

First Unitarian Universalist Congregation of the Palm Beaches

Policies & Procedures Manual



**Transforming Lives Through
Liberal Religious Community**

635 Prosperity Farms Road
North Palm Beach, FL 33406

Approved October 17, 2023
Prior Versions are Considered Obsolete

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PART A: PURPOSE

The purpose of this Manual is to provide congregational leaders with guidance in fulfilling certain duties.

This Policy describes a process whereby the Congregation may realize its goals and objectives by ensuring a timely organized system of checks and balances for maintaining efficient management by the Congregation and its operations, affording its interested parties more time to focus on its mission.

Since every situation cannot be anticipated, this Manual provides a general overview only. In applying the policies and procedures in this Manual, the Congregation will take into consideration the specific facts and circumstances of each situation.

If, in the course of your normal business serving the good of the Congregation, you find these Policies to be at odds with the best interest of the Congregation or its interested parties, please bring your concerns to a member of the Board of Trustees or to a member of the professional staff. We ask that you take matters into your own hands and decide to modify, change or ignore these policies only in instances of extreme urgency.

As a progressive and evolving organization which must respond to operating needs and other circumstances, changes and modifications in policies and procedures will be made from time to time.

If you have any questions or comments about this Manual, or if you need more information, please ask an officer of the Board or a member of Professional Staff.

PART B: NAME

The name of this congregation shall be established by Article 1 of its By-Laws. It shall be referred to as the "Congregation" herein.

PART C: MISSION AND VISION

1. Mission

The mission of the First Unitarian Universalist Congregation of the Palm Beaches is to transform lives through liberal religious community.

2. Vision

The Congregation's vision statement shall be established by Article 2 of its By-Laws.

PART D: STATEMENT OF CONGREGATIONAL AFFILIATION

1. The Congregation is currently and intends to remain affiliated with the Unitarian

Universalist Association (herein referred to as the "UUA").

2. The Board of Trustees shall take any action required by the UUA to maintain the Congregation's affiliation with the UUA.

PART E: COVENANTS

1. Congregational Affirmation

- 1.1. Love is the spirit of this Congregation
and service is its law
This is our great covenant,
to dwell together in peace,
seek the truth in love,
and to help one another.

2. Covenant of Right Relations

- 2.1. Introduction

As Unitarian Universalists, we welcome all to join in our beloved community. In our community we are bound together by covenants, promises we make about how we treat one another and our world. One such covenant is our Affirmation, which we recite each Sunday:

Love is the spirit of this Congregation and service is its law.

This is our great covenant: to dwell together in peace, to seek the truth
in love, and to help one another.

Our Affirmation, our Unitarian Universalist Principles, the Living Tradition and our Covenant of Right Relations all provide us with direction and support for who we are and what we do. Recognizing that conflict is normal and healthy, we embrace Right Relations not as a set of rules, but as guidance on how we intend to relate to each other when faced with situations that involve, or could involve conflict. When our affections become strained, with the Covenant as our guide, we seek to restore one another and our community to wholeness.

This Covenant affirms our values and aspirations for our relationship together. Each of us is responsible for upholding the Covenant in congregational life – in our services, in our committee meetings, in our social gatherings and in the connections we have as individuals united in this beloved community. As needed, we will ask for assistance from each other and our minister. We will lift up this Covenant in all that we do. We will affirm the Covenant on an annual basis, amending it as appropriate. It is a living document that will change and grow, even as we ourselves change and grow.

2.2. Covenant of Right Relations¹

In the spirit of right relations we covenant to:

Acknowledge and **celebrate** our differences.

Listen compassionately, **speak** respectfully, and **take responsibility** for our actions and feelings.

Speak from personal experience, use “I” statements, and **avoid** judgment, generalizations, and offering unsolicited advice.

Deal directly with others to resolve conflict.

Strive to stay in relationship through conflict.

Fulfill our commitments, **complete** our tasks, **admit** our mistakes, **praise** each other’s successes, and **say** “thank you”.

Ask for help when needed and **give** help as able when asked to do so.

Assume the good intentions of others.

PART F: RIGHT RELATIONS POLICY

1. Purpose and Introduction

Ours is a relational community in which we agree to follow the formal guidelines of Unitarian Universalism and its stated principles. Our Covenant of Right Relations (Covenant) governs our communication as well as all other interactions with each other.

2. The Role of the Committee

The Committee on Ministry (Committee) will function as a committee on right relations and act as an intermediary amongst those persons comprising the Congregation to promote healthy communication within the Congregation and to support the Congregation in reestablishing right relations when conflict occurs. Right relations issues may be brought to the Committee by any individual, any group of persons within the Congregation, the Board or the Minister who believe that the Covenant has been violated (Person or Persons).

3. Protocols for Resolving Differences and Reestablishing Right Relations

The Committee is responsible for determining the appropriate action and process to undertake in response to any issue presented. When called upon to intervene, the role

¹ This Covenant is used in substantial part by the 1st Unitarian Universalist Congregation of the Palm Beaches with the permission of First Church Cambridge, Massachusetts, with gratitude.

of the Committee will be to take such steps as it deems necessary to seek a return to the Covenant. In all cases, the Committee will ensure confidentiality and respect the privacy of the individuals involved.

In cases involving the Congregation in general, or a committee or group of individuals whose relationship spins out of Covenant, the Committee, or one or more persons from the group may request the more formal process of a Restorative Justice Circle. A Restorative Justice Circle operates within Covenant. It provides a safe space where all participants are treated respectfully and equally. The Committee will determine whether the Restorative Justice Circle is an appropriate process for the issue presented. A member of the Committee, or a trained intervention specialist, will serve as Moderator. This intervention requires that the individuals involved in the dispute voluntarily agree to participate and to abide by any decisions jointly reached.

4. Committee Process Steps

As an initial matter, the Committee will ensure that the Person or Persons have attempted to reach a resolution of the issue directly. If no resolution can be reached, the Committee will proceed to Step One.

4.1. Step One: Identifying and Clarifying the Issue

The Committee will receive a written or verbal description of the issue and determine whether the issue raises a concern under the Covenant.

When the Committee agrees that the issue raises a concern under the Covenant, they will move to Step Two.

In the case of egregious misconduct, in which the Committee deems a return to Covenant is untenable, the Committee will recommend the matter to the Board with a proposed action, which may include requesting the Person or Persons be removed from the Congregation. Directly observed unlawful conduct must be reported to the Minister, the Board and to proper authorities immediately.

If the Committee does not believe the issue is one of the Covenant, the Committee will provide the Person or Persons with a statement explaining why, along with any recommendations for possible resources to resolve the issues outside of the Committee process.

4.2. Step Two: Working Towards Resolution

The Committee will ask the Person or Persons to meet with them privately, at which time they will review the issue (and any allegations of violation of the Covenant).

The Committee will work with the Person or Persons to develop a written plan for restoring relations. Such plan may include the more formal process of a Restorative Justice Circle.

If the Person or Persons agree, the process moves to Step Three.

If the Person or Persons do not agree with the process, or refuse to engage with the Committee, Committee will determine an appropriate course of action, which may include making a recommendation to the Board for further action, which may include requesting the Person or Persons be removed from the Congregation.

4.3. Step Three: Returning to Right Relations

The Committee will meet with the Person or Persons to review the plan to return to right relations and the Person or Persons will be given the opportunity to accept, modify or reject the plan completely.

Once a plan is finalized, the Person or Persons will sign it to indicate each Person's acceptance of the Plan, and the issue will be considered fully resolved.

If no agreement is reached, the Committee will make a request to the Board for action, which may include a recommendation to have the Person or Persons removed from the Congregation.

4.4. Closure

In all issues involving the Covenant, the Committee serves as the authorized representative of the Congregation. As such, once an issue of Covenant comes before the Committee for intervention, the work of the Committee, including any recommendations the Committee may make to the Board for further action, shall stand as the committee's complete response to the issue.

5. Annual Affirmation of the Covenant

On an annual basis, the Congregation shall affirm its commitment to the Covenant as a statement of intention as to how we will conduct ourselves in community with one another. On an annual basis we will review the Covenant, amending it as appropriate. It is a living document that will change and grow, as we ourselves change and grow. In lifting up the Covenant in all that we do, we will ensure our beloved community is strong, and holds close the promises we make about how we treat one another.

PART G: WELCOMING CONGREGATION DECLARATION

The Congregation dedicates itself in word and deed to the following:

1. Being a "Welcoming Congregation," both in the specific Unitarian Universalist sense of being intentionally affirming and welcoming to people who are gay,

lesbian, bisexual, transgender and questioning, and in the more universal sense of doing the work of carefully listening to and being welcoming of each individual human being who walks through its doors;

2. The ongoing process of bringing to its By Laws, its Sunday Services, its programs, and its social activities an explicit welcoming and affirmation of people who are gay, lesbian, bisexual, transgender or questioning, or who may find themselves in the minority due to race, creed, class, age, culture, educational level, ethnicity, or physical or mental ability; and
3. Working for basic human rights and social justice for people in the sexual minority and for all others who are oppressed.

PART H: BY-LAWS

1. The Board of Trustees shall be responsible for maintaining By-Laws which are compliant with all state and federal regulations.
2. A current and accurate copy of the By-Laws shall be made available to anyone requesting such a copy.
3. The official copy of the Congregation's By-Laws shall be the copy maintained on the Congregation's official website.

PART I: COMMITTEES

The By-Laws permit and expect that the Congregation shall function by way of Committees. There are generally two types of Committees.

1. Committees of the Congregation

The function and operation of these committees is governed by the By-Laws. Currently, the By-Laws provide for the following Committees and govern their mission(s) and operations (relative By-Laws Article):

- 1.1. Board of Trustees (8);
- 1.2. Finance Committee (10.3);
- 1.3. Stewardship Committee (10.4);
- 1.4. Endowment (11); and
- 1.5. Committee on Ministry (13).

2. Committees of the Board

As permitted by Section 14 of the By-Laws, the Board of Trustees may, from time to time, delegate its work to various groups, which shall be referred to as either a Committee, Sub-Committee or Taskforce, depending on the scope of their work and at

the discretion of the Board. Committees, Sub-Committees and Taskforces shall be referred to herein collectively as "Committees" and shall:

- 2.1. Be elected or appointed according to the By-Laws;
- 2.2. Orient their Operations to a Charter (or similar document) which gives the Committee direction from the Board. This Charter shall include general goals and objectives of each Committee in addition to the following duties. Each Committee shall have the duty to:
 - 2.2.1. Meet regularly;
 - 2.2.2. Record their Committee's Activities;
 - 2.2.3. Comply with these Policies and Procedures;
 - 2.2.4. Manage Their Budget;
 - 2.2.5. Integrate their Activities with Professional Staff;
 - 2.2.6. Document their Processes; and
 - 2.2.7. Search for its own new members.

PART J: CONFLICTS OF INTEREST

The Board expects its members to carry out their duties with undivided loyalty to the Church and its mission. A conflict of interest exists whenever a Board Member has interests or duties that may hinder or appear to hinder the Board Member from fulfilling this duty.

1. Definition

Conflicts of interest arise when a Board Member:

- 1.1. Stands to gain or lose financially because of an action of the Church in which he or she has a decision-making role.
- 1.2. Cannot set aside his or her personal preferences as an individual consumer of the Church's services to act on behalf of the whole Church and its mission.
- 1.3. Faces any other situation that impairs or reasonably appears to impair his or her independence of judgment.
- 1.4. Has a close relationship with someone who has a conflict of interest, as defined above. A close relation includes any person, corporation, or other business entity with which the Board Member has a close personal, family, or business relationship.

2. Conflict of Interest Disclosure

- 2.1. The Board will annually require its members to disclose in writing all existing or foreseeable conflicts of interest.
- 2.2. Disclosure forms must be kept by the Clerk of the Board and made available to any member of the Board who asks to see them.
- 2.3. Conflict of Interest Process

When a Board Member raises a potential conflict of interest related to a matter before the Board, the Board (minus the affected member) will determine how to handle the situation. Possible responses include:

- 2.3.1. Disclosure in Board minutes of the nature of the conflict;
- 2.3.2. Leaving the room during all Board discussions and votes related to the conflict of interest;
- 2.3.3. Resignation from the Board.

3. Anti-Nepotism Policy

No family member within one generation, committed partner or spouse of an employee shall serve or be nominated to serve on the Board of Trustees, the Nominating Committee or the Committee on Ministry. The Board of Trustees may make exceptions to this policy on a case-by-case basis, with the exception that no member of the Board of Trustees may vote to approve any such exceptions when their family is involved.

PART K: PERSONNEL POLICIES

1. About this Part

This Part of the Congregation's Manual serves as its Personnel Policies. It has been prepared to assist employees in understanding some of its policies and procedures as they apply to your work and your status as an employee. You should familiarize yourself with the content of this Manual as it provides basic information about our expectations, policies, procedures and benefits.

