

UUFCO Policies as of Aug 11 2016

UUFCO POLICY ON POLICIES (2014 policy document)

These policies are established by the Board of Trustees (the “Board”) of the Unitarian Universalist Fellowship of Central Oregon (“UUFCO” or the “Fellowship”) and are subject to change by the majority vote of this Board. Policies are created from time to time by Board action, and, while they are intended to clarify the intent of the Bylaws, they in no way alter the Bylaws.

These policies will be reviewed annually by the Board of Trustees.

New policies will be reviewed at one Board meeting and approved or rejected at the following Board meeting.

Procedures for carrying out these policies and other congregational business are maintained in a separate Procedures Manual.

UUFECO Conflict of Interest Policy

The following UUFECO 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.

UUFCA POLICY ON HARRASSMENT

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

POLICY ON SEXUAL HARRASSMENT (*from personnel manual)

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:

repeated and unwelcome suggestions regarding, or

invitations to, social engagements or social events; or

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

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.

POLICY ON RELIGIOUS EDUCATION FOR CHILDREN AND RELATED MATTERS

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 Education Committee shall work with the Director of Religious Education to oversee the Fellowship's religious education program.

Background Check on Childcare Providers Each Childcare Provider employed by UUFCCO shall be checked by ScreenNow, a Church Mutual Insurance Co. background screening partner, or equivalent reputable screening service.

UUFCCO POLICY NO. 2008-6-11 DISRUPTIVE BEHAVIOR

(Adopted by Board June 11, 2008)

It is the purpose of this policy to provide a procedure to be followed in the event a congregational member, friend, or guest who is on church premises or is attending a church activity engages in behavior that is disruptive to the orderly conduct of congregation business or is threatening to the safety of an individual(s) or property.

If an immediate response to the conduct is required, action shall be taken by the Minister, if present, or in his/her absence by the Board President, if present, or in his/her absence by any affected 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:

1. Asking the offending person(s) to leave;
2. Suspending the meeting or activity until such time as it can be safely resumed.
3. If further assistance is required appropriate law enforcement officials may be called.

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.

If appropriate, a follow-up letter shall be sent by the Minister to the offending party(ies) within five (5) working days of the incident with an explanation of what must be done by the offending party(ies) 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 individual or ad hoc committee appointed by the Board President for the purpose of investigating the disruptive conduct. The individual or committee shall investigate the alleged disruptive conduct in any manner deemed reasonable to ascertain the facts surrounding the incident. 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(ies) personally or may notify the party(ies) by mail of the decision.
3. Any action taken under 1 or 2 above 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(ies) 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(ies) explaining the reason for the expulsion.
5. The individual or committee may recommend that no action be taken in which case the party(ies) shall be notified in writing of such decision.

MINISTRY/PROGRAMING POLICIES

POLICY ON MEMBERSHIP AND RELATED MATTERS

Membership Committee

A Membership Committee shall work with the Committee on Ministries to develop ways to attract new members and to support current ones.

New Members

New members are to be informed of the general financial condition of the Fellowship, and the cost to the Fellowship of each membership is to be explained clearly, including dues to the regional and national associations. For those on limited incomes unable to make a monetary contribution to cover these costs, the Board will accept alternate ways for the member to participate.

New members are to be informed of opportunities for participation in Fellowship activities and for volunteering time to maintain Fellowship operations.

Inactive Members

Members who will be removed from membership as described in the Bylaws Article III, Sections 3.03, 3.04, shall be notified in writing.

UUFCO Policy on Non-monetary (non-art) Gifts

Date approved: June 9 2016

Policy Number:

Policy:

UUFCO 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 UUFCO's purpose, programs and values, and comply with the donation procedures outlined below, and detailed on the attached UUFCO Non-monetary Gift Proposal document. The Board of UUFCO 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 UUFCO 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, see *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

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.

UUFSCO Board Policy Proposal: Alcohol Policy

Date Approved 12/10/14 **Policy Number** 1001

Policy: *UUFSCO will limit alcohol allowed on the premises to only non6spirit alcoholic beverages (wine, beer, cider, etc.). This rule will apply to all events, regardless of who is hosting or renting. All UUFSCO alcohol6related procedures shall follow OLCC regulations.*

History/Need/Rationale: UUFSCO 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 UUFSCO 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 UUFSCO events and for requirements for rentals will be forthcoming.

