

2015 ERC Holiday Practices Survey

November 2015

Conducted by ERC
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ERCTM
Where Great Workplaces Start.

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Table of Contents

About Us	3
Introduction & Methodology	4
Holiday Parties	5
Timing & Logistics of Holiday Parties	8
Holiday Gifts & Service	12
Holiday Pay Practices	17
General Holiday Celebrations	18
Respondent Demographics	20
Participating Organizations	21
Appendix A: Limitations on Alcohol Consumption	22
Appendix B: Vendors & Caterers for Holiday Parties	23
Appendix C: Holiday Gifts	24
Appendix D: "Gift Giving" Policies	26
Appendix E: Criteria for Receiving Holiday Bonus	27
Appendix F: Holiday Community Service Efforts	28
Appendix G: Overlapping Holiday Time-Off Request Policies	30

About ERC

ERC is Northeast Ohio's largest organization dedicated to HR and workplace programs, practices, training and consulting. ERC membership provides employers access to an incredible amount of information, expertise, and cost savings that supports the attraction, retention, and development of great employees. We also host the nationally recognized NorthCoast 99 program and sponsor the ERC Health insurance program. For more information about ERC, please visit www.YourERC.com.



Introduction & Methodology

This report summarizes the results of ERC's survey of organizations in Northeast Ohio, conducted in October and November of 2015, on practices related to holiday parties, gift-giving and other holiday practices. The survey reports trends in:

- Holiday parties
- Timing and logistics of holiday parties
- Holiday gifts and service
- General holiday celebrations

All ERC members were invited to participate in the survey starting on October 6 via email invitation and other promotions, and participated in the survey throughout the month. The survey officially closed on November 6. In order to provide the most reliable and accurate information, data was cleaned and duplicate records were removed. Any outliers or invalid data were also eliminated, yielding a final data set of 136 participating organizations, only from Northeast Ohio. Qualitative data was coded where applicable or analyzed according to commonality or major themes, and all quantitative data was analyzed using statistical software to ensure data validity and reliability.

This report shows several frequencies and response distributions. Frequencies of data responses may not total 100% exactly in some cases due to rounding of decimals or the ability for participating organizations to select multiple response options. In some cases, breakouts are not included due to quantity of data or insufficient sample.

Holiday Parties

Parties & Budgets

Eighty-two percent of organizations are planning to host a holiday party for their employees in 2015, with most employers (65%) budgeting the same amount or more as last year for their party. In general, employers' practices appear to be very similar to those of last year. Among those employers budgeting more than last year, organizations are planning to budget 37% more for their holiday party, on average. Insufficient data (fewer than 3 organizations) was reported among organizations budgeting less this year to report an average for this group.

Figure 1 | Percentage of organizations planning a holiday party for this year

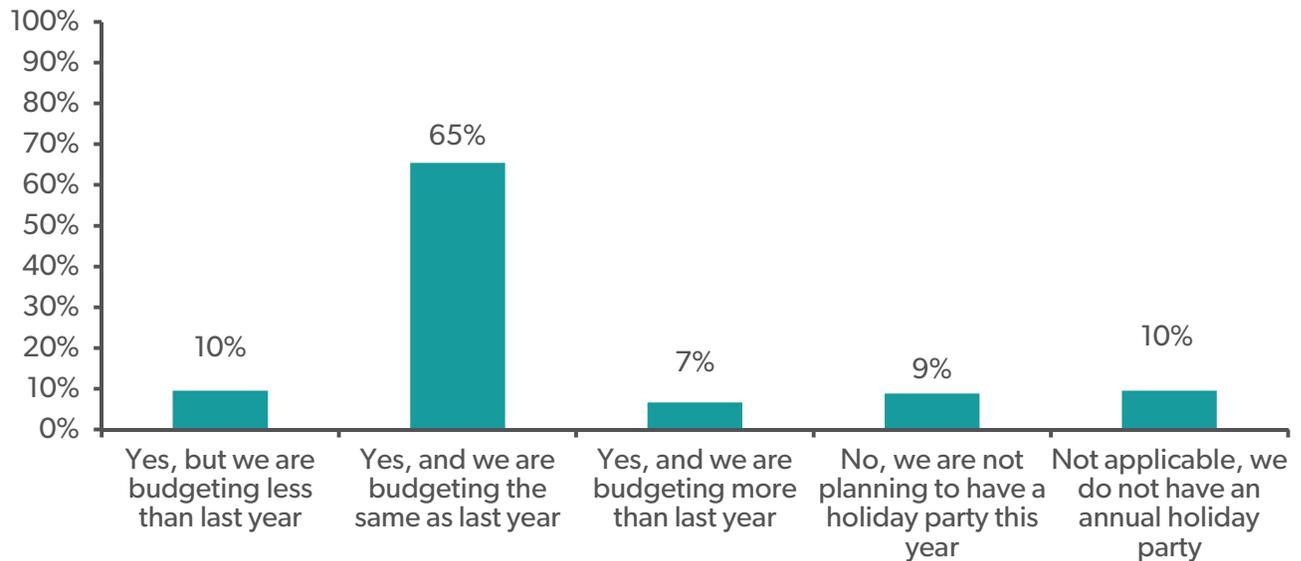
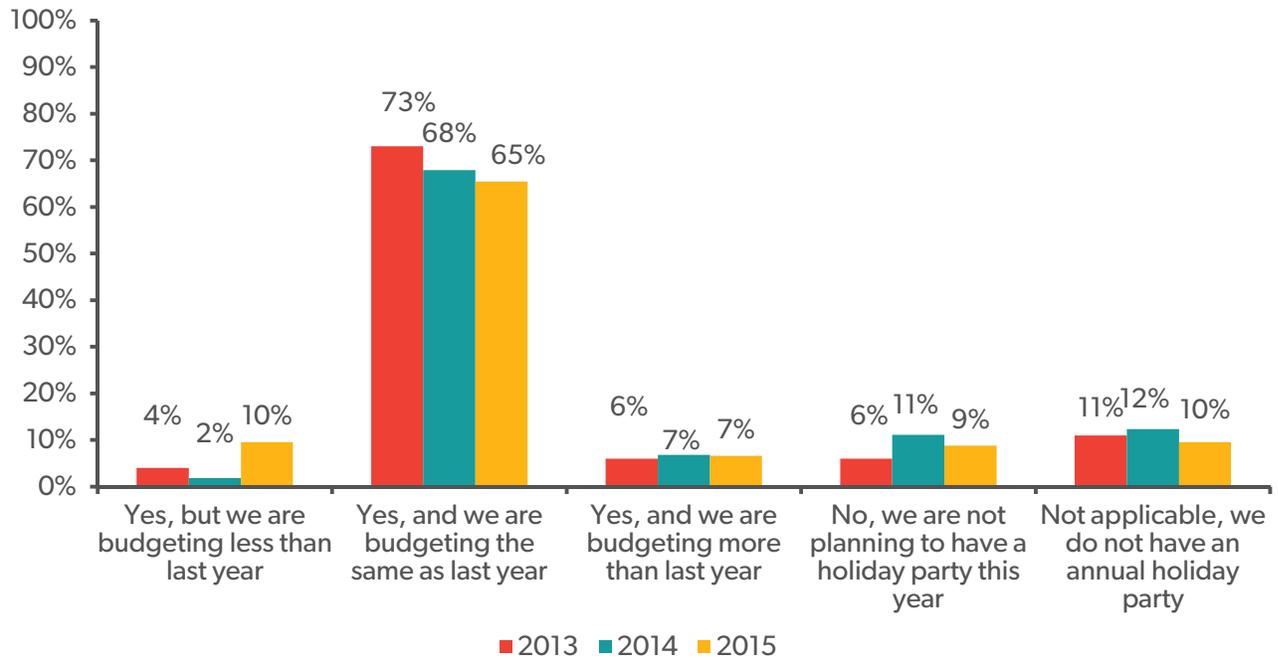


Figure 2 | Average increase or decrease in holiday party budget compared to last year among organizations planning a holiday party for 2015

	Average Increase	Average Decrease*
All Organizations	37%	n/a
Industry		
Manufacturing	40%	n/a
Non-Manufacturing	39%	n/a
Non-Profit	28%	n/a
Organizational Size		
1-50	35%	n/a
51-200	43%	n/a
201-500	n/a	n/a
Over 500	30%	n/a

*Note: Only one respondent indicated their holiday party budget would decrease for 2015.

Figure 3 | Percentage of organizations planning a holiday party for this year: 2013-2015



Holiday Party Practices

A slight majority of respondents say that their holiday party is catered (62%) and that only employees are invited (53%). In terms of location, slightly less than half of employers (43%) indicate their holiday parties will be held at an external location. Alcohol is served at 43% of holiday parties. Of this group, respondents are fairly evenly split on whether or not they limit the amount of alcohol being consumed, with a slight preference in favor of limiting consumption. A full description of the mechanisms used to limit alcohol consumption can be found in **Appendix A**. For a full listing of locations and caterers cited by respondents, please refer to **Appendix B**.

