

REGULATIONS OF THE SOCIAL BENEFITS FUND AT THE CENTER FOR THEORETICAL PHYSICS POLISH ACADEMY OF SCIENCES

I. LEGAL BASIS OF THE REGULATIONS

§ 1

1. The regulations for the use of funds from the Social Benefits Fund are developed based on:
 1. The Act of March 4, 1994, on in-house social benefits funds (Journal of Laws of 1994, No. 43, item 163),
 2. The Act of May 23, 1991, on trade unions (Journal of Laws of 1991, No. 55, item 234),
 3. The regulation of the Minister of Labor and Social Policy of March 9, 2009, on the method of determining the average number of employees for the calculation of contributions to the social benefits fund (Journal of Laws of 2009, No. 43, item 349).
2. Data of entitled persons are processed based on Art. 8 of the Act on in-house social benefits funds in connection with Art. 6(1)(c) and Art. 9(2)(c) of the Regulation (EU) 2016/679 of the European Parliament and of the Council of April 27, 2016, on the protection of individuals with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (Official Journal of the European Union L 119 of May 4, 2016, p. 1).
3. Data of entitled persons are processed by the Center for Theoretical Physics of the Polish Academy of Sciences, as the Personal Data Administrator, and by members of the Social Committee acting on its behalf and on its authorization, obliged to keep the data confidential during the performance of their functions in the Committee and after its completion. Data of entitled persons are processed solely for the purpose of exercising the entitlements to receive benefits from the Fund.

II. ORGANIZATIONAL PROVISIONS

§ 2

1. The Social Benefits Fund, hereinafter referred to as the "Fund," is formed from the annual basic contribution in relation to the average number of employees at the Center for Theoretical Physics of the Polish Academy of Sciences, in accordance with the Act on social benefits funds.
2. The funds are accumulated in a separate bank account of the Fund, and unused funds in a given year are carried over to the next year.

§ 3

1. To streamline the allocation of benefits from the Fund, the Director of the Center for Theoretical Physics of the Polish Academy of Sciences, hereinafter referred to as the "Director CTP PAS," appoints a four-member Social Committee, hereinafter referred to as the Committee, consisting of employees of CTP PAS. The Committee includes at least one person representing the personnel unit and at least one person representing the financial department.
2. At the first meeting of the Committee, its members elect a Chairman, Vice-Chairman, and Secretary from among themselves.
3. The term of the Social Committee is 3 years and begins from the day of the first Committee meeting.
4. The Committee meets during sessions. Participation in Committee sessions is obligatory for each member.
5. The Committee reviews and assesses applications submitted in accordance with the principles specified in these Regulations.
6. After each Committee meeting, the Secretary prepares a protocol containing a summary of recommended benefits and a written recommendation for each benefit granted or denied, along with its justification.
7. The protocol mentioned in paragraph 7 is signed by all members of the Social Committee present at the meeting. The protocols are kept by the Secretary of the Social Committee in a location determined by the Committee.
8. The tasks of the Committee include, in particular:
 1. Planning expenditures and proposing the allocation of funds in the form of a Preliminary Plan;
 2. Proposing new solutions tailored to the needs of employees;



3. Participating in meetings convened by the Chairman or at the request of any member of the Committee;
 4. Reviewing applications based on these Regulations and submitting proposals to the employer for rejection or approval of benefits from social funds;
 5. Preparing a protocol of Committee meetings;
 6. Reviewing personal data no less than once a calendar year to determine the need for further storage;
 7. After the Director's decision on a social benefit, preparing, by the Secretary, a document on the approval or denial of the benefit.
9. The Secretary's tasks include recording incoming applications and checking their completeness with attachments.
10. Membership in the Social Committee expires before the end of the term mentioned in § 3(3) in the following situations:
- a) On the date of termination of the employment contract with CTP PAS;
 - b) Upon submission by a Committee member of a written resignation from membership in the Committee to the Director of CTP PAS;
 - c) In justified cases as a result of a decision by the Director of CTP PAS.
11. Committee decisions are made by a simple majority vote.
12. Each member of the Committee is entitled to one vote. In the event of a tie, the Chairman's vote is decisive.
13. Members of the Social Committee are obliged to maintain special confidentiality regarding data provided by applicants and to adhere to the principle of impartiality.