This was the overwhelming opinion of survey respondents for UUFSCO Events (76%), UUFSCO 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.

UUFCO Board Policy: Smoking

Date Approved 12/10/14 Policy Number 1002

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:

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

- “I do recognize the difficulty some have with this habit and I would hate to push them away over it.”
- “There are MANY more reasons than those given above to have a NO SMOKING policy.”
- “not altogether happy about it but otherwise it's a bit unrealistic”
- “What is more welcoming and enforceable?... Providing a place to put their butts is probably wise. Also, what about 12 step groups?”
- “We're in an area that has already seen the results of a wildfire. A non-smoking policy is environmentally wise.”
- “Smokers will smoke; best to give them a designated safe area”
- “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 socioeconomic gap in the population of smokers vs. non-smokers. We modeled our policy recommendation based on the current smoking policy at Central Oregon Community College. **Budget Implications:** Purchase of non-budgeted fire-safe receptacle. Estimated between \$50-\$200

Timing Requirements: This policy is scheduled for review in Winter 2016.

UUFCO Board Policy: Fragrance

Policy:

1. UUFCO expects that our facility remains free of scented products.

Date Approved 02/10/15 **Policy Number** 1006

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 POLICY FOR MEETING ROOM USE

(Adopted by Board _____)

Policy:

1. Any activities or functions taking place in meeting rooms in properties leased or owned by UUFCO must be consistent with the mission of UUFCO.
2. UUFCO properties shall not be used for any profit-generating endeavor.
3. A member of UUFCO must be present at all functions in UUFCO properties at all times, unless prior arrangements have been made with the Board.
4. The office should be locked unless staff or a Board member is in the office, or unless a key was provided for an authorized purpose.

Discussion/Intent:

At the time of this policy's inclusion, UUFCO had acquired sole use of "the Cottage," a small house located adjacent to the church premises of the Old Stone Church where the Fellowship was a tenant, and where Sunday services were held. As various uses of UUFCO properties are being encouraged, it is necessary to draw up certain guidelines to ensure aligning all uses with the express mission and vision of UUFCO, and to keep exposure to liability at a minimum.

Date Approved 02/10/15 Policy Number 1009

UUFSCO Board Policy: Service Animals and Pets

Policy: Service animals are welcomed within the facility of UUFSCO when accompanied by an individual who has a disability or who indicates that the service animal provides a specific service to them except in the kitchen where their presence is prohibited by Health Department regulations.

Pets are only allowed at events where their presence is specifically designated as part of the event or service.

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

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

UUFSCO Board Policy: Timeline for Starting Rentals

Date Approved 12/10/14 **Policy Number** 1003

Policy: *UUFSCO will place a hold on external rental opportunities until 9/8/2015. External rentals are defined as any rental by an outside organization or private individual including inactive members and friends of the fellowship. These types of reservations may be made after 4/1/2015 for dates occurring after 9/8/2015. UUFSCO will place a hold on private active-member rentals until 4/1/2015 with a provision that individual circumstances may allow for some flexibility with the approval of the Board President and Minister.*

History/Need/Rationale: Upon moving into our new facility it is likely we will be presented with some amount of interest in renting our space. The above recommendation is made to maintain a balance between creating an open environment for the community and meeting our needs as a congregation as we settle into our own space.

Budget Implications: The FY 14/15 budget has \$0.00 allocated to rental income during the fiscal year. **Timing Requirements:** This policy shall expire from the policy book on 1/1/2016 unless further action is taken by the Board of Trustees.

UUFCO Board Policy: Sustainability Practices

Date Approved 01/14/15 **Policy Number** 1004

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 7th 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 7th 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

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 lifeDlong 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

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.

FISCAL POLICIES

UUFCO POLICY ON EXPENDITURES AND RELATED FISCAL MATTERS

Deficit Spending

The Board shall make every effort to cover operating expenses with operating income. If directed by the congregation at the previous annual meeting to use contingency funds to cover deficit operating expenses, the Board may do so. If such blanket permission has not been given, the Board will have to approach the congregation with such a request when needed.