Figure 3** | Percentage of organizations that have holiday parties and use the following party practices

	This Year	Last Year
Only employees are invited to the holiday party.	53%	51%
Employees & spouses/significant others are invited to the holiday party.	27%	28%
Employees, spouses/significant others & children are invited to the holiday party.	9%	7%
The holiday party is held on the company premises.	36%	36%
The holiday party is held at an external location (restaurant, hotel, etc.).	43%	43%
The holiday party is held at a coworkers' residence.	7%	7%
The holiday party is catered.	62%	59%
The holiday party includes entertainment.	21%	21%
Alcohol is served at the holiday party.	43%	41%
Transportation is provided to and from the holiday party.	7%	7%

** Includes only those organization reporting having holiday parties

Figure 4 | Percentage of organizations that limit or do not limit alcohol consumption at their holiday parties among those that provide it

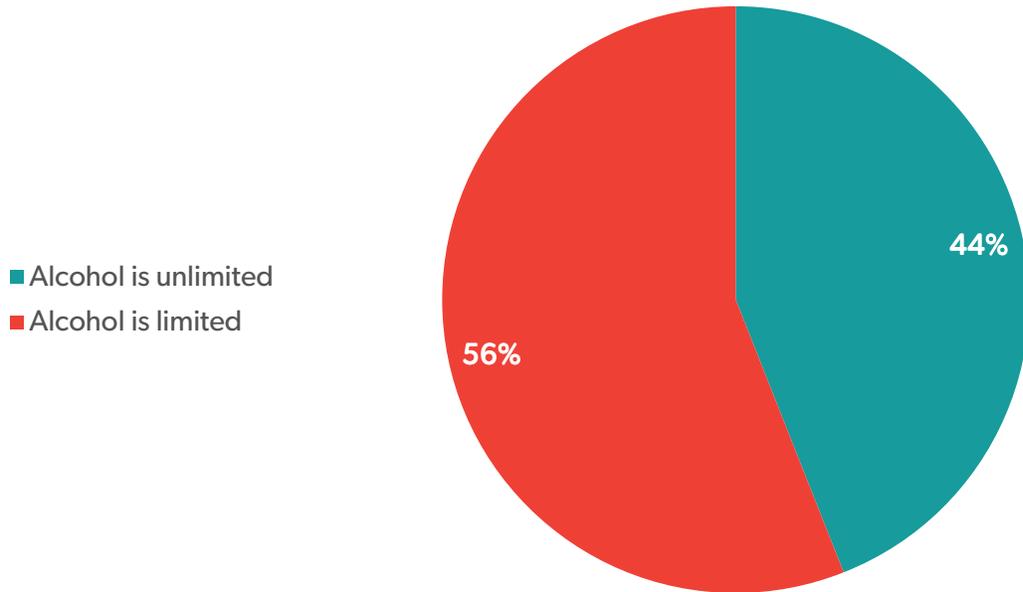


Figure 4a | Percentage of organizations that limit or do not limit alcohol consumption at their holiday parties among those that provide it (with breakouts)

	Alcohol is unlimited	Alcohol is limited
All Organizations	44%	56%
Industry		
Manufacturing	32%	68%
Non-Manufacturing	56%	44%
Non-Profit	50%	50%
Organizational Size		
1-50	54%	46%
51-200	41%	59%
201-500	33%	67%
Over 500	0%	100%

Timing & Logistics of Holiday Parties

Holiday Parties: Date

Respondents were asked to cite the specific date and time on which their holiday party is being held this year. The most common week for holiday parties in 2015 is the third week of December—primarily on Friday, December 18. The second most common week cited is the second week of December. Although these schedules are fairly consistent with previous year’s data, parties do appear to be scheduled slightly later in the month than has typically been reported by this survey. Forty percent of employers are holding their holiday parties on a Friday. Parties on Mondays, Tuesdays, and Sundays were fairly uncommon, totaling only 10% of the sample between the three days.

