

# UUFCO Policies as of Nov 12 2016

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## **Governance Policies**

### UUFCO Policy on Policies

Date initially approved: Nov 12 2014

Date of last approved modification: Oct 13 2016

Date last reviewed and re-affirmed: Oct 13 2016

It is the intent of the Board of Trustees that the governance model of UUFCO transition from its current more hands on approach to that of a Governance by Policy Board. It is understood that this will not take place immediately but will be implemented over time in a manner which seems best for the Board and the Congregation.

Governance by policy means: a form of governance (purposing function) in which governance is separated from management (the performing function). It seeks to provide a structure whereby the Board proposes broad policies which leads and directs the organization forward in accordance with the UUFCO mission and the minister and staff implement those Board policies. An essential element of this form of governance is the need for accountability among all active elements i.e. Board, Minister, staff and congregation. It allows the Board to delegate authority over the day to day operations of UUFCO to accomplish Board policy while ensuring that the parties to whom authority is delegated comply with reporting obligations to the Board which has the ultimate responsibility for the proper administration of the work of UUFCO.

The following policies have been adopted by the Board of Trustees of the Unitarian Universalist Fellowship of Central Oregon ("UUFCO" or the "Fellowship") and may be changed, deleted or added to by the Board. Such action shall be taken by Board resolution voted upon and passed at two monthly Board meetings at which a quorum is present or at one meeting if the consent for passage is unanimous. Such policies shall not conflict with the Bylaws of UUFCO, its Articles of Incorporation or any governing law or regulation.

These policies shall be reviewed from time to time as deemed appropriate by the Board but no less frequently than every two years.

## UUFCO Conflict of Interest Policy

Date initially approved: Nov 12 2014

Date of last approved modification: Nov 12 2014

Date last reviewed and re-affirmed: Sept 8 2016

The following UUFCO Conflict of Interest Policy, adapted from the Sample Conflict of Interest Policy in Appendix A of Instructions for IRS Form 1023, was presented to the Trustees by e-mail for a first reading and discussion on November 24, 2014; every Trustee responded with positive supportive comments on that same day. On November 25, 2014, the President presented it for a second reading and called for a vote; every Trustee responded with a "yes" vote on that same day, and the policy was adopted. This vote is reported in the Board minutes of November 12, 2014.

### **Article I Purpose**

The purpose of the conflict of interest policy is to protect this tax-exempt organization's (Unitarian Universalist Fellowship of Central Oregon) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

### **Article II Definitions**

#### 1. Interested Person

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

#### 2. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,
- b. A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

## **Article III Procedures**

### **1. Duty to Disclose**

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

### **2. Determining Whether a Conflict of Interest Exists**

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

### **3. Procedures for Addressing the Conflict of Interest**

- a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- c. After exercising due diligence, the governing board or committee shall determine whether the Organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

### **4. Violations of the Conflicts of Interest Policy**

- a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

#### **Article IV Records of Proceedings**

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

#### **Article V Compensation**

- a. A voting member of the governing board who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

#### **Article VI Annual Statements**

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

#### **Article VII Periodic Reviews**

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

**Article VIII Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

## UUFCO BOARD POLICY ON BOARD EXECUTIVE SESSIONS

Date initially approved: Oct 8 2008

Date of last approved modification: Oct 13 2016

Date last reviewed and re-affirmed: Oct 13 2016

The UUFCO Board of Trustees desires as much of its business as possible to be conducted in an open and transparent manner. Member attendance at Board meetings is encouraged in order to promote an informed congregation. However, the Board recognizes that because of the sensitive nature of some limited number of subjects it may be necessary for the Board to meet in executive session without member participation.

Therefore, the Board may meet in executive session only for the following purposes:

- . Evaluation or discipline of or other discussions relating to Staff and or Minister
- . Legal or potential legal issues
- . Contract matters
- . Other matters which the Board believes require Confidentiality to protect a member's privacy

Notice that an executive session will be held at an upcoming Board meeting shall be placed in the agenda and notice of that Board meeting.

Only matters which have been scheduled and noticed for a Board executive session may be discussed in that executive session.

The Minister(s) may attend all executive sessions of the Board except those that are called to evaluate or discuss matters related to these persons and in that event neither shall be in attendance.

No other person(s) shall attend executive sessions except upon invitation of the Board. No minutes of discussions at executive sessions shall be taken. No decision shall be taken by the Board in executive session.

## UUFCO POLICY ON POLITICAL ACTIVITY

Date initially approved: Oct 8 2008

Date of last approved modification: Oct 13 2016

Date last reviewed and re-affirmed: Oct 13 2016

The Fellowship may speak out on issues in accordance with UU principles or matters approved by a vote of the congregation. However, no one shall speak on behalf of the fellowship or take any action which would contravene the restrictions on political campaigns as established by the Internal Revenue Service for 501(c)(3) organizations.

A copy of the most recent rules of the IRS on this subject is attached hereto as Exhibit A and incorporated herein by reference. The primary restriction relates to endorsing specific political candidates.

When the Fellowship does take a position on a particular political issue, the spokesperson shall be either the Minister, the President of the Board, or a designee of the Board of Trustees. No one else may speak for the fellowship on political matters. This policy should in no way interfere with an individual expressing an opinion about a political subject or candidate so long as the opinion given is identified clearly as being personal to the party stating the opinion.



**Exhibit A: (from IRS web site)**

**The Restriction of Political Campaign Intervention by Section 501(c)(3) Tax-Exempt Organizations\_\_Last Reviewed or Updated: 13-Sep-2016**

Under the Internal Revenue Code, all section 501(c)(3) organizations are absolutely prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for elective public office. Contributions to political campaign funds or public statements of position (verbal or written) made on behalf of the organization in favor of or in opposition to any candidate for public office clearly violate the prohibition against political campaign activity. Violating this prohibition may result in denial or revocation of tax-exempt status and the imposition of certain excise taxes.

Certain activities or expenditures may not be prohibited depending on the facts and circumstances. For example, certain voter education activities (including presenting public forums and publishing voter education guides) conducted in a non-partisan manner do not constitute prohibited political campaign activity. In addition, other activities intended to encourage people to participate in the electoral process, such as voter registration and get-out-the-vote drives, would not be prohibited political campaign activity if conducted in a non-partisan manner.

On the other hand, voter education or registration activities with evidence of bias that (a) would favor one candidate over another; (b) oppose a candidate in some manner; or (c) have the effect of favoring a candidate or group of candidates, will constitute prohibited participation or intervention.

# FISCAL POLICIES

## UUFCO POLICY ON INCOME, EXPENDITURES AND RELATED FISCAL MATTERS

Date initially approved: \_\_\_\_\_

Date of last approved modification: Nov 10 2016

Date last reviewed and re-affirmed: Nov 10 2016

### **Deficit Spending**

The Board should make every effort to cover operating expenses with operating income. If directed by the congregation's approval of the annual budget to use operating reserve funds to offset deficits; such funds can be used as approved.

### **Budgets**

The annual budget will be prepared by the Finance Committee in cooperation with staff, presented to the Board for approval and then approved by the congregation at the annual meeting.

During the fiscal year any line item that exceeds the approved budget amount must have written approval provided to the accountant/bookkeeper before posting. The President or Treasurer can approve amounts up to \$500.00; larger amounts need prior approval by the Board. The accountant/bookkeeper should note these increases in the monthly Board financial reports.

Unbudgeted items (spending on an unforeseen category of expense), of any amount, may also be approved for amounts up to \$500 by the President or Treasurer, who must also propose a name and description for a new spending category for which this expense should be billed against, and this category name shall be provided to the bookkeeper. Such requests should be infrequent and may require the Board to review approved expense amounts. This policy does not apply to the Building Reserve balances. Projects may be proposed for the building/grounds and approved by the Board on their merits.

### **Income**

All UUFCO funds must be deposited in our bank accounts named Unitarian Universalist Fellowship of Central Oregon.

The Sunday offertory collection will be counted in dual custody by the Treasurer and another

congregant, a deposit form prepared for the accountant/bookkeeper, and a copy kept by the Treasurer for audits. Another Board member may replace the Treasurer if needed.

Other cash amounts submitted to the accountant/bookkeeper should be counted in dual custody by the responsible parties with a form showing compliance.

Pledge payments will be posted only by the accountant/bookkeeper. Individual pledge amounts can only be viewed by the Minister or Treasurer or bookkeeper. Congregants can request that only the accountant/ bookkeeper view these records and such a request will be honored and maintained in the records until rescinded.

### **Expenditures and Withdrawals**

Withdrawals from UUFCO bank accounts can only be done by checks or similar orders such as bill-pay for recurring monthly statements. Electronic transfers between accounts may be done by the Treasurer or accountant/bookkeeper. Any electronic transfers to other parties are blocked by our banking agreements.

All checks issued must be signed by the President or Treasurer. All bill pay transactions must be authorized by the Treasurer or the President of the Board.

Credit cards may be issued to individuals upon approval by the Board. The cards will be issued by our bank and have \$5,000.00 credit limits. These are intended for use only for church related expenses and must be paid off each month. Receipts or invoices shall be provided to the accountant/bookkeeper for expenses incurred.

### **Periodic Review of the Financial Records**

The Finance Committee will appoint an ad hoc committee of at least three members to review financial records including payroll documents. The Treasurer will be one member of the committee. This review must be done at least yearly using UUA provided guidelines for such church reviews. A written report must be provided to all Board members.

## UUFCO BOARD POLICY ON DESIGNATED FUNDS

Date initially approved: \_\_\_\_\_

Date of last approved modification: Nov 10 2016

Date last reviewed and re-affirmed: Nov 10 2016

Designated Funds are created to provide congregants the opportunity to donate funds in surplus of their pledged offerings, with specified and targeted uses, e.g. books for the library, or to be maintained as a reserve for activities outside the annual budget such as scholarships to attend conferences.

The Board must approve opening these accounts and balances are reported monthly in the financial reports. If an account is not used for a year the Treasurer may request permission from the Board to close the account and move the funds to the general operating account.