Committee chairs may not exceed their budget without the approval of the Board.

Travel Reimbursement

Reimbursements for expenses for travel and attending meetings, etc., will be made only when the Board has granted prior approval to the individual for the travel and for the amount to be covered. Requests for reimbursements must include receipts.

Accountant [Bookkeeper]

A check payable to the [Bookkeeper] for salary or expense reimbursement shall be signed by an authorized signer other than the [Bookkeeper]. (usually the President or Treasurer).

Periodic Review of the Financial Records

The Stewardship Committee will appoint an ad hoc subcommittee, of at least two members, one of whom will be the Treasurer, to review UUFCO's financial records. Ideally this will happen every six months, but in any event at least once a year. The subcommittee will follow the published UUA guidelines for internal review of church financial records, and will submit a written report to the Board.

UUFCO BOARD POLICY ON DESIGNATED FUNDS

(Adopted by Board: _____)

Policy:

Any member congregant can propose the establishment of a Designated Fund to be approved by the Board. Contributions to a Designated Fund can be made at any time and by anybody, by clearly identifying the intended fund on the check or correspondence accompanying the gift. Disbursements of funds shall be made with the following approvals:

- a. Minister's Fund: unsupervised (i.e., at Minister's sole discretion)

- b. RE Fund, Music Fund: Board President

- c. Special Event Fund, GA Scholarship Fund, Building Fund: Board of Trustees

Acknowledgments of all donors, but not amounts of donations, shall be published in the UUFCO newsletter, unless donor explicitly requests anonymity; donors shall have the option of specifying in whose honor or memory a gift is made. Additionally, a personal acknowledgment will be sent in response to each gift given; gifts above \$25.00 shall be acknowledged by the President of the Board.

Balances of all Designated Funds shall be reported to the Board monthly on the Treasurer's Report, and thereby included in the Board minutes and available for review by all members. Dissolution of Funds: If a fund is inactive for a period of one (1) year, the Treasurer will bring the matter to the Board to determine whether the Fund should be retired.

Discussion/Intent:

Designated Funds were created to provide members/congregants the opportunity to donate funds in surplus of their pledged offerings, with specified and targeted uses, e.g., to fill needs that are more immediate in nature, for items or other uses that are outside of the annual budget, or to be maintained as a type of savings reserve for larger purchases or activities which might be desirable at some point. While these funds are outside of the UUFCO budget, their balances are still within the purview of the Board.

At the writing of this policy, the current funds are as follows:

1. Minister's Discretionary Fund: funds designated for the use of the Minister may be used entirely at the Minister's discretion.
2. Religious Education Fund: Funds designated for the benefit of the Religious Education program may be used for education opportunities of the Director of Religious Education, special supplies or guests/activities.
3. Music Fund: Funds designated for the Music program of UUFCO may be used by the Director of Music for the purchase of supplies and/or music not covered by the annual budget, or for special skill enhancement opportunities for the Director of Music or other music staff.
4. Special Event Fund: This fund was created to offer assistance for rental of site locations and/or to cover additional costs of special events throughout the UUFCO church year which may not have been anticipated in the budget.
5. GA Fund: This fund was created specifically for offering scholarship assistance to members of UUFCO who desire to attend

General Assembly.

6. Building Fund: Monies designated for the Building Fund are covered by the UUFCO Board Policy On Use Of Building Funds, adopted 07-08-10.

The UUFCO will shall maintain designated revolving funds as approved annually by the Board for the purpose of receiving monies for expenditures outside the annual budget.

History/Need/Rationale:

Designated funds were created to provide members/congregants the opportunity to donate funds in surplus of their pledged offerings, with specified and targeted uses, e.g., to fill needs that are more immediate in nature, for items or other uses that are outside of the annual budget, or to be maintained as a type of savings reserve for larger purchases or activities which might be desirable at some point. While these funds are outside of the UUFCO annual budget, their balances are still under the direct control of the Board. Expenditure authority of these designated funds may be delegated by the Board.