Figure 5 | Week in which the holiday party is scheduled

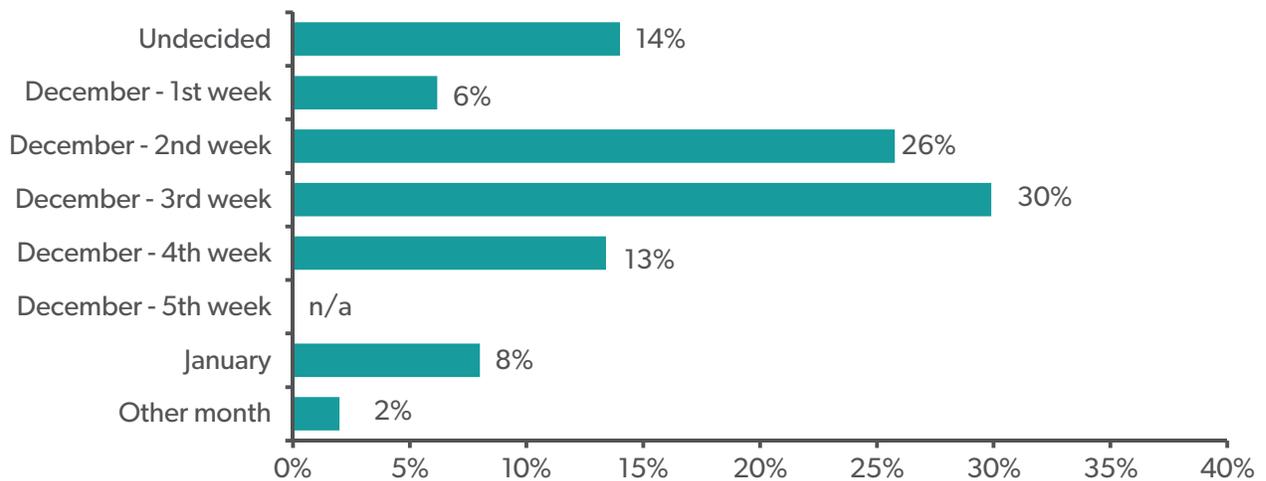


Figure 5a | Day of the week on which the holiday party is scheduled

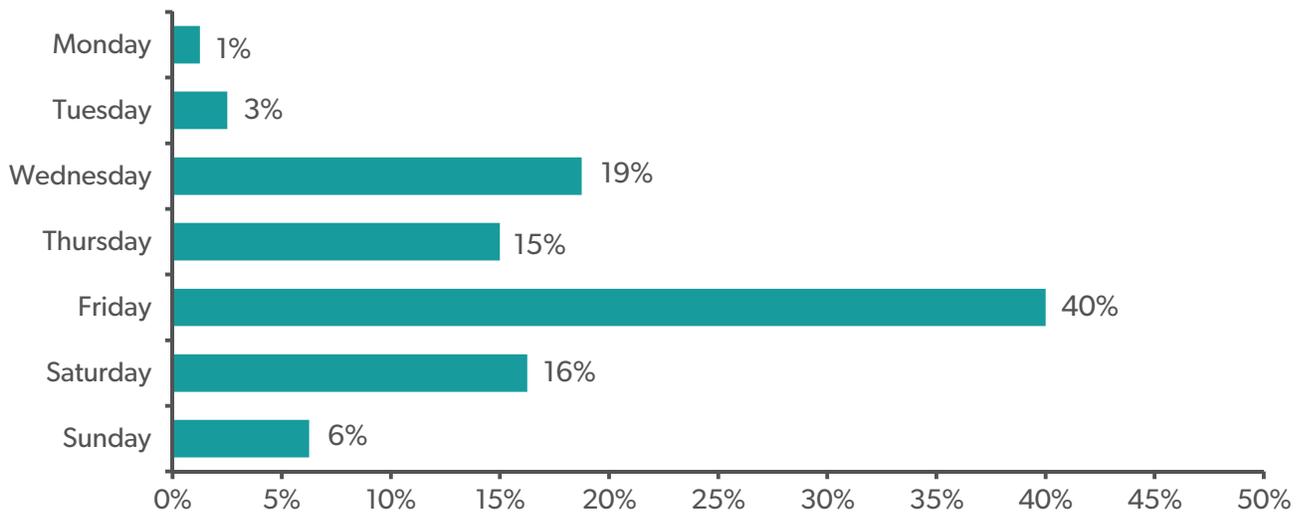


Figure 5b | Exact day on which the holiday party is scheduled in December

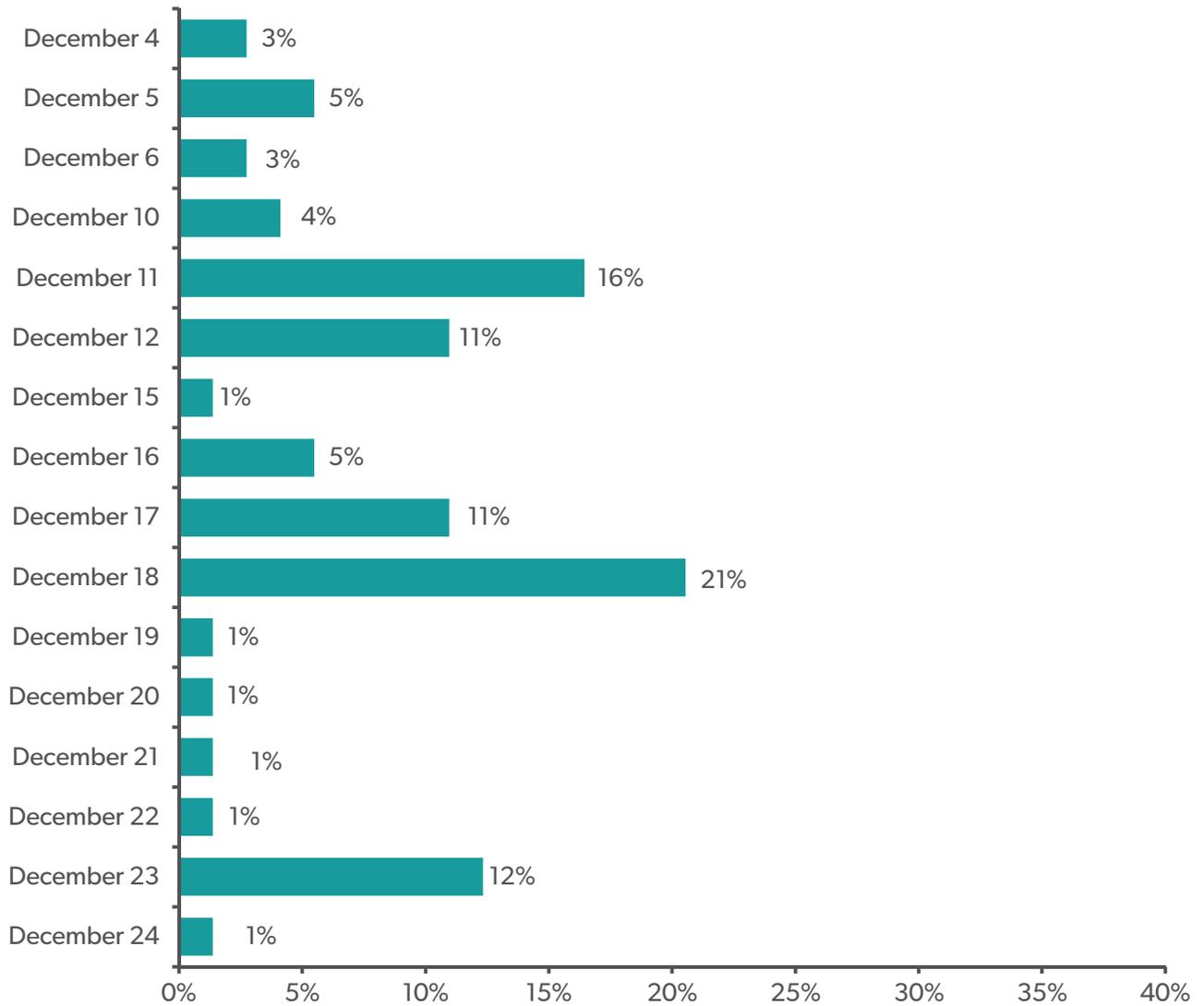
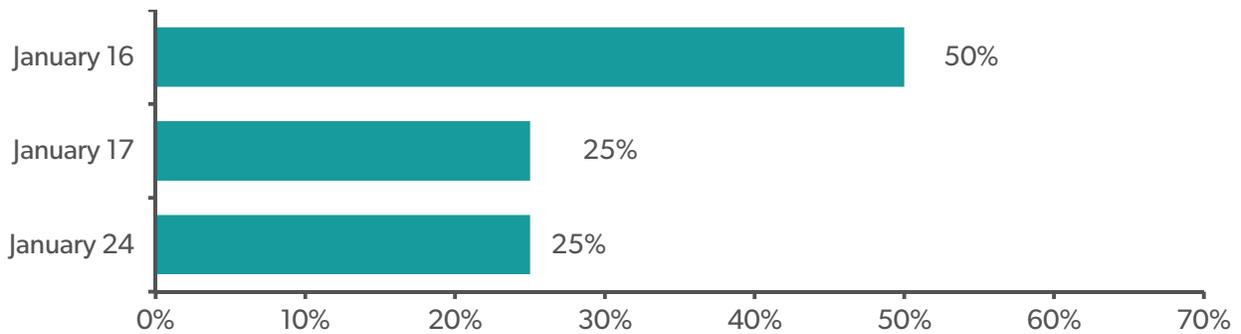


Figure 5c | Exact day on which the holiday party is scheduled in January



Holiday Party: Timing

In terms of timing, the majority of employers are having their 2015 holiday party during lunch (52%). Evening parties are the second most common, provided by 35% of respondents. This year only one holiday party was scheduled during the morning and this party was planned to last all day long. However, it is worth noting that several respondents will be holding holiday parties for 2nd and 3rd shift workers either during or immediately subsequent to their shift hours. Depending on the shift, some of these parties may fall in the very early hours of the morning. As in years past, lunchtime parties are much more common when a holiday party is on a weekday. Evening parties are more common when the event is being held on a Saturday and are increasingly popular on Fridays as well.

Figure 6 | Holiday party time of day

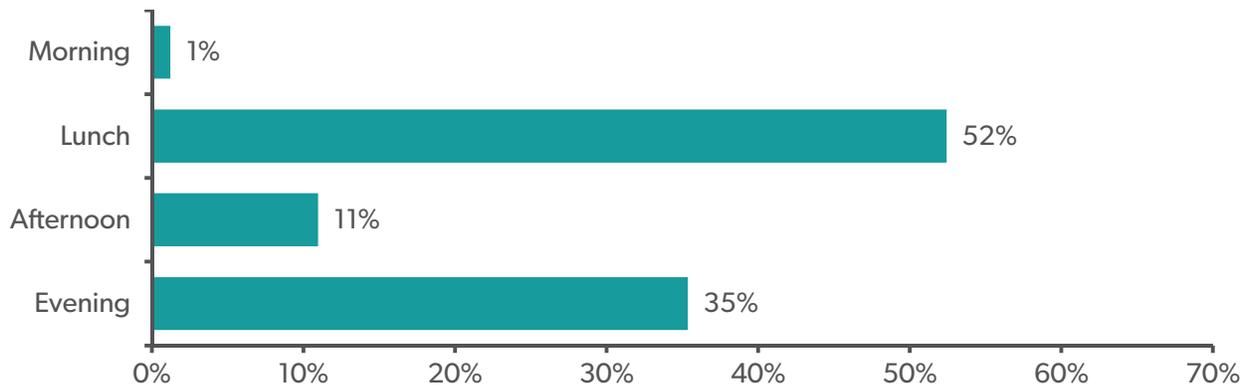


Figure 6a | Exact times of holiday parties

	Percent
Time for employer hosting party in the morning	
9:00 AM	100%
Times for employers hosting parties at lunch	
11:00 AM	12%
11:30 AM	7%
12:00 PM	80%
Times for employers hosting parties in the afternoon	
1:00 PM	11%
2:00 PM	44%
3:00 PM	33%
3:30 PM	11%
Times for employers hosting parties in the evening	
4:00 PM	18%
4:30 PM	4%
5:00 PM	21%
6:00 PM	39%
6:30 PM	7%
7:00 PM	11%

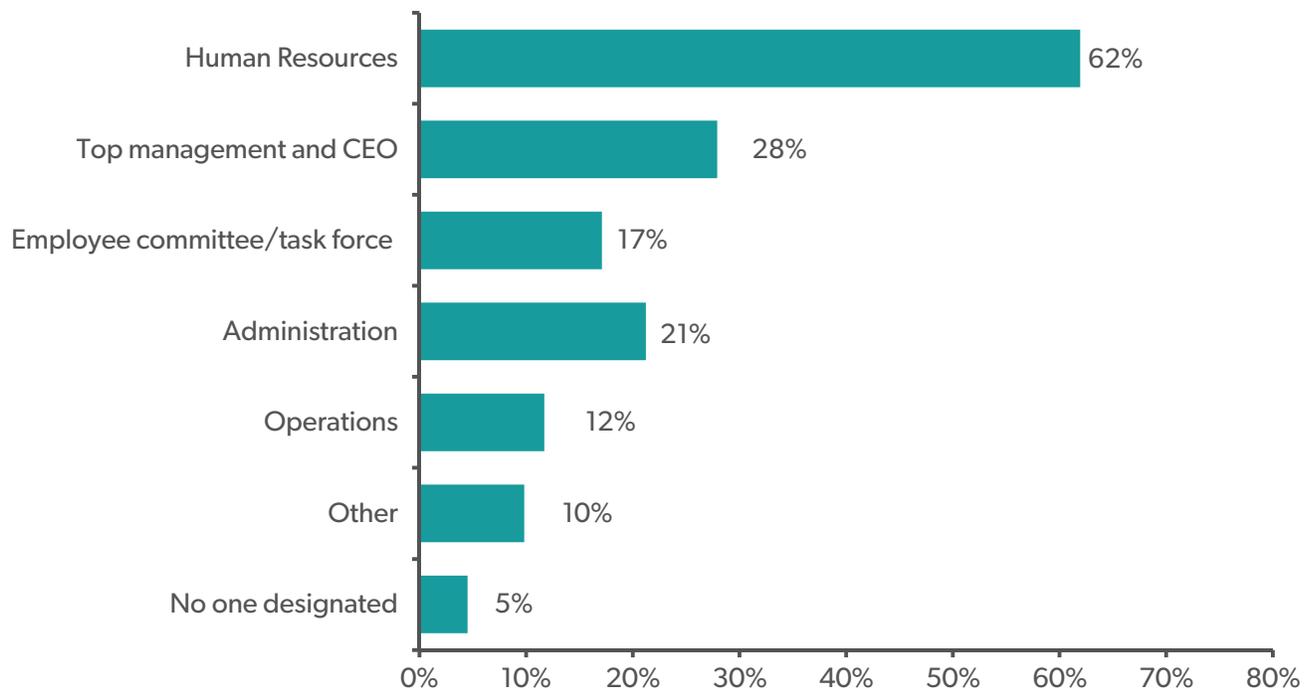
Figure 6b | Holiday party time of day by days of the week

	Morning	Lunch	Afternoon	Evening
Monday	33%	0%	0%	67%
Tuesday	0%	100%	0%	0%
Wednesday	0%	50%	50%	0%
Thursday	0%	57%	21%	21%
Friday	0%	58%	0%	42%
Saturday	0%	73%	7%	20%
Sunday	0%	8%	8%	83%

Planning Responsibility

The Human Resources Department is far and away the most common group responsible for planning holiday parties in 2015 (62%). Some employers (28%) report that top management and the CEO are involved in planning. Very few organizations leave the responsibility open-ended and assign no one in particular to the task (5%). Other individuals cited as responsible for planning holiday parties include marketing personnel and the owner or CEO’s family members.