The present member or committee designated funds and their required distribution approvals follow:

Minister Discretionary Fund – funds designated for the use at the sole discretion of the minister. Approval required: Minister

Youth RE Program Discretionary Fund – funds designated to fund special supplies, enhance programs, etc. Approval required: RE Director and Minister

Music Program Discretionary Fund – funds designated to purchase additional music, attend musical conferences, etc. Approval required: Music Director and Minister

Library Discretionary Fund – funds designated to purchase books, supplies, etc. Approval required: Library Committee Chairperson and Minister

Adult RE Discretionary Fund – funds designated for special supplies, new programs, etc. Approval required: Adult RE Committee Chairperson and Minister

Education Leadership Development Fund - used for program scholarships , special programs, etc. Approval required: Board President and Minister

## **UUFBO BOARD POLICY ON USE OF BUILDING FUNDS**

Date initially approved: July 08 2010  
Date of last approved modification: Nov 10 2016  
Date last reviewed and re-affirmed: Nov 10 2016

Building funds will be placed in separate line items on balance sheets and reported to the Board each month. These funds are subject to the agreements signed before construction started.

One of these funds, Operating Reserve, may be used to offset deficits caused by increased building operation costs. The necessary withdrawal amount will be estimated in the annual budget and adopted by the congregation. Money will only be withdrawn from this account if actual expenses for the fiscal year exceed income by an amount sufficient to require drawing on this reserve fund.

The second fund, Building Reserve, consists of contingency funds left from construction and final pledges being completed. This fund is directly under Board oversight and may be used for additional projects concerning the building. All expenditure requests require Board approval.

As of Jan 1 2018, all remaining funds in the building reserve account will move to the Operating Reserve account, subject to aforementioned restrictions on use of funds.

## **UUFECO ENDOWMENT COMMITTEE: POLICIES AND PROCEDURES**

Date initially approved: Feb 24 2016

Date of last approved modification: Feb 24 2016

Date last reviewed and re-affirmed: Sept 8 2016

### **Plan of Operation**

The UUFECO Endowment Fund Committee (hereafter, the "Committee") shall consist of a minimum of five voting members, all of whom shall be voting members of UUFECO. One member shall be appointed from the Board of Trustees by the board President. The other members shall be elected by the Congregation. Except as herein limited, the term of each member shall be two (2) years.

No member shall serve more than two consecutive two year terms. After a lapse of one (1) year, former Committee members may be reelected. The UUFECO Treasurer shall be excluded from appointment or election to the Committee in order to avoid a conflict of interest with the Treasurer's audit responsibility.

In the event of a vacancy of an elected position on the Committee, the UUFECO Board of Trustees shall appoint a congregation member to fill the vacancy until the next annual meeting of the Congregation, at which the Congregation, following electoral procedures for other Fellowship officers, shall elect a member to complete the term of the vacancy.

The Committee shall meet at least quarterly, or more frequently as deemed by it in the best interest of the Fund. A quorum shall consist of three members and a majority of those members present and voting shall carry any motion or resolution.

### **Duties of the Committee and Committee Officers**

The Committee is responsible for:

1. Promoting the concept of giving to the Fund.
2. Developing an investment policy.
3. Receiving or rejecting contributions to the Fund. Gifts other than cash will normally be liquidated as promptly as practical.
4. Investing gifts in accordance with the Investment Policy
5. Maintaining necessary records of gifts, investments and distributions.
6. Adopting means for acknowledging the receipt of gifts in a manner that will permit the donor to claim federal income, gift and estate tax charitable contribution deductions.
7. Causing distributions to be made from the Fund, consistent with Endowment policy.
8. Reporting to the Board of Trustees and Congregation on activities, Fund balances and the distribution of proceeds.

The Committee shall elect from its membership a chairperson, a recording secretary, and a financial secretary. The length of terms for these officers shall be determined by the Committee. The responsibilities of these persons shall be as follows:

The Chairperson, or person designated by the Chairperson, shall preside at all Committee meetings, and shall provide an annual report to the Congregation.

The Recording Secretary shall maintain complete and accurate minutes of all meetings of the Committee, shall supply a copy thereof to each member of the Committee, and post them in a location easily accessible to the congregation as a whole. Each member shall keep a complete copy of minutes to be delivered to his or her successor. The Recording Secretary shall provide quarterly reports to the Board.

The Financial Secretary shall maintain complete and accurate records of receipts for the fund, income from the fund, and disbursements from the fund, including the names of donors and recipients. Should a donor wish to remain anonymous, their name and donation details will not be revealed in public records of the committee. The Financial Secretary shall assist the Congregation Treasurer and bookkeeper in maintaining complete and accurate books of account for the Fund, shall submit to the treasurer on behalf of the Committee written requests for checks payable from the Fund, and shall sign all other necessary documents on behalf of the Congregation in furtherance of the purposes of the Fund. The financial activity of the Endowment Fund shall be audited or reviewed as a part of the annual review of Fellowship finances.

Members of the Committee shall not be liable for any losses that may be incurred upon the investments of the assets of the Fund except to the extent that such losses shall have been caused by bad faith or gross negligence. No member shall be personally liable as long as she or he acts in good faith and with ordinary prudence. Each member shall be liable for only her or his own willful misconduct or omissions and shall not be liable for the acts or omissions of any other member. No member shall engage in any self-dealing or transactions with the Fund in which the member has direct or indirect financial interest and shall at all times refrain from any conduct in which her or his personal interests would conflict with the interest of the Fund.

All assets are to be held in the name of the Unitarian Universalist Fellowship of Central Oregon Endowment Fund.

Recommendations to buy, hold, sell, exchange, rent, lease, transfer, convert, invest, reinvest, and in all other respects to manage and control the assets of the Fund, including stocks, bonds, debentures, mortgages, notes, or other securities, as in their judgment and discretion they deem wise and prudent, are to be made by the Committee, for approval by the Board of Trustees of the fellowship, with subsequent execution by the delegated member of the Committee.

The Committee shall provide an annual report to the Congregation in advance of the Annual Meeting. This report shall include the accomplishment of the Committee for the past twelve months and the plans for the next twelve months. The topics to be reported shall include its activities with regard to raising, administering, and disbursing funds. Information about the investments shall be provided including: type of investment(s), gain or loss, and the value of the account(s). This report shall be made available in written form to members of the Fellowship with the same lead time required by the by-laws for providing the list of candidates prior to the date of the meeting. Recognition shall be accorded to the donors and planned givers of the past year, if they so desire.

### **Raising and Administering Funds**

The Committee shall provide for the continuing education of congregation members about the charitable aspects of estate planning, ways to transfer assets, the use of wills and trusts, life insurance, annuities, gifts of real property, securities or other tangible property of value such as art works and antiques. Preferred donations to the Fund are cash, securities, or other financial instruments that can quickly and easily be converted to cash or other liquid assets.

The Committee shall encourage and assist members and friends of the congregation in making contributions to the Fund.

The Committee shall solicit gifts throughout the year, dealing with donors individually.

The Committee shall not hold general fund drives that would compete with regular Church pledge campaigns and anticipated capital fund drives.

Except in extraordinary circumstances, the Committee will not accept donations earmarked for special purposes. Other UUFCA funds are available for these types of donations.

The Committee shall invest the Fund's assets in a prudent manner.

The Committee shall consider the Congregation's social and ethical positions when formulating investment strategy.

### **Disbursement of Funds**

The Committee shall place highest priority on disallowing any invasion of the accumulated original monetary value of the gifts to the Fund. However, momentous issues may arise that require the congregation to consider access to part or to all of the Fund's principal. For any meeting at which decisions shall be made on expenditures from the eligible endowment funds, eighty percent (80%), including proxy votes, of the voting congregational membership shall be required as a quorum, and an eighty percent (80%) majority of those present, or by proxy, shall be required to adopt a substantive motion. A written ballot shall be required for all such decisions. The ballot shall include



the amount of principal to be withdrawn along with the purpose of the withdrawal. Upon approval by the congregation, the Board of Trustees shall have the power to make expenditures from the principal of the Endowment Fund in accordance with the authorizing motion by the congregation.

Once a Fund asset value (principal and income) of \$100,000 is reached and maintained for four (4) consecutive quarters, the Committee may, at the direction of the Board of Trustees, disburse annually any new Fund income and not withhold it for further growth. The primary means for fund growth shall then be the Committee's fund raising activities.

A financial model for determining the proceeds available for disbursement, and designed to protect the fund from erosion by inflation, shall be chosen by the Committee and communicated to the Board of Trustees and the Congregation.

### **Amendments**

These Policies and Procedures may be altered or amended by a majority vote of the Endowment Committee followed by approval of the Board of Trustees.

### **Dissolution of the Fellowship**

In the case of dissolution of the Fellowship, all assets of the Endowment Fund, subject to all claims against it, shall be vested in the Unitarian Universalist Association or its successor to be held in trust for the benefit of a future Unitarian Universalist Fellowship in Central Oregon.

(02/24/16)

## **UUFCCO Policy and Procedures on Non-monetary (non-art) Gifts**

Date initially approved: June 9 2016

Date of last approved modification: June 9 2016

Date last reviewed and re-affirmed: Sept 8 2016

### **Policy:**

UUFCCO welcomes non-monetary gifts from its congregants and friends. Gifts must support the vision and aspirations of the design and the intention of our new church, conform to UUFCCO's purpose, programs and values, and comply with the donation procedures outlined below, and detailed on the attached UUFCCO Non-monetary Gift Proposal document. The Board of UUFCCO reserves the right to negotiate the conditions of the gift with the donor. There will be a "wish list" established and donors are encouraged to consult that list before deciding to make a different contribution. There is a separate policy and procedures document for gifts of art.