Procedures: To be determined.

UUFCO BOARD POLICY ON USE OF BUILDING FUNDS

(Adopted by Board 07-08-2010)

Policy: The Building Account will have two funds: a general building fund and a restricted building fund. The general building fund will be unrestricted and said monies may be used upon a decision of the Board. The restricted fund will contain contributions or allocations made to the restricted fund solely for purchase of land and/or building as approved by the UUFCO Membership or as designated by the donor.

Discussion/Intent: Contributions made to the restricted building fund will remain separate from the general building fund. If UUFCO enters into negotiations for purchase of land and/or building and there are necessary costs during the due diligence period for inspections, permits, etc., these costs must be covered by the general building fund or by contributions as designated by the donors. Monies from the restricted building fund may not be used for due diligence costs or for other reasons except as follows: 1) the donor indicated such in the initial contribution, 2) the donor agrees, in writing that all or part of his/her prior contribution to the restricted building account may be used for specific due diligence costs, or 3) the donor indicates in writing that the monies may be used for other purposes.

UUFCO ENDOWMENT COMMITTEE: POLICIES AND PROCEDURES

Plan of Operation

The UUFCO Endowment Fund Committee (hereafter, the “Committee”) shall consist of a minimum of five voting members, all of whom shall be voting members of UUFCO. 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 UUFCO 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 UUFCO 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 UUFCO 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)

GOVERNANCE – Board of Directors

UUFCO BOARD POLICY ON BOARD EXECUTIVE SESSIONS

(Adopted by Board 10-8-2008)

The UUFCO Board of Trustees may meet in executive session for the following matters only:

- Evaluation of staff and/or Minister
- Legal or potential legal issues
- Contract issues
- Other matters requiring confidentiality

The Administrator and Minister shall attend all executive sessions except those that are called to evaluate either or both of these persons. No minutes shall be taken of the discussions in executive sessions. No final decisions shall be made in executive session.

Board of Director Committees & Charters

STEWARDSHIP COMMITTEE

A Stewardship Committee of not less than three persons shall be established to assist the Board with its fiscal responsibilities; the Treasurer shall be the Board liaison for the committee. Its duties include, but are not be limited to:

Reviewing the annual budget requests from the various committees and sending them, with recommendations, in the proposed budget, to the Board;

Monitoring the investments of the Fellowship and make recommendations to the Board regarding the placement of these funds;

Organizing and carrying out the annual canvass activity and pledge drive;

Suggesting ways to increase income from pledging and fundraising activities;

Improving communication with the members regarding Fellowship finances.

GENERAL ADMINISTRATION

POLICY ON UUFCA DIRECTORY

Active members and contributing friends will receive at least one copy of the Fellowship Directory free each year. The Membership Committee will determine additional distributions.

The Directory is intended for personal use only. Any use of the Directory for commercial purposes or by any organization other than the Unitarian Universalist Fellowship of Central Oregon is prohibited. This disclaimer is to be published in the front of every edition of the Directory.

As a general rule, neither the Fellowship Directory nor the mailing list will be provided to anyone outside of the denomination. Only the Board can override this rule should such a request for use be made.

(Information Access Policy will go here once passed)

(Recordings Policy will go here once passed)

UUFCO NEWSLETTER POLICY

(Adopted by the Board 6-11-2008)

The responsibility for the editorial policies and practices of the newsletter rests with the Board of Trustees. The Newsletter Editor is responsible for receiving submissions and composing the newsletter; the Administrator is responsible for proofreading and distributing the newsletter and for implementing Board policies.

The Primary function of the newsletter is to inform the congregation of church programs and activities. Space and emphasis will be allocated according to the following priorities:

- Information about Sunday services
- Communications from the Minister
- Information about religious education programs and classes (all ages)
- Information about all-church functions, e.g., annual canvass, congregational meetings/events
- Communications from the Board, the staff, and church committees
- News of church members/friends; brief announcements of members' special needs
- District and denominational news
- As space permits, community news and announcements of activities of organizations of particular interest to the church or its members

- As space permits, a small section of members' classified ads (e.g., an upcoming class or event; a service to offer; a job to fill; an item to sell or barter) will be published. A small donation to the Fellowship is appreciated.