Figure 7 | Individuals or functions responsible for planning holiday parties



Holiday Gifts & Service

Employee Gifts

Over half of organizations surveyed intend to provide employees with holiday gifts this year (56%), a percentage almost identical to 2014. Organizations are also very consistent in their budgets for holiday gifts from year to year. Ten percent of employers report they will not be providing holiday gifts to employees in 2015 and 35% have never done so. In terms of the types of holiday gifts provided to employees, gift cards remain the most common option. Other employers provide cash, company logo item, or a ham or turkey. One option that is rising in popularity this year is for employers to conduct a raffle to distribute larger ticket items as gifts, although some still provide all employees with small token items in addition to the raffle. For a full listing of holiday gifts reported, please refer to **Appendix C**. For the full text of organization’s “gift giving” policies, please see **Appendix D**.

Figure 8 | Percentage of organizations providing employees with holiday gifts

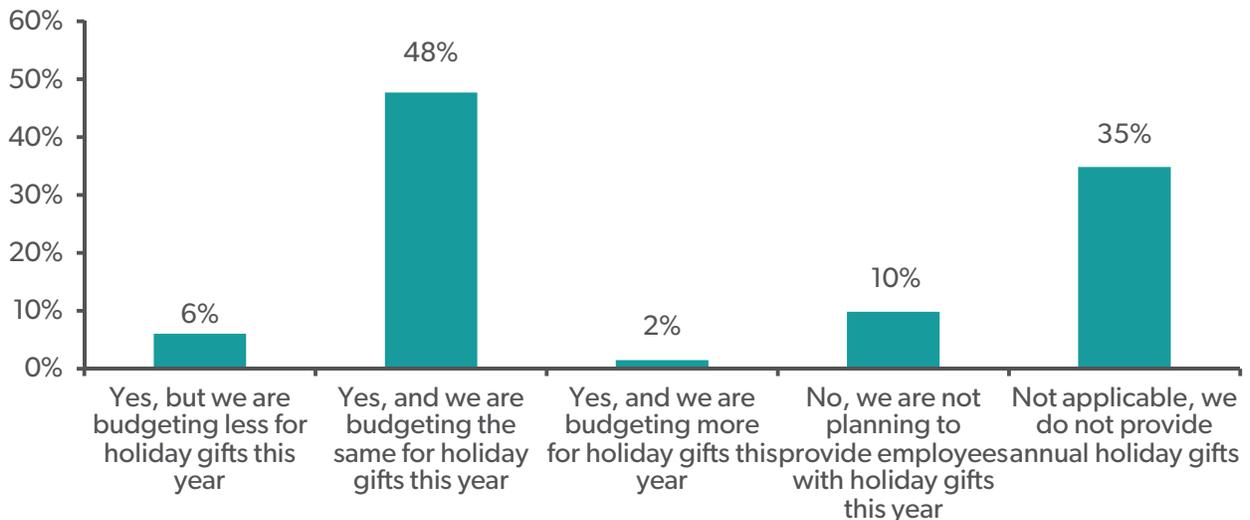


Figure 8a | Comparison of percentage of organizations that provide holiday gifts based on whether or not they offer a holiday party

	Organizations offering a holiday party	Organizations not offering a holiday party
All Organizations	60%	20%
Industry		
Manufacturing	72%	14%
Non-Manufacturing	55%	33%
Non-Profit	17%	0%
Organizational Size		
1-50	62%	0%
51-200	60%	14%
201-500	59%	0%
Over 500	50%	50%

Figure 9 | Percentage of organizations with a “gift giving” policy in place (i.e. a formal policy that places limits or provides guidance around giving gifts to employees)

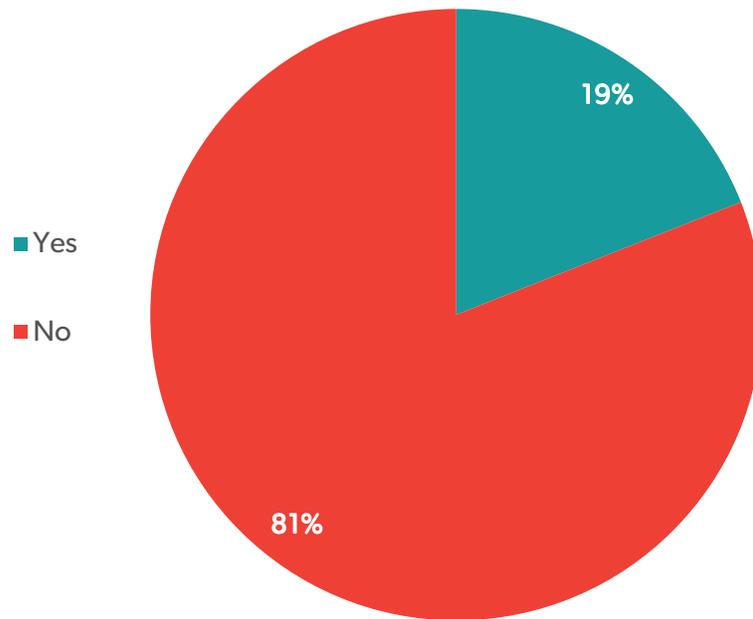
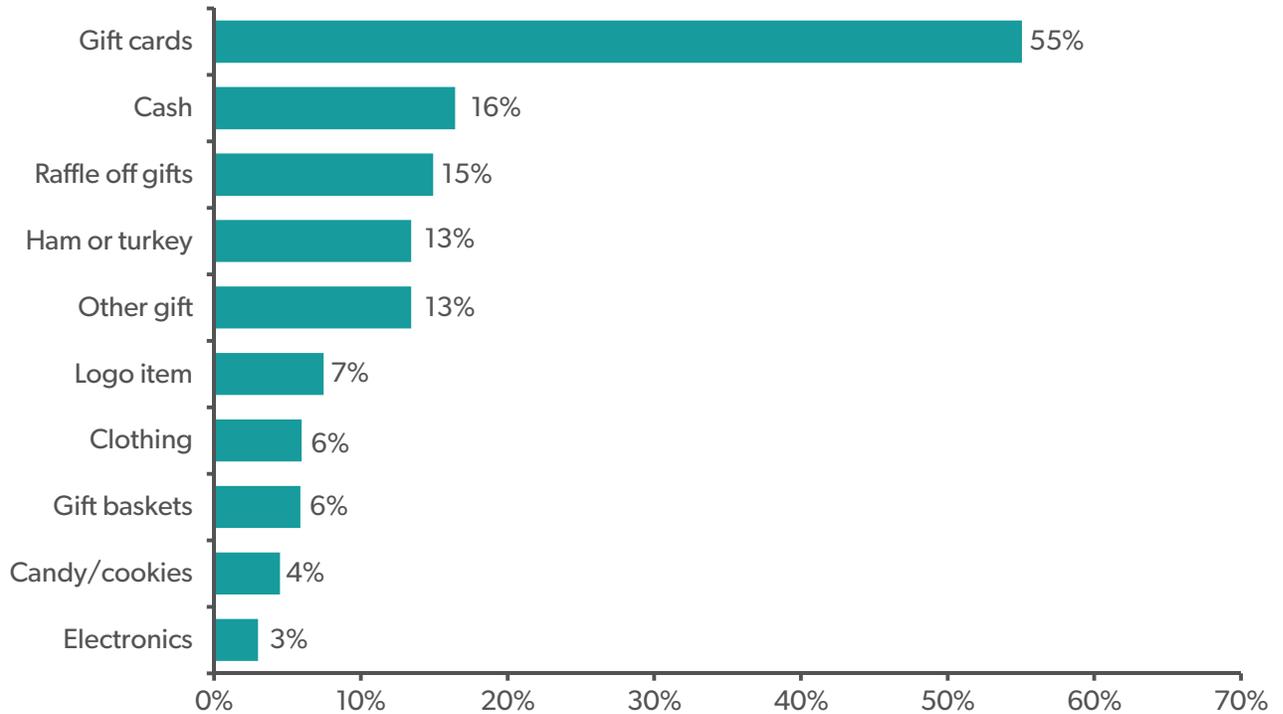


Figure 9a | Percentage of organizations with a “gift giving” policy in place (with breakouts)

	Percent
All Organizations	49%
Industry	
Manufacturing	41%
Non-Manufacturing	57%
Non-Profit	33%
Organizational Size	
1-50	57%
51-200	46%
201-500	40%
Over 500	0%

Figure 10 | Types of holiday gifts given to employees***



***Includes only those organization reporting providing employees with holiday gifts

Holiday Bonus

Exactly one-third of participants reported that they will provide a holiday bonus to their employees in 2015. The dollar amount reported for the holiday bonus ranged significantly, anywhere from \$50 to \$3,000. The most common criteria for receiving a holiday bonus include employee performance and company profitability, although many employers reported that all employees receive this bonus. A full listing of the criteria cited by respondents can be found in **Appendix E**.