### **Procedures for the acceptance of non-monetary gifts:**

1. The donor proposes the gift to a specific related committee, program, Minister or Board in the attached written format.
2. The committee, program, Minister or Board under which the gift's purpose falls will review the proposal, explore possible implications the gift has to the UUFCCO budget. (For example, if there are moving, installation, labor, or maintenance costs associated with the gift either for the short or long term). If the proposed gift does not fit the criteria, the gift will not be accepted. The entity to which the proposal was submitted will make recommendations of acceptance to the Board.
3. The donors and Board President, or Treasurer or Vice-President will sign off on the Donation Form for Art and Non-Monetary Gifts.

## UUFCO Non-monetary Gift Proposal

**(NOTE: If this is a Memorial for a Deceased Member, will eventually reference *Policy on Establishment of Memorials for Deceased Members*)**

Donor/s Name: \_\_\_\_\_

Donor/s Contact information: \_\_\_\_\_

Date submitted: \_\_\_\_\_

1. Brief statement of the purpose of the gift and attach photos if possible:
2. How does the gift adhere to and/or support the vision and aspirations of the design of the new church.
3. What UUFCO committee or program this gift will support? (Social Justice, Music, Children's RE, Adult RE...)
4. How might this gift impact the UUFCO budget in terms of moving, labor, long term maintenance?
5. How willing are you to negotiate the terms of this gift?
6. If this is an item related to seasonal use, where do you propose the item be stored?

## FACILITIES RELATED POLICIES

### UUFCO Board Policy: Safety

Date Approved 02/10/15 Policy Number 1008

(UNDER REVIEW)

**Policy:** *The church facility of the Unitarian Universalist Fellowship of Central Oregon shall be managed and maintained at all times in a manner that preserves the safety and security of the building, its equipment and furnishings, and its occupants.*

*To the extent possible the grounds surrounding the church shall be monitored and managed to maximize the safety and security of those who are legitimate users of the church grounds. This includes patio areas, driveways, parking lots, sidewalks, playgrounds and entrances to the church facility.*

**History/Need/Rationale:** Ownership of a newly planned and constructed building and grounds will occur in 2015, a first for the Fellowship. UUFCO will assume responsibility for the care, safety and security of the facility and its occupants upon assuming ownership. While some procedures, such as management of access to the building, are obvious from the beginning, other procedures will be developed and adopted as the congregation becomes familiar with its new church. Responsibility for safety and security will also be assumed for those who are using the church grounds as part of an affiliation with the Fellowship.

#### **Timing Requirements:**

The policy is scheduled for review during 2016.

**UUF​CO Board Policy Proposal: Alcohol Policy**

Date Approved 12/10/14 Policy Number 1001

**(UNDER REVIEW)**

**Policy:** *UUF​CO will limit alcohol allowed on the premises to only non-spirit alcoholic beverages (wine, beer, cider, etc.). This rule will apply to all events, regardless of who is hosting or renting. All UUF​CO alcohol-related procedures shall follow OLCC regulations.*

**History/Need/Rationale:** UUF​CO currently uses a BYOB approach to events. This has been advertised as “wine and beer welcome,” in our internal communications. The above policy will not change this current approach to alcoholic beverages at UUF​CO event. With the potential for outside rentals and weddings, the need for an official stance on spirits is necessary, given the added potential liability. Procedures for serving alcohol at UUF​CO events and for requirements for rentals will be forthcoming.

This was the overwhelming opinion of survey respondents for UUF​CO Events (76%), UUF​CO Member Rentals (71%), and Outside Rentals, both private individuals and organizations (67%).

**Budget Implications:** This policy recommendation has no direct budgetary implications, there are potential costs related to OLCC licensing which will be determined during the drafting of the specific procedures.

**Timing Requirements:** This policy will come up for review in winter 2016.

## **UUFBO Board Policy: Smoking**

Date initially approved: Dec 10 2014

Date of last approved modification: Dec 10 2014

Date last reviewed and re-affirmed: Sept 8 2016

**Policy:** *Smoking of any kind, the use of smokeless tobacco, or the use of electronic cigarettes is limited to a designated smoking area, to be on pavement, and not less than 40 feet from the building entrance, accompanied by a fire-safe, self-extinguishing receptacle for waste, unless otherwise posted. During high fire danger periods, smoking will be banned completely.*

**History/Need/Rationale:** The committee used the following information to aide in shaping this recommendation:

UUFBO survey on building policies showed a split of 53% in favor of smoke6free property with 47% in favor of smoking area. Below is a sampling of the comments:

o "I do recognize the difficulty some have with this habit and I would hate to push them away over it."

o "There are MANY more reasons than those given above to have a NO SMOKING policy." o "not altogether happy about it 66 but otherwise it's a bit unrealistic" o "What is more welcoming and enforceable?... Providing a place to put their butts is probably wise. Also, what about 12 step groups?" o "We're in an area that has already seen the results of a wildfire. A non6smoking policy is environmentally wise." o "Smokers will smoke; best to give them a designated safe area" o "I firmly believe that it would serve Us to have an easily accessible designated smoking area

which is fire safe and away from the children's areas of the campus." 6 In an interview with the Bend Fire Chief, he advised that creating a smoking area, as described in the above policy recommendation, is the safest way to mitigate wildfire danger. We discussed the message that a smoking ban would convey to visitors and considered the socio6economic gap in the population of smokers vs. non6smokers. We modeled our policy recommendation based on the current smoking policy at Central Oregon Community College.

## **UUFCO Board Policy: Fragrance**

### **Policy:**

Date initially approved: Feb 10 2015

Date of last approved modification: Feb 10 2015

Date last reviewed and re-affirmed: Sept 8 2016

- 2. Personal care products such as cologne, perfume, aftershave, perfumed lotions and/or similar products are not to be worn in the facilities owned and operated by UUFCO.*
- 3. Use of air fresheners, incense, and scented candles are prohibited from the facilities owned and operated by UUFCO.*
- 4. We will seek to use cleaning products that are unscented.*

### **History/Need/Rationale:**

A fragrance\*free environment helps create a safe and healthy place for congregation and worship. Fragrances from personal care products, air fresheners, and scented candles have been associated with adversely affecting a person's health including headaches, upper respiratory symptoms, shortness of breath, and difficulty with concentration. People with allergies and asthma report that certain odors, even in small amounts, can cause asthma symptoms. UUFCO recognizes the hazards caused by exposure to scented products and cleaning chemicals and we have a policy to provide a fragrance\*free environment for all who use its facility to keep a safe and healthy environment for congregation and worship.

This policy is adapted from the American Lung Association.

## **UUFCO Board Policy: Service Animals and Pets**

Date initially approved: Feb 10 2015

Date of last approved modification: Oct 13 2016

Date last reviewed and re-affirmed: Oct 13 2016

**Policy:** Service animals are welcomed within UUFCO when accompanied by an individual who has a disability or who indicates that the service animal provides a specific service.

Animals in the kitchen are prohibited by Health Department regulations.

Pets are only allowed at events where their presence is specifically designated as part of the event or service. At the discretion of the Minister, staff members may bring pets to the administrative office area.

Any procedures developed to implement this policy must comply with the Americans With Disabilities Act (ADA).

**History/Need/Rationale:** UUFCO welcomes the participation and membership of individuals who require the assistance of service animals. The presence of other animals is prohibited except at specifically designated events and the office area to respect the needs of members and participants who have animal allergies, and to minimize human animal conflicts within our facility.



**UUFCO Board Policy: Sustainability Practices**

Date Approved 01/14/15 Policy Number 1004

**(UNDER REVIEW)**

**Policy:** *UUFCO will strive to minimize our footprint on the earth's resources in all aspects of our use, maintenance of, and improvements to, our New Home, and will strive to maintain the health of our congregation and our employees by making sustainable choices.*

**History/Need/Rationale:** Unitarian Universalism has a long history of commitment to and respect for nature and living with a light impact on the earth. This is represented by our 7<sup>th</sup> Principle:

Respect for the Interdependent Web of all Existence of Which We Are a Part.

UUFCO has had an opportunity to put this principle into practice in the construction of our New Home, using the newest technologies for energy efficiency and sustainability, and will be certified under the Earth Advantage Commercial Program as a Platinum level facility. We will strive to make sustainable decisions about the use, maintenance and improvements to our new facility in a way that embodies the 7<sup>th</sup> Principle, while also considering cost effectiveness.

**Potential Procedures:** This commitment is broad and far reaching. It will be encompassed in the maintenance and management of our new building through the use of 'green' cleaning products and processes, and the use of re-usable and/or compostable dishes and utensils and linens in the kitchen. We will encourage alternative transportation for accessing our facility. We will explore the use of renewable energy.

**UUFCO Board Policy: Building Use Policy:**

Date Approved 01/14/15 Policy Number 1005

**(UNDER REVIEW)**

**A. Purpose**

*The facilities of the Unitarian Universalist Fellowship of Central Oregon were constructed to further its ministry to affirm and promote the seven principles of Unitarian Universalism to its members and to the community of Bend.*

*The Unitarian Universalist Fellowship of Central Oregon is pleased to make its beautiful building facilities available to individuals and groups in the community that seek to serve and enrich human life, through the arts, education, social and environmental justice, celebrations, weddings, or other activities that are compatible with our mission and vision: "The Unitarian Universalist Fellowship of Central Oregon is an intergenerational liberal religious community dedicated to energizing life-long learning, freedom of belief, caring fellowship, spiritually meaningful services, and engaged social action."*

*Furthermore, in keeping with UU principles, no individual or group will be denied use of the building on the basis of religion, race, sex, national origin, disability, sexual preference, age, or public assistance status.*

**B. Priorities**

*As a guideline, the priority for building and scheduling decisions shall be determined following the below list of priorities:*

*Services, programs, groups and meetings of the Unitarian Universalist Fellowship of Central Oregon.*

*Programs and meetings of organizations affiliated with this congregation.*

*Programs and meetings of organizations or special projects as outlined by the Social Justice committee and affirmed by the Board of Trustees.*

*Programs and meetings of organizations affiliated with the members of our congregation.*

*All other uses*

**C. Calendaring**

*Calendaring will occur on an as needed basis by the Minister, Board President, Council of Committees, and Administrator. The above mentioned groups will work collaboratively to ensure that the above priorities are maintained while addressing any conflicts that arise in the scheduling of space.*

Date Approved 02/10/15 Policy Number 1007

**(UNDER REVIEW)**

**UUFCO Board Policy Proposal: Keys Policy:** *As a general guideline, keys will be assigned on an as-needed basis to staff, contractors, committee chairs (both program and board committees), and to renters.*

*Criteria for being issued a key:*

- 1. Active member (per UUFCO Bylaw Article III)*
- 2. Member of leadership (board or program)*
- 3. Clear need to have a key (i.e. evening/off-hour committee meetings, events, etc.)*

*The safety and security committee will serve as the reference for key issuance and recommend the initial list of individuals who will receive keys. The minister and/or board president will retain the ability to deny a key issuance for reasonable cause.*

*Additional policies or procedures will be developed regarding assigning keys to outside renters.*

**History/Need/Rationale:** Balancing safety, cost and convenience are aspects of the thinking that went into development of this policy. Our new key card based security system allows UUFCO to monitor building access but incurs costs in assigning key cards and monitoring use. By starting the card assignment with UUs in leadership positions we can monitor the effectiveness of this approach and make modifications, if needed, in the future.