Since every situation cannot be anticipated, this Manual provides a general overview only. In applying the policies and procedures in this Manual, the Congregation will take into consideration the specific facts and circumstances of each situation.

As a progressive and evolving organization which must respond to operating needs and other circumstances, changes and modifications in policies, procedures, and benefits will be made from time to time according to **Part R of this document**. This Part of this Manual, and any amendment or restatement of any part of it replaces all previous

personnel policy manuals or employee handbooks and any inconsistent policies.

2. No Creation of a Contract/Employment Status

Nothing in this Manual is intended to create nor creates an employment agreement, express or implied, or a contract that employment or any benefit will be continued for any period of time.

You have been hired on an at-will basis unless you have a written individual employment agreement that states otherwise as long as that agreement has been signed by the President of the Congregation's Board. This means that you may terminate the employment relationship at any time, for any reason, with or without notice, and the Congregation retains the same right.

3. Reliance Interpretation, Questions

This section of this Manual has been compiled for your use and for your benefit.. However, in certain cases, it may be inaccurate. If there is any conflict between this document and the applicable plan document(s), statute(s) or laws, the applicable plan document(s), statute(s) or laws shall prevail in all cases.

If you have any questions or comments about this Manual, or if you need more information, please ask the Congregation's Minister, your supervisor or officer of the Board.

4. Diversity and Inclusion

4.1. Equal Employment Opportunity

The Congregation is committed to addressing the systemic prejudices and biases found within all parts of society by, among other things, working to ensure that you and all staff are trained to understand, welcome, and better serve a multiracial, multiethnic, increasingly diverse community and enhance the ability of each individual to live our values of justice, equity, and interdependence.

The Congregation affirms its commitment to inclusion and equal employment opportunity for all individuals. Decisions about recruiting, hiring, training, promotions, compensation, benefits, and all similar employment decisions will be made in compliance with all federal, state, and local laws and without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, genetic information, or any other classification protected by law. The Congregation may consider religion in the hiring and terms and conditions of employment of certain positions. Any discrimination in the workplace based upon any protected status/classification is illegal and against this policy.

Retaliation against individuals who make a claim of discrimination or participate in the

investigation of such a claim is prohibited and will not be tolerated. Prohibited retaliation includes shunning and avoiding an individual who reports harassment, discrimination or retaliation; express or implied threats or intimidation intended to prevent or inhibit an individual from reporting harassment, discrimination, retaliation; or denying employment benefits because an applicant or employee reported harassment, discrimination or retaliation or participating in the reporting and investigation process.

4.2. Accommodations of Disabilities

If you are or become disabled during the course of your employment, the Congregation provides reasonable accommodations to enable you to perform the essential functions of your job in compliance with state and federal law. If you are unable or find it difficult to perform all the functions of your job due to a disability, you should inform your Supervisor, the Minister or an Officer of the Board about the disability and discuss the type and nature of any assistance or adjustment that would enable you to perform the essential functions of the job.

In most cases, the Congregation will need medical documentation of your disability and of possible accommodations. The Congregation may also need regular discussions with you to determine what, if any, accommodations are appropriate, your continuing need for accommodations and the effectiveness of the accommodations provided. The Congregation may also ask to speak to your physician or health care provider to help the Congregation assess the need for and the appropriateness of the proposed accommodations and to ensure that you can safely perform the essential functions of your job with the accommodations. The Congregation may also ask you to submit to an independent medical or other appropriate examination, at the Congregation's expense.

4.3. Religious Accommodations

The Congregation will also reasonably accommodate employees whose work requirements interfere with a religious belief unless doing so would result in an undue hardship. Employees needing such accommodation are instructed to contact their Supervisor or the Minister.

4.4. Pregnancy Accommodation

Employees have the right to be free from discriminatory or unfair employment practices because of pregnancy, a health condition related to pregnancy, or the physical recovery from childbirth.

All those who are otherwise qualified for a position may request a reasonable accommodation related to pregnancy, a health condition related to pregnancy or the physical recovery from childbirth. If you request an accommodation, the Congregation shall engage in a timely, good-faith, and interactive process with you to determine

whether there is an effective, reasonable accommodation that will enable you to perform your duties. A reasonable accommodation will be provided unless it imposes an undue hardship on the Congregation's business operations.

The Congregation may require that you provide a note from your health care provider detailing the medical advisability of the reasonable accommodation. If you have questions about this policy or wish to request a reasonable accommodation under this policy please contact your Supervisor or the Minister.

The Congregation will not deny employment opportunities or retaliate against you because you request a reasonable accommodation in accordance with this policy. You will not be required to take leave or accept an accommodation that is unnecessary for you to perform the essential functions of your job.

4.5. Questions or to Report a Violation

If you believe that you have been harassed by another employee, your Supervisor, the Minister, a congregant, or any other person who you encountered in the course of your employment, you should report that conduct immediately to your Supervisor, the Minister or officer of the Board following the Procedure as defined in Section 6 below.

5. Your Role as Staff

Although you may often share a sense of passion and commitment to the mission of the Congregation and our faith in the same way you might if you were a member of the Congregation, you are in a distinct role from our members.

- 5.1. While we hope you find spiritual fulfillment in your work, this is not your religious home, nor is our Minister able to be your Minister.
- 5.2. The Congregation expects that you will abide by these policies and to work as a team in service of our congregation's mission and vision.
- 5.3. We strongly suggest that you not date or otherwise become romantically involved with any other staff members.
- 5.4. We strongly suggest that you not date or engage in any romantic or sexual relationships with members, friends, or regular participants in Congregational activities. This is because your priority is to ensure that congregants can engage fully and safely with the Congregation and its ministries.
- 5.5. Friendships with regular participants in Congregational activities are not prohibited, but are complicated by your role as staff. To be effective at your job, you must consistently prioritize your role as staff rather than as friend whenever these two needs come into conflict. It is always problematic for congregants to perceive that a given staff member has a "special relationship" with some

congregants but not others, and so staff members should be cautious about forming friendships.

- 5.6. You should never share problems or challenges about the work environment with regular participants in Congregational activities, or turn to them for support. Ultimately, you need to remember that people do not participate in Congregational activities to meet your personal needs, but rather to become a part of a meaningful, faithful community dedicated to a larger purpose; they need and must expect you to serve their spiritual journeys and growth, rather than the other way around.
- 5.7. You must be thoughtful about when or if to “friend” or “follow” congregants (or accept their requests), on social media and in all cases to remember that what you share in social media reflects on the Congregation and your job.
- 5.8. Relationships with Other Unitarian Universalists and UU Congregations. As our congregation affirms a shared sense of mission and purpose with all other Unitarian Universalist congregations, you are expected to engage with other area UU congregants with the same degree of service and care as you do with our congregants.

6. Non-Hostile Work Environment

The Congregation is committed to promoting an environment that is professional and respectful. Our Congregation expects you to conduct yourself in a professional manner with concern and respect for your colleagues, congregational members, and others served by the congregation. Similarly, we expect you to be free from harassment from other employees, congregational members and others encountered while serving us.

6.1. Harassment

Harassment by anyone in the workplace is unlawful, has no place in the workplace and will not be tolerated.

Harassment includes verbal or physical conduct which may offend, denigrate or belittle any person because of or due to any of the characteristics described above (6). Such conduct includes pictures, jokes, comments, epithets, innuendoes, name-calling, repeated and unwelcomed gestures, unwelcome physical proximity or any other behavior which creates an environment that is derogatory, intimidating, hostile or offensive to anyone.

Conduct prohibited by these policies is unacceptable in the workplace, and in any work-related setting or event outside the workplace, such as Congregation meetings, social events, and any other Congregation related activity.

6.2. Sexual Harassment

While all types of harassment are prohibited, sexual harassment requires particular attention.

Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when:

- 6.2.1. submission to the conduct is made either explicitly or implicitly a term or condition of employment;
- 6.2.2. submission to or rejection of such conduct is used as a factor in employment decisions affecting an individual; or
- 6.2.3. 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:

- 6.2.4. Unwelcome sexual advances, whether or not it involves physical touching; sexual assault, or coerced sexual acts;
- 6.2.5. Requests for sexual favors in exchange for actual or promised benefits such as a favorable review, salary increases, promotions, or other benefits;
- 6.2.6. Unwelcome suggestions regarding, or invitations to, social engagements or social events;
- 6.2.7. 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;
- 6.2.8. Unwelcome or coerced physical proximity or physical contact which is of a sexual nature or sexually motivated;
- 6.2.9. Use of offensive or demeaning terms which have a sexual connotation;
- 6.2.10. Inappropriate remarks of a sexual nature;
- 6.2.11. Sexual gestures, suggestive comments, sexually insulting comments, epithets, jokes or name-calling; written or verbal references about sexual conduct;
- 6.2.12. Communication or displaying sexually suggestive objects, pictures, cartoons or computer Web sites in writing, electronically or verbally;

- 6.2.13. Sex stereotyping, such as when the conduct or traits are considered inappropriate simply because they may not conform to other people's ideas or perceptions about how individuals of a particular sex should act or look; or
- 6.2.14. Hostile actions taken against an individual because of that individual's sex, sexual orientation, or gender identity, such as interfering with an individual's work area, equipment, or ability to do their job, name-calling, etc.

6.3. Violence and Threats in the Workplace

The use of violence or any threats of violence by anyone in the workplace, including by anyone considered part of the Congregation is unlawful, has no place in the workplace and will not be tolerated.

Violence and threats include verbal or physical conduct which may cause a person to believe that they or anyone is in physical danger.

The possession or use of weapons, firearms, ammunition, etc. is prohibited on the property of the Congregation except for authorized law enforcement or security personnel.

Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts on congregation property may be removed and must remain off congregation property until they are invited to return by the Board of Trustees or the Minister.

If the Congregation determines that a staff member has violated this policy, the Congregation may take action as outlined in Part K, Section 26 of this Manual.

If you witness or experience any behavior which you regard as threatening or violent, you will inform your Supervisor or the Minister as soon as feasible.

7. Procedure & Resolution of Employee Complaints

- 7.1. You should communicate immediately with your Supervisor or with the Minister. If the report or complaint involves your Supervisor or the Minister, you may report to an officer of the Board. You may be asked to put your complaint in writing.
- 7.2. In certain instances, the Board of Trustees may refer the matter to the Committee on Ministry for management through the Right Relations Policy (refer to Part F of this Manual).

- 7.3. In certain instances, the Board of Trustees may form an objective Congregational Response Team, made up of at least one board member and two congregants who are not directly involved in the complaint.
- 7.4. The Committee on Ministry or the Congregational Response Team will proceed as described in the relevant process.
- 7.5. The Board of Trustees shall evaluate the Recommendations of the Committee on Ministry or the Congregational Response Team and take appropriate action. The complainant should be notified that appropriate action has been taken.
- 7.6. If either the complainant or the alleged violator objects to the resolution, they may seek a review by the Congregation's Board. The resolution recommended by the Board will be binding upon the Congregation and the employee and any complainant or alleged violator.

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

Retaliation or reprisal against you if you report harassment, sexual harassment, violence, being threatened or any other sort of discrimination is prohibited and will not be tolerated. Violations of this policy will be treated as a serious matter and will result in disciplinary action, up to and including termination.

8. Categories of Employment

8.1. At-Will

You are an at-will employee unless you have a written individual employment agreement that states otherwise.

8.2. Full Time

An employee who regularly works the Congregational year or 12 months of continuous full-time service at 35 hours or more per week is considered a full-time employee.

8.3. Part Time

An employee who regularly works for the Congregational year or 12 months for fewer than 35 hours per week is considered a part-time employee. Part-time employees scheduled to work at least 12 hours but less than 35 hours per week are eligible for benefits according to the benefit plan descriptions in this Manual.

8.4. Casual/Temporary

An employee who works full or part-time for a specific time period, including during peak or seasonal periods, for specific projects, to fill in for an absent regular employee, or for other reasons for a limited period of time is considered a casual/temporary employee. Casual/Temporary employees are entitled to benefits consistent with the provisions of benefit plans offered by the Congregation or as required by law.

8.5. Fair Labor Standards Act Definitions

Employees are also categorized as either Non-Exempt or Exempt for purposes of the minimum wage and overtime provisions of the Fair Labor Standards Act ("FLSA").

8.5.1. Non-Exempt Employees

An employee who is compensated based on the number of hours worked each workweek and are entitled to be paid the minimum wage and overtime for hours worked over 40 in a workweek.

8.5.2. Exempt Employees

An employee who is employed in an executive, administrative, or professional position which meets certain requirements, are paid on a salary basis, and are exempt from the minimum wage and overtime provisions of the FLSA.

8.5.3. Ministerial Exception

Ministers, and other employees who perform "essential religious duties," are exempt from FLSA requirements under the ministerial exception (sometimes called the ecclesiastical exemption). Under this exemption, other employees, such as religious educators or music directors, might be classified as exempt depending upon their specific responsibilities. Unlike the FLSA exemptions, the ministerial exception is dependent only on responsibilities, not salary.

