALS Rev. Nov. 2021**

**Global Scholars Ministry Essentials guide and direct our strategic plans as well as our day to day activities and behaviors. Our Ministry Essentials include our Purpose Statement, our Statement of Faith, and our Core Values.**

**Our Purpose Statement:** Global Scholars exists to equip Christian academics to have a redemptive influence among their students, colleagues, universities, and disciplines, at a reasonable cost.

### **Global Scholars Statement of Faith**

In accord with the ancient creeds of the Christian faith such as the Apostles Creed and the Nicene Creed, the following Statement of Faith is a summary of essential biblical teaching as we strive for unity in essentials, liberty in non-essentials, and charity in all things.

- The Holy Scriptures as originally given by God, divinely inspired, infallible, entirely trustworthy, and the supreme authority in all matters of faith and conduct.
- One God, eternally existent in three persons, Father, Son, and Holy Spirit.
- Our Lord Jesus Christ, God manifest in the flesh, His virgin birth, His sinless human life, His divine miracles, His vicarious and atoning death, His bodily resurrection, His ascension, His mediatorial work, and His personal return in power and glory.
- The Salvation of lost and sinful man through the shed blood of the Lord Jesus Christ by faith apart from works, and regeneration by the Holy Spirit.
- The Holy Spirit, by whose indwelling the believer is enabled to live a holy life, to witness and work for the Lord Jesus Christ.
- The Unity of the Spirit of all true believers, the Church, the Body of Christ.
- The Resurrection of both the saved and the lost; they that are saved unto the resurrection of life, they that are lost unto the resurrection of damnation.

**Global Scholars' Core Values**, guiding our relationships, policies, and decision-making:

- Christ's Lordship
- Thinking Christianly
- Transformation through Christ
- Vocational Excellence
- Integrity
- Innovation



## **1.2 POLICY: TRANSPARENCY AND COMPLIANCE Revised Jan. 2020**

Global Scholars' actions will be in compliance with federal, state, and local laws and regulations. Should there be a conflict among laws of various countries, U.S. law will be the CEO's primary responsibility. The only exceptions are cases in which biblical teaching is in conflict with a nation's law(s) (e.g., with respect to religious freedoms and carrying out the Great Commission). In such cases, in order to be faithful to the higher Law of Scripture, the CEO in consultation with the Board, as appropriate, may be compelled to take or authorize actions that are in conflict with the specific laws of the nation where such activities occurred (See the Statement of Faith, our Core Values, and the Global Scholars Statement on Human Sexuality).

Should an employee or an un-salaried fellow who is based outside of the U.S. have a concern about a conflict concerning his/her local regulations, U.S. regulations, and/or biblical teaching, the employee should bring the matter to the attention of his/her supervisor.

As expressed in the Global Scholars' Core Values, each employee is expected to be honest in all statements and to never knowingly communicate misleading information in any situation.

Each person is expected to report any case of fraud, dishonesty, or misuse of funds to the appropriate supervisor (See Whistleblower Policy).

# SECTION 2: EMPLOYMENT

## **2.1 POLICY: HIRING PROCESS Effective November, 2021**

**Objective:** Global Scholars believes that hiring qualified individuals is fundamental to the overall success of the organization in achieving its Vision and living out its Core Values and Statement of Faith. Each employee is hired to make significant contributions to Global Scholars. In order to hire the most qualified candidates for positions, the following process should be followed for all administrative positions. This policy applies, mutatis mutandis, to volunteers, per the appointing supervisor's discretion. This policy does not apply to Independent Contractors.

### **Hiring Process and Procedures:**

Supervisors may initiate the hiring process for budgeted positions, assuming the organization has not implemented a hiring freeze or a financial contingency plan that prohibits hiring.

### ***Position Description***

Prior to advertising for an open position or interviewing, the Position Description for the opening must be complete. The Position Description will include:

- Position title
- Position hours/shifts.
- Exempt or non-exempt status of the position.
- Essential job functions
- Education and experience requirements
- Skills required
- Character and personal traits required

The Operations and Finance Department staff are available to assist with formatting and review of the Position Description.

### ***Job postings***

The hiring supervisor or the Operations and Finance Department staff will create a job posting that briefly describes the job opening and communicates Global Scholars' status as a "religious" organization. If the supervisor creates the job posting, it must be reviewed by the Operations Vice President prior to posting. Job openings will be posted on sites appropriate for the position being filled.

Job postings must include a link to Global Scholars' Statement of Faith and Core Values. The job posting must notify applicants that affirmation of the Statement of Faith and Core Values is required for employment.

The Operations and Finance Department will be responsible for tracking all applicants and retaining applications and resumes as required by the Document Retention Policy.

It is not mandatory for a position to be posted prior to making a hiring decision. The Operations Vice President must, however, be consulted if the position is not publicly posted

### ***Applicants with special circumstances***

Current employees with a satisfactory employment status may apply for internal job openings. The consent of the employee's supervisor is necessary for employees with less than one year of service with Global Scholars.

If the applicant is known to the hiring supervisor (family member, acquaintance, business associate, etc.), the Operations Vice President should be notified of a potential conflict of interest.

### ***Screening of applications and resumes***

All applicants for a posted vacancy will be considered based on their qualifications, competencies, capacities, and character in order to assess his/her ability to perform the job successfully. See Global Scholars' "Equal Employment Opportunity Policy".

The hiring supervisor will screen applications and resumes prior to scheduling interviews. The Operations and Finance Department staff is available to assist in the screening process, if requested.

### ***Interview process***

Initial interviews are generally conducted by the hiring manager, focusing on the qualities, competencies, capacities, and skills needed for the position. The interview questions will include core questions asked of each candidate, although the interviewer has the discretion to ask additional individualized questions, as appropriate. The interviewer will submit the interview notes to the Operations and Finance Department staff and the notes will be retained with the application. At the discretion of the hiring supervisor, the initial interview can be conducted by a member of the Operations and Finance Department, with a second interview conducted by the hiring supervisor.

The CEO may elect to conduct a final interview, at his/her discretion or to participate in an earlier interview.

The Operations and Finance Department staff will notify applicants who are not selected for positions at Global Scholars.

### ***Reference checks***

The Operations and Finance Department staff will conduct professional reference checks and employment verification on the top candidate(s) as identified by the hiring supervisor. A minimum of two professional references are required from each candidate. (See Reference Check Policy)

### ***Job offers***

After a decision has been made to hire a candidate, an offer will be made contingent on the satisfactory completion of required background checks and testing. Background checks will vary depending on the position and may include criminal history, credit history, driving record, drug testing, or any other relevant information for the job.

Internal applicants must complete required background checks or tests not previously completed.

Once the Operations and Finance Department staff receives satisfactory results from all required background checks and tests, candidates will be provided with a final job offer. If a candidate fails to accept an offer of employment within 7 calendar days, the offer may be rescinded by the organization.

## **2.2 POLICY: EQUAL EMPLOYMENT OPPORTUNITY Revised Nov. 2020**

Desiring to be consistent with biblical teaching as expressed in the Transparency and Compliance Policy, Global Scholars shall follow the spirit and intent of all federal, state, and local employment law and is committed to equal employment opportunity. To that end, we will not discriminate against any employee or applicant in a manner that violates the law.

Global Scholars is committed to providing equal opportunity for all employees and applicants without regard to race, color, national origin, sex, age, marital status, or any other characteristic protected under federal, state or local law. (See Exemptions below in 2.2) Each person is evaluated on the basis of personal skill and merit, including adherence to our Purpose Statement, Core Values, and Statement of Faith.

Global Scholars' policy regarding equal employment opportunity applies to all aspects of employment, including recruitment, hiring, job assignments, promotions, working conditions, scheduling, benefits, wage and salary administration, disciplinary action, termination, and social, educational, and recreational programs.

The Operations Vice President shall act as the responsible agent in the full implementation of the Equal Employment Opportunity Policy.

Any employee who believes that any other employee or volunteer of Global Scholars may have violated the Equal Employment Opportunity Policy should report the possible violation to the Operations Vice President.

- If the Operations Vice President may have violated the Equal Employment Opportunity Policy, the concern should be reported to the President.
- If the Operations Vice President (or the President if the allegation involves the Operations Vice President) determines that a violation of this policy has occurred, it will take appropriate disciplinary action as outlined in the Progressive Corrective Action policy.
- Employees who report, in good faith, violations of this policy and employees who cooperate with investigations into alleged violations of this policy will not be subject to retaliation. (See Whistleblower Policy)

Global Scholars is also committed to complying fully with applicable disability discrimination laws and ensuring that equal opportunity in employment exists for qualified persons with disabilities. All employment practices and activities are conducted on a non-discriminatory basis. Reasonable accommodations will be available to all qualified disabled employees, upon request, so long as the potential accommodation does not create an undue hardship on Global Scholars. Employees who believe that they may require accommodation should discuss these needs with the Operations Vice President.

Global Scholars is eligible for the Title VII exemption for employment. Global Scholars is a religious organization committed to equipping Christian academics to serve Jesus Christ through global higher education. A requirement for employment with Global Scholars is affirmation and adherence to our Purpose Statement, Statement of Faith, and Core Values. Our Statement of Faith prerequisite for employment is consistent with federal law set forth in Title VII of the Civil Rights Act of 1964, 42 U.S.C Section 2000e-1.

## **2.3 POLICY: PROGRESSIVE CORRECTIVE ACTION Revised 2018**

Progressive Corrective Action is a process designed to specify steps to be taken when a policy in this manual is violated. The steps are as follows:

1. Corrective counseling
2. Written warning
3. Dismissal

These steps are usually taken in sequence when a policy is violated. However, depending on the situation, any step may be repeated, omitted, or taken out of sequence. Global Scholars reserves the right to effect immediate termination should the situation be warranted. Each case is considered on an individual basis.

## **2.4 POLICY: EMPLOYEE AND VOLUNTEER CLASSIFICATIONS Rev. Nov. 2022**

All employees are designated as either exempt or non-exempt under state and federal wage and hour laws. Non-exempt employees are employees whose work is covered by the Fair Labor Standards Act (FLSA). They are not exempt from the law's requirements concerning minimum wage and overtime. Exempt employees are generally managers or professional, administrative, teaching or technical staff that are exempt from the minimum wage and hour standards as established under the FLAA by the US Department of Labor.

- Full-time employee: Any employee scheduled to work 32 or more hours per week. A full-time employee may be paid on an hourly basis or a salary basis and may be exempt or non-exempt as required by applicable law.
- Part-time employee: Any employee scheduled to work less than 32 hours each week. Part-time employees are eligible to earn certain benefits, as specified in this manual. A part-time employee may be paid on an hourly basis or a salary basis, as required by applicable law. Part-time employees may or may not be non-exempt.
- Temporary employee: Any employee who is hired for a pre-established period usually during peak workloads, for vacation relief, or as needed for special assignments. They may work a full-time or part-time schedule and are paid on a pre-arranged hourly rate of pay. They are not eligible for the benefits described in this manual.
- Non-salaried fellow: A person, appointed as a fellow, who actively takes on a task, responsibility, or project on his or her own accord without being paid by Global Scholars for the work that he/she provides. Non-salaried fellows are directed and supervised by paid staff members and are subject to the policies and procedures described in this Manual.



## **2.5 POLICY: BACKGROUND AND REFERENCE CHECKS Revised Dec. 2018**

To ensure that individuals who join Global Scholars are well qualified and to ensure that Global Scholars maintains a safe and productive work environment, it is our policy to conduct pre-employment background checks on all applicants who accept an offer of employment. Background checks may include verification of any information on the applicant's resume or application form as well as criminal history background checks.

All offers of employment are conditioned on receipt of a background check report that is acceptable to Global Scholars.

All background checks conducted are in conformity with the Federal Fair Credit Reporting Act, the Americans with Disabilities Act, and state and federal privacy and anti-discrimination laws.