## Other Policies

### **POLICY ON RELIGIOUS EDUCATION FOR CHILDREN AND RELATED MATTERS**

**(UNDER REVIEW)**

In the context of a safe, nurturing, intergenerational community the Unitarian Universalist Fellowship of Central Oregon supports the spiritual development of its children and youth based on UU values. This mission is promoted by teaching and modeling:

- Respect for diversity of ideas and religious traditions;
- Respect for the worth and dignity of each person;
- Service to the community;
- Good stewardship of the earth.

A Religious Exploration Committee shall work with the Director of Religious Exploration to oversee the Fellowship's religious exploration program. A background check on all teachers and childcare providers is required. UUFCO shall use ScreenNow, a Church Mutual Insurance Co. background screening partner, or equivalent reputable screening service.

Refer to UUFCO Childcare Handbook August 2015 for more details regarding childcare providers, parental responsibilities, health, safety and discipline policies.

**UUFCA INFORMATION ACCESS POLICY:**  
**Approved 08/11/2016**

A. Definitions:

1. "**Members**" are individuals who have been admitted to the Fellowship as defined under the UUFCA Bylaws.
2. "**Friends**" shall be understood as non-Members who have consented to sharing their personal information with lay leaders in accordance with this policy. <Typically such people will have a high current level of involvement in the life of the church, but the judgement shall be made by the participant via an opt-in process, with an opt-out option also available if a "friend" wishes to stop sharing their personal information with UUFCA lay leaders.>
3. "**Personal information**" shall be understood to include, but not be limited to: electronic or printed materials containing identifying information about those who participate in the activities of UUFCA, where "identifying information" is any combination of name, photo, address or email where a person could be uniquely identified or contacted. <Examples of places with UUFCA personal information are: Members area of the website, Directory, Church management software.>
4. "**Financial information**" shall be understood to include, but not be limited to: electronic or printed materials that describe pledges or contributions to UUFCA or affiliated groups, as well as pledge totals and annual UUFCA budgets as described in the annual meeting.

B. Policy:

1. Policy on control of and access to personal and financial information of UUFCA Members and non-Members is a responsibility of the Board. All such information is to be treated as "for personal use or for uses of the official activities of UUFCA only," and designated as such.
2. As a general rule, none of the personal or financial information about UUFCA Members or non-Members will be provided to anyone outside of UUFCA. Only the Board can override this rule should such a request for use be made. Any individual found to be abusing his or her information access privileges may have them revoked, and people who are administering sites where information is provided may temporarily reduce access if issues are discovered.
3. In general, there will be greatest information access for people who are most actively involved in UUFCA, and least information access for those who are least actively a part of UUFCA.

C. Levels of access:

1. **Non-Members** have no access to personal or financial information about UUFCA Members but are limited to information maintained on UUFCA's public website or displayed in UUFCA's public areas.
2. **Members** can see personal information on Members, church calendar, and public church business such as board minutes and church policy documents. Members may also see their own pledge and contribution information, as well as the UUFCA annual budget and pledge drive totals.

3. Members who **are Committee Chairs, team leads or Board members** may also see personal information on all Members and Friends. Other members may be granted access to this level of access by approval of the board.
4. Staff may allow Members temporary permissions to edit other's personal information **if Members are volunteering to help Staff update personal records**. Such expanded permissions should be communicated by staff to the board and the minister. These Members would have only the access to financial information given them as Members.
5. **Staff** may be granted permission to view and edit personal information of any people connected with UUFCO, as appropriate for their job responsibilities. Staff may be able to see who has pledged, and who is current with pledges, as appropriate for their job responsibilities.
6. The **Minister** may see all personal information. The Minister may also see individual pledge and contribution records, unless an individual specifically requests that their gift or pledge NOT be viewable by the minister. The minister will be able to see who has pledged, and who is current with their pledge responsibilities.
7. **System Administrators** of the UUFCO website and online church management system software have access for viewing and editing purposes to all personal and financial information contained within the systems that they administer. Agreements should be signed by all System Administrators to ensure ethical use of this information.
8. The **Stewardship Chair** will have access to information whether any Member or non-Member has pledged or contributed to UUFCO, and to the aggregate of all pledges and contributions, but will not have access to information about the amount of any individual pledge or contribution.
9. The **Bookkeeper and the Treasurer** each has a right to see and edit all Individual pledge and contribution records. Personal information access is the same as committee chairs.

## UUFCO DISRUPTIVE BEHAVIOR POLICY:

Date initially approved: June 11 2008

Date of last approved modification: Sept 8 2016

Date last reviewed and re-affirmed: Sept 8 2016

This policy provides a procedure to be followed in the event a congregational member, friend, or guest who is on church premises or is *engaged in a church activity behaves in a manner* that is disruptive to the orderly conduct of congregational business or is threatening to the safety of persons or property.

*Disruptive behavior includes:*

- *Perceived threats to the safety of any adult or child;*
- *The disruption of church activities;*
- *Perceived threats to the church facility or grounds;*
- *Behavior so offensive that it prevents the participation of others in church activities.*

*Other intra church conflict will be managed in a respectful manner according to the UUFCO Relational Covenant.*

If an immediate response to the conduct is required, action shall be taken by:

- The minister, if present, or;
- Any board member, if present, or;
- Any church member witnessing the offending conduct.

The action taken shall be appropriate to the circumstances causing the disruption and may include, but is not limited, to the following:

- Asking the offending person(s) to leave *or desist from his/her offending behavior;*
- Suspending the meeting or activity until such time as it can be safely resumed;
- *In case of immediate danger, confronting the offender(s) physically if necessary;*
- If the offending person(s) refuses to leave or cannot be controlled, call police.

If action is taken by anyone other than the minister or president of the board, then the minister or president of the board shall be notified of the problem and some action taken at the earliest reasonable opportunity. *A record should be made of notification to church leaders.*

If appropriate, a letter shall be sent by the minister to the offending party or parties within five (5) working days of the incident with an explanation of what must be done by the offender(s) to rectify the problem caused by the disruptive behavior.

If the offensive conduct does not require immediate action, the matter shall be referred to *an appropriate committee or individual* appointed by the board president for the purpose of investigating the *incident*. The committee or individual shall investigate the alleged *incident* and conduct in any manner deemed reasonable to ascertain the facts surrounding the incident, and use their own judgement observing the following:



- *The response will be to problems as they arise. There will be no attempt to define “acceptable” behavior in advance.*
- *Persons identified as disruptive will be dealt with as individuals. Stereotypes will be avoided.*
- *All necessary information will be collected.*
- *To aid in evaluating the problem, these points will be considered:*
  - *Dangerousness – Is the individual(s) the source of a threat or perceived threat to persons or property?*
  - *Disruptiveness – How much interference with church functions is going on?*
  - *Offensiveness – How likely is it that prospective or existing members will be driven away?*

*To determine the necessary response, these points will be considered:*

- *Causes – why is the disruption occurring? Conflict within the church? A condition of mental illness?*
- *History – Has there been a history of this or similar disruptive incidents in the past?*
- *Probability of change—How likely is it that the problem behavior will diminish?*

After making its investigation, the individual or committee shall take one of the following steps:

- (1) Inform the minister of the disruptive conduct and either the minister or the appointed person or committee member shall meet with the offending individual(s) to discuss the incident and to give the individual(s) a written copy of the findings of the investigation.
- (2) The offending individual(s) shall be excluded from the church and/or specific church activities for a limited period of time with an explanation for the action and conditions of reinstatement set forth in writing. The investigating party or committee may meet with the offending party or parties personally or may notify them by mail of the decision.
- (3) Any action taken under either of steps (1) or (2) may be appealed to the Board of Trustees within 30 days of the meeting or mailing of the written notice of the action taken.
- (4) The offending party or parties may be permanently excluded from the church premises and all church activities. Before this sanction is imposed the investigator shall consult with the minister and the Board of Trustees. If it is determined that expulsion shall occur, a letter shall be sent by the minister to the offending party or parties explaining the reason for the expulsion. If the offending party being excluded is a member of UUFCO, they shall also be removed from UUFCO membership if expelled.

(5) The individual or committee may recommend that no action be taken in which case the party or parties shall be notified in writing of such decision.

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### **UUFÇO POLICY ON HARASSMENT**

Date initially approved: Nov 14 2007

Date of last approved modification: Oct 13 2016

Date last reviewed and re-affirmed: Oct 13 2016

Harassment of any sort will not be tolerated in the Fellowship. Any victim of alleged harassment should report such events to any member of the Board or the Minister immediately upon occurrence. The Board, or the Board's designee(s), shall investigate as thoroughly as practical, the validity and the seriousness of the accusation.