9. Orientation

Your Supervisor, the Minister or a designated congregational leader will introduce you to your co-workers and orient you to your work area(s) and details of how to fulfill the expectations laid out in your Position Description, as described in section 26.

10. Employment Authorizations & Background Checks

10.1. Federal Eligibility

Federal law requires that you show proof of eligibility to work in the United States by completing Form I-9 within 3 days of time of hire. You must provide an original document or documents to your supervisor that establishes identity and employment eligibility from the date employment begins. Failure to comply may result in immediate termination of employment.

10.2. Required Pre-Employment Forms & Documents

10.2.1. Job Application

10.2.2. Authorization for a Criminal Background Check

10.2.3. Authorization for a Credit Check (only for positions with access to financial accounts)

10.2.4. Proof of Social Security Number

11. Work Schedules and Pay

11.1. Hours of Work

The office is required to be open for a minimum of 4 hours each weekday. Some employees may be scheduled for work on weekends and evenings.

Your Supervisor or the Minister will establish individual work schedules. Your Supervisor or the Minister has discretion to change your normal work hours from time to time based on the needs of the Congregation. Attendance at meetings outside of established work schedules at the request of your Supervisor or the Minister will be considered time worked. You may occasionally be required to attend staff retreats or off-site events which are relevant to your position.

11.2. Meals and Break Periods

11.2.1. You are encouraged to take a 10-minute break for each 4-hour work period. Such breaks are paid but you can't accumulate them or add them to the end of your work day.

11.2.2. If you are scheduled to work more than a 6-hour period, you are required to take a 30-minute unpaid meal break. The time of meal and break periods will be scheduled at the discretion of your Supervisor or Minister. You should not perform any work during your meal period. You can't add this unpaid meal break to the end of your work day.

11.3. Timekeeping

If you are a non-exempt employee (Refer to 8.5.1 of this Part) you must submit a written record of your time worked on a weekly basis, consistent with the recordkeeping provisions of the Congregation.

11.4. Overtime

- 11.4.1. From time to time, the Congregation may require you to work in excess of your regularly scheduled hours.
- 11.4.2. Any time you work in excess of 35 hours in a workweek must be approved in advance by your Supervisor or the Minister.
- 11.4.3. If you are a non-exempt employee (Refer to 8.5.1 of this Part) you are entitled to overtime pay of 1.5 times your average hourly rate for every hour worked over 35 in a single week.
- 11.4.4. Paid holidays, vacation days, or other paid time off does not count as time worked for purposes of calculating overtime.
- 11.4.5. Exempt employees do not receive overtime pay when working in excess of 35 hours.

12. Pay and Payroll Deductions

12.1. Equitable and Competitive Wages

The Congregation strives to offer you equitable and competitive wages and salaries commensurate with its ability, resources, and sound policy.

12.2. Adjustments to Pay Rates

The Congregation will consider pay adjustments generally once a year, with any adjustments effective at the beginning of the fiscal year. There is no guarantee of an annual pay adjustment. Pay adjustments are usually based upon such factors as individual performance, job responsibilities, and other appropriate factors, such as increases in the cost-of-living as well as changes to UUA salary recommendations.

12.3. Payroll Deductions

Deductions made from your wages are reflected on your pay stub, which is available for download from our secure payroll site. 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, such as voluntary retirement contributions, or medical or other benefit cost-sharing, are optional and are made only if you authorize the deduction.

12.4. Payroll Errors

It is the Congregation's policy to comply with federal and state laws governing payment of wages, and the Congregation makes every effort to ensure employees are paid correctly. Occasionally, however, mistakes may happen. If you believe a mistake has occurred or if you have any questions, you should contact your Supervisor or the Minister immediately.

In the event that you do not provide direct deposit instructions or in the event that those instructions are faulty, you will be paid as soon as administratively feasible after you correct the error.

12.5. Payroll Timeframes & Method

You will be paid bi-weekly and your pay will be electronically deposited into your preferred bank account each pay period according to your instructions.

13. Employee Benefits

In addition to its desire to offer you equitable and competitive wages and salaries, the Congregation also offers non-cash benefits to you to provide for a wholesome and fulfilling period of employment with us.

13.1. Paid Time Away From Work

13.1.1. Definitions

The following definitions shall apply to this Section.

13.1.1.1. Day

A "Day" shall mean the number of hours an employee regularly works in a day. In the case of employees without fixed, daily schedules, "Day" shall mean, during the preceding six pay cycles, the average number of hours an employee worked per week, excluding overtime, divided by 5. For example, for an employee working or averaging 20 hours per week, a day shall consist of 4 hours.

13.1.2. Paid Holidays

13.1.2.1. Eligibility

13.1.2.1.1. Employees regularly scheduled to work at least 20 hours or more per week are eligible for holiday pay if they would normally be scheduled to work that day.

13.1.2.1.2. If a paid holiday falls on a Saturday, the preceding Friday generally will be observed as the holiday. If a paid holiday falls on a Sunday, the following Monday generally will be observed as the holiday.

13.1.2.1.3. If eligible employees are required to work on a holiday, they generally will be granted another day off. Eligible part-time employees only receive holiday pay if they are scheduled to work on a holiday and are paid for the

number of hours they are normally scheduled to work that day. You generally will be granted another day off to be taken within two weeks after the original date of the holiday. This day is scheduled at your discretion with the approval of your Supervisor or the Minister.

13.1.2.2. Recognized Holidays

The office will be closed for the following holidays:

New Year's Day
Martin Luther King Jr. Day
Presidents' Day
Memorial Day
Juneteenth
Independence Day
Labor Day
Indigenous Peoples' Day
Thanksgiving
Day after Thanksgiving

The campus is open and accessible for worship services and congregational activities on these holidays.

13.2. Paid Time Off (PTO)

13.2.1. Eligibility

13.2.1.1. If you work fewer than 20 hours per week, you are eligible for 2 days of PTO per calendar year.

13.2.1.2. If you work more than 20 hours per week, but less than 35 hours per week, you are eligible for the following PTO per calendar year:

Less than one year of service: 15 days

1-2 years of service: 16 days

3-4 years of service: 17 days

5-6 years of service: 20 days

7-8 years of service: 21 days

9-10 years of service: 22 days

11-15 years of service: 23 days

16-19 years of service: 24 days

20+ years of service: 25 days

13.2.1.3. If you work 35 hours or more per week, you are eligible for the following PTO per calendar year:

Less than one year of service: 22 days

1-2 years of service: 23 days

3-4 years of service: 24 days

5-6 years of service: 27 days

7-8 years of service: 28 days

9-10 years of service: 29 days

11-15 years of service: 30 days

16-19 years of service: 31 days

20+ years of service: 35 days

13.2.2. Carryover

You are encouraged to use your PTO in the year in which you earned it, but if that proves not possible, you may carry over up to five (5) days into the next calendar year.

13.2.3. Scheduling

PTO can be used at the discretion of the employee. No reason needs to be given for taking personal time off. Planned PTO shall be scheduled at a time convenient for the church and with the approval of your Supervisor or the Minister. In illness and emergency situations, you must notify your Supervisor or the Minister as soon as you are aware of the need to take PTO.

13.3. Increments

PTO may be used in increments of not less than one (1) day.

13.3.1. Bereavement Time

13.3.1.1. Eligibility

You are eligible for bereavement time.

13.3.1.2. Accrual & Carryover

Bereavement time does not accrue, nor does it carry over. You only gain access to the benefit in times of need.

13.3.1.3. Benefits and Limits

A regular employee will be granted up to 10 days of consecutive work days for paid bereavement leave to attend to arrangements and to take care of matters attendant to the death in the event of a death of an immediate family member (spouse/partner, child, parent), up to 5 work days for death of a member of the extended family (siblings, in-laws), or 1 work day for other relatives (aunts/uncles, nieces/nephews). Additional time may be requested from your Supervisor/Minister.

13.3.1.4. Notification

You must notify your Supervisor or the Minister as soon as you are aware of the need to be absent.

13.3.1.5. Increments

Bereavement time may be used in increments of not less than one (1) day.

13.3.2. Jury Duty

The Congregation recognizes jury duty as a civic and community obligation and duty of a citizen. While you are serving on a jury, you will receive your regular paycheck with no loss of regular pay for up to 30 days as long as you provide your Supervisor or the Minister with copies of court documents affirming the facts concerning your service on a jury. If you receive pay from the court, you will be required to advise your Supervisor/Minister and arrange to turn the amount you receive over to the Congregation.

You are expected to keep your Supervisor/Minister informed of your service as a juror so plans can be made to provide continued coverage of your position during your absence. On any day or half-day you are not required to serve, you are expected to return to work

13.4. Unpaid Leaves of Absence

Leave of absence without pay may be granted at any time at the discretion of the Minister and the Board of Trustees.

You are expected to return to work upon the expiration of the leave as granted. If you are prevented from returning as expected, you must immediately notify your Supervisor or the Minister.

13.4.1. Family and Medical Leave

13.4.1.1. Consistent with our Unitarian Universalist values, the Congregation voluntarily provides certain aspects of the Family Medical Leave Act ("FMLA").

13.4.1.2. Eligibility

You are eligible for FMLA coverage if you have been employed by the Congregation for one year or more.

13.4.1.3. Accrual & Carryover

FMLA time does not accrue, nor does it carry over. You only gain access to the benefit in times of need.

13.4.1.4. Benefits and Limits

13.4.1.4.1. You are allowed up to 12 weeks of unpaid leave for any of the following qualified reasons:

13.4.1.4.1.1. your own serious health condition;

13.4.1.4.1.2. for the birth, adoption or placement for foster care of a child, or;

13.4.1.4.1.3. to care for a family member (child, spouse, or parent) with a serious health condition.

13.4.1.4.2. The 12 weeks do not have to be consecutive.

13.4.1.4.3. The Congregation will make its best effort to provide that you will be able to return to the same position.

13.4.2. Notification

You must give thirty (30) days notice, or in case of unforeseen circumstances, as much notice as possible to your Supervisor or the Minister.

13.4.3. Certification

You may be asked to provide written proof of the condition which is causing the need for the benefit.

13.4.4. Benefits & Benefits Accruals

13.4.4.1. Paid Time Off

While you are on unpaid leave, you will not be eligible for any form of Paid Time off, as described by this Section, nor will any Paid Time off accrue. If your unpaid leave includes the last day of the calendar year, your unused paid time off benefits will be forfeited as described in the relevant Section of this manual.

13.4.4.2. Retirement

While you are on unpaid leave, you will not be eligible for accrual of any retirement plan benefits, however benefits due and payable to you under the Plan will continue.

13.4.4.3. Health, Dental, Life and Disability

While you are on unpaid leave, you will be eligible for your employer sharing contribution to insurance benefits premiums for up to 12 weeks.

13.5. Insurance and Retirement Employee Benefits

13.5.1. Introduction

These Insurance and Retirement Employee Benefits outlined in this Section represent significant additional compensation to eligible employees. Outlined below is a brief summary of the types of employee benefits currently available through the Congregation. These benefits are subject to change at any time at the discretion of the Congregation.

Many of the benefits programs our Congregation offers are group plans offered by the Unitarian Universalist Association and its affiliates.

13.5.2. Conflicts

In the event of any discrepancy between the benefits outlined in this Section and the relevant Summary Plan Description ("SPD") or Plan documents, the SPD or Plan documents will govern. Any questions about employee benefits should be directed to your Supervisor or the Minister.

13.5.3. Group Health Insurance Benefits

13.5.3.1. Eligibility

You are eligible to enroll in the group health insurance plan if you are expected to work at least 750 hours per year.

13.5.3.2. Premium Sharing

13.5.3.2.1. For your coverage, the Congregation shall pay the ratio listed below based on your expected hours of work. This ratio will be calculated using the lowest premium option offered by the group medical plan it selects.

Annual (Weekly) Expected hours	Congregation Pays
1,750 (35) or more	80%

1,750 (35) or fewer	0%
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13.5.3.2.2. For coverage for your spouse, family or other dependents, the Congregation shall not pay any premium.

13.5.3.3. You will be required to make your required contributions by payroll deduction or timely payment as appropriate.

13.5.4. Group Dental

13.5.4.1. Eligibility

You are eligible to enroll in the group dental insurance plan if you are expected to work at least 750 hours per year.

13.5.4.2. Premium Sharing

For coverage for you, your spouse, family or other dependents, the Congregation shall not pay any premium.

13.5.4.3. Enrollment Period for New Hires & Newly Eligible

If you are newly hired, you must enroll within 60 calendar days of your date of hire/eligibility

13.5.4.4. Enrollment Period

Each year, the plan will offer an enrollment period, normally in the fourth calendar quarter. If you wish to enroll, you must enroll during this period, as governed by the plan and its administrative operations.