§ 4

1. The amount of funds for financing individual social benefits is determined each year depending on the needs of employees, taking into account the amount of the Fund's resources provided for that year.

III. PERSONS ENTITLED TO USE THE IN-HOUSE SOCIAL BENEFITS FUND

§ 5

1. Persons entitled to use the Fund are individuals as specified in Art. 2, item 5 of the Act on the Social Benefits Fund, and in particular:
 - a) Employees employed under an employment contract for a fixed term, indefinite period, probationary period, for the duration of specific work, as a substitute, in full and part-time, as well as based on appointment;
 - b) Children of entitled persons up to 19 years of age who are studying and not working, with the age limit not applying to children solely supported by an employee with recognized disabilities;
 - c) PhD students of CTP PAS;

IV. AWARDING BENEFITS

§ 6

1. Each benefit is granted based on a declaration of income submitted by the entitled person mentioned in § 5(1), available in the electronic circulation of documents at CTP PAS.
2. The granting of all non-refundable benefits and their

amount are dependent on the life, family, and financial situation of the person entitled to use the fund.

3. The assessment of the social situation of the entitled person is based on a **declaration submitted** by that person each year when applying for benefits, **indicating the average gross monthly income per family member for the last 6 months preceding the application**. This includes income from all family members forming a common household, such as compensation obtained at CTP PAS, alimony, family allowances, social assistance, pensions, disability pensions, compensation from other employers based on employment contracts, compensation from civil law contracts, rental income, income from business activities. The submission of such a document is a necessary condition for receiving a non-refundable benefit as provided in these Regulations.
4. In case of doubt, the employer may request additional documentation on the method of calculating the average gross income per family member in the form of a statement or statements for family members, confirming the income earned.
5. The Committee's application for the approval or denial of a benefit, along with an explanation of the reason for the denial, is forwarded to the Director of CTP PAS.
6. The final decision is made by the Director of CTP PAS or a person authorized by him.
7. The entitled person receives information about the decision to grant the benefit specified in these Regulations in the form of a document from the Social Committee, which is to be collected in the personnel unit.
8. In the case of a negative decision, the person applying for the benefit has the right to appeal to the Director of the Center for Theoretical Physics of the Polish Academy of Sciences. The new decision made after reviewing the appeal will be the final decision.
9. If someone loses the status of an employee of CTP PAS, they lose the entitlement to the benefit unless they have submitted an application for the benefit and a statement of income while still employed at CTP PAS. In that case, the due benefit should be paid to them at the earliest possible date, no later than within 6 months from the date of termination of the contract.

V. SOCIAL ACTIVITY

§ 7

Funds from the Fund are intended for the financing and co-financing of social activities, in particular:

1. Recreation leave for employees;
2. Recreation for employees' children;
3. Care for the children of entitled persons attending nurseries and kindergartens;
4. Non-refundable cash assistance for entitled persons provided in random events or in cases of finding themselves in a difficult material or life situation;
5. Co-financing of Multisport cards for entitled persons.

VI. CO-FINANCING OF RECREATIONAL LEAVE FOR EMPLOYEES

§ 8

1. Every employee who takes at least 14 consecutive calendar days of recreational leave is eligible for co-financing of recreation. The leave must be completed within the calendar year.
2. Each entitled person has the right to one co-financing of recreation per calendar year.
3. The Committee establishes the upper income threshold per family member, denoted as G. Employees whose gross income per family member was at least G receive a co-financing of 100 PLN.

- a. The funds, denoted as P, are paid to the remaining n employees applying for co-financing according to the formula:

$$d_i = \frac{\Delta x_i}{\sum_{i=1}^n \Delta x_i} P$$

- b. where d_i is the amount granted to the i-th employee, and Δx_i is the difference between the upper threshold G and the income per family member of the i-th employee.

VII. CO-FINANCING OF RECREATION FOR EMPLOYEES' CHILDREN

§ 9

1. The maximum amount of total co-financing for employee costs of children under 19 years of age, who are studying and not working, is determined up to the amount of one minimum gross salary for the given year.
2. Each entitled employee has the right to one co-financing of recreation for each child per year, based on a submitted application. When both parents are employees of CFT PAN, co-financing will be paid to each parent. The amount of co-financing for each child meeting the conditions specified in paragraph 9(1) is determined according to the formula given in paragraph 8(3).