If the investigation indicates that a significant act or pattern of harassment has taken place, the offending person may be requested by the Board, in writing, to abstain from further attendance at Fellowship functions. As harassment can be understood as a type of disruptive behavior, see the "disruptive behavior" policy for more details on the process to be followed.

In the particular case of sexual harassment, the sexual harassment policy found in the personnel manual shall be understood to apply to any participants in UUFÇO activities, not just to paid employees of UUFÇO.

# **Personnel Policy Manual**

## **UNITARIAN UNIVERSALIST FELLOWSHIP OF CENTRAL OREGON**

Drafted by the Personnel Committee on October 2, 2007

Reviewed by the Board of Trustees on October 10, 2007

Approved by the Board of Trustees on November 14, 2007

Revisions approved by the Board of Trustees on March 29, 2014

*Revisions approved by Board of Trustees on October 13, 2016*

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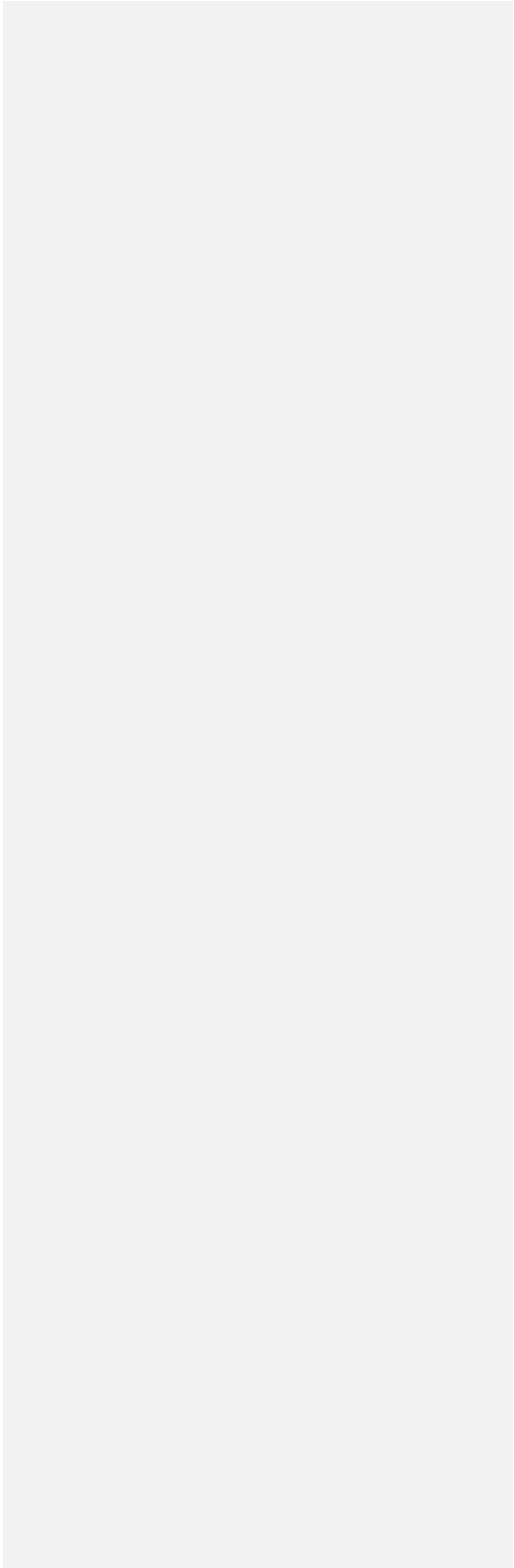
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## I. UUFCO CODE OF CONDUCT

The following Code of Conduct sets standards for employees that should guide their decisions in a way that will contribute to the welfare of all members of the UUFCO community as well as respect the rights of everyone affected by UUFCO operations. The term “members” is all inclusive, encompassing staff, members, friends, visitors in the UUFCO community. It is expected that all staff members of UUFCO will:

1. Understand and be in sympathy with the principles and purposes of Unitarian Universalism.
2. Maintain professional and personal integrity.
3. Hold to a single standard of respect and help for all members of the congregational community of whatever age or position; strive to serve each member of the congregation in an open, impartial, and non-exploitative manner.
4. Respect the traditions of the congregation, enriching and improving these in consultation with the members.
5. Strictly respect confidences shared by colleagues and expect them to keep yours.
6. Be mindful of power that congregants invest in church employees, and refrain from practices which are harmful to others and which endanger one’s integrity and professional effectiveness. Such practices include sexual activity with any child or with an unwilling adult, with a counselee, with a member of the congregation, with the spouse or partner of a person in the congregation, with interns, or any other exploitative relations. In addition, each staff person is expected to be aware of and observe legal requirement of the State of Oregon regarding reporting of physical or sexual misconduct.
7. Stand in supportive relation with one another and keep an open mind and heart toward one another.
8. Cooperate with one another in supporting the total ministry of the congregation.

9. Work for clear delineation of responsibility, accountability, and channels of communication with regard to roles and work responsibilities.
10. Exercise leadership within their realm of responsibilities.
11. Exercise good stewardship in the use of the church's resources.
12. Abide by the "Code of Professional Practice Documents" of the religious leadership organizations of the Unitarian Universalist Association. Ministers are expected to follow the Code of Professional Practices of the UU Minister's Association. Religious education leaders are expected to follow the Code of Professional Practices of the Liberal Religious Educator's Association. The Music Director is expected to follow the Code of Professional Practices of the UU Musician's Network. The Administrator is expected to follow the Code of Ethics of the Association of UU Administrators. (Adapted from the Employee Handbook and Personnel Policies of First Parish Unitarian Universalist Of Arlington MA)

Revised March 2014



## **II. EMPLOYMENT POLICIES AND PRACTICES**

### **A. PURPOSE OF THIS MANUAL**

We have prepared this Personnel Manual to help you to understand some of the policies and procedures of the Unitarian Universalist Fellowship of Central Oregon (UUFCO) (referred to herein as "Employer"). Employees should familiarize themselves with the Manual, as it will provide answers to some questions you may have about your employment. Nothing in this Manual or in any other written or unwritten policies and practices of Employer creates an express or implied contract, promise or representation between Employer and any employee.

The Employer's policies generally will be applied consistently. However, the Employer reserves the right to deviate from normal policy in certain situations. Since every employment situation cannot be anticipated, this Manual provides a general overview only.

From time to time, changes in the Manual may become necessary. Therefore, the Employer reserves the right to amend, supplement or rescind any provisions of this Manual as necessary.

The Manual applies to all staff, whether full-time, part-time, exempt or nonexempt, except where otherwise stated. This Manual does not apply to ordained ministers(s) called by vote of the congregation. Employment "at-will" means that an employee or the Employer may terminate the employment relationship at any time for any reason. Employer will follow due process as stipulated in these policies.

This Manual supersedes all previous employment policies, whether written or oral, expressed or implied. If any provisions of this Manual are found to be invalid or unenforceable, the remaining provisions will remain in full force and effect.

If you have any questions or comments about this Manual, or if you need more information, please ask your supervisor or the Personnel Committee. Your comments and suggestions are genuinely encouraged.

## B. EMPLOYER PURPOSE

As a religious organization, it shall be the purpose of UUFCO to bring religious liberals together into closer fellowship and to provide opportunities for worship, discussion, action, and education in accordance with the traditions of religious liberalism and in support of the values expressed in the Principles and Purposes of the Unitarian Universalist Association (UUA) (See Addendum to this Manual).

UUFCO affirms and promotes the full participation of persons in all of its activities and endeavors, without regard to race, color, religion, sex, national origin, age, disability, sexual orientation or gender identity.

## C. EQUAL EMPLOYMENT OPPORTUNITY

Employer affirms its commitment to equal employment opportunity for all individuals. Decisions about recruiting, hiring, training, promotions, compensation, benefits, and all similar employment decisions must be made in compliance with all federal, state and local laws and without regard to race, color, religion, sex, national origin, age, disability, sexual orientation or gender identity, or any other classification protected by law. Any discrimination in the workplace based upon any protected classification is against policy.

Employees who have questions about discrimination in the workplace, or who believe this policy has been violated, should report their concerns immediately to the Minister or the Personnel Committee. Retaliation against individuals who make a claim of discrimination or participate in the investigation of such a claim is prohibited by this policy and will not be tolerated.

## D. EMPLOYEES AS MEMBERS OF UUFCO

An employee may become a member of UUFCO; this involves:

Attending a Path to Membership class series or scheduling an individual conversation with the Minister.

Engaging in an ongoing spiritual practice   Making an annual monetary contribution (and/or pledge) of any amount to UUFCO with your name clearly attributed   Signing our membership book   Becoming involved in the ongoing energetic creation of our

congregational community

An employee who is a member of UUFCO cannot be on the Board or committees of the Board nor on the *Shared Ministries Committee*. (Policy approved by UUFCO Board on November 13, 2013, updated Oct 13 2016)

#### E. SEXUAL HARASSMENT

Sexual harassment is prohibited and will not be tolerated. This policy applies to sexual harassment by members of the same gender as well as opposite genders. Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when:

- submission to the conduct is made either explicitly or implicitly a term or condition of employment;
- submission to or rejection of the conduct is used as a factor in employment decisions affecting an individual; or
- the conduct unreasonably interferes with an individual's employment or creates an intimidating, hostile, or offensive employment environment. Some examples of conduct which may constitute sexual harassment, depending on the circumstances, include but are not limited to, the following:
  - o repeated and unwelcome suggestions regarding, or invitations to, social engagements or social events; or
  - o any indication, expressed or implied, that any aspect of employment conditions, depends or may depend on the granting of sexual favors or on a willingness to accept or tolerate conduct or communication of a sexual nature; or
  - o unwelcome or coerced physical proximity or physical contact which is of a sexual nature or sexually motivated; or the deliberate use of offensive or demeaning terms which have a sexual connotation; or inappropriate remarks of a sexual nature.