13.5.4.5. Qualifying Life Events

The plan also offers enrollment opportunities that are outside of the annual enrollment period. To be eligible to take advantage of this feature, you must have experienced a “qualifying event”, as defined by the plan.

13.5.5. Term Life and Long Term Disability

13.5.5.1. Eligibility

You are eligible to enroll in the group Term Life and/or Long Term Disability insurance plans if you are expected to work at least 750 hours per year.

13.5.5.2. Enrollment Period for New Hires & Newly Eligible

There is no waiting period before eligible employees may enroll. **If you are newly hired, you must enroll within 60 calendar days of your date of hire/eligibility** Coverage is effective on the day after the form is received by the Insurance Plans Coordinator.

13.5.6. Enrollment Period

There is no annual enrollment period for either of these benefits. You must enroll as a new hire or when you are newly eligible.

13.5.6.1. Premium Sharing

For coverage for you, your spouse, family or other dependents, the Congregation shall not pay any premium.

13.5.7. Workers Compensation Insurance

13.5.7.1. Eligibility

The Congregation 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.

13.5.7.2. Enrollment Period

There is no enrollment period. You are automatically enrolled.

13.5.7.3. Premium Sharing

The Congregation pays 100% of these premiums.

13.5.8. Retirement Benefits

13.5.8.1. Eligibility

You are eligible to enroll in the group Retirement Plan if you have met one of the following three conditions:

13.5.8.1.1. worked a minimum of 1,000 hours during a twelve (12) consecutive month period defined in the Plan, or;

13.5.8.1.2. have successfully completed a UU Ministerial Internship, or;

13.5.8.1.3. if you previously received Employer contributions at another UU participating congregation or employer.

13.5.8.2. Enrollment Period

You may enroll at any time once you are eligible. There is a paper enrollment form you must complete. Please ask your Supervisor or the Minister for a form.

13.5.8.3. Congregational Contributions

The Congregation will make contributions to your account based on a formula set every year. Currently, the Congregational contribution rates are:

13.5.8.3.1. dollar for dollar match on the first 5% of eligible compensation you voluntarily contribute to the plan, and;

13.5.8.3.2. an additional 5% of your eligible compensation, which is not dependent on your voluntary contributions to the plan.

13.5.8.4. Other Benefits

The plan offers other provisions for which you may be eligible, including the option to take loans against your account and to combine other retirement accounts into this account.

13.5.8.5. Your Responsibilities

You are responsible for making investment and contribution decisions for your plan account. For more information, visit the plan's website at: <https://www.uua.org/finance/compensation/retirement>

14. Personnel Information and Files

14.1. Right to Retain Certain Information

The Congregation has a right to maintain a personnel file for you that contains new hire paperwork, performance reviews, and other documents related to your employment.

14.2. Right to review and Comment on File Contents

You may review the contents of your file in the presence of a Congregation's representative at a mutually agreed upon time. You are allowed to write your own response to any document added to the file.

14.3. Right to Privacy

The information in your Personnel file may be highly confidential. As such, the Congregation will keep your Personnel file in a secure manner such that access is limited to only people who would have a need to access the information.

14.4. Your Responsibility to Report Changes to the Congregation

It is very important you keep up-to-date all the information provided to the Congregation at the time of hire and as requested from time to time. This information is essential for many purposes, including benefit administration, mailing information to your home, and contacting friends or family in case of emergency. Please notify your Supervisor or the Minister promptly of any changes in:

- 14.4.1. Address and telephone number;
- 14.4.2. Marital status (including legal separation);
- 14.4.3. Legal change name;
- 14.4.4. Dependents;
- 14.4.5. Changes in beneficiaries;
- 14.4.6. Person to notify in case of emergency; and
- 14.4.7. Any relevant changes in licensing or education.

15. Medical Documentation

From time-to-time, employees may be required, as a condition of employment, to undergo a medical examination or otherwise to provide the Congregation with requested documentation, such as evidence of the existence or duration of medically required absence, ability to return to work, etc.

16. Conflicts of Interest/Outside Employment

You shall not engage in any other employment or business activity that is incompatible, in conflict with or otherwise impairs your duties, functions, or responsibilities as an employee. Activities that may constitute a conflict include use of the Congregation's time, facilities, equipment or supplies, or the use of the title, prestige, or influence of the congregation for private gain or advantage. You must obtain the prior approval of your Supervisor or the Minister before engaging in any other such employment or activity.

In addition, you shall not engage in any outside activity which, by its nature, reflects negatively on the Congregation, tends to increase the Congregation's obligations or costs for benefits such as sick leave or long-term disability benefits or otherwise is detrimental to the Congregation.

Lastly, you shall not engage in any business transaction, and shall not have a financial or other personal interest which is incompatible with your employment duties or which would impair your judgment or actions in the performance of your duties for the Congregation.

If you question whether or not your activities constitute a conflict of interest, you will discuss it with the Minister as soon as possible.

If the Congregation and you disagree that a conflict of interest or the appearance of a conflict of interest exists, the Congregation retains the right to make the final determination.

17. Work Hours & Timeliness

17.1. Timeliness

You are expected to maintain good attendance and to report to work on time. Absence and lateness hinder the effectiveness of our work and must be kept to a minimum. Examples of such unacceptable behavior are:

- 17.1.1. Arriving after the beginning of the scheduled hours;
- 17.1.2. Scheduling personal appointments during work hours;
- 17.1.3. Returning late from lunch;
- 17.1.4. Leaving before the end of the scheduled hours.

17.2. Reporting Requirements

If you are unable to report to work at your scheduled time, you must call your Supervisor or the Minister as soon as possible to report the absence and the expected time of return to work. You must call in each day you are absent, unless otherwise authorized by your Supervisor or the Minister.

17.3. Medical Reporting

From time-to-time, you may be required, as a condition of employment, to undergo a medical examination or otherwise to provide the Congregation with requested documentation, such as evidence of the existence or duration of medically required absence, ability to return to work, etc.

17.4. Effect of Excessive Absenteeism

Approval of a particular absence by a Supervisor or the Minister does not insulate you from a review of the total number of absences or late arrivals in any given period of time.

Excessive absenteeism or repeated tardiness may result in discipline up to and including termination of employment.

17.5. Effective Voluntary Termination

If you fail to report to work without notice for three or more consecutive days you will be considered to have voluntarily terminated employment, effective at the end of the normally scheduled work hours on the third day.

18. Professional Attire and Conduct

You are expected to maintain a professional appearance that is appropriate to your position and the Congregation. If the Congregation provides you with a name badge, it should be worn when you are on duty on Sunday or at major congregational events.

19. Alcohol, Smoking and Illegal Drugs

19.1. Smoke Free Workplace

The Congregation is a smoke-free workplace. Smoking and vaping is not allowed anywhere on Congregation property, both inside or outside the Congregation building.

19.2. Drug-Free Workplace

The Congregation maintains a drug-free workplace. The use, possession or distribution of any illegal drug (or prescription drugs not being taken or possessed according to medical direction) on Congregation premises or property is prohibited. Under no circumstances may you appear at work while intoxicated or under the influence of illegal non-prescription drugs or alcohol or smelling of alcohol. Improper use of prescription drugs is also prohibited.

19.3. Alcohol at Congregational Functions

The Congregation recognizes that responsible consumption of alcohol might be acceptable at occasional functions, but generally, the workplace is alcohol-free. On such an occasion, you are expected to uphold an atmosphere of professionalism and respect for those who choose not to participate. Any staff or congregational function at which alcohol is served must first be cleared with the Minister. It is expected that if you choose to consume alcohol on the premises at an approved function, that you do so in moderation and in the spirit of maintaining a safe and comfortable environment for all.

19.4. Effect of Violation of This Policy

A violation of this policy may be grounds for immediate disciplinary action up to and including termination.

20. Confidentiality

You may have access to confidential information about the Congregation, including but not limited to information about members, friends, or other staff members. Such information must remain confidential and may not be released, removed from the

Congregation's premises, copied, transmitted or in any other way used for any purpose outside the scope of your employment.

All requests for information concerning past or present employees received from organizations or individuals should be directed to the Supervisor or the Minister.

A violation of this policy may be grounds for immediate disciplinary action up to and including termination.

21. Use of Congregational Property and Resources

21.1. Non-Personal Use

The Congregation provides you with a wide variety of tools and resources for use in running day-to-day business activities. Whether it is the telephone, voice mail, fax, scanner, internet, intranet, e-mail, text messaging, or any other Congregation provided technology or resources use should be reserved for legitimate business use and not for more than incidental personal use.

21.2. Permitted Personal Use of Congregational Property

The congregation has on its premises storage facilities such as desks, file cabinets, closets and storage areas for the use of employees. While this property is expected to be used for Congregational matters, it is understandable that from time to time, you may wish to temporarily store items you brought with you to work. This is permitted within certain limitations.

21.3. Prohibited Personal Use of Congregational Property

21.3.1. You may not store any unauthorized alcohol, weapons, explosives, or illegal drugs or drug-related paraphernalia or any property that is not rightfully yours on congregation premises.

21.3.2. You may not use personal locks on congregation owned desks, cabinets, closets or storage areas.

21.4. Off-site Use

You may not remove any Congregational resource or property from the campus for personal use.

21.5. Use of Congregational Communication Resources

All communication using tools provided by the Congregation or used for Congregation related business should be handled in a professional and respectful manner. Inappropriate use includes, but is not limited to:

- 21.5.1. transmitting obscene, harassing, offensive or unprofessional messages;
- 21.5.2. accessing, displaying, downloading, "liking" or distributing any offensive or inappropriate messages including those containing racial slurs, sexual connotations or offensive comments about race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability or any other classification protected by law;
- 21.5.3. transmitting any of the Congregation's confidential or proprietary information, including member/friend data or other materials covered by the Congregation's confidentiality policy.

21.6. Congregational Property/Right to Monitor/Inspect/No Privacy

All files, computer storage devices, materials, desk, file cabinet, storage closet, storage area, information and software created, transmitted, downloaded or stored on the Congregation's computer system are the property of the Congregation and may be reviewed and inspected at the Congregation's discretion.

The Congregation reserves the right to monitor and review the content of e-mails or other messages sent using Congregational resources as well as your use of the Internet at any time.

You should not consider your Internet usage or e-mail communications to be private. Personal passwords are not an assurance of confidentiality, and the Internet itself is not secure.

21.7. Proper Use of Licenced Materials

Any software or other material downloaded onto the Congregation's computers may be used only in ways consistent with the licenses and copyrights of the vendors, authors or owners of the material. Prior written authorization from the Supervisor/Minister is required before introducing any software into the Congregation's computer system.

21.8. Official Communications

Only the Minister, authorized staff, and members approved by the Board of Trustees may communicate on the Internet on behalf of the Congregation. Any account established on behalf of the Congregation must be authorized with all access information, including passwords, communicated to and maintained by the Congregation. Employees may not express opinions or personal views that could be construed as being those of the Congregation.

21.9. Use of Personal Resources in Employment

With prior authorization, you may use your own personal electronic devices (computers, tablets, phones, etc.) for work related purposes.

You assume all risk for this use, including risk arising from virus or malignant software or physical damage to the device.

Any files or software belonging to the Congregation may only be downloaded and used for Congregation related work provided the employee is given express written permission from the Congregation.

In addition, upon employment termination for any reason, you agree to give the Congregation access to any personal resources used, to allow the Congregation to retrieve and/or delete all Congregation files and documents from them. In the event that the Congregation does not request such access, then you agree to promptly delete any and all Congregation related documents or data (and copies thereof) from any such resources.

You agree to provide the Congregation with immediate notice should a personal device containing Congregation software or files be lost or stolen.

22. Use of Personal Vehicle

The Congregation does not own any vehicles. Therefore, from time to time, you may need to use your own vehicle for congregation-related business.

22.1. Pre-Approval Required

You are required to receive approval to use your own vehicle prior to using it, this includes approval of all passengers. Failure to do so may result in a denial of reimbursement of related expenses.

22.2. Compliance with Local Requirements

You are required to be licensed to drive and your vehicle must be properly registered and insured. You are also required to comply with all local regulations, including use of mobile phones for texting or voice communications while operating the vehicle.

22.3. Reimbursement of Expense

You will be reimbursed for any pre-approved use of your personal vehicle according to the Congregation's reimbursement policy, as described in Section M, 8 after a properly submitted request.

22.4. Non-Reimbursable Expense

The Congregation will not reimburse you for the following:

- 22.4.1. Parking tickets;
- 22.4.2. Traffic violations;
- 22.4.3. Damage to your vehicle.

23. Safety and Accidents

The safety of employees, members, friends, and visitors is a primary concern of the Congregation.

23.1. Duty to Participate

The Congregation expects that you will abide by accepted safety standards and any other Congregational policy regarding safety of children and youth, disruptive conduct or any other safety related policies at all times. You should know the whereabouts of fire extinguishers, first aid kits, and defibrillators.