- Reports are kept confidential and are only viewed by individuals involved in the hiring process.
- If the information obtained in a background check would lead Global Scholars to deny employment, a copy of the report will be provided to the applicant, and the applicant will have the opportunity to dispute the report's accuracy.

## **2.6 POLICY: MANAGEMENT OF PERSONNEL RECORDS Revised Dec. 2018**

Employee files are maintained by the Operations/Finance department and are considered confidential.

- A supervisor may only have access to personnel file information of his or her subordinate employees on a need-to-know basis.
- A Global Scholars employee with hiring authority who is considering the hire of a former employee or transfer of a current employee may be granted access to the file, or limited parts of it, in accordance with anti-discrimination laws.

The personnel file is the confidential property of the organization and any request for access by current employees and former employees will be considered on a case-by-case basis.

- Personnel files are to be reviewed in the Operations/Finance department. Personnel files may not be taken outside the department.
- Representatives of government or law enforcement agencies, in the course of their duties, may be allowed access to file information. (Note: Please be advised that company policy is subject to state requirements, including potential requirements to provide copies of personnel files.)

# Section 3: Workplace Safety

### **3.1 POLICY: HARASSMENT-FREE WORKPLACE Revised Dec. 2018**

Global Scholars' leadership expects all employees to conduct themselves in a God-honoring manner and to adhere to Global Scholars Core Values, believing all employees should maintain an atmosphere free from all forms of disrespect and harassment.

Harassment consists of unwelcome conduct, whether verbal, physical or visual, that is based on a person's race, color, national origin, religion, age, marital status, gender, or disability.

This policy covers both discriminatory words or statements and non-verbal conduct. Improper words, symbols, or conduct expressed or received on voicemail, email, or through the Internet are also serious violations of this policy and will not be tolerated. This includes sexual harassment.

Global Scholars' leadership will not retaliate or discriminate, or allow retaliation or discrimination by any employee against any employee who makes a good-faith complaint about harassment, participates in an investigation into alleged harassment, or otherwise exercises any right protected by the Anti Sexual Harassment Policy.

### **3.2 POLICY: ANTI-SEXUAL HARASSMENT Revised November 2022**

**Title VII of the Civil Rights Act of 1964 prohibits discrimination on the basis of race, color, sex, age, or national origin. Sexual harassment is included among the prohibitions. It is Global Scholars' policy to promote a workplace that is free of sexual harassment or conduct that might reasonably be perceived as constituting sexual harassment or creating/contributing to a sexually hostile work environment. Each individual has the right to work in a professional atmosphere, which promotes equal opportunities and prohibits discriminatory practices, including sexual harassment. At Global Scholars, sexual harassment, whether verbal, physical, or environmental, is unacceptable and will not be tolerated.**

This policy applies to all employees and un-salaried fellows of Global Scholars.

#### **Definition:**

For purposes of this policy, sexual harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- Submission to such conduct is made, either explicitly or implicitly, a term or condition of an individual's employment;
- Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting the individual; or
- Such conduct has the purpose or effect of unreasonable interference with an individuals' work performance, or creates an intimidating, hostile, or offensive working environment.

Examples of sexual harassment include but are not limited to:

- Unwanted physical advances;
- Requests for sexual favors in exchange for favorable treatment or continued employment;
- Offensive comments, jokes or other sexually oriented statements or depiction
- Unwelcome flirtation, advances, or propositions;
- Verbal abuse of a sexual nature;
- Graphic, verbal commentary about an individual's body, sexual prowess, or sexual deficiencies;
- Leering, whistling, touching, or pinching; suggestive insulting, or obscene comments or gestures of a sexual nature;
  
- Transmitting or forwarding emails containing offensive, suggestive, or lewd attachments, statements, or jokes; and
- Uploading, downloading, or viewing inappropriate pictures or material onto organizational information systems.

The above list is only illustrative of the types of conduct that would violate this policy and, as such, by no means represents an exclusive list of conduct that could lead to disciplinary action, up to and including termination of employment. Offensive and inappropriate behavior need not rise to the level of sexual harassment within the meaning of applicable state and federal law to be deemed a violation of this policy.

#### **Scope:**

All employees and un-salaried fellows must comply with this Anti-Sexual Harassment Policy and take appropriate measures to ensure that such conduct does not occur.

In addition to discipline by the company, individuals who engage in acts of sexual harassment may also be

subject to civil and criminal penalties.

### **General Guidelines:**

This policy covers all employees and un-salaried fellows of Global Scholars. Global Scholars will not tolerate, condone, or allow sexual harassment, whether engaged in by employees, outside clients, or other non employees who conduct business with Global Scholars. Global Scholars encourages the reporting of all sexual harassment incidents, regardless of who the offender may be.

While Global Scholars encourages individuals who believe they are being harassed to firmly and promptly notify the offender that his or her behavior is unwelcome, we also realize that the power and status disparities between the person allegedly harassing and the person harassed may make such a confrontation unlikely. In the event that such informal, direct communication between individuals is either ineffective or impossible, Global Scholars management should be contacted through the procedures outlined below.

Global Scholars will not retaliate in any way against any individual making a report of sexual harassment, nor will Global Scholars permit any employee, un-salaried fellow or volunteer to do so. Retaliation is a serious violation of this sexual harassment policy and should be reported immediately.

### **Procedures:**

A report of an alleged violation of this policy should be made to one's immediate supervisor. Usually, the sooner the report is made, the better.

- If the individual is uncomfortable speaking with his or her supervisor, or if his or her supervisor is the subject of the concern, the individual should report his or her concern directly to the next level supervisor.
- If the concern relates to actions by the President, then the individual should report his or her concern directly to the Board Chairperson.
- An investigation of the alleged harassment will be handled by the supervisor and second-level supervisor (hereafter "supervisors") in a confidential manner so as to protect the privacy of persons involved.
- If the complaint relates to actions by the President, the Board Chairperson will follow the procedure outlined, in lieu of the supervisors.
- Confidentiality will be maintained throughout the investigatory process to the extent practical and appropriate under the circumstances. In pursuing the investigation, the supervisors will seek to consider the wishes of the complainant, but will thoroughly investigate the matter as appropriate under the circumstances.
- The alleged offender will be made aware of the report and will be given an opportunity to respond and present witnesses.
- The supervisors will keep the complainant informed as to the status of the investigation. Upon completion of the investigation of a sexual harassment complaint, the supervisors will recommend to the President the appropriate action taken.
- If the concern relates to actions by the President, the Board Chairperson will make a recommendation of appropriate action to the entire Board of Directors. **The Board Chair is JT Smith and his email address is [jt.smith@yahoo.com](mailto:jt.smith@yahoo.com).**
- If Global Scholars concludes that harassment occurred, the harasser will be subject to appropriate disciplinary action, as described below.
  - The complainant will be informed of the disciplinary action taken.
  - In the event harassment cannot be substantiated, this finding will be communicated to the

complainant in an appropriately sensitive manner. The complainant is always free to



provide additional evidence for investigation.

- If any party directly involved in a sexual harassment investigation is dissatisfied with the outcome or resolution, that individual has the right to appeal the decision to the President, in writing and in a timely manner.
- If dissatisfied with the President's decision, that individual has the right to appeal the decision to the Board Chair, again in writing and within fifteen days. **The Board Chair is JT Smith and his email address is [jt.smith@yahoo.com](mailto:jt.smith@yahoo.com).**
- Employment conditions of the complainant and witnesses will be in no way adversely affected through the use of this procedure. (see below for exceptions)
- Individuals found to have engaged in misconduct constituting sexual harassment will be disciplined, up to and including administrative leave and/or termination.
- Appropriate sanctions also may include written reprimand and referral to counseling.

If an investigation clearly reveals that the complainant knowingly and intentionally made a false accusation of sexual harassment, appropriate disciplinary action will be taken.

### **3.3 POLICY: WHISTLEBLOWER PROCEDURE Revised November 2022**

**The purpose of the Whistleblower Policy is to establish a procedure by which employees and un-salaried fellows of the organization can report (a) questionable or improper accounting or auditing matters, and (b) reasonable beliefs that some policy, practice, or activity of Global Scholars and/or a Global Scholars employee are in violation of law, or a clear mandate or public policy.**

**This policy applies to all employees and un-salaried fellows of Global Scholars.**

The Employment Policies and the Conflict of Interest Policy of Global Scholars require employees and un-salaried fellows to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. Employees, un-salaried fellows, and other representatives of the organization must practice honesty and integrity in fulfilling their responsibilities and comply with all applicable laws and regulations.

Each Global Scholars employee and un-salaried fellows has a responsibility to report Concern

This Whistleblower policy is intended to encourage and enable employees and un-salaried fellows to raise Concerns within the organization for investigation and appropriate action. With this goal in mind, no employee or un-salaried fellows who, in good faith, reports a Concern shall be subject to retaliation. Moreover, an employee or un-salaried fellows who retaliates against someone who has reported a Concern in good faith is subject to discipline up to and including dismissal from the un-salaried position or termination from employment.

#### **Procedure for Reporting Concerns:**

- Employees and un-salaried fellows should first discuss their concern with their direct supervisor.
- If, after speaking with him or her, the individual continues to have reasonable grounds to believe the Concern is valid and has not been adequately addressed, the individual should report the Concern to their second-level supervisor.
- If still not resolved, the individual should report the concern to the next level supervisor.
- Finally, if still not resolved by the President, the individual should report the concern to the Board Chairperson.
- In addition, if the individual is uncomfortable speaking with his or her supervisor, or if his or her supervisor is the subject of the Concern, the individual should report his or her concern directly to the next level supervisor.
- If the concern relates to actions by the President, then the individual should report his or her concern directly to the Board Chairperson. [The Board Chair is JT Smith and his email address is jt.smith@yahoo.com.](mailto:jt.smith@yahoo.com)
- The supervisor shall work with the reporting person to record the Concern in writing and to submit the Concern to the appropriate person(s), for immediate investigation. If the supervisor does not do so within five days, the employee may immediately notify the next level supervisor without reprisal.

#### **Handling of Reported Violations:**

- The supervisor and second-level supervisor shall begin an investigation of the Concern within at least five days of being notified (See above)
- The investigation shall be completed within no more than 30 days of receiving the complaint.

- Within three days of concluding the investigation, the supervisor shall file a written conclusion in the involved staff's personnel file, and take appropriate action.
- The President shall be notified of the conclusion of the investigation and action taken.
- Action taken must include a conclusion and/or follow-up with the complainant for complete closure of the Concern.
- If the Concern pertains to the President, the same process shall be followed by the Board Chairperson and others the Chairperson appoints.
- The investigating supervisors have the authority to retain outside legal counsel, accountants, private investigators, or any other resource deemed necessary to conduct a full and complete investigation of the allegations.

**Acting in Good Faith:**

- Anyone reporting a Concern must act in good faith and have reasonable grounds for believing the information disclosed indicates an improper accounting or auditing practice, or a violation of a law, regulation or appropriate standard of business and personal ethics in the conduct of duties and responsibilities.
- The act of making allegations that prove to be unsubstantiated, and that prove to have been made maliciously, recklessly, or with the foreknowledge that the allegations are false, will be viewed as a serious disciplinary offense and may result in discipline up to and including dismissal from the unsalaried position or termination of employment. Such conduct may also give rise to other actions, including civil lawsuits.

**Confidentiality:**

- Reports of Concerns, and investigations pertaining thereto, shall be kept confidential to the extent possible and will be shared only with those who have a legitimate need to know so that the investigating committee may conduct an adequate investigation.
- Disclosure of reports of Concerns to individuals not involved in the investigation will be viewed as a serious disciplinary offense and may result in discipline up to and including termination of employment. Such conduct may also give rise to other actions, including civil lawsuits.