Any employee who believes he or she has been sexually harassed by another employee, a supervisor, or any other person encountered in the course of employment

should report that conduct immediately to his or her supervisor, the Minister; or if one of the foregoing is the source of the harassment, the employee may report it to the Personnel Committee, president, vice president, or any other Trustee of the Board.

Every complaint or report of sexual harassment will be promptly investigated. Although investigations will be conducted with sensitivity to confidentiality issues, investigative information will be communicated as appropriate to those with a need to know. If the investigation indicates that a violation of this policy has occurred, timely and appropriate action will be taken.

Retaliation or reprisal against employees who report sexual harassment claims is prohibited and will not be tolerated. Any violation of this policy will be treated as a serious matter and will result in disciplinary action, up to and including termination.

#### F. HARASSMENT

The Employer prohibits conduct that shows hostility or an aversion toward an individual because of his or her race, color, religion, sex, national origin, age, disability, sexual orientation or gender identity, or any other classification protected by law, and that:

-has the purpose or effect of creating an intimidating, hostile, or offensive work environment; or

-has the purpose or effect of unreasonably interfering with an individual's work performance; or otherwise adversely affects an individual's employment opportunities. Some examples of conduct which may constitute harassment, depending on the circumstances, include but are not limited to, the following: epithets or slurs; or ß threatening or intimidating acts; or written or graphic material; or ß written, verbal or physical acts that purport to be jokes or pranks. Any employee who believes he or she has been harassed by another employee, a supervisor, or any other person encountered in the course of employment should report that conduct immediately to his or her supervisor, the Minister, or the Personnel Committee; or the employee may report it to the president, vice president, or any other Trustee of the Board. Every complaint or report of harassment will be promptly investigated. If the investigation indicates that an act of harassment has occurred, timely and appropriate action will be taken. Retaliation or reprisal against employees who report harassment claims is prohibited and will not be tolerated. Any violation of this policy will be treated as a serious matter and will result in

disciplinary action, up to and including termination.

#### G. RESOLUTION OF EMPLOYEE COMPLAINTS

Effective communication is essential for productive working relationships. To that end, employees are encouraged to discuss any concerns about work or suggestions for improving operations in the following manner:

The employee should present any complaint or grievance to his/her supervisor and together discuss the problem, applicable rules or policies, and possible resolution.

If discussion with the supervisor does not resolve the matter to the employee's satisfaction, the employee should submit the complaint or grievance in writing to the Minister, the UUFCO Personnel Committee, or president of the congregation who shall gather the evidence necessary to complete an investigation. The Minister, the UUFCO Personnel Committee, or president may interview the employee, involve the personnel committee, or appoint an ad hoc committee to advise him/her. The president of the congregation shall then recommend a resolution of the problem to the supervisor and employee.

If the president's recommendation does not resolve the matter to the employee's satisfaction, the employee may then seek a review by the Board of Trustees. The resolution recommended by the Board will be binding upon the congregation and employee.

#### H. MEDIA INQUIRIES

All requests for information about the Employer from newspapers, television, radio, and digital media should be directed to the Minister or President. An appropriate response to a media inquiry would be, "I'm not the best person to answer that question. May I contact the appropriate person and have that individual get back to you?"

#### I. CONFIDENTIALITY

Employees may have access to confidential information about the Employer, including but not limited to information about members, other congregants, or staff members.

Such information must remain confidential and may not be released, removed from the Employer's premises, copied, transmitted or in any other way used for any purpose by employees outside the scope of their employment. All requests for information concerning past or present employees received from organizations or individuals should be directed to the Bookkeeper, who will forward the request to the supervisor.

#### J. CONFLICTS OF INTEREST

Employees are expected to avoid conflicts of interest, defined as any situation where an employee may attain personal gain or which may serve as a detriment to the Employer, either monetarily or to its public image, because of the use of information or personal contact which is not generally available except through employment with the Employer.

Employees shall not engage in any business or transaction, and shall not have a financial or other personal interest which is incompatible with their employment duties or which would impair their judgment or actions in the performance of their duties for the Employer. Employees who have questions about whether an activity violates this policy should discuss the matter with the Minister or Personnel Committee.

#### K. EMPLOYMENT OF RELATIVES

Other members of an employee's family may be considered for employment; however, relatives may not supervise one another. "Relative" means a spouse, domestic partner, parent, sibling, child, grandparent, or grandchild.

#### L. PERSONNEL RECORD

It is very important that employees keep up to date all the information provided to the Employer at the time of hire. This information is essential for many purposes—mailing information to the employee's home, and contacting friends or family in case of emergency. The Bookkeeper should be promptly notified of any changes in:

Address, telephone number, e-mail address; Marital status (including legal separation); Legal change in employee's name; Dependents; Person to notify in case of emergency; and Any relevant changes in licensing or education.

#### M. INITIAL REVIEW PERIOD

New employees and employees who are transferred to another position may be

required to complete an initial review period of ninety days, but which may be shortened or lengthened in the Employer's discretion. Upon completion of this period, the employee will be considered a regular employee. Satisfactory completion of the initial review period does not alter the employment-at-will relationship. Employees must continue to perform satisfactorily even after the initial review period is completed. Although regular employees typically work on an ongoing basis, there is no guarantee that any job position will continue indefinitely. Any position may be eliminated at any time at the discretion of Employer.

#### N. PERFORMANCE EVALUATION

In general, employees will receive a performance evaluation written by the supervisor each year in May that will be maintained in the Employee's permanent personnel file. These evaluations will be reviewed by the Personnel Committee. Factors considered in assessing performance include but are not limited to quality and quantity of work; dependability; attendance and punctuality; effective interpersonal relationships with the congregation, and personal conduct.

Employees and their supervisors are requested to agree upon goals and objectives in advance so that

their work may be evaluated on the basis of clear criteria they have helped to develop.

#### O. SOCIAL MEDIA

At ~~{Employer}~~, [The Unitarian Universalist Fellowship of Central Oregon \(UUFCO\)](#), we understand that social media can be a fun and rewarding way to share your life and opinions with family, friends and co-workers around the world. However, use of social media also presents certain risks and carries with it certain responsibilities. To assist you in making responsible decisions about your use of social media, we have established these guidelines for appropriate use of social media.

This policy applies to all ~~associates-employees, contracted ministers, and leadership volunteers~~ who work for ~~{Employer}~~ [UUFCO](#)

#### **GUIDELINES**

*In the rapidly expanding world of electronic communication, social media can mean many things. Social media includes all means of communicating or posting information*

or content of any sort on the Internet, including to your own or someone else's web log or blog, journal or diary, personal web site, social networking or affinity web site, web bulletin board or a chat room, whether or not associated or affiliated with [UUFCO](#)~~[Employer]~~, as well as any other form of electronic communication.

The same principles and guidelines found in ~~[Employer]~~[UUFCO's](#) policies ~~and three basic beliefs~~ apply to your activities online. Ultimately, you are solely responsible for what you post online. Before creating online content, consider some of the risks and rewards that are involved. Keep in mind that any of your conduct that adversely affects your job performance, the performance of fellow ~~associates-employees~~ or otherwise adversely affects members, ~~customers~~[friends](#), suppliers, people who work on behalf of ~~[Employer]~~[UUFCO](#) or ~~[Employer's]~~[UUFCO's](#) legitimate ~~business-organizational~~ interests may result in disciplinary action up to and including termination.

### **Know and follow the rules**

~~Carefully read these guidelines, the [Employer]~~[UUFCO Statement of Ethics Policy](#) Code of Conduct (Section I, Personnel Manual), the [UUFCO \[Employer\] Information Policy and the Discrimination-Sexual Harassment \(Section II, Subsection E. - Personnel Manual\), & Harassment \(Section II, Subsection F – Personnel Manual\), and Confidentiality \(Section II, Subsection I – Personnel Manual\) Prevention Policies, and ensure your postings are consistent with these policies. Inappropriate postings that may include discriminatory remarks, harassment, and threats of violence or similar inappropriate or unlawful conduct will not be tolerated and may subject you to disciplinary action up to and including termination.](#)

### **Be respectful**

Always be fair and courteous to fellow ~~associates~~[employees](#), ~~customers~~, members, [friends](#), suppliers or people who work on behalf of ~~[Employer]~~[UUFCO](#). Also, keep in mind that you are more likely to resolve work- related complaints by speaking directly with your co-workers or by utilizing our ~~Open Door Policy~~ [Complaint Resolution Policy \(Section G. - Personnel Manual\)](#) than by posting complaints to a social media outlet. Nevertheless, if you decide to post complaints or criticism, avoid using statements, photographs, video or audio that reasonably



could be viewed as malicious, obscene, threatening or intimidating, that disparage ~~customers,~~ members, ~~friends,~~ ~~associates-employees,~~ or suppliers, or that might constitute harassment or bullying. Examples of such conduct might include offensive posts meant to intentionally harm someone's reputation or posts that could contribute to a hostile work environment on the basis of race, sex, disability, religion or any other status protected by law or company policy.

### **Be honest and accurate**

Make sure you are always honest and accurate when posting information or news, and if you make a mistake, correct it quickly. Be open about any previous posts you have altered. Remember that the Internet archives almost everything; therefore, even deleted postings can be searched. Never post any information or rumors that you know to be false about UUFCO{Employer}, fellow ~~associates~~employees, members, ~~customers~~friends, suppliers, people working on behalf of UUFCO{Employer} or ~~competitors~~other religious organizations.