23.2. Duty to Report

If you observe an unsafe condition, equipment, or practice you must report it immediately to your Supervisor or the Minister. This includes all on-the-job accidents or injuries you may incur, no matter how minor. In the event of a fire or other emergency, the fire department and/or other emergency services should be called immediately, and all staff and members of the congregation should leave the premises.

24. Personal Property

The Congregation is not responsible for damage to or loss of personal property, including loss or damage to vehicles or other property in or on congregation property. You should report any lost items to your Supervisor or the Minister so that the item can be returned if it is found. If you find an item, it should be immediately turned in to the Congregation's Lost and Found.

25. Representing the Congregation in the Media

All requests for information on behalf of or regarding the Congregation from newspapers, television and radio media should be directed to your Supervisor or the Minister. 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?"

26. Job Performance, Conduct, Supervision Feedback and Difficulties

The Congregation wants you to be successful at your job. Our success as a Congregation is related, in part to your success as an employee. The policies in this part hope to guide us to that sort of mutual success.

26.1.

26.1.1. Delivery of Position Description

You are entitled to and shall be provided with a Position Description that contains a summary of duties and responsibilities. Of course, it is impossible to list or to describe all of the duties of a particular job.

26.1.2. Approval, Modification and Amendment of Position Descriptions

From time to time, changes in jobs will occur to reflect temporary or long-term changes in staffing or operational needs. The Board of Trustees shall retain sole responsibility for approving, modifying and amending Position Descriptions.

26.1.3. Duties Not Specifically Mentioned in your Position Description

Please keep in mind that your Supervisor or the Minister has the authority to assign duties, responsibilities, or functions to you even though the duties have not been yours in the past or are not specifically mentioned in your Position Description.

26.2. Feedback on Performance

On a regular basis, your Supervisor or the Minister will meet with you to review your job performance, goals and priorities, assessing needs, and working through challenges.

Any feedback your Supervisor or the Minister may have should be discussed directly with you. This feedback may be formal and documented or it may be informal and verbal. Documented reviews will be maintained in your Personnel File as described in Section 14 of this Part.

You are entitled to at least one formal, documented review per year, to which you may choose to also file a rebuttal as permitted in Section 14 of this Part.

26.3. Difficulties on the Job

The Congregation expects and bases its assumption of continued employment on the Congregation's needs and your ability to satisfy performance and conduct standards.

From time to time it may happen that your performance does not measure up to the standards of the job established by the Congregation, or where you do not conform to work or conduct expectations. In such cases, the Congregation will strive to help you to succeed by asking your Supervisor to become more involved in your work.

We hope problems will be resolved at an early stage with open communication between you and your Supervisor or the Minister. When improvements are necessary

in your conduct or performance, the Congregation will attempt to give you written advance notice of the problem, how you might resolve the problem and whether or not the problem puts your continued employment with the Congregation in jeopardy.

However, because of the circumstances or the nature and seriousness of the conduct or performance deficiencies involved, your employment may be immediately terminated without prior notice.

26.4. Standards of Conduct

26.4.1. Congregational Expectations

The Congregation expects that you will conduct yourself in a manner consistent with the highest standards of professional conduct conducive to creating a harmonious and pleasant work environment. This includes courtesy, respect, and working collaboratively and cooperatively, demonstrating the characteristics of high performing team members. As a staff of professionals in whom trust and power have been placed, you are a member of a team which has been called to be faithful both morally and legally to upholding professional relationships. You must never abuse the authority of your position by manipulating others to satisfy personal needs, or engage in any exploitative relationship that abuses the power and damages the trust that has been placed in you.

The Congregation seeks to provide the highest quality of service and support to its members. Thus, poor work habits, such as careless work, failure to complete assignments on time, or a failure to follow policies, procedures or instructions from duly authorized Supervisors or the Minister are unacceptable.

26.4.2. Unacceptable Conduct

Certain guidelines must be observed by all employees to protect the integrity of the congregation. These examples are intended only as a guide and are not all-inclusive.

26.4.2.1. Willful violation of any of the Congregation's Policies;

26.4.2.2. Continued failure to perform work in a manner acceptable to the Congregation;

26.4.2.3. Absenteeism or tardiness;

26.4.2.4. Leaving work without permission;

26.4.2.5. Failure to report absences as required;

26.4.2.6. Discrimination, harassment or retaliation described in this Manual;

- 26.4.2.7. Unauthorized possession of weapons;
- 26.4.2.8. Disclosure of confidential information;
- 26.4.2.9. Smoking in unauthorized areas;
- 26.4.2.10. Failure to report-on-the job injuries;
- 26.4.2.11. Working another job while absent;
- 26.4.2.12. Failure to accurately complete or permitting another person to complete the employee's timecard;
- 26.4.2.13. Theft or dishonesty;
- 26.4.2.14. Falsifying records or information (or misuse or unauthorized manipulation of any computer or electronic data processing equipment or system);
- 26.4.2.15. Falsifying or misleading the Congregation about your credentials, experience or education;
- 26.4.2.16. Discourteous or disrespectful treatment of others;
- 26.4.2.17. Taking Congregation property without paying for it or without written permission;
- 26.4.2.18. Reckless, careless or unauthorized use of Congregation property, equipment or materials;
- 26.4.2.19. Improper or profane language;
- 26.4.2.20. Violation of any other Congregation policy or the standards of conduct generally applicable to a professional and respectful workplace.

26.4.3. Effect of Violations

Violations may result in disciplinary measures including verbal warnings, written warnings, or termination.

In certain cases, most notably in cases of gross misconduct, which includes actions or statements which are intentional, wanton, willful, deliberate, reckless, or in deliberate indifference to an employer's interest, termination may be immediate.

27. Separation of Service

27.1. Notice

The Congregation requests that you provide at least one month's notice of your intent to voluntarily terminate your employment with us to allow for adequate planning and a smooth transition without undue strain on other staff.

27.2. Severance Pay

- 27.2.1. If you voluntarily terminate your employment, you are not eligible for severance pay.
- 27.2.2. If your employment is involuntarily terminated by the Congregation for reasons unrelated to your work performance or your conduct, you are eligible for 2 weeks of severance pay for each year of employment up to a maximum of 16 weeks.
- 27.2.3. If your employment is terminated for poor performance or as a result of your conduct which is *not* considered egregious or serious by the Board of Trustees and that termination occurs on or *before* the second anniversary of your date of employment with us, you are eligible for 2 weeks severance pay.
- 27.2.4. If your employment is terminated for poor performance or as a result of your conduct which is *not* considered egregious or serious by the Board of Trustees and that termination occurs on or *after* the second anniversary of your date of employment with us, you are eligible for 2 weeks severance pay, plus one additional week of severance for each year of service up to a maximum of 6 weeks.
- 27.2.5. If your employment is terminated for poor performance or as a result of your conduct which is considered egregious or serious by the Board of Trustees you are not eligible for severance pay.
- 27.2.6. In all cases, a week of severance pay shall be calculated as the average weekly pay actually paid to you over the immediately preceding eight payroll cycles, including vacation, sick, personal and other forms of paid time off.

27.3. Health Benefits

27.3.1. Voluntary Termination

If you voluntarily terminate your employment, you may be eligible to continue your health insurance under the provisions of COBRA (Consolidated Budget Reconciliation Act of 1985).

27.3.2. Involuntary Termination without Gross Misconduct

If your employment is involuntarily terminated and it is the determination of the Board of Trustees that your conduct did *not* involve conduct that was intentional, wanton, willful, deliberate, reckless, or deliberate indifference to the Congregation's interest, you may be eligible to continue your health insurance under the provisions of COBRA (Consolidated Budget Reconciliation Act of 1985).

27.3.3. Involuntary Termination with Gross Misconduct

If your employment is involuntarily terminated and it is the determination of the Board of Trustees that your conduct did involve conduct that was intentional, wanton, willful, deliberate, reckless, or deliberate indifference to the Congregation's interest, you are not eligible to continue your health insurance under the provisions of COBRA (Consolidated Budget Reconciliation Act of 1985).

27.4. Paid Time Off

Regardless of whether your termination was voluntary or involuntary or whether or not it involved gross misconduct or not, you will not be paid for any accrued paid time off.

27.5. Acknowledgement

Each time you receive this document, either in physical or electronic form, you are required to acknowledge receipt in writing. In so doing, you further acknowledge that it is your responsibility to read this Part of the Manual and to comply with the policies, practices and rules of the Congregation as outlined herein.

28. Grievance Procedure

28.1. Eligibility

You may file a grievance according to the process below.

28.2. Procedure

28.2.1. Level 1

You shall informally discuss the problem with the Minister and you shall identify the problem as a grievance or potential grievance within 15 calendar days after the cause of the grievance,

28.2.2. Level 2

If you are not satisfied with the outcome of the discussion with the Minister, then you may, within 15 calendar days of the discussion with the Minister, submit a written statement of the problem and the requested solution to the President of the Board of Trustees, with a copy to the Minister.

28.2.3. Level 3

The Board shall grant you time on its next Board meeting agenda to present your grievance. The Board may choose to hear your grievance in executive session. The Board shall respond to your grievance presentation. After the presentation and response, the Board may meet in executive session—with or without you present—to discuss your grievance and the Board's decision. The Board shall render its written decision within 15 calendar days of the meeting at which your presentation was made. The Board's decision is final.

PART L: THE CONGREGATION AS AN EMPLOYER

1. Hiring Process

When a position for employment is identified as available the Board of Trustees will consult the Minister and other stakeholders to develop and post an advertisement to recruit applicants. The advertisement should list the job title, overview of responsibilities, and salary.

The Board of Trustees, in consultation with the Minister and other stakeholders will identify viable applicants and schedule interviews.

Applicants not being considered will receive a letter from the Board within 10 (ten) days of application advising the applicant that they will not be considered.

Initial interviews will be conducted by one Board member, the Minister, and one relevant stakeholder as a group interview. During this interview the group will gather relevant experience and work history, outline the position description, and ask relevant questions. The group will request three (3) personal references and check them. Follow-up interviews may be required.

Once interviews complete and references have been checked for applicants being considered, the Board President will convene the group conducting the interview to make final recommendations to the Board of Trustees. The Board of Trustees will then make a decision to accept or decline the recommendation within seven (7) days of its receipt. If declined, the applicant will be notified of the Board's decision by the President within three days and the group will begin the hiring and interviewing process for a second round. If accepted, the applicant will be notified of the Board's decision by the President within three (3) days and schedule a time to participate in orientation. The President will follow-up with a letter of hire detailing start date, Position

Description, naming the direct supervisor, salary, and benefits if applicable within three (3) days of notifying the applicant.

2. Employment of Members and Members Family

The Board of Trustees, as a matter of policy, will decline consideration for employment if the potential employee/contractor is a member of the congregation, is related to a member of the congregation, is the spouse or significant other of a member of the congregation, or has participated in the activities and services of the church for the past two (2) years as a former member or friend of the congregation.

3. Compensation And Salary

3.1. Budget

Each employee's compensation shall not exceed the amount budgeted for the position by Congregational vote at the time of approval of the budget.

3.2. Basis for Setting Compensation

The Minister, Board of Trustees, and Finance Committee shall rely on UUA compensation guidelines, which describe a basis for the minimum, middle, and maximum ranges. The guidelines state that the minimum range is appropriate for employees new to the position with little or no experience in the job. The recommendations further state that, presuming satisfactory evaluations, an employee could expect to move to the middle range after approximately five years in the position. The employee could expect to move to the maximum range after approximately ten years in the position. *Note: Meeting UUA guidelines is a high priority, but not a guarantee, as compensation is subject to budgetary limitations.*

3.3. Process for Non-Ordained Employees

3.3.1. The Minister submits salary recommendations for each employee they supervise to the Finance Committee in March of each year.

3.3.2. If the Finance Committee differs with the Minister regarding the recommendation, it shall present the Minister's recommendation along with a rationale for their concern when it makes its recommendations to the Board of Trustees.

3.3.3. The Finance Committee will then present compensation recommendations to the board as part of the proposed annual budget, stating the recommendations made by the Minister (for non-ordained Employees) and the committee on ministry (for the Minister).

3.3.4. Once approved compensation will be clearly communicated to all employees on or before the effective date of the change in compensation.

3.4. Process for the Minister

The Minister will negotiate changes to salary directly with the Board of Trustees (or a subset thereof, as determined by the whole Board), who will communicate those changes to the Finance Committee in a timely manner to be adopted into the budget cycle.

4. Whistleblower Protections

4.1. The Congregation prohibits retaliation against employees or other persons who in good faith report legal or ethical concerns.

4.2. If you have experienced retaliation for making a report, you should immediately inform your Supervisor or the Minister. If the retaliation is from your Supervisor or the Minister, then you should inform the President of the Board of Trustees.

PART M: FINANCIAL POLICIES

1. Purpose

The purpose of this Policy is to provide congregational leaders with guidance in fulfilling certain duties.