Figure 11 | Percentage of organizations that provide a holiday bonus

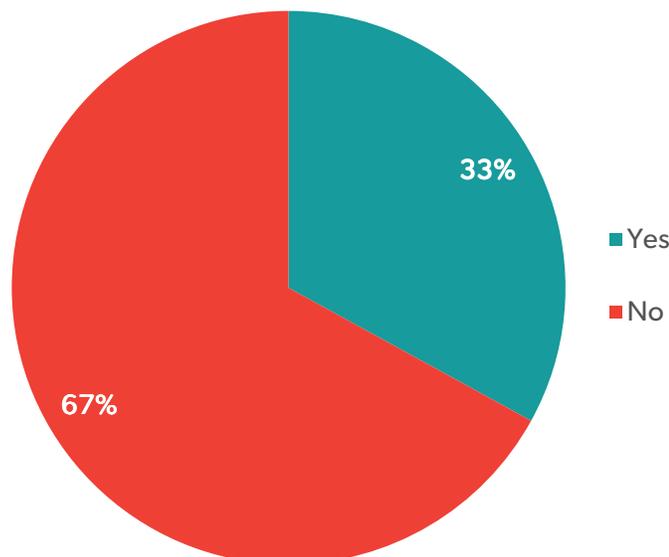


Figure 11a | Comparison of percentage of organizations that provide holiday bonuses based on whether or not they offer a holiday party

	Organizations offering a holiday party	Organizations <i>not</i> offering a holiday party
All Organizations	35%	42%
Industry		
Manufacturing	48%	43%
Non-Manufacturing	24%	40%
Non-Profit	8%	0%
Organizational Size		
1-50	40%	0%
51-200	35%	33%
201-500	31%	100%
Over 500	17%	50%

Figure 11b | Average amount of a holiday bonus

	Minimum	Maximum	Average	Median
All Organizations	\$50	\$3,000	\$706	\$400
Industry				
Manufacturing	\$50	\$3,000	\$825	\$400
Non-Manufacturing	\$100	\$500	\$350	\$400
Non-Profit	n/a	n/a	n/a	n/a
Organizational Size				
1-50	\$200	\$3,000	\$1,233	\$500
51-200	\$100	\$2,500	\$744	\$500
201-500	\$50	\$750	\$367	\$300
Over 500	\$250	\$300	\$275	\$275

Community Service

Up by a whole 10% over the 2014 Holiday Practices Survey, forty-nine percent of employers will coordinate holiday community service efforts for their employees in 2015. Among the most common efforts are participation in Adopt-a-Family and other similarly structured programs, food drives, or other community service efforts with specific local non-profit organizations. Many organizations listed multiple community service efforts, with some coordinated by the employer and other coordinated by a group of employees. A full listing of the community efforts coordinated at responding organizations is provided in **Appendix F**.

Figure 12 | Percentage of organizations that coordinate holiday community service efforts

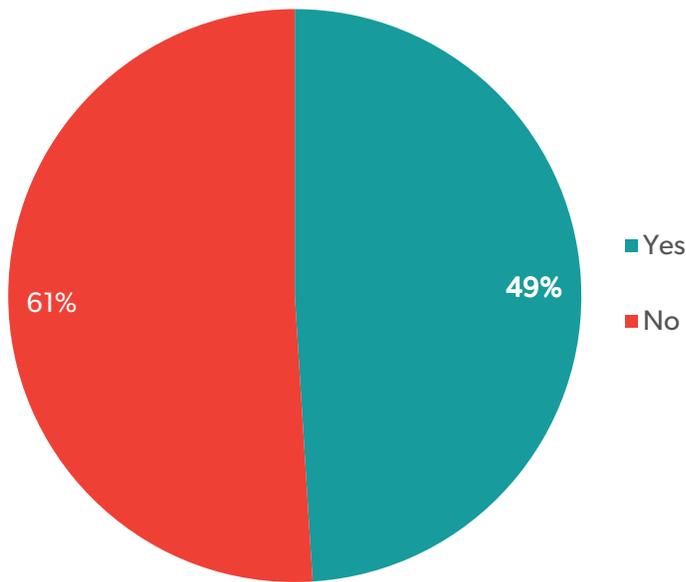


Figure 12a | Comparison of percentage of organizations that coordinate holiday community service efforts based on whether or not they offer a holiday party

	Organizations offering a holiday party	Organizations not offering a holiday party
All Organizations	55%	17%
Industry		
Manufacturing	49%	14%
Non-Manufacturing	65%	20%
Non-Profit	50%	0%
Organizational Size		
1-50	53%	0%
51-200	50%	0%
201-500	59%	0%
Over 500	100%	100%

Holiday Pay Practices

Pay Differentials

Less than half of organizations report that their employees are never asked to work on holidays, so offering a pay differential for holiday hours is not applicable. Of the remaining 55%, many more organizations pay a differential to non-exempt employees than do not pay a differential to this employee group for holiday hours worked. Additional policies around holiday pay practices, specifically how employers handle overlapping time-off requests, can be found in **Appendix G**.

Figure 13 | Percentage of organizations that pay non-exempt employees a pay differential for working on a holiday

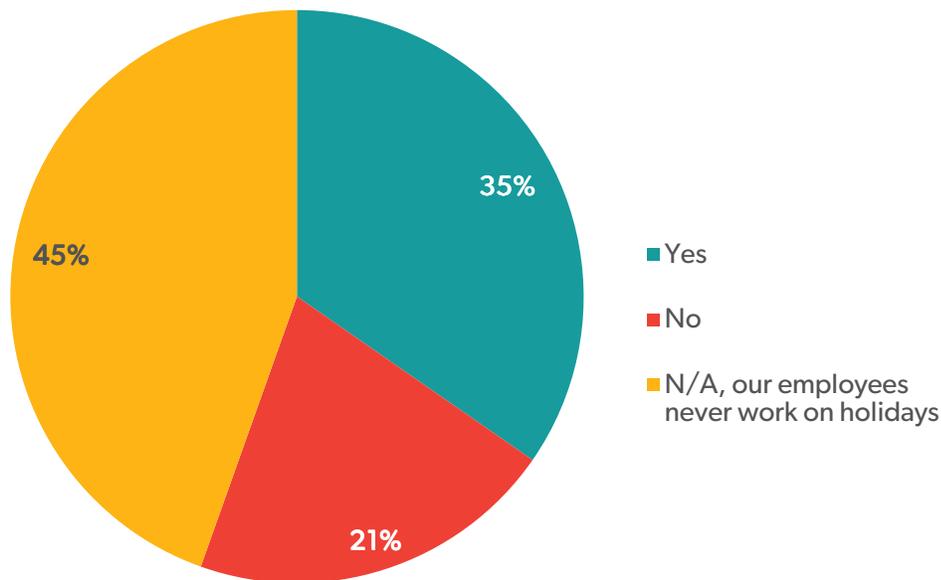


Figure 13a | Percentage of organizations that pay non-exempt employees a pay differential for working on a holiday (with breakouts)

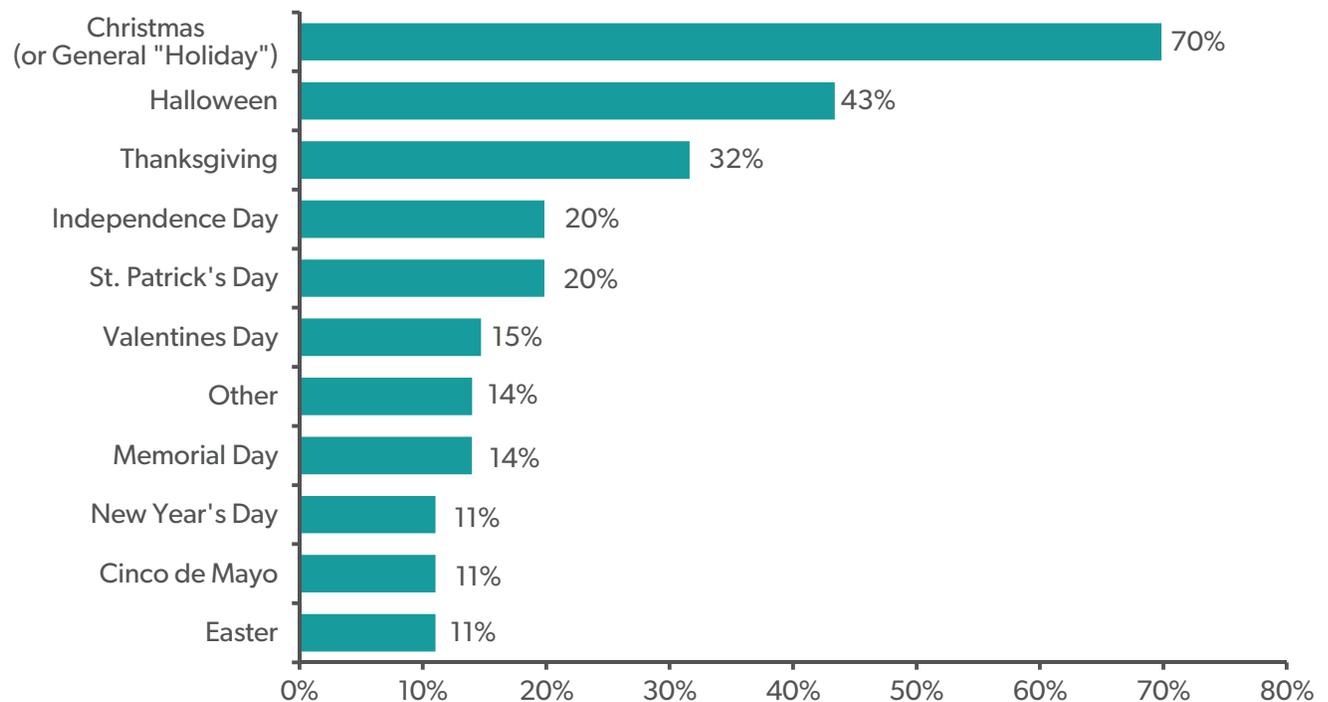
	Yes	No	N/A (ee's don't work holidays)
All Organizations	35%	21%	45%
Industry			
Manufacturing	42%	16%	41%
Non-Manufacturing	23%	26%	51%
Non-Profit	27%	27%	47%
Organizational Size			
1-50	41%	5%	54%
51-200	26%	24%	50%
201-500	48%	29%	24%
Over 500	33%	44%	22%

General Holiday Celebrations

Holidays “Celebrated” at the Workplace

In addition to Christmas (which is “celebrated” by just over two-thirds of respondents), employers report celebrating a variety of holidays at their workplaces by decorating or hosting parties and other related events. This practice is becoming somewhat more popular, particularly for holidays such as Halloween (43%) and Thanksgiving (32%). In the “other” category, parties celebrating the Cleveland Indian’s home opener and Veteran’s Day are the most common. Nearly all organizations allow employees to display holiday decorations in their workspaces (96%), although 23% have some type of restriction on what these decorations entail. In addition, a strong majority of employers display holiday themed décor in common areas at the workplace (82%).