### **3.4 POLICY: COMPLAINTS AND GRIEVANCES RESOLUTION Revised: November 2022**

**The purpose of the Complaint and Grievance Resolution Policy is to facilitate a fair, healthy, and productive work environment consistent with our Core Values and Statement of Faith, the Complaints and Grievance policy provides a clear and uniform process for resolving complaints and grievances.**

We seek to provide a process for related parties, including but not limited to, donors, applicants, and independent contractors, to communicate concerns or grievances.

Complainants will not incur discrimination or discipline as a result of honestly and appropriately raising a complaint or grievance. (See the Corrective Action Policy)

Nothing in this policy should be interpreted to supersede or limit the processes described in the Whistleblower Policy or the Sexual Harassment Policy.

#### **Definition:**

For Global Scholars' purposes the terms grievance and complaint will be used interchangeably and will be defined as an expression of dissatisfaction, concern or of a wrong action believed to cause distress or detriment. "un-salaried fellows" are included in "employee" below.

#### **Procedure for employees and un-salaried fellows:**

##### Step 1:

Global Scholars encourages employees to first seek to resolve the complaint with the person(s) most closely involved in the situation at the earliest possible opportunity.

- Step 1 is informal and requires no documentation.
- If the employee does not feel safe or comfortable discussing the matter with those involved, he/she can move directly to Step 2.

##### Step 2:

The employee will notify his/her supervisor of the complaint. If appropriate, the supervisor may facilitate discussion between the complainant and other relevant parties.

- The supervisor will document, in writing or electronically, the nature of the complaint and the resolution reached, and have the employee confirm the complaint is documented accurately
- Should the person who is the subject of the complaint be the employee's supervisor, the employee should contact the next higher supervisor.
- Step 2 should be completed within 5 business days.
- If the matter is not resolved, the employee may proceed to Step 3.

##### Step 3:

- The employee or the supervisor may refer the complaint to the CEO.
- A complaint taken to the CEO must be detailed in writing (electronic format is acceptable) and from the complainant employee.
- The CEO will investigate the complaint and provide a written response to the complainant within 5 business days.

- If the matter is not resolved, proceed to Step 4:

Step 4:

- Upon the request of the complainant, the CEO will provide the complainant with the contact information for the Chairperson of the Board of Directors for further investigation of the complaint. [The Board Chair is JT Smith and his email address is jt.smith@yahoo.com.](mailto:jt.smith@yahoo.com)

Should any Global Scholars employee become aware of a complaint communicated by a related party that the employee is not able to resolve following normal business processes, the employee should provide the related party complainant with the following information.

**Procedure for donors, applicants, independent contractors and other related parties:** Step 1:

- Global Scholars encourages related parties to first seek to resolve the complaint with the person(s) most closely involved in the situation at the earliest possible opportunity.
- Step 1 is informal and requires no documentation.
- If the related party does not feel safe or comfortable discussing the matter with those involved, he/she can move directly to Step 2.

Step 2:

- The related party will notify the appropriate Vice President of the complaint.
- If appropriate, the Vice President may facilitate discussion between the complainant and other relevant parties.
- The Vice President will document, in writing or electronically, the nature of the complaint and the resolution reached, and have the related party confirm the complaint is documented accurately. ● Should the person who is the subject of the complaint be a Vice President, the related party should contact the CEO.
- Step 2 should be completed within 5 business days.
- If the matter is not resolved, the related party may proceed to Step 3.

Step 3:

- The related party or a Vice President may refer the complaint to the CEO.
- A complaint taken to the CEO must be detailed in writing (electronic format is acceptable) and from the related party.
- The CEO will investigate the complaint and provide a written response to the complainant within 5 business days.
- If the matter is not resolved, proceed to Step 4:

Step 4:

- Upon the request of the complainant related party, the CEO will provide the complainant with the contact information for the Chairperson of the Board of Directors for further investigation of the complaint. [The Board Chair is JT Smith and his email address is jt.smith@yahoo.com.](mailto:jt.smith@yahoo.com)

### **3.5 POLICY: WORKERS' COMPENSATION COVERAGE Revised November 2022**

All employees, currently receiving a paycheck, are covered by workers' compensation insurance, which compensates an employee for lost time, medical expenses and loss of life or dismemberment from an injury arising out of or in the course of work. (Subject to review and assessment of the insurance carrier.)

Employees must report any accident or injury to their supervisor and the Operations/Finance department on the same day that the injury occurs, so that the necessary paperwork may be completed.

Un-salaried fellows are not covered by workers' compensation insurance.

## Section 4: Benefits

#### **4.1 POLICY: LONG-TERM DISABILITY INSURANCE COVERAGE Revised Dec. 2018**

Global Scholars makes employee-paid long-term disability insurance available for each employee working 30 hours or more per week. Premiums are paid via payroll withholding.

Employee paid long-term disability insurance coverage allows the employee's benefit to be tax-free income. The coverage is provided by The Standard Insurance Company.

- There is no benefit during the first 6 months of continuous disability
- After 6 months, the long-term disability monthly benefit is 60% of your monthly wage base (not exceeding \$5,000). Other sources of income may reduce the benefit received.
- The length of time for which monthly benefits will be paid depends on your age when your disability begins.
- See the Standard Insurance Company policy for complete details.



#### **4.2. POLICY: 403B RETIREMENT SAVINGS PLAN BENEFIT Revised Dec. 2018**

All employees, currently receiving a paycheck, are eligible to participate in the Global Scholars 403B Retirement Savings Plan administered by TIAA.

- Global Scholars will match the employee's monthly contribution, up to 5% of the employee's salary.
- An employee may begin making contributions to the retirement plan from the first day of the month following the date they are hired.
- Matching contributions by Global Scholars will begin after 3 months of employment.
- Pre-tax, Post-tax, and Roth options are available for the employee contributions.
- **Fellows:** See Academic Staff Addendum for further details regarding the impact on fund balance.

#### **4.3 POLICY: EMPLOYER'S SHARE OF FICA Revised Dec. 2018**

**FICA taxes (Federal Insurance Contribution Act) include Social Security and Medicare.**

- The employee portion of FICA taxes is withheld from your paycheck, as required by law.
- Global Scholars pays the employer's share of FICA.
- **Fellows:** See Academic Staff Addenda for further details regarding the impact on fund balance.
- Ordained members of the clergy have special options under the FICA regulations. See IRS.gov for further information.

# Section 5: Workplace Expectations

## **5.1 POLICY: CONFIDENTIALITY Revised Nov. 2022**

Our donors and other parties with whom we do business entrust Global Scholars with important personal information. This includes, but is not limited to, donor demographics, donation histories, organizational records, strategies, and plans, and vendor contracts.

It is our policy that all information considered confidential will not be disclosed to external parties, un-salaried fellows, or to employees without a clear “need to know.” (See also the Intellectual Property Rights Policy)

Global Scholars will maintain PCI compliance certification (Payment Card Industry Data Security Standards) with each of its credit card processing vendors Any questions concerning PCI compliance should be directed to the Operations Vice President.

Global Scholars staff will not record or communicate a donor’s Primary Account Number (credit card number; also known as PAN). Any questions concerning the use or communication of donor information including credit card or ACH information should be directed to the Operations Vice President.

If an employee or un-salaried fellow questions whether certain information is considered confidential, he/she should first check with his or her immediate supervisor.

This policy is intended to alert employees and un-salaried fellows to the need for discretion at all times and is not intended to inhibit normal business communications.

**All inquiries from the media concerning organizational policies or activities must be referred to the President & CEO. If an employee or un-salaried fellow has a question about whether it is appropriate to respond to a media request, he/she should contact his/her supervisor.**

## 5.2 POLICY: CONFLICT OF INTEREST Revised Nov. 2022

The purpose of the Conflict of Interest Policy is to ensure Global Scholars' staff and un-salaried fellows act in the best interests of the organization. The Conflict of Interest Policy is also intended to enhance public confidence in the integrity of Global Scholars and its staff. The organization recognizes that staff and un-salaried fellows have a variety of interests and connections; however, those interests must not be in conflict with the interest of Global Scholars or damage the donors' confidence and support for Global Scholars.

**Definition:** Conflict of Interest: A situation in which an individual or the organization he/she has an interest in, has a direct or indirect competing interest with Global Scholars' purpose and activities. The competing interest may result in the individual recognizing an inappropriate benefit from the situation or Global Scholars not being able to achieve a result that is in the best interest of Global Scholars.

A conflict may arise when an employee or un-salaried fellow:

- Is party to a contract with Global Scholars
- Has an interest in an organization, or is related to a person who is a party to a contract with Global Scholars
- Receives payment from Global Scholars for services provided to Global Scholars (outside of normal expense reimbursements)

Conflict of interest includes, but is not limited to situations in which

- An employee's or un-salaried fellow's financial interests or private concerns are in conflict with his/her work responsibilities and obligations or results in the public perception that a conflict exists
- An employee's or un-salaried's fellows ability to act in the best interest of Global Scholars' donors, fellows, or Society members is impaired
- An employee's or un-salaried fellow's actions would damage the trust of donors, fellows, and Society members place in Global Scholars

### **Procedure:**

On an annual basis, all Leadership Team members will be provided with a copy of the policy and will be required to acknowledge receiving the policy and to disclose any interest that could give rise to conflicts.

On an annual basis, all administrative team members and un-salaried fellows with fiduciary obligations, other than the Leadership Team members, will be reminded of the Conflict of Interest policy and process for disclosing any real or potential conflicts.

Further, at any time a conflict should arise all employees and un-salaried fellows shall immediately disclose, in writing, to their supervisor, any personal, business or financial interest where such interest might be construed as being a real or potential conflict with their Global Scholars' duties.

In performance of their duties, employees and un-salaried fellows must not:

- Place themselves in a position of obligation to persons who might benefit or appear to benefit from special consideration with respect to Global Scholars' business
- Have a monetary interest that would conflict with the Global Scholars' work responsibilities
- Disclose, use, benefit or appear to benefit from the use of information not generally available to the public which has been acquired during the performance of official work duties
- Directly or indirectly use, or allow the use of, Global Scholars' property or information for anything other than officially approved activities

Global Scholars staff members and un-salaried fellows may obtain employment with another employer, pursue other volunteer activities, or operate another business providing:

- It does not interfere with the performance of their Global Scholars duties (not applicable to un-salaried fellows)
- It does not bring Global Scholars into disrepute
- It does not involve the use of Global Scholars' premises, equipment, or supplies, including mailing lists, unless official authorization is secured
- It does not appear to represent Global Scholars' activities or policies

**Gifts:** Staff and un-salaried fellows must avoid the appearance of favoritism in their Global Scholars activities and shall not accept personal gifts valued at more than \$25.00 per year from those doing business with or seeking to do business with Global Scholars. Exceptions may be authorized by the CEO in light of the cultural norms of non-U.S. citizens.

**Vendor relationships:** Goods and services shall not be purchased from a staff member, volunteer fellow, or relative of an employee without prior authorization of the CEO.

**Breach of conflict of interest policy:** Employees and un-salaried fellows shall consult with their supervisor whenever they have any question as to whether a particular circumstance may result in a conflict of interest.

Employees and un-salaried fellows who fail to comply with this policy will be subject to appropriate measures as described in Global Scholars' discipline policy. Further, Global Scholars shall have the right to enforce its lawful rights and remedies against any offending person and Global Scholars reserves all rights it may have to deal with contracts or conflict related to the breach of the conflict of interest policy.

**Responsibilities:** The CEO is responsible for maintaining and monitoring this policy and for authorizing exceptions. Members of the Global Scholars' Leadership Team are responsible for implementing this policy in each of their respective areas. Should a staff member or an un-salaried fellow have an unresolved concern regarding a conflict of interest matter involving the CEO, the staff member shall contact the Chairperson of the Board of Directors. See also the "Whistleblower Policy".