- As space permits, display ads for members' ongoing business or professional services will be published on a case-by-case basis (based on the size and number of submissions). Donations to the Fellowship are requested for this service. Ads must be one page or smaller. All newsletter items must be turned in to the Newsletter Editor by the second to the last Monday of the month. Inclusion of submissions will be at the discretion of the Administrator. The Administrator is granted the right to edit material that is too long or that contains incorrect grammar or spelling, and to refuse material that is not appropriate; however, every effort will be made to be inclusive. Any questions or problems concerning the newsletter should be addressed to the Administrator.

POLICY ON POLITICAL ACTIVITY

The Fellowship may speak out on issues in accordance with UU principles and/or stands taken by a vote of the congregation. However, the Fellowship may not participate in political campaigns on behalf of, or in opposition to, any candidate for public office. Banned activities include candidate endorsements, donations, fund-raising, and even programs that are “nonpartisan” but help or hurt a specific candidate. Forums that do not take sides are allowed. This is to maintain the nonprofit status of the Fellowship.

When the Fellowship is taking a stand on a particular issue, the spokesperson is the Minister, President of the Board, or a designee of the Board of Trustees. No one else may speak for the Fellowship. This should in no way interfere with an individual giving an opinion about a subject so long as the opinion or information is identified clearly as being personal. (Ref. UUA Guidelines)

UUFECO BOARD POLICIES RELATING TO PERSONNEL

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 UUFECO 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 UUFECO Board March 13, 2013)

POLICY ON FLEXIBLE SALARY AND BENEFITS PACKAGES

The UUFECO Board may consider requests by staff for flexible salary and benefits packages within the amount allocated in the annual budget for each respective position. The salary/benefits package for each position, when possible, will conform to UUA recommendations.

The Board will not take on evaluation or researching benefit options beyond the currently endorsed UUA recommendations/programs for benefits.

If the final salary/benefit package for a given position, as approved by the Board, is less than budgeted by the Board the balance of the salary/benefits package remains in the general operation budget of the congregation. (policy approved by UUFECO Board July 11, 2012)

D. EMPLOYEES AS MEMBERS OF UUFECO

An employee may become a member of UUFECO; 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 UUFECO 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 UUFECO cannot be on the Board or committees of the Board nor on the Committee on Ministry. (Policy approved by UUFECO Board on November 13, 2013)

Approved by board on March 10 2016:

UUFSCO has modified the Health Insurance benefit (this benefit applies only to employees who work half time or more); and has added a new benefit that enables employees to accrue and use sick leave hours (this applies to all employees). These benefits are described below **and will be incorporated into the Personnel Policy Manual** (every employee should have been given a manual when they were hired).

Personnel Policy—Health Insurance Benefit

1. Rescind Board Policy on Flexible Salary and Benefits and remove it from Section IV. B. in the UUFSCO Personnel Policy Manual
2. Revise Group Insurance Programs policy (which now becomes B.) as follows:

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; UUFSCO will pay the premium and deduct the cost of the premium from the employee's check. When the employee reaches .5 FTE UUFSCO will pay the premium and deduct 50% of the UUA premium cost from employee's paycheck; when employee reaches 1 FTE, UUFSCO 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. (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 UUFSCO 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, UUFSCO 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, UUFSCO encourages all employees to be in compliance with the Affordable Care Act and obtain health insurance.

Retirement Benefits, now is C.

Personnel Policy—Paid Sick Leave

D. PAID SICK LEAVE

Effective 1/1/2016, Oregon Senate Bill 454 (which applies to employers of 10 or more employees) requires that UUFSCO 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.

Personnel Policy Manual

For

UNITARIAN UNIVERSALIST FELLOWSHIP OF
CENTRAL OREGON P O Box 428 BEND,
OREGON 97709

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

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I. UUFECO 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 UUFECO community as well as respect the rights of everyone affected by UUFECO operations. The term “members” is all inclusive, encompassing staff, members, friends, visitors in the UUFECO community. It is expected that all staff members of UUFECO will:

5. Understand and be in sympathy with the principles and purposes of Unitarian Universalism.
6. Maintain professional and personal integrity.
7. 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.
8. Respect the traditions of the congregation, enriching and improving these in consultation with the members.
9. Strictly respect confidences shared by colleagues and expect them to keep yours.
10. 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.