Figure 14 | Percentage of organizations that celebrate the following holidays (e.g. decorating your workplace, or organization employee parties, events, luncheons, etc.)



“Other” holidays cited:

- Annual Cornhole tournament on site.
- Arbor Day
- Birthdays
- Indians home opener picnic, Labor Day picnic
- Indians opener picnic
- Labor Day
- Labor Day
- Series of Events monthly throughout the year.
- Sports-related events (home opener, playoff games)
- St Joseph the Worker Feast Day
- Veteran's Day
- We always do a month event.
- We celebrate random National awareness days. Like National Flip Flop day.
- We do a little something special for ALL holidays!
- We usually do a cook out for Labor Day, 4th and Memorial Day.

Figure 15 | Percentage of organizations that allow employees to display holiday themed decorations in their workspace

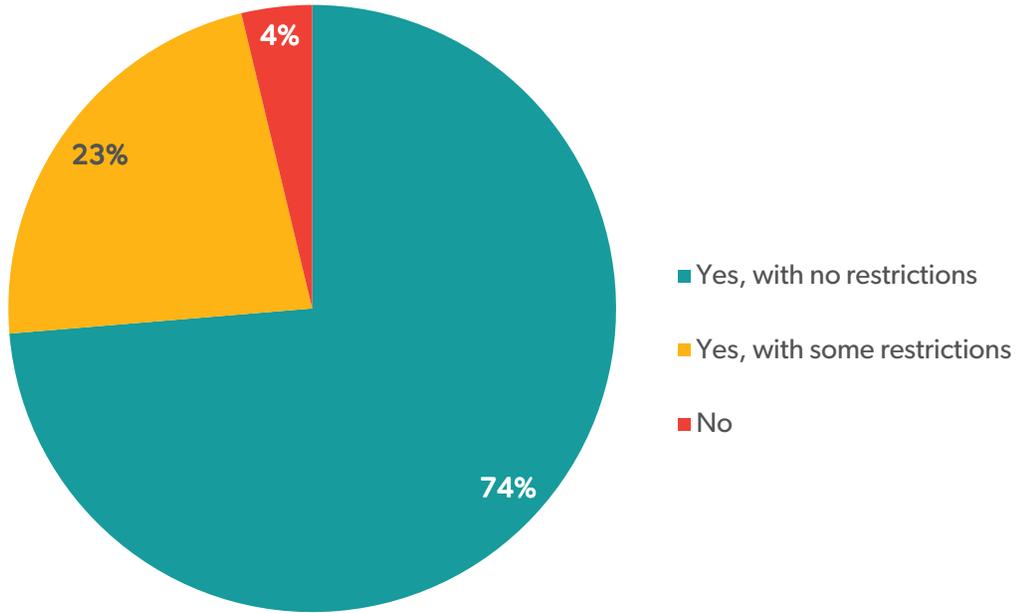
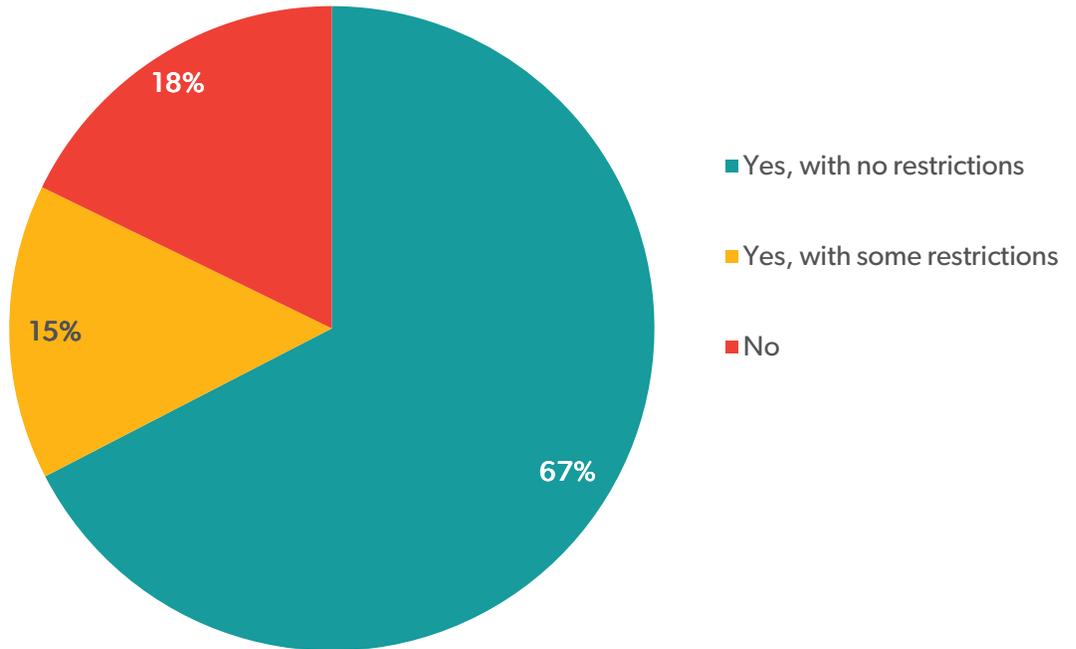


Figure 16 | Percentage of organizations that display holiday themed decorations in workplace common areas



Respondent Demographics

Below is a breakdown of the industries and sizes that respondents represent.

	Percent
Industry	
Manufacturing	54%
Non-Manufacturing	35%
Non-Profit	11%
Organizational Size	
1-50	27%
51-200	50%
201-500	16%
Over 500	7%

Participating Organizations

Many thanks to the following organizations for their participation in this survey:

1 EDI Source	Gotta Groove Records	One Health Organization
Alloy Bellows & Precision Welding, Inc.	Graco Ohio	Ophthalmic Physicians, Inc.
Aluminum Line Products Company	Grand River Academy	Owens Corning - Tallmadge Plant
Apple Growth Partners	Great Lakes Brewing Company	Park Place Technologies
A Raymond Tinnerman	Greater Cleveland Food Bank	Pearne & Gordon, LLP
Automated Packaging Systems, Inc.	Harley-Davidson Dealer Systems	Port of Cleveland
Bardons & Oliver	Hinkley Lighting	Process Technology
Bass Security Services, Inc.	Holden Arboretum	Professional Travel, Inc.
Bay Corporation	ICI Metals, Inc.	Pyramyd Air Ltd
Benjamin Rose Institute on Aging	Interstate-McBee, LLC	Quaker Mfg. Corp.
Bettcher Industries, Inc.	Intigral, Inc.	Quasar Energy Group
Bravo Wellness, LLC	Iten Industries	Ramco Specialties
C&K Industrial Services, Inc.	Jet, Inc.	Ranpak Corp.
C.TRAC, Inc.	Kaufman Container Company	RBB Systems
Career Curve	Kaydon Corp.	Refrigeration Sales Corp.
CASNET	Kerr Lakeside, Inc.	Revenue Group
Chapman & Chapman, Inc.	Kichelr Lighting	Rhenium Alloys, Inc.
Cleveland Housing Network	Kinetico Incorporated	Robin Industries, Inc.
Cleveland Steel Container Cleveland Thermal, LLC	King's Medical Group	Ross Environmental Service, Inc.
Clinical Specialties, an Option Care owned Company	Kobelco Stewart Bolling, Inc.	Safran Power USA (Labinal Power Systems)
CNC A Global Body & Equipment Company	Lanly Company	Software Answers, Inc.
Coastal Pet Products, Inc.	Lexipol, LLC	Staffing Solutions Enterprises
Corporate Screening Services, Inc.	Litigation Management, Inc.	State Industrial Products
Crystal Clinic	Lumitex, Inc.	Stop'nGo of Medin
Custom Products	Majestic Steel USA	Superior Roll Forming
Cuyahoga Arts & Culture	Malco Products, Inc.	The Burton D. Morgan Foundation
Delta Systems, Inc.	Maloney + Novotny, LLC	The Cleveland Orchestra
DRB Systems, LLC	Matplus	The Congregation of St. Joseph
DS Benefits Group, LLC	Mature Services, Inc.	The National Telephone Supply Company
Earnest Machine	Mayfran International	The Step2 Company, LLC
ECKART America	MB Dynamics, Inc.	Transfer Express
EGC Enterprises	MC Sign Company	Tylok International, Inc.
Empaco Equipment Corporation	Medical Service Company	United Disability Services
Energy Focus, Inc.	Meister Media Worldwide	Valfilm
EnerSys	Meyer Products	Weltman, Weinberg & Reis Co., L.P.A.
Findaway	Midwest Industrial Supply, Inc.	Wheeler-Rex
FormFire	Miles Farmers Market	Whirlaway Corporation
GLT Companies	MJM Industries	Wholesale Supplies Plus
	More Than Gourmet	Xact Spec Industries, LLC
	Multi-Wing America	Zion Industries, Inc.
	Myers Industries, Inc.	
	NCS	
	NLC Loans	
	Noble-Davis Consulting, Inc.	
	NOPEC	
	Oakwood Laboratories, LLC	

Appendix A:

Limitations on Alcohol Consumption

The following are limitations cited by organizations for alcohol consumption at their holiday parties. The most common method used to limit alcohol consumption at holiday parties is to limit employees to 2 drinks on the company.