## **5.3 POLICY: INTELLECTUAL PROPERTY RIGHTS Revised Nov. 2022**

**Global Scholars (the “Organization”) is committed to a high level of legal and ethical standards, consistent with our values and Statement of Faith. Our commitment to our values includes and requires respecting the intellectual property rights of our suppliers, partners, employees, independent contractors and others, including other independent organizations. No employee, independent contractor, un-salaried fellow, or agent should steal or misuse the intellectual property rights owned or maintained by another. Similarly, Global Scholars is committed to protecting its own intellectual property from infringement by others and no employee, independent contractor, un-salaried fellow, or agent shall fail to protect the Intellectual Property of the Organization.**

Intellectual Property includes knowledge, creative ideas, or expressions of the human mind that have commercial value and are protectable under copyright, patent, service mark, trademark, or trade secret laws from imitation, infringement, and dilution. Intellectual property includes brand names, discoveries, formulas, inventions, knowledge, registered designs, software, and works of artistic, literary, or musical nature. It is one of the most readily tradable properties in the digital marketplace.

The provisions of this Policy are subject to any applicable laws, regulations or specific provisions of the grants or contracts that govern the rights in Intellectual Property. All employees, independent contractors, and un-salaried fellows will receive a copy of the policy at hire or upon modification of the policy.

### ENUMERATION OF INTELLECTUAL PROPERTY SUB-POLICIES:

#### **1. General Copyright Policy:**

The ownership of the various rights associated with copyright is dependent upon the specific type of Copyrightable Work that is created. The Organization shall assert limited ownership of Copyrightable Works as set forth below. Unless otherwise provided for under this policy, all rights associated with Copyrightable Works produced as “work Made for Hire” or other works that make “Substantial Use” of the Organization’s resources belong to the Organization. “Work for Hire” is defined as a contractual relationship in which the Organization pays for the creation of a specific Copyrightable Work. The ownership of the Copyrightable Work will be expressly defined in a written contract prior to the creation of the Copyrightable Work. “Work for Hire” also includes the creation of Copyrightable Works specifically listed as a job responsibility in the employee’s Position Description. For the purposes of the policy “Substantial Use” will be defined as more than ten percent of the employee’s scheduled work time over a period of more than three months or requiring more than \$10,000 in the Organization’s resources per fiscal year. The Organization asserts ownership of publications, web site pages, training materials, and fundraising/communication pieces prepared specifically for Global Scholars, including but not limited to the Global Scholars web site, the Society of Christian Scholars website, “The Addenda”, “NotaBene”, “The PROfile”, “The Global Scholars Annual Report”, and “Staff Policy Manual”, the Board of Directors’ Policy Governance Manual”, and staff orientation/training recordings and webinars.

##### A. Courseware and Curriculum

- a. The Organization shall have limited ownership or control rights for Courseware and

Curriculum as specified below:

- i. When employees develop Courseware and Curriculum without specific direction by the Organization, unless otherwise agreed, the ownership of the courseware shall remain with the employee. The Author(s) shall acknowledge Global Scholars as his/her sponsor or employer in the publication notes, **whenever possible**.
- ii. When the Organization specifically directs the creation of Courseware and Curriculum and supplies the employee with materials and time to develop the Courseware and Curriculum, the resulting materials belong to the Organization. The Organization may specifically agree to share revenues and control rights with the employee.

**B. Scholarly and Artistic Works**

- a. Notwithstanding the Organization's ownership of Copyrightable Works made with Substantial Use of the Organization's Resources and Work Made for Hire, the ownership of blogs, textbooks, curricula, course materials, lectures, presentations, learning modules, scholarly monographs, trade publications, maps, charts, articles in popular magazines and newspapers, novels, nonfiction works, supporting materials, artistic works, and like works, whether in physical, electronic, or any other media of expression, shall reside with the Author/Creator(s) and any revenue derived from their work shall belong to the Author/Creator(s).

**C. Manuscripts for Academic Journals and Written Products of Scholarly Work.**

- a. Notwithstanding the Organization's ownership of Copyrightable Works made with Substantial Use of the Organization's Resources and Work Made for Hire, the ownership of written products of scholarly work, such as conference publications, manuscripts for publication in academic journals, and similar written work product, shall reside with the Author(s), and any revenue derived from the works shall belong to the Author(s).
- b. If the scholarly work is to be published, the Author(s) shall request the right to provide the Organization with a royalty-free right to use the work within its teaching, research, and service programs, but not for external distribution, and, if successful, the Author(s) shall grant such right to the Organization.
- c. If the scholarly work is to be published, the Author(s) shall acknowledge Global Scholars as his/her sponsor or employer in the publication notes.

**D. Digital Courses and Webinars**

- a. The Organization's digital learning materials and webinars will incorporate content developed by individuals who are not employed by the organization as well as those who are Global Scholars' employees and/or volunteers. In keeping with the tradition in higher education that academic works such as articles, lectures, visual materials, and other teaching materials are owned by the author, rather than the employing organization, the copyright to the academic content under shall be owned by the author(s). content owner.
- b. The Organization's digital courses and webinars will be delivered through or otherwise incorporate Digital Delivery Infrastructure, at times in combination with third-party software or delivery platforms. Such Infrastructure shall be owned by the Organization or, as needed, used by agreement with third-party owners.
- c. Notwithstanding the author's ownership of the content, the Organization shall have a royalty-free right to use the work within its teaching, research, and service programs, but not for external distribution without the express consent of the author.

**E. Copyrightable Software**

- a. The ownership of Copyrightable Software that a reasonable person would believe to have an



actual or projected market value in excess of \$10,000 annually shall be retained by the Organization where such software results from the Substantial Use of Organization's resources.

## F. Grant Sponsors

- a. In cases when the grant sponsor claims ownership of a copyright or invention as part of the grant process, the organization retains a royalty-free right to use the intellectual property for any internal research and teaching purposes. Grant applicants should refer to each specific grant's requirements.

## G. Unauthorized Use of Copyrightable Materials:

- a. Unauthorized file sharing of copyrighted material, distribution of others' copyrighted works and illegal downloading violate federal copyright law. Subject to limited exceptions, owners of the copyright in a work have exclusive rights to:
  - i. reproduce, photocopy, or make an electronic copy of the copyrighted work
  - ii. prepare derivative works based upon the copyrighted work
  - iii. distribute copies of the work to the public by sale, transfer or lending
  - iv. perform or display the work publicly
- b. Even if no formal copyright notice is attached, written text, music, movies, digital images, and computer software are some examples of intellectual property protected by copyright. The same legal protections for copyrighted works exist in an electronic environment as they do in a paper environment.
- c. Making or distributing an electronic copy of a copyrighted work by any means constitutes reproduction of the work, and illegal copying may subject students and others who engage in copyright infringement to significant civil and criminal penalties,
- d. The Organization will take appropriate disciplinary action against those who violate copyright laws. (See Discipline policy.)
- e. Copyright law includes the "Fair Use" principle for non-profit, educational organizations. "Fair Use" provides that the reproduction of copyright protected works for certain limited, educational purposes does not constitute a copyright infringement. The Copyright Act establishes a four factor test, the "fair use test," to use to determine whether a use of a copyrighted work is fair use that does not require the permission of the copyright owner. To determine whether a proposed use is a fair use, you must consider the following four factors, on which we elaborate more below:
  - i. Purpose: The purpose and character of the use, including whether such use is of a commercial nature, or is for nonprofit education purposes.
  - ii. Nature: The nature of the copyrighted work.
  - iii. Amount: The amount and substantiality of the portion used in relation to the copyrighted work as a whole.
  - iv. Effect: The effect of the use upon the potential market for, or value of, the copyrighted work.

## 2. Trademark Policy

The Organization reserves the right to own, control, and protect the trademarks and service marks of the Organization. Trademarks include, but are not limited to, the Global Scholars' logo, the Society of Christian Scholars' logo, and the Global Scholars tagline.

### **3. Trade Secrets Policy**

- A. Trade secrets are confidential organizational information and can include a formula, pattern, compilation, program, device, method, technique or process. Trade secrets provide an economic or competitive advantage to the Organization. Factors considered in evaluating whether information meets the definition of a trade secret include but are not limited to 1.) the extent to which the information is known outside the Organization and 2.) the amount of effort or money expended in developing the information. Trade secret infringement includes disclosing to others any information received in confidence from or protected from disclosure by a supplier, contractor, or other third party.
- B. The Organization's trade secrets include but are not limited to, donor information (all sources), web site structure and design, organizational strategic plans, curriculum, and Board of Directors' documents.

### **4. Procedure and Dispute Resolution:**

The Organization shall establish procedures to notify all employees, un-salaried fellows, and independent contractors that they are subject to the Intellectual Property Policy of the Organization and to resolve questions concerning intellectual property rights and any disputes that develop under this policy. Final decisions on disputed matters will be made by the Chief Executive Officer or designee and shall constitute final organizational action. Should the question or dispute concerning Intellectual Property Rights be in reference to the work product of the CEO, the matter will be referred to the Chairperson of the Board of Directors.

## **5.4 POLICY: ELECTRONIC COMMUNICATION AND INTERNET USE Revised Nov. 2022**

All company-supplied technology and company-related work records belong to Global Scholars and not the employee.

- Global Scholars reserves the right to monitor the use of company-supplied technology.
- Inappropriate or illegal use and/or communications may be subject to disciplinary action up to and including termination of employment.
- Internet, company-provided equipment (e.g., cell phone, laptop, and/or computers) and services may not be used for transmitting, receiving or storing any communication of a defamatory, discriminatory, harassing or pornographic nature.

All computers, whether owned by Global Scholars or personally owned equipment used in the course of Global Scholars work, will utilize antivirus software capable of detecting, removing, and protecting against all known types of malicious software (for example, viruses, Trojans, worms, spyware, adware, and rootkits.) Global Scholars will provide an option for antivirus software at no cost to the user. Should an individual choose to use a different software program, the employee must notify the IT/ Media Specialist of their choice, in order to assure adequate security is provided by the individual's preferred option.

The following actions are forbidden:

- Using disparaging, abusive, profane or offensive language; creating, viewing or displaying materials that might adversely or negatively reflect upon Global Scholars or be contrary to Global Scholars' best interests, whether generated on company owned or privately owned technology.
- Engaging in any illegal activities, including piracy, extortion, blackmail, and copyright infringement.
- Unauthorized access to any computers and company provided equipment.
- Use of the system in a way that disrupts its use by others.
- Employees should not open suspicious emails, pop-ups or downloads.

Note: Internal and external emails are considered business records and may be subject to discovery in the event of litigation.

## **5.5 POLICY: ACCEPTABLE USE OF SOCIAL MEDIA Revised Nov. 2022**

Social Media has become an integral part of our daily lives. Global Scholars asks that all employees and un-salaried fellows take care to post only appropriate and respectful content.

Global Scholars fellows, un-salaried fellows, and administrative staff will:

- Maintain the confidentiality of Global Scholars' trade secrets and private or confidential information. Trade secrets may include information regarding the development of systems, processes, products, know-how, and technology.
- Not post internal reports, policies, procedures, or other internal business-related confidential communications.
- Use discernment when making personal posts on social media. If there is a possibility of a viewer relating the post to Global Scholars, either directly or tangentially, be transparent about the fact that you are expressing only your personal opinions.
- Never represent yourself as an official spokesperson for Global Scholars. (The CEO is the only official staff spokesperson for Global Scholars.)
- If Global Scholars is a subject of the content you are posting, including but not limited to creating a link from a blog, website or other social networking site to a related Global Scholars related post or page, be transparent about the fact that you are an employee and make it clear that your views do not necessarily represent those of Global Scholars. (This does not apply to simply "sharing" official Global Scholars posts concerning events, webinars. blogs, etc.)

Global Scholars may review content on the Internet. Policy violations may result in discipline, up to and including termination of employment.