VIII. NON-REFUNDABLE ASSISTANCE

§ 10

1. Non-refundable financial assistance can be granted to an entitled person in random events or in the case of finding themselves in a difficult material or life situation, especially in situations such as natural disasters (fire, flood), severe chronic illness, death of immediate family members, i.e., spouse, father, mother, father-in-law, mother-in-law, children, and individual random events.
2. CFT PAN PhD students can apply for non-refundable assistance for housing purposes, which is dependent on the income per person in the family for the last 6 months preceding the application (Table No. 1).
3. Non-refundable financial assistance can be granted no more than once in a calendar year.
4. In case of random events, the application for non-refundable assistance should be accompanied by current documentation confirming the event.
5. An applicant for non-refundable assistance who is an retiree or pensioner must attach a statement confirming that they are not employed anywhere on the day of submitting the application and provide the average gross income per family member for the previous month.
6. It is allowed for a retiree's or pensioner's application for non-refundable assistance to be prepared by them personally in the form of a request.
7. The maximum amount of assistance cannot exceed the minimum gross salary for the given calendar year.

IX. CO-FINANCING OF MULTISPORT CARDS

§ 11

1. Employer-subsidized MultiSport cards aim to support physical activity and health care for entitled persons.
2. Anyone entitled can apply for co-financing for MultiSport cards who joined the MultiSport package.
3. The amount of co-financing is determined in Table No. 2 and depends on the average monthly income per family member in accordance with art. 6(3) of the Regulations.

X. CHILDCARE IN NURSERIES, KINDERGARTENS, CHILDREN'S CLUBS, AND OTHER FORMS OF PRESCHOOL EDUCATION

§ 12

1. Persons entitled can apply for co-financing for benefits, having their own or adopted children in the nursery and/or preschool age, regardless of the form of the institution attended by the child.
2. The basis for obtaining co-financing is a paid VAT invoice, invoice, or other document (bank transfer) confirming the expenses, which should be submitted together with the application for co-financing.



3. The amount of co-financing for each child depends on the income per person in the family for the last 6 months preceding the application (Table No. 3), but it cannot exceed the amounts presented on the individual purchase receipts.
- 4.

XI. FINAL REMARKS

§ 13

1. Benefits from the Fund are not of a compensatory nature, and the refusal to grant them does not entitle the person to pursue administrative or legal action.
2. A person entitled to benefits from the Fund who has submitted a statement inconsistent with the truth or who has knowingly and deliberately misled the employer in any way is obliged to return any unduly obtained benefits.
3. Any changes to these Regulations can only be made in writing under the penalty of invalidity in the procedure provided for the establishment of the Regulations.
4. Matters not regulated in these Regulations are governed by the provisions of laws and regulations referred to in § 1(1), as well as other generally applicable legal regulations.

Table No. 1 - Non-repayable Housing Assistance for CTP PAS Doctoral Students

Income Threshold	Income per Person in the Family	Assistance Amount
I	Up to 5500.00 PLN	1200.00 PLN
II	5101.00 - 6500.00 PLN	800.00 PLN
III	6501.00 - 7500.00 PLN	500.00 PLN

Table No. 2 - Amount of Subsidy for MultiSport Card

Income Threshold	Income per Person in the Family	Subsidy Amount (Percentage)
I	Up to 5000.00 PLN	50%
II	5001.00 - 6500.00 PLN	40%
III	6501.00 - 7500.00 PLN	30%
IV	7501.00 PLN - 10,000.00 PLN	10%

Table No. 3 - Subsidy for Childcare in Daycare Centers, Preschools, Children's Clubs, and Other Forms of Preschool Education

Income Threshold	Income per Person in the Family	Monthly Subsidy per Child (Fixed Amount)
I	Up to 5000.00 PLN	200.00 PLN
II	5001.00 - 6500.00 PLN	150.00 PLN
III	6501.00 - 7500.00 PLN	100.00 PLN

Note: Amounts are in Polish Zloty (PLN).

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