- 2 drink limit
- 2 drink tickets
- 2 drink tickets are provided to each guest
- 2 drink tickets per employee
- 2 drink tickets per person
- 2 drinks
- 2 glasses the company pays for, after that employee must purchase
- 3 drink tickets
- Cash bar which is usually pretty expensive which decreases the amount that is purchased.
- Drink tickets
- Each attendee receives 2 drink tickets provided by the company; however, we do not monitor what the employee purchases on their own beyond the 2 drink tickets.
- Each person receives one glass of wine to use for a toast. Employees are allowed to purchase their own drinks from the bar at the restaurant.
- Employees are given a certain number of drink tickets
- Employees must purchase their own drinks. No alcohol is purchased by employer. "
- First 2 drinks are paid by company then it becomes a cash bar
- It's actually limited to whoever needs to go back to work after the party. The shift workers who need to return can't have alcohol.
- Ticket system
- Tickets
- Tickets purchased by company
- Two-drink limit
- Typically drink tickets are used - limited to one or two drinks per person of age depending on the duration of the event.
- Typically provide 2 drink tickets.
- We give 2 drink tickets. If the EE wants more, they buy on their own.
- We give tickets
- We have a late lunch at a local restaurant. 1 drink per person
- We only offer alcohol during specific times where the company pays for it. After a certain time, the alcohol will be available as a cash bar.

Appendix B: Venues and Caterers for Holiday Parties

The following are local venues cited by organizations as being used for their holiday parties in 2015.

- 100th Bomb Group
- Aloft
- AMF Bowling
- Avon Oaks Country Club
- Buffet
- Cedar Creek Grille
- Cleveland Airport Marriott
- Copper Cup
- D'Agnes Restaurant
- Double tree in Beachwood
- Executive Director's home
- Firestone Country Club
- Freeway Lanes
- Guy's Party Centre
- Harry's Steakhouse
- Hilton Garden Inn
- Hofbrauhaus
- Holiday Inn Mayfield
- Hungarian Club
- J. Bella, Strongsville OH
- Ken Stewart's
- Kirtland Country Club
- Ladies & Gentleman's Spa
- Local restaurant
- Market Avenue Wine Bar
- Mayfield Country Club
- Medina Rec Center
- Owner's home
- Patrician Party Center
- Punch Bowl Social Club
- Quail Hollow Resort
- Restaurant
- Restaurant
- Sawmill Creek
- Solon Freeway Lanes
- Solon Rec Center ballroom
- St. Noel's Party Center
- Stan Hywet
- The Country Club
- The District
- The Galaxy Restaurant - Wadsworth
- Trinity Cathedral
- Union Hall
- Unknown at this time

The following are local caterers cited by organizations as being used for their holiday parties in 2015.

- Acme
- Alfredo's Restaurant
- AMF Bowling
- Ben's Catering
- California Kitchen
- Cater for You
- Chef's for Hire
- Cleveland Airport Marriott
- Club facility
- Copper Cup
- Cuyahoga Group
- Freeway Lanes
- Guy's Party Centre
- Harry's Steakhouse
- Hilton Garden Inn
- Hofbrauhaus
- KCC
- Ken Stewart's
- Lago
- Market Avenue Wine Bar
- Mayfield Country Club
- Olive Garden
- Patrician Catering
- Provided by site location
- Punch Bowl Social Club
- Quail
- Restaurant
- Solon Freeway Lanes
- The Country Club

Appendix C: Holiday Gifts

The following are holiday gifts cited by organizations as being provided to employees. Most employers offer cash or gift cards as holiday gifts to their employees.

- \$20 gift card
- \$25.00 GC at Thanksgiving to all. For Holiday party we purchase 15 gifts valued around \$250-300 each and people enter drawings for them
- \$25.00 Gift Card
- \$30 ACME gift card
- \$50 bill
- A raffle is conducted with a variety of gift cards, gifts and tickets to sporting events
- A specific item is given -- different each year.
- Big Screen TVs, Drones, Kuerigs, Airplane Flights, Pilot Lessons, Watches, Fun Gadgets, Gaming Systems, \$200 gift card for each employee
- Box of Malley's chocolate.
- Cash
- Cash
- Cash
- Cash
- Cash
- Cash
- Cash and gift cards
- Cash, gift cards, gift baskets, poinsettias
- Choice of gift card or gift - usually some type of clothing for field employees
- Christmas turkeys
- Clothing
- Company apparel, gift cards
- Cookie tins and Poinsettia
- Coupon book
- Day off or gift cards
- Drawing for prizes and gift cards
- Generally - coats, jackets, blankets - company logoed.
- Gift baskets for staff, gift baskets and gift cards for management
- Gift baskets, food, gift cards - we change it up every year
- Gift card
- Gift card - \$100
- Gift cards
- Gift cards

- Gift Cards
- Gift cards
- Gift cards
- Gift Cards
- Gift cards
- Gift cards and hams
- Gift cards and some big prizes
- Gift cards for Thanksgiving, wearable for Christmas
- Gift cards to a local grocery store
- Gift cards, prizes
- Gift Cards, Promo Items
- Gift raffles but everyone gets a gift but they are randomly selected.
- Gifts are given as part of a drawing. Not all employees receive a gift. Prizes are gift cards, TVs, video game system.
- Hams and bottles of liquor
- Hams and cash gifts
- Hams/turkeys provided by Honey Baked Ham.
- Honey Baked Ham Gift Certificate
- In past we were given a fruit basket or a gift card
- T-shirts, gift cards, cash
- Trinkets, one year pedometer and another year a mug, and candy.
- Turkey at Thanksgiving and company logo items (i.e. nice mechanical pencil) at Christmas
- Turkey, Wine or Grape juice
- Typically, promotional items with our logo (shirts, hooded jackets, stadium blankets)
- Undecided. In the past, we have given ornaments, tumblers, blankets, and gift cards.
- Visa Gift Cards with dollar amount based on years of service.
- We create an annual gift bag with holiday food items, a company Logoed item, and the employees choice of an Yocum smoked ham or turkey (which are absolutely delicious!) We also hold a 'Santa Saturday' for the children of employees. Each year we have a different theme, and the party includes activities, a visit with Santa, and lunch.
- We do a holiday gift exchange w/ big bonus prizes, including a TV, Go Pro, Gift Cards, and Plane Tickets.
- We have our own vending program so whatever cash is left over at the end of the year we give a set amount to each employee. Last year each employee got \$25 and then we raffle off the rest of the cash in 100's, 50's 20's and some gift cards.

Appendix D: “Gift Giving” Policies

The following text provides the language used in “gift giving” policies (i.e. a formal policy that places limits or provides guidance around giving gifts to employees) as reported by respondents.

- \$10 game exchange
- \$25 limit.
- Any amount in cash/gift cards that equals more than @ \$25.00 is taxable.
- Because of our commitment to preserve our reputation, no employee of our Company may accept any type of monetary or non-monetary gift, favor or payment of any kind from any individual with whom our Company conducts business. An employee, who accepts such a gift, however innocently offered and/or accepted, will be subject to disciplinary action, up to and including discharge.
- Company employees should not accept gifts from clients or vendors. A gift shall include anything of monetary value, including meals and entertainment, or any item of value earned by the Company through frequent customer reward programs. Small items with little or no value, such as promotional items, may be accepted from clients and vendors. Perishable items, such as food baskets must be placed in an accessible location, such as an employee kitchen, to be enjoyed by all employees. Any gifts received by employees in the course of doing business are the property of the Company. As such, gifts must be forwarded to Human Resources to be distributed or raffled in a fair and equitable manner. Before accepting invitations to social engagements, employees must obtain approval from their manager.
- Gift cards are taxable and are put in as earnings and deducted as a deduction in payroll so that taxes are withheld.
- Gift exchange \$15 max
- Gift giving should be voluntary & private. Refrain from giving gifts to Officers/Executive Board.
- If more than \$25, they need to report it to HR.
- No gifts from vendors, contractors, etc., over \$25.00 to individual employee; must be available to all staff. Under \$25 must be approved.
- Policy applies only to business dealings (as it relates to conflicts of interest): This policy establishes only the framework within which we wish the business to operate. Activities and relationships that conflict with [Company’s] interests or adversely affect our reputation and, therefore, should be avoided include, but are not limited to: accepting or soliciting a substantial gift (above \$25), favor, or service that is intended to, or might appear to, influence an employee’s decision-making or professional conduct; accepting, agreeing to accept, or soliciting money or other tangible or intangible benefit in exchange for the employee’s favorable decisions or actions in the performance of his or her job; accepting employment or compensation or engaging in any business or professional activity that might require disclosure of confidential information; accepting employment or compensation that could reasonably be expected to impair an employee’s independent judgment in the performance of official duties; and making personal investments that are contrary to [Company’s] interests.
- Relatively inexpensive items of personal property of less than \$100 in value (as outlined by the IRS ‘de minimis’ definition), such as a calendar, box of candy, holiday gift, or bouquet of flowers which are clearly being given as a simple act of kindness, thoughtfulness and appreciation. Cash, in any denomination, is not acceptable,
- Vendors and or customers may offer you perks as a way of trying to influence your decisions, saying thank you for doing business or for assisting them. If a vendor or customer approaches you with tickets, dinners, gift certificates, T Shirts, hats or wine to name a few please have them see [HR].
- We are not permitted to give gift cards of any value to our employees.
- We do a \$20 white elephant gift exchange in December.
- We host a gift exchange that is voluntary participation and there is a \$20 limit placed on the gifts.

Appendix E: Criteria for Receiving Holiday Bonus

The following are criteria cited by organizations as being used to determine who receives the holiday bonus. These criteria most commonly include company and/or individual performance or length of service.