## **POLICY 5.6: GLOBAL SCHOLARS' STATEMENT ON HUMAN SEXUALITY Revised Nov. 2022**

In recent decades, shifting norms on human sexuality are becoming inscribed in law in many nations, which now compels the church and Christian organizations to make explicit statements declaring their stance on the matter. Given these circumstances Global Scholars states the following:

Global Scholars' position on human sexuality aligns with historic Christianity's interpretation of Christian scripture – The triune God created differentiated human beings in his image, male and female.

As image-bearers, humans find their fullness by the Spirit in Jesus Christ – the one who imparts dignity and worth based on God's loving acts for them. In Christ, God expresses his designed sexual differentiation by the Spirit's calling to a life devoted in fidelity to Christ in singleness or in marriage, which is exclusively between one woman and one man – the God-ordained context for all sexual relations.

While we recognize the complexity of the issues related to human sexuality and seek to engage this conversation in humility, compassion, respect, grace, and gentleness, all employees and unsalaried fellows must affirm and abide by this statement on human sexuality in order to serve with Global Scholars.

Global Scholars reserves the right to not hire or to dismiss any persons who are unable to affirm or abide by this statement. Affirming and abiding by this statement is necessary as we seek, even in our brokenness, to have a redemptive influence among the people and ideas of higher education to foster human and societal flourishing for the glory of God.

# **SECTION 6: POLICIES APPLICABLE ONLY TO ACADEMIC STAFF**

## **POLICY 6.1: DEFINITIONS PERTAINING TO ACADEMIC STAFF Revised Nov. 2022**

Academic Staff: Persons, working as a volunteer (un-salaried fellow) or paid staff member, who have successfully completed the Global Scholars fellows' application process. Also referred to as "fellow".

### **During Active Service:**

- Fellow (plural: fellows): Person currently serving under the auspices of Global Scholars and receiving services from the organization
- Sabbatical: If the university grants a sabbatical, Global Scholars will also authorize up to a one-year leave from Global Scholars duties, supervised by the Program Development Department. A person on sabbatical may continue to receive salary and benefits from Global Scholars.
  - A sabbatical may be extended, renewable annually through the Program Development Department.

### **Inactive Fellow:**

- Leave of Absence (Inactive fellow):
  - A one-year leave in order to address a specific issue, which makes service on the field impossible until the issue is resolved. The inactive fellow does not receive salary or benefits from Global Scholars (though the fellow's fund balance is maintained).
  - After one year of absence, the Program Development Department will have a conversation with the inactive fellow to determine if she or he should be reinstated as an active fellow and return to field service with Global Scholars, or moved to Alumni status. If reinstated as an active fellow, it is not required that she or he reapply unless a leave of absence has been extended for more than five years.
  - Reasons for leave include:
    - Medical Leave
    - Personal Leave
    - Family Leave
    - Academic Leave

### **Alumnus:**

- Alumnus (-a, female; -i, generic plural): fellow(s) who served on the field with Global Scholars previously but is not currently an active or inactive fellow.

Immediate Family refers to the fellow, spouse and children under the age of 21, residing in the home.



## **POLICY 6.2: FINANCIAL AND PRAYER SUPPORT Revised November 2022**

**Global Scholars is a 501(c)(3) organization and as such, all fellows are deputized fundraisers for Global Scholars and therefore may raise funds to support the mission. Global Scholars honors the donor's preferences in the use of those donations whenever possible while maintaining legal discretion and control over all donations. The Global Scholars Operations and Finance department processes all gifts, sends timely thank-you receipt letters and annual receipts to donors for tax purposes.**

**How to Develop Personal Funding:** The most effective way for Global Scholars fellows to develop funding is to network with family, friends, churches and colleagues to share the story of Global Scholars and fellows' specific call to this mission. Therefore, fellows should meet with congregations, missions' committees and individuals interested in the ministry of Global Scholars prior to departure for the field and while back during summer breaks or other times.

**Writing and Editing a Letter for Funding:** Regular communication with donors is the best way to encourage partners to continue their funding while you are on the field. We suggest a hard copy letter with a response device be sent twice per year. Letterhead, envelopes etc. are available through the Development Department.

Additional communication via electronic means is encouraged at least every other month.

Electronic communications should include contact information for the organization and a link to the donations page on the website (unless doing so raises security concerns in your country of service). A MailChimp template for electronic newsletters is available from Global Scholars. See Appendices for Newsletter Guidelines.

**Major Gifts and Grants:** Foundations respect professional, well-developed proposals and every proposal they receive has an influence on the foundation's perception of the organization. Therefore, fellows must coordinate all proposals to foundations (including personal and family foundations) with the Development Director. This communication prevents the fellow and the Development Director from both submitting proposals to the same foundation. By working together, we can all be more effective in major gift development.

### **Communication from the CEO:**

Donors to a ministry need to and expect to hear from the ministry's CEO occasionally as well. Furthermore, studies have shown that the more a donor feels "connected" to the ministry, the more consistent their support is for the person they directly support. Therefore, the CEO will include all donors giving to Global Scholars in the following communications:

- Monthly "PROFile": a brief email sharing one encouraging story of how God is using Global Scholars worldwide.
- The Global Scholars' Annual Report.
- Fiscal year-end CEO letter (sent in May or June): A letter from the CEO thanking donors for their support and asking them to consider a special end-of-fiscal-year gift to the account of the fellow they support.

- Calendar year-end CEO letter (sent in November or December): A letter from the CEO thanking donors for their support and asking them to consider a special end-of-calendar-year gift to the account of the fellow they support, as well as a special end-of-calendar-year gift to the general account to help us better serve fellows.<sup>1</sup>

### **Processing Contributions:**

#### *Remittance of Contributions*

IRS regulations only allow tax deductions for donations made to a qualified non-profit organization (such as Global Scholars). Therefore, donations should be made to Global Scholars, not to an individual.

Occasionally a donor will mistakenly write the check to the individual fellow. The fellow should first clarify with the donor what his or her intentions are. Did they intend to give a personal gift to the fellow, which would *not* be tax deductible and subject to IRS limitations; or did the donor intend to make a tax deductible contribution in which case the contribution must be processed by Global Scholars? When the latter happens, the fellow should remit the contribution directly to Global Scholars, PO Box 12147, Overland Park, KS 66282 and explain to the donor that Global Scholars will endorse the check and all future donations should be made to Global Scholars. Every effort should be made to send the gifts to Global Scholars within three days of receipt of the gift so that a thank you and office receipt can be sent to the donor in a timely fashion.

#### *Gift Preferences*

IRS regulations state that the 501(c)(3) organization must maintain control over all gifts to the organization and the funds must be used in accordance with the ministry purposes of the organization, approved budgets and policies, and IRS regulations.

Therefore, contributions solicited by fellows must be with the understanding that Global Scholars has complete discretion and control over the use of all donated funds, in accordance with United States Internal Revenue Service regulations.

That said, Global Scholars is committed to honoring donor's preferences for the use of all gifts to the fullest extent possible. Therefore, as donations are received and referenced for a particular fund, the donations typically are placed in that ministry fund and expended as needed for the fellow's reasonable and related ministry costs.

<sup>1</sup>Donor research indicates that donors who also give to a ministry's general fund are more committed donors to the individual(s) they support, and even increase support to the individuals, due to developing a deeper vision for the work of the ministry of which the individual is a part.

### **POLICY 6.3: PROCESSING PAYROLL AND EXPENSE REIMBURSEMENTS Revised Dec. 2019**

Each fellow shall provide bank information to the Operations/Finance department for the purpose of payroll and expense reimbursement. Non-US citizens may have funds directly deposited into a non-US bank account, but such transfers will be subject to appropriate conversion and wire transfer fees.

All salary and expense reimbursements are directly deposited in the fellow's bank account.

- Payroll is scheduled for the 15<sup>th</sup> of each month
- Should the 15<sup>th</sup> of the month fall on a Saturday, Sunday, or a legal holiday, payroll will be processed on the last workday prior to the 15<sup>th</sup> of the month.
- Expense reimbursements are scheduled for the last business day of each month.

## **POLICY 6.4: TERMS OF SERVICE Revised Dec. 2019**

### **University Laws:**

All fellows shall fully conform to all rules, laws, and expectations that apply to university personnel at the host university, unless in conflict with biblical directives. If such a conflict arises, the fellow should discuss the matter with the Program Development Department as soon as possible to help determine a course of action.

**POLICY 6.5: MEDICAL LEAVE Revised Nov. 2021**

The fellow's employment with Global Scholars shall continue during a period of medical disability if the fellow, because of ill health, physical or mental disability, or for other causes beyond his or her control, shall have been continuously unable to perform his or her usual duties as determined by a licensed physician. Global Scholars retains the right to terminate a fellow's employment after more than six continuous months of medical disability, in a manner consistent with any applicable regulations.

## **POLICY 6.6: REPORTS AND ACCOUNTABILITY Revised Nov. 2021**

**Annual Reports:** Each Global Scholars fellow is required to complete the Society of Christian Scholars annual survey by June 15, as well as the Annual Ministry Assessment. Fellows who raise funds are also asked to affirm an ECFA ethics statement each year.

## **POLICY 6.7: MINISTRY AND RELATIONSHIPS IN COUNTRY OF SERVICE** Revised Dec. 2019

**Relationships:** The fellow is employed by Global Scholars with the understanding that his or her primary service is to the university. Ministry is also a priority. However, ministry commitments must not detract from excellence in one's academic performance.

**Significant Marital Conflict:** Global Scholars service often demands radical changes in lifestyle. This can cause strain on any marriage. If serious marital conflict develops, please communicate this immediately to the supervisor. We will seek to minister to both spouses with the goal of reconciliation.

**Egregious Moral Failure:** Egregious moral failure is grounds for immediate dismissal from employment and/or volunteer work with Global Scholars.

Egregious moral failure includes, but is not necessarily limited to, illicit sexual relations outside marriage, drug or alcohol abuse, spousal or child abuse, embezzlement, or other such actions that violate scriptural principles.

The Global Scholars Leadership Team reserves the right to determine the nature of "egregious moral failure" for all administrative staff members, fellows, and un-salaried fellows (all fellows' designations). Discussions regarding this subject should be directed to the President.

An effort will be made to minister redemptively and confidentially whenever staff becomes aware of an egregious moral failure. Conversations shall be limited to the fellow, spouse (if applicable and advisable), the Program Development VP, and the President.

## **POLICY 6.8: DEALING WITH EMERGENCIES Revised Dec. 2019**

**Evacuation:** Fellows must always seek to maintain good and clear relationships with the host governments that have given them permission to be in their host country. Where possible, we suggest that each family register with the embassy and keep the embassy personnel informed of any change of address and other pertinent information. A fellow and his or her family should look to the embassy for information regarding any dangers within the host country.

Should evacuation be required, the fellow should work out an evacuation plan in consultation with the embassy. Recommendations of the embassy should be communicated to the Global Scholars Program Development Department as soon as possible, if time permits. In most cases the embassy's advice should be fully heeded.

The fellow should cultivate other information sources if possible, such as trusted nationals, the news media (BBC, VOA) and other trusted ex-patriates. Global Scholars commits itself to be as fully informed as possible regarding volatility of the region and potential threat to Global Scholars fellows.

We recommend that fellows submit a list of all Global Scholars-owned property and all personal property of value to embassy officials. We also recommend that each fellow make the following advanced arrangements:

- Keep an adequate amount of currency on hand for emergencies.
  - Have a credit card that is valid for purchasing airline tickets.
  - Where possible, form a link with an international bank.
  - In volatile areas, keep a small bag packed for emergency evacuation, including passports and other valuable documents.

Conduct during an Emergency Evacuation:

- Global Scholars' healthcare policy (AETNA Global) includes coverage for the need to evacuate the country for medical reasons.
- If there are records or documents that could be misused if they fell into the wrong hands, they should be destroyed if at all possible.
- The major emphasis should be placed upon effecting an emergency evacuation in such a way that it will bear strong testimony to our deep love and concern for the spiritual welfare of those being left behind, especially those of the household of faith. The immediate needs and future security of the indigenous Christians should be kept in mind at all times.