This Policy describes a process whereby the Congregation may realize its goals and objectives by ensuring a timely organized system of checks and balances for maintaining accurate financial management by the Congregation.

It has been established with the intent to be and remain in compliance with the bylaws, policies or procedures of 1stUUPB and is designed to work in conjunction with them. If any term or condition of this Policy should conflict in any way with bylaws, the bylaws shall prevail.

2. Fiscal Year

The fiscal year of the Congregation shall be governed by Section 10.1 of its By-Laws. The Administrator will close out the fiscal year on the accounting system after all adjustments are made.

3. Audit

An annual audit shall be conducted in accordance with the congregational by-laws (Article 10).

4. Banking

- 4.1. All banking relationships shall be approved by the Board.
- 4.2. 1stUUPB will maintain a minimum of four accounts for specific purposes.
 - 4.2.1. The first, which will be referred to as the "Operating Account", shall be used for paying bills including salaries and expenses of the congregation. All revenues, grants, and unrestricted donations received shall be deposited into this account.
 - 4.2.2. The second, which will be referred to as the "Merchant Account", shall have a debit card linked to it in the event one is needed for purchases. The funding for this account shall come from online contributions from Breeze. The Administrator shall be responsible to manage the account such that the daily balance shall be maintained at an amount greater than \$1,500 if, at the end of the month, the balances were to exceed \$3,000, the Administrator shall transfer the excess into the Operating Account.
 - 4.2.3. The third, which will be referred to as the "Restricted Account", shall be dedicated to off-budget funds committed to specific purposes, as approved by the Board. Funds for any special off-budget purpose, whether a special collection or a donation earmarked for a specific purpose, will be deposited in this account, and the related expenditures will be made out of this account.
 - 4.2.4. A fourth account, which shall be referred to as the "Minister's Discretionary Account", shall be used for cash needs at the discretion of the congregation's minister, save that the account shall not provide any personal benefit to the minister or their family. This account may be funded from the annual budget, special collections and/or outside use revenue. The Treasurer shall, annually review disbursements from the account to ensure compliance with the non-self-benefitting provision of this paragraph.

4.3. Reconciliation

All bank accounts shall be reconciled monthly by the Administrator. The Treasurer shall review and approve all bank reconciliation reports. The Administrator shall be responsible for retaining the reports.

4.4. Checks

- 4.4.1. The Administrator will issue checks according to a schedule approved by the Treasurer, but no less frequently than monthly.

- 4.4.2. Congregation checks are two voucher pre-numbered forms, the stock is kept in a locked, secured cabinet.
- 4.4.3. The Administrator shall mutilate voided checks by cutting out the signature section and a portion of the account number. Void checks are filed under Void Checks in the Accounts Payable vendor files.
- 4.4.4. The check voucher, payment record, is stapled to the payment request and all backup.
- 4.4.5. The Board of Trustees shall periodically designate no fewer than four Authorized Signers.
- 4.4.6. Payment by electronic transfer or by check with one signature is authorized for the following categories/vendors:
 - 4.4.6.1. utilities;
 - 4.4.6.2. payroll;
 - 4.4.6.3. pension and benefit obligations;
 - 4.4.6.4. landscaping;
 - 4.4.6.5. security/fire alarm system;
 - 4.4.6.6. housekeeping;
 - 4.4.6.7. maintenance contracts;
- 4.4.7. All checks not listed in 4.4.6 over \$1,000.00 require two authorized signatures. Checks not listed in 4.4.6 equal to or less than \$1,000.00 require only one authorized signature.
- 4.4.8. No signed blank checks are permitted.
- 4.5. Outstanding Checks
 - 4.5.1. The following procedure will be followed in the process of identifying outstanding checks and resolving their status:
 - 4.5.1.1. The Administrator, during the normal monthly reconciliation process of bank accounts, will identify any outstanding checks older than 6 months.
 - 4.5.1.2. The Administrator will contact the congregation member who initially requested the expenditure to verify that payment was forwarded to the payee if applicable.

- 4.5.1.3. The Administrator will attempt to contact the payee in order to find out why they didn't cash the check.
- 4.5.1.4. If the Administrator was successful in determining why the payee didn't cash the check and the payee requests a reissued check, the Administrator shall, with the approval of the Treasurer, stop payment on the original check and reissue a replacement.
- 4.5.1.5. If the Administrator was successful in determining why the payee didn't cash the check and the payee does not request a reissued check, the Administrator shall, with the approval of the Treasurer, stop payment and void the original check.
- 4.5.1.6. If the Administrator was not successful in determining why the payee didn't cash the check, the Congregation will hold the unclaimed property for a period consistent with Florida Statute, at which point, if still unclaimed, the congregation will remit to the State of Florida in accordance with the then-current state policy as required.
- 4.5.2. The Treasurer will review the list of all outstanding checks no less frequently than annually.

4.6. Charge Cards

- 4.6.1. This policy relates to the use of any and all charge cards, (including but not limited to debit cards and credit cards), vendor charge cards/accounts and other credit cards provided by 1stUUPB to its employees (herein referred to collectively as "Charge Cards") for use according to these policies.
- 4.6.2. Acceptable Uses, Limits and Procedures
 - 4.6.2.1. Charge Cards shall be used solely for official 1stUUPB business. Therefore, Charge Cards shall not be used for personal or private business purchases.
 - 4.6.2.2. Obtaining cash back from the Charge Cards is prohibited.
 - 4.6.2.3. Authorized use of Charge Cards shall be limited to the person whose name appears on the face of the Charge Card (hereinafter referred to as a "Card Holder") or a person who is specifically authorized by the President or the Treasurer of the congregation to use the Card (also referred to as a "Card Holder"). Charge Cards shall not be loaned to other individuals.

- 4.6.2.4. The Board of Trustees shall on at least an annual basis publish a list of Authorized Charge Card user(s) for each account. That list shall be maintained internally and coordinated with the Charge Card Issuer. The Administrator should be an Authorized user for each account.
- 4.6.2.5. The person to whom the card is provided shall keep the charge card in a secured location when not in use.
- 4.6.2.6. The Administrator shall maintain a list of all accounts for which the Congregation has either charge cards or charge authority and a list of the names of each individual with charge authority on each account.
- 4.6.2.7. Intentional misuse or fraudulent abuse of any Charge Card may result in disciplinary action, up to and including dismissal and/or criminal sanctions. In addition, the authorized Card Holder shall promptly reimburse 1stUUPB of any unacceptable purchases, including through the deduction of these charges from the employee's salary and/or deferred benefits, i.e. vacation leave, to the extent allowable by law.
- 4.6.2.8. Reward Cards: In some instances, 1stUUPB may receive points from its vendors for business activity (e.g., AT&T provides such points for telephone use). Those points may be converted to reward cards in the form of Visa or MasterCard charge cards with specified dollar amounts. These cards belong to 1stUUPB, and should be retained under the control of the Treasurer, as administered by the Administrator.
- 4.6.3. Liability for Payment: 1stUUPB is liable for all authorized charges made by its employees using Charge Cards.

4.7. Revenue/Deposits

- 4.7.1. All cash, checks and other revenue and contributions received in the mail are opened, receipted, restrictively endorsed and deposited by the Administrator into the Operating Account as soon as feasible.
- 4.7.2. Any revenue received electronically will be receipted by the Administrator into Quickbooks.
- 4.7.3. Checks and cash received as part of a Sunday service or other event shall be counted by two members of the congregation. The Administrator shall receipt, restrictively endorse, and deposit these funds into the appropriate account, as described in 4.2.

4.7.4. The Treasurer monitors the monthly cash flow and account balances and informs the Board of Trustees when funds are low.

4.7.5. Any undeposited cash or checks shall be locked up in a location established for this purpose.

5. Mail

5.1. Checks and other revenue and contributions and invoices and requests for payment received in the mail shall be opened, received and filed by the Administrator (as part of their responsibility for opening all mail) for processing.

5.2. The Administrator is responsible for taking outgoing mail to the Post Office or postal drop box.

6. Accounting Methodology

6.1. 1stUUPB uses Cash basis of accounting and utilizes Quickbooks to record all transactions including revenues, expenses, accounts payable/receivable, operating, reserve and restricted accounts and security deposits.

6.2. Donations are recorded in the Breeze Church Management System.

7. Procurement

7.1. "Goods" shall be defined herein as any materials deemed necessary to the proper operation of the Congregation which do not require professional services, expertise and permits from non-employees or non-volunteers to install, adapt or implement.

7.1.1. The Congregation strives to maintain a balance between the cost effectiveness and the environmental impact of products and materials purchased. When feasible, 1stUUPB will attempt to purchase products and materials made with recycled content.

7.2. "Services" shall be defined herein as any goods required to make repairs or renovations to any Congregational assets and the necessary professional services, expertise and permits required to install, adapt or implement those goods.

7.3. Non-Emergency Procurement of Routine Goods: Any authorized agent of the congregation [which may include (but is not limited to) employees and volunteers] is authorized to procure duly approved goods from any Approved Vendor (Reference Section 7.51 & 7.5.2 of this document).

7.4. If there is no Approved Vendor that can fulfill the procurement needs, effort shall be made through the Administrator to make the purchase using our sales-tax exemption.

7.5. Vendor Selection Process: Goods

7.5.1. Goods from any licensed retail or wholesale vendor, with preference to those who recognize our sales tax-exempt status.

7.5.2. In selecting Goods and their vendor, consideration and preference should be given to Goods and vendors who:

7.5.2.1. Appear to or are known to operate in accordance with the Mission of the Congregation;

7.5.2.2. Appear to or are known to operate in accordance with the Seven Principles of Unitarian Universalists;

7.5.2.3. Can provide Goods reasonably expected to be cost-efficient, when considering both the price and the expected service time of the goods being purchased;

7.5.2.4. Can recognize and honor the Congregation's sales-tax exemption.

7.6. Procurement of Routine Services: Any authorized agent of the congregation [which may include (but is not limited to) employees and volunteers] is authorized to procure duly approved services from the list of Approved Vendors (Reference 7.7.1) for repairs or Services that are routine, recurring or expected.

7.7. Vendor Selection Process: Routine Services

7.7.1. The Board of Trustees shall publish from time to time a list of Approved Vendors.

7.7.2. The Finance Committee shall make recommendations to the Board of Trustees for vendors to be included in the Approved Vendors list. In making its recommendations, consideration and preference should be given to vendors who:

7.7.2.1. Appear to or are known to operate in accordance with the Mission of the Congregation;

7.7.2.2. Appear to or are known to operate in accordance with the Seven Principles of Unitarian Universalists;

7.7.2.3. Have had long-term, mutually beneficial relationships with the congregation, its leaders or members;

7.7.2.4. Can provide services reasonably expected to be cost-efficient, when considering both the price and the expected service time of the goods being purchased;

- 7.7.2.5. Can recognize and honor the Congregation's sales-tax exemption;
- 7.7.2.6. Are licenced by the appropriate local, state or federal licencing agencies;
- 7.7.2.7. Free of conflicts of interest with the congregation or any of its membership;
- 7.7.2.8. Its ability to complete the work within required timeframes;
- 7.7.2.9. Are adequately insured for liability, workmen's compensation and other risks common to their line of work.

7.8. Vendor Management Process: Services

7.8.1. The Finance Committee shall recommend continuation or removal of a vendor from the Approved Vendors list on a schedule that it deems reasonable and in the best interest of the Congregation as long as each recommended vendor is reviewed no less frequently than once every three years. This review should include:

- 7.8.1.1. All the items listed in 7.7.2;
- 7.8.1.2. The quality of the work provided by the vendor since the last recommendation;
- 7.8.1.3. The professionalism of the work provided by the vendor since the last recommendation;
- 7.8.1.4. Any other factors which in the opinion of the Committee serve the best interest of the Congregation.

7.9. Procurement of Non-Routine Services: Procurement of Non-Routine Services, including renovations, replacements or capital improvements is limited to the Board of Trustees.

7.9.1. At its discretion, the Board may delegate the Procurement of Non-Routine Services for which the total cost is expected to be within budgetary limitations AND less than 1% of the Congregation's annual operating budget.

7.9.2. In instances in which the Board delegates the Procurement of Non-Routine Services to a Committee or employee, the vendor shall be selected exclusively from the Approved Vendor List.

7.10. Vendor Selection Process: Non-Routine Services

- 7.10.1. Vendors from the Approved List of Vendors as described in 7.7 are automatically includable;
- 7.10.2. The Board (or its agent) shall solicit up to three quotes for the Non-Routine services to be rendered. These quotes must come from vendors who would reasonably be expected to fulfill the Vendor Selection Process for Routine Services as described in 7.7.
- 7.11. Emergency Procurement of Goods and or Services
 - 7.11.1. Any well-intentioned staff member, member or friend of the congregation who purchases goods or services in emergency conditions shall be reimbursed for any expense incurred.
 - 7.11.2. As soon as feasible, anyone acting according to 7.11.1 shall notify a Board member.