- \$100 for every year of service up to a maximum of \$1000.
- All employees receive a bonus. Percentage of bonus based on job class.
- All employees, of all levels, including executives, receive the same amount - it sends a nice message to the organization that we're all working hard and all deserve the same recognition.
- All employees.
- All full-time employees at the time of the holiday party.
- Average hours worked for year.
- Based on company performance.
- Based on goal achievement equals the percent you receive.
- Based on Salary and years of service.
- CEO discretion.
- Company performance.
- Company performance.
- Company profit.
- Discretion of the owner, usually managers only.
- Discretionary
- Everyone receives a bonus, the amount varies based on salary and position, and the ability to directly impact financial goals.
- Excludes Commissioned Associates and Directors.
- For the last few years, employees have received an additional paycheck (at their normal rate) at the year of the year.
- Full time employees.
- Full-time regular employees.
- Longevity
- Must be employed for a least 6 months.
- No criteria, everyone received the bonus in appreciation for their hard work over the year.
- Non executive and non commissioned employees receive based on performance reviews.
- Non-management employee.
- None. All employees receive one.
- Not on any corrective action.
- Performance
- Performance and profitability.
- Seniority and position within company.
- Support staff.
- Tenure, position
- Type of employee.

Appendix F: Holiday Community Service Efforts

The following are the community service efforts coordinated for staff cited by organizations.

- Adopt A Family - Lake county jobs and family services.
- Adopt a Family - Salvation Army
- Adopt a family from local food bank to provide presents for adults and children.
- Adopt a family through Ohio JFS.
- Adopt a Family, Misty's Wish, Toys for Tots, Food Bank
- Adopt-a-Family
- Adopt-A-Family
- Adopting children to get gifts for Christmas.
- Akron Food Bank
- Clothing drive for elementary students.
- Coats for Kids, Food Drives
- Collecting toys for Toys for Tots
- Day of giving local food pantry.
- Donation of gifts, volunteer opportunities.
- Donations to local charities.
- Donations, soup kitchen
- During November, we're holding both a Food Drive and a Drive for the City Mission.
- Employees provide gifts to local agencies which help families in need. Organization provides a grant to a local non-profit group for a particular need.
- Feeding the homeless, Clothing Drives
- Food & clothing drives; volunteer at mission, shelter, etc.
- Food and clothing collection, United Way campaign
- Food and toy drive for local charity.
- Food and toy drives
- Food and/or clothing drives, adopting a family for the holiday, etc. One year we decorated a holiday tree with gloves, scarves and hats and donated to an area school.
- Food baskets
- Food drive
- Food Drive - given to local food bank.
- Food drive for SCAN Hunger Center
- Food drive for Second Harvest.
- Giving tree for kids in foster care.
- Giving tree for Toys for Tots.
- Giving Tree to sponsor a local family
- Gloves and Hats for the needy.
- Harvest for Hunger
- Heart Association fundraising: gifts, books, bakery
- Holiday Lights at a Metro Parks - raise funds
- Nakon Foundation, Fill the House

- Salvation Army Angel Tree and Adopt a Kettle
- Salvation Army giving tree
- Students and faculty volunteer at Nursing homes and Decorate Trees for needy families, serve lunches at local churches etc.
- Thanksgiving canned food drive. Adopt a family around Christmas
- This year for the first time, we are sponsoring a Toys for Tots campaign.
- This year we're volunteering with Fostering Hope, and organization whose mission is to enrich the lives of children living in foster care and residential treatment by providing unique experiences and giving the community opportunities to profoundly impact a child's life.
- Through Job and Family Services- adopt a family.
- Toy collection that distributed through the Fire Department.
- Toys are collected for Rainbow Babies and Children's Hospital.
- Toys for Tots
- Toys for Tots
- Toys for Tots
- Toys for Tots, Brunswick Food Bank
- Turkey bakes to provide dinner for families in need.
- United Way
- Warmth Drive - collecting Hats, coats, blankets, gloves, mittens, scarves - given to Homeless Shelter & Domestic Violence Shelter
- We adopt a family and provide gifts for the children and food for their holiday meal.
- We are collecting coats, hats, mittens for the Haven of Rest in Akron.
- We coordinate volunteers for the Summit County Children's Services Holiday Party annually.
- We do a giving tree for the city of Westlake.
- We don't really coordinate community services, but we do typically have 1-2 fundraisers around Toys for Tots and/or local food banks.
- We donate to families through community Christmas and Pathway for Caring.
- We donate turkeys and hams that are left over to St. Herman's House of Hospitality.
- We donate turkeys to a local shelter.
- We might raise money for a charity, donate time, etc. - it changes every year.
- We participate in the Adopt a Family program.
- We sponsor 4 families in the community, and provide gifts for them at Christmas. We also buy a gift for each person at the Geauga County Home (this is a home where people who cannot live on their own due to mental challenges and other misfortunes, live).
- We usually have a charity casino night to benefit a local non-profit organization.
- Westlake Senior Center

Appendix G: Overlapping Holiday Time-Off Request Policies

The following are policies cited by organizations that are used when multiple employees ask to schedule time off over the same time period during the holidays in order to decide who gets to take the requested days off.

- 1st come first serviced policy.
- All have been approved.
- Approvals are based on the order in which requests are submitted.
- Based on area of work.
- Based on company production needs.
- Based on need of skills and first come first serve.
- Based on who asked for it first.
- Based on years of services and workload.
- By order requests are received and occasionally the job position requirement.
- By seniority until February then first come.
- By seniority.
- Date of Request and Seniority.
- Date of request/workload.
- Departmental seniority.
- Dependent on date submitted and department they work in. Adequate coverage has to be maintained.
- Depends on departmental needs.
- Depends on when request was submitted and tenure at the organization.
- Each department is only allowed so many employees out at a time, so it's a first come, first serve basis.
- Each department manager implements his/her own strategy, as each department (we are healthcare) has a different staffing need over the Holidays. However, managers typically try to rotate time off requests on key holidays one year to the next, so that the same employees do not always have the same Holidays off.
- Each department manager reviews the requests and determines the scheduling needs.
- Employees are given off days requested.
- First come - First served based on business needs.
- First come - first served.
- First come bases.
- First come basis and ability to cover a site adequately.
- First come first receive.
- First come first serve and seniority.
- First come first serve basis typically.
- First come first serve.

- First come first served, but if able to do without both employees, vacation is granted for both.
- First come first served, if submitted at the same time, then seniority.
- First come first served.
- First come-first served then by seniority.
- First come, first serve and assuming they have the time to take.
- First come, first serve.
- First come, first serve.
- First come, first serve.
- First come, then seniority.
- First come.
- First come.
- First one to request the time off gets priority.
- First request and area of work.
- First request has preference.
- First request in has preference.
- First request.
- First requested receives approval.
- First requested, first received.
- First requested.
- First requested.
- First to request; then seniority.
- Granted to those who asked first.
- Handled by employee's manager. This has never been an issue, however.
- If more than one person wants the same day off, the employee must find a replacement to work their scheduled shift.
- If the employee had it off last year, they are placed on a wait list in case someone who did not have it last year wants it OR first come first serve basis.
- In order of how they were requested.
- In order of request.
- It just depends on the schedule.
- It's based on who applies first but the team really works together to split up the time so everyone who would like time off is able to.
- It's based on who requests it first.
- It's usually first come first served. However we are usually slow and will send folks home. This year we plan on shutting down the week between Christmas and New Year's and only run with a small crew. This time will either be with PTO/Vacation or unpaid with no penalty.
- Management and work load.
- Managers work with staff to be equitable in approving vacation time (i.e. so the same person does not always get the prime days off every year) if there is a conflict.
- N/A - never an issue. There is always a professional or administrative back up during the holiday season.
- N/A We work to accommodate.
- Normally the plant is shut down on the actual holiday.
- Our organization is made up of several service teams. Each team coordinates within to determine how to accomplish work while some are on vacation and to coordinate which days each team member takes off.

- Person who requested first - then would go to seniority.
- Prioritized by date request was submitted.
- Rotating years.
- Seniority
- Seniority and last year's schedule.
- Seniority and when the request was made are taken into consideration.
- Seniority or who requested first. Case-by-case basis.
- Seniority, but usually we accommodate everyone.
- Supervisor decides.
- Tenure or manager discretion.
- The employees work it out with the manager. Amazingly, we have not had issues with this.
- The first come first served.
- The first request is the one that is awarded the time off. Depending on the position, multiple people may be approved for the same day off.
- The office is closed from Christmas Eve through New Year's Day.
- They rotate days from one year to the next. If enough people are requesting off, we will close certain departments for the day.
- This is worked out in the departments with each manager - some managers may do this based on seniority or alternate years between staff.
- Time it was requested and production.
- Try to accommodate everyone. Manager decides based on business needs.
- Typically first to request it, but try to rotate if the same people can't have the same time off
- Typically, seniority prevails but the request must be submitted and approved 30 days prior to the holiday.
- Usually close week between Christmas and New Year.
- Usually whomever asked first.
- We allow any employee to take vacation during the same holiday period. If an emergency arises and one is needed, the employee who has not yet worked a holiday would be called in.
- We are not allowed to request that time.
- We are retail and the holiday season is our busiest time of the year. We have a 'blackout' period from November to the first week in January where PTO is limited for vacation purposes.
- We do not need much coverage through the holiday season so it isn't an issue with multiple employees requesting vacation.
- We evaluate a variety of variables - who asked first, who is trained on what function, who has a more critical need, etc.
- We have a vacation scheduling policy in place (for hourly). We go by seniority for vacation submitted by cut off period (March 1st), after that it is first come first serve.

- We historically shut down the week of Christmas with a skeleton staff working in the office. Decisions concerning holiday time off to those employees is based on business needs and a first-come, first-serve basis.
- We require every non-manufacturing department to be staffed. Manufacturing is staffed based on need.
- We try to rotate so that the same people don't get the same holiday off each year.
- Who applied first.
- Whoever request's it first, then seniority
- Whoever requests it first.

2015 ERC Holiday Practices Survey

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