**Abduction and Ransom:** The Leadership Team pledges to its fellows that, should socio-political difficulties arise creating an imminent threat to any fellow or his or her family, Global Scholars shall exercise every effort including every legal means at its disposal to respond appropriately to the crisis at hand. In some cases, this may require immediate evacuation for the safeguarding of fellows. Global Scholars will contact Crisis Consulting International ([www.cricon.org](http://www.cricon.org)) for assistance during a security emergency.

Global Scholars does not maintain crisis intervention insurance and will not make concessions nor negotiate for payment of ransom for the release of any fellows taken hostage.



Fellows serving in volatile areas are strongly encouraged to consider personal Crisis Management and Abduction Insurance.

If a fellow, affiliate or family member is kidnapped or abducted while in country, it is advisable that the rest of the family be evacuated immediately to either their home country, or a safe area. This is to ensure the victim that family members are not also in danger and that the abductors cannot use them as leverage.

**Stolen Property:** Global Scholars does not provide property insurance as a part of the fellow's benefit package. Each fellow is encouraged to explore available insurance options.

**Death:** Each fellow must be aware that international service always carries a degree of risk and the possibility of his/her death or the death of a family member while in a foreign country. Global Scholars encourages each family to write down their desires in such a case. In light of the high expense and great difficulty that sometimes accompanies the return of a body to one's home country, burial on the field of service may be preferred.

## **POLICY 6.9: LEAVING EMPLOYMENT Revised Nov. 2022**

**Termination for any cause:** Either party may terminate employment for any reason. In the event of termination, travel and reasonable and necessary shipping charges (as determined by Global Scholars) for the fellow and immediate family to the fellow's country of residence are reimbursable (taxable income) from proceeds within the fellow's fund balance.

Global Scholars does not undertake any responsibility for loss, injury or damage to people or property.

**Salary, Transition Cost, and Deficits at Termination:** Salary may be continued for alumni for up to three months following the fellow's change of status to alumnus. Salary payment is dependent upon availability of funds in the alumnus' fund balance. Funds remaining in the alumnus' fund balance after three months following his or her change in status to alumnus will be placed in the appropriate regional fund.

An alumnus who has a deficit upon change of status from fellow to alumnus shall take the following action:

- Coordinate with the Development Department to send an appeal letter to his or her donor base to reverse the deficit.
- If the fellow does not send a letter within 30 days of his or her return, the Development Department will send a letter to the fellow's donor list.
- If a deficit remains 30 days after the letter goes out, a second letter will be sent by the fellow, in coordination with the Development Department.
- If this does not cover the fellow's deficit, Global Scholars requests the fellow/alum work out a payment plan with Global Scholars to pay back the remaining deficit.
- Fellows who for any reason leave employment with Global Scholars and do not have adequate funds to cover transition costs will not be permitted to use any Global Scholars funds which would result in incurring or increasing a deficit in their fund balance.

**Resignation:** Intent to resign from employment with Global Scholars should be given 60 days in advance, if possible, to the Program Development Department before making any public announcement. This allows the Program Development Department adequate time to work with the fellow on transition issues to ensure a smooth transition. A final Global Scholars employment termination date will be determined in consultation with the Program Development Department.

The draft of the letter announcing resignation or termination of the fellow to the fellow's donors must be submitted in advance to the Program Development Department for approval. It must include a request for the donors to consider transferring their support to another fellow, or the Global Scholars General Fund.

**Debriefing:** Fellows leaving employment with Global Scholars are asked to complete an exit interview with the Program Development Department within six weeks of leaving Global Scholars employment. Conversations with the fellow's faculty care staff member may substitute for a formal exit interview.

**POLICY 6.10: SALARIES, BENEFITS, EXPENSES, AND OTHER FINANCIAL ISSUES** Revised  
Nov. 2021

**Advantages of Being a Global Scholar:**

- Complimentary Membership in the Society of Christian Scholars
- Pastoral Care via Program Development Department
- Planning and budgeting consultation
- Discounted software offering
- Donation processing and receipting
- Payroll distribution
- Tax withholding
- International health insurance (requires fellow to be paid staff)
- TIAA 403B plan (requires fellow to be paid staff)
- Long Term Disability Insurance (covers Global Scholars pay only)
- Overseas Worker's Compensation Insurance (requires fellow to be paid staff)
- Expense reimbursement

**Administration and Association Fees:** Working as a team is one of the most important values of Global Scholars. The administrative staff conscientiously seeks to serve, strengthen and enhance the ministry of each fellow. Administration and/or Association Fees help defray a small portion of the total overhead costs.

*Administration Fees on Gifts to Global Scholars for the Ministry Funds of fellows (Funding via Donors)*

The administrative fee on all gifts through the first two years of field service is 15%.  
The administrative fee helps cover the costs of training, pastoral care, and other services.

After the first two years of service the amount of resources required to sustain a fellow on the field decreases. Therefore, two years after the fellow arrives on the field the administration fee is reduced to 10% on all gifts.

Administration fees shall not exceed a total of \$7,500/year

**Salary:**

*Fellow Salary:* Global Scholars will pay the agreed upon salary on a monthly basis. Salary payments are made on the 15<sup>th</sup> of each month. Global Scholars will issue payment by direct deposit service to the fellow's designated bank account.

Payment of fellow salaries and/or expense reimbursement is dependent on sufficient funds in the fellow's account balance. A deficit of \$1,500 or more for two consecutive months will result in non- payment of the fellow's salary and reimbursement of expenses.

Returning fellows are required to secure adequate funding before departing or returning to the field. Otherwise, it is possible that employment status will be terminated due to insufficient funds while serving on the field.

*Spouse Salary:* Spouses are an integral part of the ministry of Global Scholars. It is frequently beneficial for the spouse of a fellow to apply for a position with Global Scholars as the Administrative Assistant to the fellow.

Receiving a paycheck may allow the spouse to access employment benefits including maintenance of employment quarters for future U.S. Social Security benefits (see IRS.gov for further information on requirements), long term disability insurance, and contributions to the 403B Retirement Savings Plan administered by TIAA.

Certain expenses such as travel costs of the spouse become reimbursable business expenses providing the travel is for business/ministry related expenses.

In countries where fellows are assessed an extremely heavy tax rate, two individual salaries may greatly reduce the family's combined tax liability. Please check with your tax advisor as every country and every family's situation is different.

The spouse seeking employment as an Administrative Assistant should contact the Operations/Finance

department to complete the proper paperwork for employment.

**Non-Taxable Employment Benefits:**

*Health Insurance:* The Global Scholars group health insurance may be purchased through Global Scholars for the fellow and his or her immediate family. Payment for group health insurance is charged against the fellow's fund balance. Other health insurances not sponsored by Global Scholars may not be expensed per IRS regulations.

*Long Term Disability:* A long-term disability policy is provided for salaried fellows. The premium is included as taxable income, allowing benefits to be paid to a participant as "non-taxable."

*Retirement Savings Plan (403B):* Fellows and administrative assistants receiving a paycheck from Global Scholars have the option of investing a percentage (up to IRS maximums) of their monthly salary in the Global Scholars-approved 403B retirement plan, administered by TIAA. Global Scholars will process a match the amount invested up to 5% of salary with funds provided from each fellow's fund. The percentage of the contributions desired by the fellow must be indicated to the Operations and Finance Department 10 days in advance of the payroll.

Contributions made by the fellow can be made before taxes or after taxes. Fellows are encouraged to work with a tax advisor in regards to these matters.

Those wishing to participate in the 403B plan must complete an enrollment with TIAA prior to the first payroll withholding. Administrative staff cannot complete the TIAA enrollment for a fellow.

*Expenses Eligible for Reimbursement* Example of expenses eligible for reimbursement include

- Entertainment of individuals related to Global Scholars ministry such as a pizza party for students
- Calls to donors or other calls related to Global Scholars ministry
- Transportation, meals, lodging on behalf of Global Scholars
- Basic housing set-up costs of furnishing and improvements
- Clerical assistance
- Driver, security guards, house helpers (if common in the country)
- All other expenses directly related to ministry

*Certain Taxable Expenses Eligible for Reimbursement:* On occasion it may be necessary for a fellow to request reimbursement for non-business related/non- ministry related expenses such as family travel expenses and moving expenses. The amount of the expense will be entered as "taxable income" on the fellow's paycheck in the month after the expense is incurred. Generally speaking, the fellow's salary should be set at a level to cover personal and family expenses. If you have questions, please check with the Operations and Finance Department regarding the taxability of expenses.

*Expenses Not Eligible for Reimbursement :*

Personal expenses are not eligible for reimbursement. Some examples of personal expenses are:

- Food (when not entertaining or traveling for Global Scholars)

- Housing improvements
- Furniture or purchasing beyond the basic housing set-up allowance
- Baby-sitting
- Furniture repair
- Storage
- Transportation, meal and lodging expenses related to non-Global Scholars ministry engagements
- Expenses for projects, ministries or other services not directly sponsored by Global Scholars or advancing the Global Scholars purpose

**Ownership of Equipment:** The IRS requires that every item purchased with a fellow's fund balance is owned by the organization to which the donors gave and not by the person who purchases or uses the items. Therefore, all items purchased using money donated to Global Scholars and expensed on an expense report are the property of Global Scholars. Items costing less than \$1,500 are considered to have been used and fully expensed in the month purchased.

For items costing more than \$1,500, if desired, when leaving Global Scholars employment, the fellow will have the opportunity to purchase the item from Global Scholars for a fair market price based on age and condition. If not, the item will either be transferred to another Global Scholars fellow or sold and the income applied to the same regional account, with the approval of the Operations/Finance Department. The transfer of all equipment or payment for such shall be completed 30 days after the end of service with Global Scholars. If not, the fellow's last paycheck may be held or reduced by the fair market price of the equipment in question.

For items costing more than \$1500, if the item has been fully depreciated, Global Scholars will transfer the item to the fellow at no additional cost to the fellow.

**Purchase of Residence in Country of Ministry:** Should a fellow purchase a house to serve as their residence in the country of their ministry, the fellow holds full ownership of the house and is fully responsible for its upkeep.

#### **Expense Reports and Reimbursement Process:**

*Report Format:* Expense reports are due by the 15<sup>th</sup> of the month, using "Certify" software. (If the fellow is in a location without Internet access, the Operations and Finance Department will establish an alternate procedure.)

Global Scholars will reimburse, as funds allow, the fellow for all qualifying expenses upon timely receipt of an expense report itemizing all expenditures. Expense reports should be submitted within 90 days of the expense, but not more frequently than once per month.

After processing the electronic report, the Global Scholars Operations and Finance Department will process by direct deposit the reimbursement funds into the fellow's bank account on the last business day of the month.

Fellows are expected to retain original receipts and applicable expense reports for a period of 3 years and

be able to produce receipts if requested by the organization's auditors or by the Internal Revenue Service.

*Receipts:* It is recommended that receipts be submitted for all expenditures even if not required

A receipt is required for all hotel and entertainment expenses and any other expenses in excess of \$75.00. In cases where no receipt is available, fellows must document the expenditure and indicate "no receipt available" on the documentation.

All receipts should show the vendor's name, a description of the services provided (if not otherwise obvious), the date, and the total expenses, including tips (if applicable).

*Travel Expenses:* Ministry travel expenses. Per IRS regulations, bona-fide, reasonable travel expenses can be reimbursed as "non-taxable" reimbursements. This would include trips to visit donors/potential donors, travel to the field location, and travel to conferences related to a fellow's discipline or area of research. Generally, first class accommodations are not deemed to be reasonable travel expenses.