### **Post only appropriate and respectful content**

~~e. ——— □ Maintain the confidentiality of UUFCO{Employer} trade secrets and private or confidential information. Trades secrets may include information regarding the development of systems, processes, products, know-how and technology. Do not post internal reports, policies, procedures or other internal business-related confidential communications.~~

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### **f. Political Activity**

~~g. In accordance with UUFCO Board Policy on Political Activity (see **Policy Manual**):~~

~~h. ——— □ Do not create a link from your blog, website or other social networking site to a {Employer} website without identifying yourself as a {Employer} associate.~~

~~-Express only your personal opinions with regards to political content when content may be associated with UUFCO. Never represent yourself as a spokesperson for {Employer}-UUFCO unless it is within the scope of your job description, volunteer or paid. If UUFCO-{Employer} is a subject of the content you are creating, be clear and~~

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open about the fact that you are an ~~associate-employee or leadership volunteer~~ and make it clear that your views do not represent those of ~~{Employer}UUF~~CO, fellow ~~associatesemployees~~, members, ~~customersfriends~~, ~~suppliers~~ or people working on behalf of ~~UUF~~CO~~{Employer}~~. If you do publish a blog or post online related to the work you do or subjects associated with ~~UUF~~CO~~{Employer}~~, make it clear that you are not speaking on behalf of ~~UUF~~CO~~{Employer}~~. It is best to include a disclaimer when posting political opinions, especially those outlined in the above Board Policy, such as “The postings on this site are my own and do not necessarily reflect the views of ~~UUF~~CO~~{Employer}~~.”

### **Using social media at work**

Refrain from using social media while on work time or on equipment we provide, unless it is work-related as authorized by your ~~manager-supervisor~~ or consistent with your job description, the Company Equipment Policy. Do not use ~~UUF~~CO-~~{Employer}~~ email addresses to register on social networks, blogs or other online tools utilized for personal use.

### **Retaliation is prohibited**

~~UUF~~CO~~{Employer}~~ prohibits taking negative action against any ~~associate-employee or~~ volunteer for reporting a possible deviation from this policy or for cooperating in an investigation. Any ~~associate-employee or volunteer~~ who retaliates against another ~~associate-employee or volunteer~~ for reporting a possible deviation from this policy or for cooperating in an investigation will be subject to disciplinary action, up to and including termination of employment or leadership position.

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### **Media contacts**

~~ssociates-Employees~~ should not speak to the media on ~~{Employer's}UUF~~CO's behalf without contacting the Corporate Affairs Department/Minister or the President. ~~All media inquiries should be directed to them~~ in accordance with Section II Subsection H of the Personnel Manual.

### **For more information**

*If you have questions or need further guidance, please contact ~~HR representative~~ the Minister, Board President, or Personnel Committee.*

*This policy has been adapted from a Social Media Policy approved as lawful by the National Labor Relations Board on May 30, 2012 as presented in Memorandum OM 12-59.*

*Policy adopted by the Board of Trustees on August 13, 2014 ~~or one of its subsidiary companies in the United States (Employer).~~*

### **III. WAGE AND HOUR ADMINISTRATION**

#### **A. EMPLOYMENT CLASSIFICATIONS AND HOURS OF WORK**

For purposes of determining the applicability of various policies, practices, and benefits, employees are classified by the nature of the position to which they are assigned and by their regular work schedule.

Regular full-time employees are regularly scheduled to work 35 – 40 hours per week. Employees scheduled to work less than 35 hours per week will be considered part-time employees and their eligibility for benefits, if any, will be pro-rated according to the percentage of time worked.

Employees who are subject to state or federal minimum wage and overtime laws are referred to as “non-exempt” employees. Those in administrative, management, or supervisory positions who are not subject to such regulation are referred to as “exempt” employees.

Attendance at meetings at the request of the employee's supervisor will be considered time worked. Employees are encouraged to attend any staff retreats or off-site events which are part of their employment.

#### **B. TIMEKEEPING**

All employees must submit to the Bookkeeper a written and signed record of their time worked at the end of each month. Childcare Provider timesheets must be signed by the Director of Religious Education.

#### **C. PAY AND PAYROLL DEDUCTIONS**

When financially possible for the Employer, pay rates will be determined based on the UUA Fair Compensation Guidelines. Pay adjustments generally will be considered for all employees once a year and any adjustments will normally begin at the beginning of the fiscal year. There is no guarantee of an annual pay adjustment. Pay is usually based upon such factors as individual performance, job responsibilities, Employer's financial situation, and other appropriate factors. *See your supervisor to obtain your specific payday based on your position.*

A statement of deductions made from employees' wages is provided with their paychecks. Federal law requires deductions from pay for income tax, Social Security and Medicare. Other deductions may include state and/or local taxes or wage garnishments. Some deductions are optional and are made only if the employee has authorized their deduction.

Employees are responsible for promptly notifying the Bookkeeper of any changes to or errors in their deductions. Any necessary adjustments usually are made and reflected in the employee's next paycheck.

#### **D. POLICY FOR PAYING A QUALIFIED PERSON WHO SUBSTITUTES FOR A PAID EMPLOYEE**

A written request will be submitted to the employee's supervisor for approval of the absence and the qualified substitute. The approved request will be sent to the UUFCCO bookkeeper.

The substitute will be paid at the same rate as the employee. The substitute must submit a written and signed record of time worked to the supervisor for approval, then to the bookkeeper in order to be paid.

The substitute will be paid out of the employee's budget line item, and that amount will be subtracted from the absent employee's next payroll check. (policy approved by UUFCCO Board March 13, 2013)

#### **IV. EMPLOYEE BENEFITS**

The benefits outlined in this Manual represent significant additional compensation to eligible employees. Outlined below is a brief summary of the types of employee benefits currently available through Employer. This summary is not intended to and does not

create an express or implied contract, promise or representation between Employer and the employee. These benefits are subject to change at any time in the discretion of Employer. In the event of any discrepancy between the benefits outlined below and the plan itself, the plan will govern. Any questions about employee benefits should be directed to *your supervisor or the Personnel committee.*

#### A. WORKERS' COMPENSATION INSURANCE

Employer carries workers' compensation insurance that pays for certain medical expenses and provides partial income protection in the event of illness or injury arising out of or in the course of employment.

All on-the-job injuries or illnesses, regardless of severity, should be reported immediately to the employee's immediate supervisor. Employees may be required to provide a physician's statement in order to receive worker's compensation benefits, or to return to work.

#### B. GROUP INSURANCE PROGRAMS

##### *1. Health Insurance Benefits*

*Employees who work 750 hours (.36 FTE) or more per year are offered the option of purchasing health insurance by enrolling in the group plan sponsored by the UUA; UUFCA will pay the premium and deduct the cost of the premium from the employee's check. When the employee reaches .5 FTE UUFCA will pay the premium and deduct 50% of the UUA premium cost from employee's paycheck; when employee reaches 1 FTE, UUFCA will deduct 20% of the UUA premium cost from employee's paycheck.*

*Alternatively, employees may wish to search for coverage in the health insurance marketplace at [www.healthcare.gov](http://www.healthcare.gov). (The Affordable Care Act mandates that all Americans obtain basic healthcare coverage; this act also provides for subsidies based on income which lower the premium cost for lower-income consumers.)*

*Federal law prevents UUFCA from reimbursing or otherwise sharing the cost of an employee's healthcare coverage purchased in the marketplace. So in an attempt to encourage employees to obtain health insurance and help make it more affordable to employees, UUFCA will provide a \$200 per month increase in the salary of each employee working between .5 and 1 FTE. While the employee is free to spend this extra*

*amount in any way, UUFCO encourages all employees to be in compliance with the Affordable Care Act and obtain health insurance.*

*Policy adopted by the Board of Trustees March 10, 2016*

### C. RETIREMENT BENEFITS

Employees who work half-time or more (1,040 hours or more per year) are eligible for Retirement Benefits. The Unitarian Universalist Association (UUA) maintains a defined contribution retirement plan to assist eligible employees to accumulate tax-deferred savings for retirement. Under the plan, the Employer contributes a percentage of the employee's wages, and the employee has the option of making additional voluntary contributions on a pre-tax basis. Before an employee can become a participant, there are certain eligibility requirements that must be met. These requirements and other provisions are provided to all eligible employees, and this material should be reviewed carefully. For more detailed information, go to

<http://www.uua.org/careers/compensation/retirement/index.shtml>, scroll down and click on "Summary Plan Description (SPD)." Questions may be discussed with the Bookkeeper or with the appropriate staff members at the UUA.

### D. PAID SICK LEAVE

*Effective 1/1/2016, Oregon Senate Bill 454 (which applies to employers of 10 or more employees) requires that UUFCO develop a paid sick leave policy that allows employees to accrue and use sick leave hours and provide written notice of the requirements of this Act to each employee. The provisions below are taken directly from Oregon Senate Bill 454.*

*1) Beginning 1/1/2016, an employee earns paid sick time at the rate of 1 hour of paid sick time for every 30 hours the employee works, or 1-1/3 hours for every 40 hours the employee works. All those employed on 1/1/2016 will begin earning and accruing sick time based on the hours worked each month.*

*2) Employees hired after 1/1/2016 will begin to earn and accrue sick time on the first date of employment.*

*3) Employee is eligible to use sick time beginning on the 91st calendar day of employment and may use sick time as it is accrued. Those employed on 1/1/2016 may*

*begin using sick time as the hours accrue. Under certain circumstances, employer may allow an employee to use accrued sick time prior to the 91st calendar day of employment.*

*4) Employee shall be paid at the regular rate of pay for used accrued sick time; and sick time shall be used in hourly increments.*

*5) A salaried exempt employee, who is paid a fixed annual salary in 12 equal payments, is not required to use accrued sick time in hourly increments for part of a workday. Exempt employees use accrued sick time when they are absent for a whole workday. The Fair Labor Standards Act defines exempt employees.*

*6) Employee may carry over up to 40 hours of unused sick time from one year to the next, but is limited to using no more than 40 hours of sick time in a year.*

*7) Employee will not be paid for unused accrued sick time upon termination, resignation, retirement or other separation from employment.*

*8) Employer may not require an employee to:*

*a) Find a replacement worker as a condition for the use of sick time*

*b) Work an alternate shift to make up for the use of sick time*

*9) Upon mutual consent by the employee and employer, an employee may work additional hours to compensate for hours during which the employee was absent from work without using accrued sick time for the hours missed. However, the employer may not require the employee to work additional hours. If the employee works additional hours the employer must comply with any applicable federal or state laws regarding overtime pay.*