8. Expenditures and Reimbursements

- 8.1. Approval of Non-Recurring Expenditures and/or Reimbursements (Including Reimbursements to Members or Friends):
 - 8.1.1. The Chair of the responsible Committee or Taskforce shall recommend an expenditure using the appropriate form.
 - 8.1.2. The Treasurer of the Board of Trustees may approve or deny any expenditure. The following parameters should be taken into consideration for the decision:
 - 8.1.2.1. Budget
 - 8.1.2.1.1. The Chair of the Committee shall ensure that the expenditure is within their budget;
 - 8.1.2.1.2. The Treasurer shall ensure that the request clearly indicates the budget line item to which the expenditure should be assigned;
 - 8.1.2.2. Compliance with the Procurement Policy (Section 7);
 - 8.1.2.3. No more than three months old;
 - 8.1.2.4. Any pre-approval granted verbally or in writing;
 - 8.1.2.5. Satisfaction with the goods or services procured.
- 8.2. A member or friend of the congregation may procure goods or services and request reimbursement for such expenditures in compliance with 8.1.

- 8.2.1. It is the member or friend's responsibility to secure, complete, receive approval for and submit the then-appropriate reimbursement request to the Administrator.
- 8.2.2. Reimbursement of Member/Friend Incurred Expenses: The Administrator shall reimburse all completed, approved and submitted reimbursement requests by check according to the then-current check-writing calendar.
- 8.3. Approval of Recurring Expenditures
 - 8.3.1. The Treasurer of the Board of Trustees shall maintain a list of Authorized Recurring Expenses. The Administrator is authorized to pay Authorized Recurring Expenses in accordance with Section EXCEPT in the following cases
 - 8.3.1.1. The invoice upon which the recurring expense has been billed contains other, non-recurring expenditures;
 - 8.3.1.2. In the judgment of the Administrator, the invoice appears to be outside of the normal range of recurring expenditures for this vendor (excluding late charges);
 - 8.3.1.3. In the judgment of the Administrator, the invoice appears incorrect (including incorrect taxation);
 - 8.3.1.4. The Administrator has been informed by the Treasurer of the Board of Trustees that the expenditure has been temporarily removed from the list of Authorized Recurring Expenses by the Board of Trustees.

9. Travel

- 9.1. Reimbursable local, regional or long-distance travel expenses must be pre-approved either verbally or in writing by the Treasurer or the President.
- 9.2. Pre-Approved travel expenses shall be reimbursed in accordance with Section 8 of this document.
- 9.3. Travelers may request a cash advance for projected out of pocket costs. Authorized requests must be received two weeks prior to travel and will be issued in check form.
- 9.4. The Board of Trustees shall annually approve standard reimbursement rates for meals and approved use of personal vehicles (business and charity rates).
 - 9.4.1. In the event that the Board of Trustees fails to maintain standard

reimbursement rates at the time of approved employee travel, the reimbursement rates for travel meals shall be the most recently approved rate, increased by 10% per fiscal year elapsed since the publication of an approved employee meal rate.

- 9.4.2. In the event that the Board of Trustees fails to maintain standard reimbursement rates at the time of approved volunteer travel, the reimbursement rates for approved use of personal vehicles shall be the standard mileage rate for transportation or travel expenses as published by the Federal Internal Revenue Service at the time of the travel for all miles of business use. Reimbursement for employees shall be at the business use rate and reimbursement for volunteers shall be at the charity rate. See Section 4 of IRS Revenue Procedure 2019-46.

10. Payroll

- 10.1. All payroll, compensation and benefit issues will be made in accordance with the Congregation's Personnel Policy.
- 10.2. 1stUUPB has contracted with Quickbooks payroll service to provide all payroll related services. Quickbooks shall be the system of record for payroll administration.
- 10.3. Time sheets shall be signed by the employee and are submitted biweekly.
- 10.4. Time sheets shall be approved by the Minister, or in the absence of a Minister, the President of the Board.
- 10.5. The Administrator manages employee records and deduction authorizations in Quickbooks payroll software.
- 10.6. The Treasurer, or their designee, reviews the preliminary payroll report and the supporting notes and written documentation for any changes made to payroll and reviews and approves the payroll.
- 10.7. Once the Treasurer has approved the payroll, the Administrator authorizes payment through Quickbooks.
- 10.8. Net pay will be processed and automatically direct deposited into the employee's account.
- 10.9. All employee-originated changes to deduction authorizations or addresses must be in writing and/or on the appropriate form and submitted to the Administrator. The Administrator shall retain copies of change requests and forms.
- 10.10. All employer-originated changes to pay rates or benefits must be specifically authorized by the Treasurer before they become effective.

11. Loans of Congregational Money

1stUUPB does not loan money except to itself or related entities.

12. Financial Reporting

- 12.1. The Treasurer shall direct the Administrator to prepare the monthly Budget v. Actual & Transaction Detail reports within 10 days from the close of the prior month.
- 12.2. Pursuant to the By-Laws 8.9.3(5), the Treasurer shall validate, publish and circulate monthly Budget v. Actual and a Treasurer's report, which includes bank account balances and budget reports in advance of the next scheduled Board of Trustees Meeting. The distribution of this report shall include: Board of Trustees, Finance Committee & Endowment Committee.

13. Government Reporting

- 13.1. The Administrator shall prepare and file all required quarterly reports, (including Florida RT-6 and IRS Form 941) **with the** appropriate government agency **after review by the** Treasurer.
- 13.2. The Administrator shall prepare and file all required annual reports, (including IRS Form 1099 IRS Form W2, IRS Form W3) with the appropriate government agency after review by the Treasurer.

14. Investments

- 14.1. The Endowment Committee shall be the only congregational entity permitted to invest funds in vehicles other than savings, checking or money market accounts.
- 14.2. The Treasurer will notify the Chair of the Endowment Committee when funds need to be transferred from an investment account into the church's Operating Account.
- 14.3. The Chair and the Financial Secretary are authorized to make investment transfers to the church's checking accounts. They are authorized to make changes to the investment accounts pursuant to approval by the Endowment Committee.
- 14.4. The Chair of the Endowment Committee shall notify the investment advisor(s) at the end of each congregational year who the authorized persons will be for the upcoming year starting May 1st.
- 14.5. The Endowment Committee and the endowment shall be governed by the Congregation's bylaws (Articles 11 and 12) and the Congregation's Investment

Policy Statement whose provisions will supersede any policy in this manual.

- 14.6. The use of any unrestricted gifts - as defined by gifts donated without any specific purpose - shall be determined by the Board of Trustees. Any funds not used or allocated to a project or expense within 120 days of receipt shall be added to the Endowment's Permanent Fund.

15. Record Maintenance and Retention

- 15.1. 1stUUPB will retain financial records in accordance with Internal Revenue Service guidelines, grant funding requirements and generally accepted accounting procedures. The table in 15.5 provides current guidance for compliance with these guidelines and procedures.
- 15.2. Current financial, personnel and program participant records are secured on site in locked cabinets and/or locked offices. Computer generated records are password protected and backed up on a cloud server as protection against loss.
- 15.3. Closed prior year records may be boxed and moved to a secured offsite storage facility.
- 15.4. Monthly investment statements, trade confirmations, proxy statements and other correspondence will be made available electronically to the Chair and the Financial Secretary of the Endowment Committee by the investment advisor(s). The Financial Secretary shall email the statements to the Treasurer and the Administrator. The Treasurer will use the account balances to draft their report to the Board of Trustees and the Administrator will print out a hard copy to keep in the church office for access by members.
- 15.5. Financial Record Retention Guidelines

Type	Description	Time
Accidents and Injuries	Worker's Compensation Records	Settled +6
Accounts Payable	Claims and Disbursements Records, Expenses, Accounting, Bookkeeping, Paid Invoices, Finance, Purchasing	7
Accounts Receivable	Membership contributions, offering records	7
Administrative & Tax Records	Annual Report, Tax-Exempt Certificates Form 990, Certification of Corporate Status	Permanent

Administrative & Tax Returns	Florida RT-6 and IRS Forms 941, 945, 1099, W2, W3, etc.	7
Audit Records		Permanent
Bank Statements		7
Bequest and Estate papers	Wills, gift agreements, bequests	Permanent
Budget Records	Annual Budget	Permanent
Canceled Checks	Cashed Checks	7
Certificates of Deposit,	Including canceled CD's	Active + 3
Contracts	service contracts	Active + 4
Contracts	Repairs, lease, loans	Active +6
Contracts	Construction	Permanent
Employee Authorizations & other Payroll Records	Pensions, insurance and tax withholding	Active + 4
Employment Eligibility Verification Forms	(I-9)	Active + 4
Employment & Benefits Policies, Procedures & Records		Permanent
Employment & Benefits Policies, Procedures & Records	Rejected and Incomplete Employment Applications	2
Insurance Policies		Expiry +5

Invoices: General		7
Invoices: Construction		Permanent
Property Files	Deeds, Title papers, repair history, permits, Lease Agreements, Conveyances, Covenants, Easements, Real Estate Surveys, Plot Plans and related correspondence.	Permanent

16. Disclosure of Records

Certain financial information maintained by 1stUUPB will be made available to any Voting Member of the congregation upon request. Requests shall be made in writing to the administrator who shall respond in a timely manner. This information excludes personnel and personal information, pledge and contribution information and any information to which access may be restricted by federal or state laws.

17. Cash and In-kind Contributions

17.1. Giving outside of the annual budget cycle

17.1.1. The Congregation welcomes expressions of interest and financial support, regardless of amount, that will help it further fulfill its mission.

17.1.2. The Board of Trustees shall be the final evaluator of whether or not 1stUUPB shall choose to accept or reject any contributions. Generally, gifts are sought and accepted only for programs and purposes that are determined to be in line with 1stUUPB's mission by the Board of Trustees.

17.1.3. 1stUUPB, its staff and volunteer representatives shall endeavor to assist donors in accomplishing their philanthropic objectives in a donor-centered way. This includes the following features:

17.1.3.1. Confidentiality: Information concerning all transactions between a donor and 1stUUPB shall be held by 1stUUPB in confidence, and may be disclosed only with the permission of the donor or the donor's designee.

17.1.3.2. Anonymity: 1stUUPB shall respect the wishes of any donor offering anonymous support and will implement reasonable procedures to safeguard such donor's identity.

- 17.1.3.3. Responsibility: It is intended that 1stUUPB will faithfully follow any accepted restrictions placed on any gift by the donor.
- 17.1.4. 1stUUPB shall comply with all local, state and federal laws and regulations concerning all charitable gifts it encourages, solicits or accepts. All required disclosures and procedures shall be made and/or followed in a thorough and timely manner.
- 17.1.5. 1stUUPB shall follow then-current IRS regulations at the time of the gift or solicitation.
- 17.1.6. Although 1stUUPB can provide General tax information to potential donors, 1stUUPB shall not provide any opinion to a donor regarding the tax consequences of a specific gift in the receipt. 1stUUPB shall not itself provide legal, tax or financial advice, nor shall it or any of its Officers endorse legal, tax or financial advisors to prospective donors. It will be the responsibility of the donor to secure an appraisal of non-cash contributions (when required by IRS regulations) and to pay for their own advice from independent legal, financial or other professional advisers as needed.
- 17.1.7. When appropriate, 1stUUPB shall seek the advice of legal counsel in matters relating to the acceptance of gifts. Review by counsel is recommended for gifts involving: contracts, such as bargain sales; formation of charitable trusts; and transactions involving potential conflicts of interest.
- 17.1.8. Gift acceptance, as outlined in these policies, is administered by the Board of Trustees, who is authorized to accept all gifts permitted by this policy.
- 17.1.9. The Board shall not accept any gifts that:
 - 17.1.9.1. Are for purposes outside 1stUUPB's mission;
 - 17.1.9.2. Are too restrictive in purpose;
 - 17.1.9.3. Are beyond the Congregation's ability to administer;
 - 17.1.9.4. Are illiquid or their value may be unknown;
 - 17.1.9.5. Require infractions of the law, or Unitarian Universalist Principles;
 - 17.1.9.6. Require actions contrary to Unitarian Universalist Principles;
 - 17.1.9.7. Directly or indirectly restrict the acceptance of gifts from other donors;

- 17.1.9.8. Involve questionable title/ownership of the asset;
- 17.1.9.9. Involve questionable donor competency to transfer an asset in the opinion of the Board of Trustees;
- 17.1.9.10. Made on condition, understanding, or expectation that the property will be loaned to the donor for life or for an extended period of time (i.e. life tenancy).
- 17.1.10. The President of the Board of Trustees shall have the authority to sign planned giving agreements on behalf of 1stUUPB.
- 17.1.11. No person representing 1stUUPB in planned giving shall knowingly serve as trustee, conservator or executor for a donor or prospect without full disclosure to, and authorization by the Board of Trustees.