*Personal Travel Expenses.* Individuals traveling on behalf of Global Scholars may incorporate personal travel with their ministry-related trips. However, the personal travel expenses portion of the travel expenses would be taxable income and generally is not eligible for reimbursement by Global Scholars. The fellow's family travel expenses are personal travel expenses.

Fellows may be compensated for use of their personal cars when used for Global Scholars business. Mileage reimbursement is set at the IRS standard mileage allowance.

Parking and toll expenses, including charges for hotel parking, incurred by fellows traveling on Global Scholars business will be reimbursed.

The cost of parking tickets, fines, car washes, valet service, etc. are the responsibility of the fellow and will not be reimbursed.

**Expenses During Emergencies:** Fellows may submit expenses for costs incurred as a result of an emergency. Daily living or food expenses, however, are considered the responsibility of the fellow.

**Gifts and Compassion Funds:** Gifts are an important part of ministering to others. It will often be appropriate to bless others with gifts to demonstrate appreciation. This may include modest gifts to donors to thank them for their support or gifts to university officials to show appreciation. In general, gifts should be limited to \$25 per recipient per year and gift expenses are reimbursable.

**Taxes on Personal Income:** Each fellow is responsible for income taxes in his or her country of residence. The income taxes in the country of service are a reimbursable expense. Global Scholars will withhold FICA (Social Security and Medicare) taxes and federal income taxes for U.S. citizens. However, Global Scholars does not withhold state income tax. Each fellow should check with his or her state department of revenue or personal tax advisor to determine if he or she is liable for state income tax. This is particularly applicable if the fellow retains ownership of a residence in his or her home state.

Fellows residing overseas for more than one academic year may be eligible for the U.S. foreign earned income exclusion and/or credit for foreign income taxes paid. Because of this and because of the importance of cultural immersion and adjustment, return to the fellow's home country before the end of one's first two years is discouraged.

Global Scholars strongly urges all fellows to consult with a professional tax advisor who is experienced with international taxation before making any decisions about tax status or filing income tax returns. The Global Scholars Operations/Finance Department cannot provide these services.

**Miscellaneous Reimbursable Expenses:** Reasonable ministry-related telephone, fax and Internet charges are reimbursable.

**Advance of Funds:** At the time of departure for the field a fellow may request an advance of two months' salary and outfitting costs. This enables the fellow to have adequate cash until appropriate arrangements can be made to obtain cash in the country of service. This is not automatic, but must be requested by the fellow. The fellow must account for all expenses except salary. After two months, any advance not documented will be deducted from the fellow's next paycheck.

**Outside Income:** Global Scholars prohibits its employees from engaging in any activity, practice, or conduct which conflicts with, or appears to conflict with, the interests of Global Scholars or the interest of Global Scholars' donors. This is in accordance both with our own standards of integrity and with the standards of the ECFA. Therefore, caution must be taken when considering extra income and for-profit activities.

The following are guidelines for extra income and for-profit activities:

- No for-profit use of mailing list: Global Scholars mailing lists (including fellow's lists) should not be used in any broad sales-related approach involving any commercial, for-profit activity.
- Any marketing material sent by a Global Scholars fellow that is not for Global Scholars ministry may be misinterpreted or confused with the Global Scholars mission. Therefore, doing so should be avoided unless a clear demarcation can be communicated.
- Solicitation by others of individuals on Global Scholars lists on behalf of a business that is not operated for or by the Global Scholars person is prohibited.
- Special care must be exercised in any efforts by Global Scholars fellows or spouses to establish a personal business by recruiting overseas university personnel (administrators, teachers, students) where a Global Scholars fellow and spouse are serving. It is permitted to establish commercial enterprises that do not utilize individuals related to Global Scholars or a Global Scholars assignment.

For example, a spouse could set up a separate business in a city where the Global Scholars fellow is working, but in a sector which has no relationship with the university.



## **POLICY 6.11: Budgets, Projects, and Miscellaneous Issues Rev. Dec. 2019**

**Budget Management:** The fellow is primarily responsible for managing his or her expenses within his or her budget during the year. Expenditures should be planned in light of fund balances and projected donations.

The fellow will be required to submit an annual budget if managing fundraising, expense reimbursement or payroll through Global Scholars.

Budgets will be reviewed by the Operations and Finance Department and accepted unless the fellow is notified of concerns or the need for the budget to be modified.

The Operations and Finance Department is available for counsel on specific questions.

**Publishing and Writing Projects:** In the spirit of joint commitment to the advancement of the Global Scholars ministry, it is expected that each fellow will give due credit to Global Scholars when writing or speaking, if possible and appropriate. (See Intellectual Property Rights Policy)

# **SECTION 7: POLICIES APPLICABLE ONLY TO ADMINISTRATIVE STAFF**

## Policy 7.1: Workplace Safety Revised Nov. 2023

**Global Scholars has a commitment to provide a safe and productive work environment for all employees, even though it does not maintain a physical office and has a 100% “work from home” structure.**

**Drug-free Workplace:** Employees are expected to be fit for duty and free of any adverse effects of illegal drugs or alcohol.

- Global Scholars retains the right to require drug and/or alcohol testing if there is a reasonable suspicion that the employee is unfit for duty.
- Employees who refuse testing or test positive are subject to discipline up to and including termination.
- This policy does not prohibit employees from the lawful use and possession of prescribed medications. Employees must, however, consult with their doctors about the medications’ effect on their fitness for duty and ability to work safely, promptly disclosing any work restrictions to their supervisor. Employees should not, however, disclose underlying medical conditions unless directed to do so.

**Safety in a Remote Workplace (home office):** Global Scholars relies on employees to assess their work environment and to contact their supervisor if they have a concern about the appropriateness or safety of their home office from a physical and mental perspective.

- Attention to ergonomics is a priority in a home office setting.
  - Utilize proper seating
  - Don’t sit or stand for extended periods of time.
    - Consider a standing desk option.
    - Take regular breaks from your desk and the computer screen.
  - Arrange the top of the computer monitor so that it is at eye level.
  - Contact the Operations Vice President concerning needed equipment or furniture for your home office space.
- Follow the same guidelines as recommended for a safe home in regard to falls and slips prevention and fire safety.
  - Inspect cords and minimize the use of extension cords.
  - Have a working smoke detector near your workspace.
  - Have an evacuation plan in the event of a fire.
- Keep your work calendar up to date.

**Mental Well-Being:** Global Scholars recognizes that a “work from home” environment may contribute to isolation, anxiety, depression, or other mental health concerns.

- All staff members are encouraged to maintain a healthy understanding of work and leisure that is sustainable and suitable for accomplishing the organization’s ends. To do so, this will likely include setting healthy work hours and boundaries depending upon your home work environment. Any concerns regarding the appropriateness of the workload, work hours, or expectations should be reported to and discussed with the employee’s supervisor. If the concerns are not adequately resolved, the employee should contact the Operations Vice President or the CEO.

- Your church, personal network, and community healthcare organizations may be equipped to provide recommendations concerning mental health services.
  - Dial “988” for the Suicide and Crisis Lifeline, a network for 200 state and local call centers.

## **POLICY 7.2: ACCOUNTABILITY PARTNER Revised Jan. 2020**

Recognizing that an accountability partner can be a valuable tool in both avoiding moral failures and in seeking to live an increasingly righteous life, consistent with Global Scholars' Core Value of "Christ's Lordship," all Leadership Team Members are required to have an active, current accountability partner.

While only required for Leadership Team Members, all staff members are encouraged to participate in an accountability partner relationship.

### **POLICY 7.3: EGREGIOUS MORAL FAILURE Revised January 2020**

Egregious moral failure is grounds for immediate dismissal from employment and/or volunteer work with Global Scholars.

Egregious moral failure includes, but is not necessarily limited to, illicit sexual relations outside marriage, drug or alcohol abuse, spousal or child abuse, embezzlement or other such actions that violate scriptural principles.

The Global Scholars Leadership Team reserves the right to determine the nature of “egregious moral failure” for all staff members. Discussions regarding this subject should be directed to the CEO & President.

An effort will be made to minister redemptively and confidentially whenever staff becomes aware of an egregious moral failure. (See Progressive Corrective Action Policy)

## **POLICY 7.4: COMPENSATION Revised Dec. 2019**

**Payroll Process:** Global Scholars is committed to a consistent and reliable payroll process.

- The pay period is two weeks in length beginning on Sunday.
- Employees will be paid via direct deposit on the Friday following the end of the pay period. ● If the payday falls on a bank holiday, the payroll will be processed on the preceding Thursday.
- Employees compensated on an hourly pay rate basis are required to submit a timesheet for each pay period.
- The employee's hourly pay rate or annual salary will be provided in writing during the hiring process and at any time the pay rate or annual salary changes.

**Overtime:** The calculation of overtime is based on the Global Scholars' workweek, beginning at 12:00 a.m. on Sunday morning and ends at 11:59 p.m. on Saturday night.

- Employees who anticipate the need for overtime to complete the week's work must notify the supervisor in advance and obtain approval before working hours that extend beyond their normal schedule in order to receive overtime pay.
- Non-exempt employees who exceed 40 hours of work time in a workweek will be paid time and one half for hours in excess of 40.
- Holidays and other paid time off hours do not apply towards work time for the purpose of calculating overtime pay.
- During busy periods, employees may be required to work extended hours.

**Employee Travel and Reimbursement:** Employees will be reimbursed for reasonable expenses incurred in connection with approved travel on behalf of the company.

- Travelers seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid the appearance of impropriety.
- If a circumstance arises that is not specifically covered in the travel policies, the most conservative course of action should be adopted.
- Travel for staff must be authorized in advance.
  - Travelers should verify that planned travel is eligible for reimbursement before making travel arrangements.
  - Upon completion of the trip, and within 30 days, the traveler must submit an expense reimbursement form and supporting documentation to obtain reimbursement of expenses.
  - Exempt employees will be paid their regular salary for weeks in which they travel.
  - Nonexempt employees will be paid for travel time in accordance with federal and state wage payment laws.

### **Staffing Events:**

If required to staff an event outside of normal work hours, except for rare and preapproved circumstances, it is expected that all employees will work their normal work schedule during the weeks directly before, during and directly following the Global Scholars event.

- Hourly employees must track their hours carefully during this time as some time at the event will be

- work time and other time at the event will not be work time.
- Working hours will include those times in which the employee is actively engaged in clearly defined work responsibilities.
    - Those may include staffing the welcome desk or performing other work related tasks.
    - Non-working hours include resting in your hotel room, personal grooming, most mealtimes and other non-work related items.
    - Please check with your immediate supervisor if the work requirements are unclear.



## Policy 7.5: FLEXIBLE TIME OFF, PAID TIME OFF ACCRUAL, and HOLIDAYS Rev. Dec. 2023

**Flexible Time Off for Full Time Employees and Salaried Part Time Employees:** At Global Scholars, our values determine our policies. We honor the concept of the Sabbath and value the importance of living a well-balanced life that includes taking time for rest, relaxation, and rejuvenation. In this spirit, we recognize that our staff members know best how to manage their work responsibilities as well as their personal and family obligations. Therefore, in accordance with our values, Global Scholars offers a “Flexible Paid Time Off” policy to all full-time employees. (NOTE: Employees affected by a non-voluntary reduction in hours will continue to be covered by the “Flexible Paid Time Off policy, regardless of the number of weekly work hours.)

- Although our normal work hours are 9:00 a.m. to 5:00 p.m., Monday through Friday, full-time and salaried part-time employees are welcome to shift their schedule to accommodate their work and family obligations, with their supervisor’s approval.
- Part-time hourly employees will set their work schedule in conjunction with the expectations of their supervisor.
- Each employee is expected to take sufficient rest time and necessary sick time to enable them to operate at peak performance.
- Within this framework, we expect that employees will take responsibility to be available when needed, notify their supervisor when taking time off and coordinate coverage for their workflow while away.
- Supervisors have final discretion to allow or disallow time off based on expected workflow and employee performance.
- Flexible Paid Time Off is intended to build bonds of trust in work relationships. Therefore, if any employee’s performance declines significantly due to abuse of this policy, the company reserves the right to review the employee’s use of this policy and determine if discipline or termination is appropriate.