*10) Employer shall restore previously accrued unused sick time to an employee who is reemployed within 180 days of separation from employment. This also applies to employees who left before their 91st day of employment.*

*11) Employee may use sick time earned:*

*a) For employee's or family member's illness, injury, medical treatment, etc.*

*b) To donate accrued sick time to another employee if the other employee uses the*

*donated sick time for employee's or family member's illness, injury, medical treatment, etc.*

*c) In the event of a public health emergency or quarantine which prevents employee from reporting to work.*

*12) If the need to use sick time is foreseeable, employee should give advance notice to supervisor, and should make a reasonable attempt to schedule the use of sick time in a manner that does not disrupt the operations of employer.*

*13) If the need to use sick time is unforeseeable, the employee should provide notice to the supervisor as soon as practicable.*

*14) If employee takes sick time without providing prior notice, medical verification shall be provided to the employer within 15 calendar days after the employer requests the verification. The employer shall pay any reasonable costs for employee obtaining such verification, including lost wages while obtaining the verification.*

*15) If employee takes more than three consecutive workdays of sick time for reasons specified in 11 above, employer requires the employee to provide verification from a health care provider of the need for sick leave.*

*16) Employer may not require that the verification explain the nature or details of conditions that necessitated the use of sick time.*

*17) If an employer suspects that an employee is abusing sick time, including engaging in a pattern of abuse, employer may require verification from a health care provider of the need of the employee to use sick time, regardless of whether the employee has used sick time for more than three consecutive days. "Pattern of abuse" includes, but is not limited to, repeated use of unscheduled sick time on or adjacent to weekends or holidays.*

*18) Employees shall report used sick time on their monthly time sheets, which must be signed by the supervisor.*

*19) Employer shall provide written notification at least quarterly to each employee of the amount of accrued and unused sick time available for use by the employee.*

*20) Employer shall treat as confidential the health information of an employee related to*



*sick time, which may not be released without the permission of the employee.*

*21) It is unlawful practice for employer to:*

*a) Deny, interfere with, restrain or fail to pay for sick time to which an employee is entitled.*

*b) Retaliate or in any way discriminate against an employee because employee inquired about or submitted a request for sick time.*

*c) Include verified sick time absences in an adverse employment action against an employee.*

*Policy adopted by the Board of Trustees March 10, 2016*

## **V. OTHER EMPLOYER POLICIES**

### **A. EMPLOYMENT AUTHORIZATION**

Federal law requires that prospective employees must show proof of eligibility to work in the United States in the position for which they are applying. The hiring supervisor will have the applicant complete the following documents and will submit them to the Bookkeeper prior to confirmation of employment:

- I-9 Employment Verification (signed by applicant and hiring supervisor)
- The hiring supervisor will obtain a copy of the front side of applicant's current driver's license and applicant's social security card
- W-4 Employee's Withholding Allowance Certificate (signed by applicant)

### **B. BACKGROUND CHECK**

To ensure the safety of our children and all other congregants we perform a background check on all prospective employees. This search includes the following: verification of social security number, national felony and misdemeanor data base, sexual offender registry. The hiring supervisor will obtain the applicant's signed permission for background search and submit the necessary forms to the Bookkeeper who will initiate the background check. Confirmation of employment is contingent upon a satisfactory

background check.

#### C. SIGNED RECEIPT FOR UUFCCO PERSONNEL POLICY MANUAL

The hiring supervisor will present the employee with an up-to-date copy of the Personnel Policy Manual, have the employee sign the acknowledgement page in the back of the manual, and submit that signed page to the Bookkeeper for inclusion in the employee's file. Supervisors will also obtain signed acknowledgements from employees whenever a revised UUFCCO Personnel Policy Manual is distributed.

#### D. ATTENDANCE AND PUNCTUALITY

Each employee is expected to be prompt and regular in his or her attendance at work. Employees who are unable to report to work at their scheduled time must call their supervisor as far in advance as possible to report the absence.

#### E. WORK AND DISCIPLINARY GUIDELINES

Certain guidelines must be observed by all employees to protect the integrity of the congregation. Violations may result in disciplinary measures including verbal warnings, written warnings or termination.

Engaging in any of the following examples of unacceptable conduct may result in disciplinary actions. These examples are intended only as a guide and are not all-inclusive.

- Failure to perform work in a manner acceptable to Employer.
- Absenteeism or tardiness.
- Leaving work without permission.
- Sexual harassment or harassment described in this Manual.
- The use, possession or sale, or being under the influence of alcohol or controlled substances (other than those used for bona fide medical purposes) while working or while on Employer premises (including meal and other breaks).
- Unauthorized possession of weapons.
- Disclosure of confidential information.
- Smoking in unauthorized areas.
- Failure to report-on-the job injuries.

- Arrest and conviction for criminal offenses that are job related, including those that may affect the employee's ability to perform his or her job.
- Theft or dishonesty.
- Falsifying records or information (or misuse or unauthorized manipulation of any computer or electronic data processing equipment or system).
- Discourteous treatment of others.
- Taking Employer property without paying for it or without written permission.
- Reckless, careless or unauthorized use of Employer property, equipment or materials.
- Improper or profane language.
- Violation of any other Employer policy.

#### F. SEPARATION FROM EMPLOYMENT

Employees who resign are requested to give at least two weeks' written notice in order for the Employer to find a suitable replacement.

Any employee who is absent from work three consecutive times without notifying his or her supervisor will be deemed to have resigned, consistent with applicable law.

#### G. SAFETY AND ACCIDENTS

The safety of employees, as well as members and visitors, is of paramount concern. All employees are expected to abide by accepted safety standards at all times. They should know the whereabouts of fire extinguishers and the first aid kit.

Any unsafe condition, equipment or practice observed by an employee should be reported immediately to the supervisor, Administrator, or Minister. All on-the-job accidents or injuries to employees, no matter how minor, should be reported immediately to the Bookkeeper, or if that person is not available, to the Administrator. In the event of a fire or other emergency, the fire department and/or police should be called immediately, and all staff and members of the congregation should leave the premises.

#### H. PERSONAL PROPERTY

The Employer cannot be responsible for damage to or loss of personal property,

including loss or damage to vehicles or other property in or on church property. Employees should report any lost items to the Administrator so that the item can be returned if it is found. If an employee finds an item, it should be immediately turned in to the Administrator.

#### I. WORKPLACE THREATS AND VIOLENCE

Threats, threatening behavior, or acts of violence against persons by anyone on church property will not be tolerated.

Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts on church property may be removed and will remain off church property pending the outcome of an investigation. If the Employer determines that a violation of this policy has occurred, the Employer may take appropriate disciplinary action that may include, but is not limited to, suspension and/or termination of employment, and/or legal action as appropriate.

All employees shall inform their supervisor or the Minister of any behavior which they have witnessed or experienced, which they regard as threatening or violent, when that behavior is job-related or is connected to employment.

#### J. PROFESSIONAL BEHAVIOR

Employees should maintain a professional attitude and appearance that is appropriate to their position and the Employer-congregation. Name badges should be worn when employees are on duty on Sunday. Personal mail and non-essential telephone calls at work are discouraged.

#### K. INSPECTION RIGHTS

Churches, like other organizations, are sometimes the victims of thieves. The church has on its premises storage facilities such as desks, file cabinets, closets and storage areas for the use of employees; however, the church can make no assurances that they will always be secure. The storage of any unauthorized alcohol, illegal drugs or drug-related paraphernalia is prohibited on church premises. Therefore, the Employer reserves the right to open and inspect any desk, file cabinet, storage closet, or storage area at any time and without prior notice or consent. Employees may not use personal locks on church owned desks, cabinets, closets or storage areas.

## VI. ADDENDUM TO U UFCO PERSONNEL POLICY MANUAL

### *U UFCO MISSION STATEMENT*

*Unitarian Universalists of Central Oregon: seeking meaning, celebrating life, and serving the spirit of love and justice in our world.*

### U UFCO MOTTO:

Diverse Beliefs, One Fellowship

### U UFCO IS A “WELCOMING CONGREGATION”:

This is a voluntary program for UU congregations who have gone through deliberate steps to be intentionally inclusive of gay, lesbian, bisexual, and transgender people.

We intentionally welcome a diversity of ages, sexual orientations, races, gender identities, classes, abilities, theologies and religious heritages. All people and families are welcome here.

### SEVEN PRINCIPLES OF UNITARIAN UNIVERSILISM:

The member congregations of the Unitarian Universalist Association covenant to affirm and promote:

1. The inherent worth and dignity of every person;
2. Justice, equity and compassion in human relations;
3. Acceptance of one another and encouragement to spiritual growth in our congregations;
4. A free and responsible search for truth and meaning;
5. The right of conscience and the use of the democratic process within our congregations and in society at large;

6. The goal of world community with peace, liberty, and justice for all;

7. Respect for the interdependent web of all existence of which we are a part.

For an in-depth discussion of each Principle go to: <http://www.uua.org/beliefs/principles/>

VII. PERSONNEL POLICY MANUAL ACKNOWLEDGMENT FORM

I, \_\_\_\_\_, hereby acknowledge that I have received a copy of the Personnel Policy Manual of the Unitarian Universalist Fellowship of Central Oregon. I understand that it is my responsibility to read the Manual and to comply with the policies, practices and rules of the

I understand that this Manual, revised October 2016 supersedes all previous policies, written or oral, express or implied. I also understand that this Manual is neither a contract of employment nor a legal document, and that the Employer reserves discretion to add, change or rescind any policy, practice or rule at any time with or without notice and will inform employees of such changes.

I understand that my signature below indicates that I have read and understood the above statements and have received a copy of the Personnel Policy Manual revised October 2016.

\_\_\_\_\_ Date

\_\_\_\_\_ Employee Name (Print)

\_\_\_\_\_ Employee Signature

Revised October 2016