11. Stand in supportive relation with one another and keep an open mind and heart toward one another.
12. Cooperate with one another in supporting the total ministry of the congregation.
13. Work for clear delineation of responsibility, accountability, and channels of communication with regard to roles and work responsibilities.
14. Exercise leadership within their realm of responsibilities.
15. Exercise good stewardship in the use of the church's resources.
16. 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 MISSION AND 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 Committee on Ministry. (Policy approved by UUFCO Board on November 13, 2013)

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:

- β submission to the conduct is made either explicitly or implicitly a term or condition of employment;

- β submission to or rejection of the conduct is used as a factor in employment decisions affecting an individual; or

- β 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:

- repeated and unwelcome suggestions regarding, or invitations to, social engagements or social events; or

- 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

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:

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

6. 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 β threatening or intimidating acts; or written or graphic material; or β 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.

7. 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 UUFCA Personnel Committee, or president of the congregation who shall gather the evidence necessary to complete an investigation. The Minister, the UUFCA 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.

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. Employees are generally paid at the end of the month.

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 UUFSCO 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 UUFSCO 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 the Bookkeeper.

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, the Bookkeeper, or the Administrator. Employees may be required to provide a physician's statement in order to receive worker's compensation benefits, or to return to work.

B. POLICY ON FLEXIBLE SALARY AND BENEFITS PACKAGES

The UUFCO Board may consider requests by staff for flexible salary and benefits packages within the amount allocated in the annual budget for each respective position. The salary/benefits package for each position, when possible, will conform to UUA recommendations.

The Board will not take on evaluation or researching benefit options beyond the currently endorsed UUA recommendations/programs for benefits.

If the final salary/benefit package for a given position, as approved by the Board, is less than budgeted by the Board the balance of the salary/benefits package remains in the general operation budget of the congregation. (policy approved by UUFCO Board July 11, 2012)

C. GROUP INSURANCE PROGRAMS

1. Health Insurance Benefits

Employees who work 750 hours or more per year are offered the option of purchasing health insurance by enrolling in the group plan sponsored by the UUA unless they have health insurance through a family member or collateral employment. Further information concerning the plan and any alternative health related benefits may be obtained from the Bookkeeper. (Also, see paragraph B. above)

2. Group Dental, Term Life, and Long Term Disability Insurance

Employees who work 750 hours or more per year are offered the option of purchasing group dental insurance, term life insurance, and long-term disability insurance through the group plan sponsored by the UUA. Further information concerning these policies is available from the Bookkeeper.

D. 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.

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:

- δ. I-9 Employment Verification (signed by applicant and hiring supervisor)
- ε. The hiring supervisor will obtain a copy of the front side of applicant's current driver's (license and applicant's social security card)
- φ. 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 UUFCA 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 UUFCA 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.

7. - Failure to perform work in a manner acceptable to Employer.
8. - Absenteeism or tardiness.
9. - Leaving work without permission.
10. - Sexual harassment or harassment described in this Manual.
11. - 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).
12. -Unauthorized possession of weapons.
13. -Disclosure of confidential information.
14. -Smoking in unauthorized areas.
15. -Failure to report-on-the job injuries.
16. -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.
17. -Theft or dishonesty.
18. -Falsifying records or information (or misuse or unauthorized manipulation of any computer or electronic data processing equipment or system).
19. -Discourteous treatment of others.
20. -Taking Employer property without paying for it or without

written permission.

21. -Reckless, careless or unauthorized use of Employer property, equipment or materials.
22. -Improper or profane language.
23. -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 UUFCA PERSONNEL POLICY MANUAL UUFCA MOTTO:

Diverse Beliefs, One Fellowship

UUFCA 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 UNIVERSALISM:

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 March 2014 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 March 2014.

_____ Date

_____ Employee Name (Print)

_____ Employee Signature