Staff members will not accrue vacation days under this policy and therefore there will be no payout of unused vacation time when a staff member leaves Global Scholars’ employment.

**Vacation Accrual for Part Time Employees:** Global Scholars realizes the importance for part-time employees to accumulate Paid Time Off. All employees scheduled to work less than 32 hours per week are considered part-time for the purpose of this policy. Vacation hours will be accumulated according to the following schedule:

Length of Employment	Vacation Earned
More than 6 months but less than 3 years	0.038 hours per hour worked (Equivalent to 2 weeks if full time)
Years 3 and 4	0.058 hours per hour worked (Equivalent to 3 weeks if full time)

Years 5 through 9	0.077 hours per hour worked (Equivalent to 4 weeks if full time)
Years 10 and above	0.115 hours per hour worked (Equivalent to 6 weeks if full time)

**Holidays:**

The following days are recognized as paid holidays for part time staff members and the office will be closed:

	<u>Date Observed</u>
New Year's Day	January 1
Martin Luther King Day	Third Monday in January
Good Friday	Friday before Easter
Memorial Day	Last Monday in May
Independence Day	July 4 <sup>th</sup>
Labor Day	First Monday in September
Thanksgiving Day and the day after	Fourth Thursday in November and the Friday following
Christmas Eve	December 24 <sup>th</sup>
Christmas Day	December 25 <sup>th</sup>

If the holiday falls on a Saturday, the holiday will be observed and the office will be closed on the preceding Friday. If the holiday falls on a Sunday, the holiday will be observed on the following Monday.

## **POLICY 7.6: Workplace Expectations Revised Nov. 2020**

### **Attire and Grooming:**

Global Scholars employees are expected to be neat, clean and well-groomed while on the job.

- Clothing must be appropriate to the type of work being performed. If you have any question, consult your direct supervisor.

## **POLICY 7.7: CREDIT CARD USAGE Revised Dec. 2019**

**The purpose of the Credit Card Usage Policy is to provide guidance to employees about the appropriate usage of the corporate credit card and to outline a method for ensuring the organization's financial resources are utilized properly.**

Employees may request a corporate credit card by contacting the Operations Vice President.

To be eligible for a corporate credit card, an employee must travel frequently in the course of his/her duties, purchase significant volumes of goods and services for use by the employer, or incur other regular business expenses of a kind appropriately paid for by credit card.

The corporate credit card should not be used to obtain cash advances or for personal expenses. Should the corporate credit card be inadvertently used for a personal expense, the employee will reimburse the organization promptly. Misuse of the credit card will result in cancellation of the card and withdrawal of the corporate credit card privileges.

Corporate credit card expenditures will be reconciled by the Operations and Finance Department upon receiving the monthly statement. Original receipts should be submitted to the Operations and Finance Department within 15 business days of the credit card expenditure or upon the employee's return to office, whichever is later. If the accounting department is unable to reconcile the credit card statement and/or obtain requested documentation of expenditures, the employee's supervisor will be notified. Significant mis-use of the credit card may result in disciplinary action, up to and including termination

The Operations VP or designee will provide a second review of the credit card statement and the supporting documents.

Lost or stolen credit cards must be reported immediately to the VP, Operations.

The primary administrator of the corporate credit card account is the CEO.

## **POLICY 7.8: DOCUMENT RETENTION AND DESTRUCTION Rev. Nov. 2021**

**It is the purpose of this policy of Global Scholars to ensure that necessary records and documents are adequately protected and maintained and ensure that records that are no longer needed or are of no value are discarded at the proper time. In addition, it can aid our employees in understanding their obligations in retaining electronic documents – including email, Web files, text files, sound and movie files, PDF documents, and all Microsoft Office or other formatted files.**

### **Administration:**

The Record Retention Schedule that is approved as the initial maintenance, retention and disposal schedule for physical records of Global Scholars and the retention and disposal of electronic documents. The Operations Vice President (the “Administrator”) is the officer in charge of the administration of this policy and the implementation of processes and procedures to ensure that the Record Retention Schedule is followed. In the event that the Operations Vice President position is vacant, it is the responsibility of the President/CEO. The Administrator is also authorized to: make modifications to the Record Retention Schedule from time to time to ensure that it is in compliance with local, state and federal laws and includes the appropriate document and record categories for Global Scholars; monitor local, state and federal laws affecting record retention; annually review the record retention and disposal program; and monitor compliance with this policy.

### **Suspension of Record Disposal in the Event of Litigation or Claims:**

In the event Global Scholars is served with any subpoena or request for documents or any employee becomes aware of a governmental investigation or audit concerning Global Scholars or the commencement of any litigation against or concerning Global Scholars, such employee shall inform the President/CEO and any further disposal of documents shall be suspended until such time as the President/CEO, with the advice of counsel, determines otherwise. The President/CEO shall take such steps as is necessary to promptly inform all staff of any suspension in the further disposal of documents.

### **Applicability:**

This policy applies to all physical records generated in the course of Global Scholars’ operation, including both original documents and reproductions. It also applies to the electronic documents described above.

### **Record Retention Schedule:**

The Record Retention Schedule is organized as follows:

#### *SECTION TOPIC*

- A. Accounting and Finance
- B. Contracts
- C. Corporate Records
- D. Electronic Documents
- E. Payroll Documents
- F. Personnel Records
- G. Property Records
- H. Tax Records
- I. Contribution Records

These apply to both physical and electronic documents. If no physical copy of an electronic document is retained, the means to “read” the electronic document must also be retained.

A. ACCOUNTING AND FINANCE

<u>Record Type</u>	<u>Retention Period</u>
Accounts Payable & Accounts Receivable ledgers and schedules	7 years
Annual Audit Reports and Financial Statements	Permanent
Annual Audit Records, including papers and other documents that relate to the audit	7 years
Bank Statements	7 years
Credit card numbers	Not Retained
Employee Expense Reports	7 years
Journal Entries	7 years
Notes Receivable ledgers and schedules	7 years
Investment Records	7 years after sale

B. CONTRACTS

<u>Record Type</u>	<u>Retention Period</u>
Contracts and Related Correspondence (including any proposal that resulted in the contract and all other supportive documentation)	3 years after expiration or termination

*Comment: Some states may require longer retention period generally, or for specific types of*

contracts. A local attorney should be consulted.

#### C. CORPORATE RECORDS

<u>Record Type</u>	<u>Retention Period</u>
Corporate Records (minute books, signed minutes of the Board and all committees, corporate seals, articles of incorporation, bylaws, annual corporate reports)	Permanent
Licenses and Permits	3 years after expiration

#### D. ELECTRONIC DOCUMENTS

1. **Electronic Mail:** Not all email needs to be retained, depending on the subject matter.
  - Email—from internal or external sources—may be deleted at the discretion of the employee, based on the subject matter.
  - Office staff will strive to keep all significant emails related to business issues such as those related to pay issues or contract issues. Emails with significant impact should be saved in Google Drive (or equivalent product used by organization).
  - Staff will not store or transfer Global Scholars-related email on non work-related computers except as necessary or appropriate for Global Scholars purposes.
  - Staff will take care not to send confidential/proprietary Global Scholars information to outside sources.
  - Junk email, unsolicited newsletters, etc. should be routinely deleted.
  - Questions concerning the email technology should be directed to the IT/Media Specialist. Questions concerning the need to save an email or electronic document should be directed to the employee’s supervisor.
2. **Electronic Documents:** including Microsoft Office Suite, Google docs, and PDF files.
  - Retention depends on the subject matter. See Retention Schedule.
3. **Web Page Files: Internet Cookies**
  - All workstations: The Browsing history and cookies should be periodically deleted.

In certain cases a document will be maintained in both paper and electronic form. In such cases the official document will be the electronic document.

#### E. PAYROLL DOCUMENTS

<u>Record Type</u>	<u>Retention Period</u>
Employee Deduction Authorizations	Termination + 4 years
W-2 Forms	7 years

Garnishments, Assignments, Attachments	Termination + 4 years
Payroll Registers (gross and net)	7 years
Time Cards/Sheets	2 years
Unclaimed Wage Records	6 years

F. PERSONNEL RECORDS

<u>Record Type</u>	<u>Retention Period</u>
Commissions/Bonuses/Incentives/Awards	7 years
EEO-1/EEO-2 - Employer Information Reports	2 years after superseded or filing (whichever is longer)
Employee Earnings Records	Termination + 7 years
Employee Handbooks	1 copy kept permanently
Employee Personnel Records (including individual attendance records, application forms, job or status change records, performance evaluations, termination papers, withholding information, garnishments, test results, training and qualification records)	Termination + 7 years
Employment Contracts - Individual	Termination + 7 years
Employment Records - Correspondence with Employment Agencies and Advertisements for Job Openings	1 year from date of hiring decision
Employment Records - All Non-Hired Applicants (including all applications and resumes - whether solicited or unsolicited, results of post-offer, pre-employment physicals, results of background investigations, if any, related correspondence)	1 year from date of hiring decision
Job Descriptions	3 years after superseded



Personnel Count Records	3 years
Forms I-9	1 year after separation

#### G. PROPERTY RECORDS

<u>Record Type</u>	<u>Retention Period</u>
Correspondence, Property Deeds, Assessments, Licenses, Rights of Way	Permanent
Property Insurance Policies	3 years after expiration

#### H. TAX RECORDS

<u>Record Type</u>	<u>Retention Period</u>
Tax-Exemption Documents and Related Correspondence	Permanent
IRS Rulings	Permanent
Excise Tax Records	7 years
Payroll Tax Records	7 years
Tax Bills, Receipts, Statements	7 years
Tax Returns - Income, Franchise, Property	Permanent
Tax Workpaper Packages - Originals	7 years
Sales/Use Tax Records	7 years
Annual Information Returns - Federal and State	Permanent

IRS or other Government Audit Records	Permanent
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*Comment: Retention period for sales taxes and property taxes are determined by state law. A local accountant or attorney should be consulted.*

I. CONTRIBUTION RECORDS

<u>Record Type</u>	<u>Retention Period</u>
Records of Contributions	7 years
Documents evidencing terms, conditions or restriction on gifts	7 years after funds are expended

# SECTION 8: APPENDICES

## 8.1 Newsletter Guidelines and Process Revised Nov. 2022

### Guidelines:

It is recommended that each written newsletter includes the approved Global Scholars masthead. (Available from the office in a digital format.)

It is recommended that all newsletters contain the following:

- A reference somewhere in the text to your work in the university and your affiliation with Global Scholars (unless in a restricted country where doing so would be problematic).
- Contact Information for Global Scholars (as shown below), including mailing address, phone number and the URL of the donor page on the Global Scholars website through which they can contribute. Also include this URL in your email communications to donors and supporters (unless in restricted countries where doing so would be problematic).

Global Scholars  
P.O. Box 12147  
Overland Park, KS 66282 – 2147  
(913) 962-4422

Online donations: [www.global-scholars.org](http://www.global-scholars.org)

### Newsletter Response Device Sample:

**YES! I want to invest in the ministry of (fellow name) as [she/he/they] make an eternal difference in the lives of students in (fellow location)!**

I am enclosing a gift of:

\$5000  \$2500  \$1000  \$750  \$600  \$300  \$125  \$70  \$ Other

I am praying for [fellow and spouse, if married].

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work: \_\_\_\_\_

E-mail \_\_\_\_\_

Global Scholars, P. O. Box 12147, Overland Park, KS 66282-2147 USA

Phone: 913-962-4422 E-mail: [office@global-scholars.org](mailto:office@global-scholars.org) Web: [www.globalscholars.org](http://www.globalscholars.org)