17.2. Non-Cash Gifts

- 17.2.1. Gifts of non-cash items should be approved by the Board of Trustees prior to delivery or transfer of ownership and/or possession to the Congregation by the donor.
- 17.2.2. It is 1stUUPB's policy to sell non-cash gifts, including publicly-traded securities when received. However, from time to time, the Board of Trustees may determine that ongoing ownership of the asset is in the best interest of the Congregation in fulfilling its mission and may elect to retain the asset in lieu of selling it.
- 17.2.3. Non-Cash Gifts, including real estate and tangible and intangible, non-cash property may be accepted by the Board of Trustees. The following conditions must be met:
 - 17.2.3.1. Prior to acceptance, at least one member of the Board, and one member of the staff must conduct a visual inspection of the property and report to the Board of Trustees.
 - 17.2.3.2. In considering acceptance of the gift and in its consideration of the disposition of the gifted property, the Board should consider the following factors of the property:
 - 17.2.3.2.1. location (if the property is not portable);
 - 17.2.3.2.2. condition;
 - 17.2.3.2.3. marketability/liquidity;

- 17.2.3.2.4. value (including mortgage debt) in relation to anticipated costs;
- 17.2.3.2.5. potential liabilities arising from ownership;
- 17.2.3.2.6. the extent to which the property could enhance 1stUUPB's capacity to fulfill its mission;
- 17.2.3.2.7. estimated income, expenses and cash flow, and
- 17.2.3.2.8. the effect of the property's use or image on 1stUUPB.

17.3. Gifts of Life Insurance

- 17.3.1. 1stUUPB must be named as both beneficiary and irrevocable owner of an insurance policy.
- 17.3.2. If the donor does not elect to continue to make gifts to cover premium payments on the policy, 1stUUPB may: (1) continue to pay the premiums, (2) convert the policy to paid up insurance, or (3) surrender the policy for its current cash value.

17.4. Donors, including Planned gift donors, should specify in writing their wishes with regard to use restrictions and the receiving entity (ie, the congregation or the Endowment). Gifts received without written wishes shall be considered unrestricted gifts and their use and receiving entity shall be determined by the Board of Trustees.

17.5. Acknowledgement of Gifts

- 17.5.1. As it relates to commitments by donors to provide gifts in the future, 1stUUPB generally uses a simple exchange of letters to document gift commitments. These commitments are non-binding on the part of the donor.
- 17.5.2. Cash gifts for which no goods or services have been received including cash received at fundraising events shall be tracked by the Administrator in the Breeze system and reported to donors annually, generally in January.
- 17.5.3. In the event that the donor has, in fact, received goods and/or services in exchange for their donation, 1stUUPB will neither track nor report those contributions to the donor.
- 17.5.4. 1stUUPB shall not determine the valuation of any non-cash gift. Non-Cash gifts, including gifts of real-estate will be valued at the time ownership is transferred to 1stUUPB and receipted according to IRS

regulations current at the time of the gift. The fair market value (net of any encumbrances) of any non-cash gifts shall be determined by an independent, qualified appraiser retained by the donor within three months of the date of transfer, or whatever time span is the then-approved IRS standard.

- 17.5.5. The Administrator shall record in-kind contributions that have been previously approved by the Board of Trustees (or its designate) on a donation receipt form. This form shall indicate the name and address of the contributor and the items donated. The donor is responsible for noting their fair market value.
- 17.5.6. Gifts of publicly-traded securities will be receipted at the average of the high and low market value on the date the donor relinquished control of the assets in favor of 1stUUPB.
- 17.5.7. Gifts of Life Insurance are valued at their cash surrender value on the date of transfer to 1stUUPB and will be receipted according to current IRS regulations. (Note: If the donor contributes future premium payments, 1stUUPB will include the entire amount of the additional premium payment as a gift in the year that it is made.)
- 17.5.8. At its discretion, from time to time, the Board of Trustees may elect to recognize certain gifts by providing an acknowledgment letter any gift, including donors of future gifts (planned giving), thanking them for their gifts up to and including named or commemorative gift opportunities

18. Fundraising Events

- 18.1. Fundraising events must be approved in advance by the Stewardship Committee, which shall also ensure that any necessary licenses are acquired.
- 18.2. In the absence of a Stewardship Committee, the Board of Trustees shall act as the Stewardship Committee.
- 18.3. The receipt of funds, when at an event site, will be by designated individuals who will be provided locked cash boxes and will be accountable for funds received.
- 18.4. The Administrator will account for all funds received and all expenses incurred for each fundraiser or special event from fundraisers or special events in the "Restricted Other" account.
- 18.5. Contributions will be tracked in Breeze and reported to donors as cash donations according to 17.5.

19. Congregational Charitable Giving

- 19.1. The Congregation, from time to time, may wish to make charitable contributions to local, national or global charitable entities which provide certain goods or services which the Congregation believes align with and advances its mission. This policy is intended to provide Members and Friends of the Congregation that a due diligence process has been followed in the selection process for these charitable contributions.
- 19.2. The Congregation's Justice Action Ministry ("JAM") shall make the final determination as to the selection and timing of these contributions and their related contribution drives.
- 19.3. Any group or member of the Congregation may suggest a charitable organization for consideration to JAM. These recommendations shall include:
 - 19.3.1. Organization name
 - 19.3.2. Address, phone number, email address
 - 19.3.3. Organizational status (501(c)3, Foundation, charitable organization, religious organization, etc)
 - 19.3.4. EIN# (Federal tax ID)
 - 19.3.5. Executive Director name and contact information
 - 19.3.6. Name of submitter and title if different from Executive, including contact information.
 - 19.3.7. Website address
 - 19.3.8. Annual report (if available)
 - 19.3.9. Tax Return (if available)
 - 19.3.10. Organization Mission statement
 - 19.3.11. Purpose of the request
- 19.4. Approved List
 - 19.4.1. The Board of Trustees shall publish from time to time a list of approved charitable organizations.
 - 19.4.1.1. Organizations or funds controlled by or managed by the Congregation are automatically approved and shall be included on the Board of Trustees recommended list.
 - 19.4.1.2. Other congregations in good standing with the UUA or any other

recognized denomination as well as organizations accredited by Non-Profits First and organizations controlled by, managed by or associated with the UUA are automatically approved and shall be included on the Board of Trustees recommended list.

19.5. Selection Process

19.5.1. JAM shall make recommendations to the Finance Committee. These recommendations shall include all the information provided by the recommending member of the group.

19.5.2. The Finance Committee shall make recommendations to the Board of Trustees for additional charitable organizations to be included in the Approved list. In making its recommendations, consideration and preference should be given to organizations who:

19.5.2.1. Are approved by JAM.

19.5.2.2. Appear to or are known to operate in accordance with the Mission of the Congregation;

19.5.2.3. Appear to or are known to operate in accordance with the Seven Principles of Unitarian Universalists;

19.5.2.4. For national or global organizations: have reasonably appropriate ratings on any national rating system for charitable organizations.

19.5.2.5. For local organizations: be state licenced

19.5.2.6. Free of conflicts of interest with the congregation or any of its membership.

19.6. Renewal Process

The Finance Committee shall review its recommendations bi-annually and communicate any recommended changes to the list to the Board of Trustees. This review shall include all the conditions and characteristics reviewed in the initial selection process.

20. Holiday Bonus Collection

The Congregation, from time to time, may wish to take a special collection to provide for holiday bonuses for certain employees or professional staff.

20.1. These collections shall follow the same process as other Congregational Giving, except that each employee is automatically considered a member of the Approved List.

- 20.2. The amount of the total bonus shall be 100% of the amount collected for the purpose.
- 20.3. The allocation to each employee shall be determined by the Board of Trustees.
- 20.4. The Bonus shall be made through the payroll system as soon as administratively feasible following the determination of the allocation by the Board.

PART N: DENOMINATIONAL RELATIONS

1. Introduction

The Congregation values its relations with the Unitarian Universalist Association and its related entities.

2. Sending Delegates to UUA General Assembly (GA)

2.1. The Congregation:

- 2.1.1. supports sending as many of our allotted number of Delegates based on our congregational membership annually reported number to GA each year as possible;
- 2.1.2. supports financially supporting some of the costs associated with attendance, in years when the Congregational Budget can support the capital outlay;
- 2.1.3. considers attendance at GA to be a broadening and desirable leadership training experience in general,
- 2.1.4. recognizes the value to the Board and ultimately to the Congregation of the infusion of new ideas and enthusiasm for leadership and for our religion itself,
- 2.1.5. recognizes the importance of being able to take part in voting on resolutions at GA by our congregational delegates,
- 2.1.6. believes that the ability to pay for attending GA should not be a factor in the decision of how delegates are chosen.

2.2. Funding

- 2.2.1. If the Congregation sets aside funds to pay for attendees to GA, that amount shall be allocated to the Leadership Development budget.

2.3. Eligibility

The Board desires to offer financial support systematically and equitably according to the following priorities:

- 2.3.1. Officers of the Board
- 2.3.2. Trustees
- 2.3.3. Committee Chairs
- 2.3.4. All Voting Members (as defined by the By-Laws)
- 2.4. Special Considerations
 - 2.4.1. All allocations to individuals shall be made at the discretion of the Board of Trustees, except that:
 - 2.4.1.1. No one person shall receive GA funding more than once, and
 - 2.4.1.2. No funding shall be provided for more than one person in the same family in the same year.

PART O: SANCTUARY SERVICES

1. Music and Speaking Guests Compensation

- 1.1. The congregation may, from time to time, invite paid musicians or speakers into its sanctuary as part of its worship program(s).
- 1.2. Authority
 - 1.2.1. The Chair of the Sanctuary Service Group shall be responsible for selecting speakers, negotiating their rates of pay within UUA guidelines and managing that portion of the Group's budget.
 - 1.2.2. The Chair of the Music Committee shall be responsible for selecting performers, negotiating their rates of pay within UUA guidelines and managing that portion of the Committee's budget.
- 1.3. Specific Exclusions

The following groups of individuals are generally excluded from receiving compensation for speaking or performing:

- 1.3.1. Members of the Congregation
- 1.3.2. Relatives (including spouses) of Members of the Congregation

- 1.3.3. Individuals who have participated in the activities and services of the church for the past two (2) years as a former member or friend of the congregation.

PART P: FACILITIES

1. Animals

In order to maintain hygiene standards, animals, with exception of service animals, are not allowed inside of any buildings on campus where food is being served (Ministers Hall). Service animals must be well-trained, appropriately leashed, and not allowed to roam freely. Members and friends are asked to rely on the event leader for direction when considering being accompanied by a pet.

2. Rental

2.1. Priorities

In case of conflicting requests, the groups will be given priority in this order:

- 2.1.1. Scheduled Congregational functions;
- 2.1.2. Regularly scheduled events by regular renters
- 2.1.3. Ad-hoc events sponsored by members
- 2.1.4. Ad-hoc events sponsored by regular renters
- 2.1.5. All other rentals

2.2. Fees

- 2.2.1. The Board of Trustees shall publish a schedule of fees which includes fees for various types of Renters.
- 2.2.2. All Fees shall be paid in advance of the rental.

2.3. General Policies

- 2.3.1. Renters shall be responsible for returning the building, its fixtures and furniture to a presentable, suitable state after their use. This includes:
 - 2.3.1.1. Picking up after themselves
 - 2.3.1.2. Keeping the restrooms clean
 - 2.3.1.3. Emptying trash cans used in the kitchen into the dumpster on campus

PART Q: CONFLICTS

1. Conflicts with Applicable Laws and Statutes

This Manual has been established with the intent to be and remain in compliance with all applicable laws and statutes. If any term or condition of this Policy should conflict in any way with applicable laws and statutes, the applicable laws and statutes shall prevail.

2. Conflicts with the Congregation's By-Laws

This Manual has been established with the intent to be and remain in compliance with the Congregation's By-Laws and is designed to work in conjunction with them. If any term or condition of this Policy should conflict in any way with By-Laws, the By-Laws shall prevail.

3. Internal Conflicts

While every effort has been undertaken to ensure that each provision contained herein is not in conflict with any other provision, it is possible that such a conflict may occur. If such a conflict does occur, the interested party who discovered the conflict should ask an officer of the Board of Trustees or a member of Professional Staff who would be reasonably expected to be able to resolve the conflict to lend guidance. Efforts to resolve the conflict should be undertaken by the Board of Trustees.

PART R: AMENDMENT

1. Process

- 1.1. This Manual may be amended or restated in its entirety from time to time as conditions change or to comply with changes in law, statutes or the Congregation's By-Laws.
- 1.2. Each Part of this Manual may contain its own process for Amendment or Restatement.
- 1.3. In the event that a Part of this Manual does not carry any specific process for its amendment, the Board of Trustees shall be able to amend this document by a simple majority vote.

2. Prior Versions

Upon amendment or restatement, prior versions of the Manual shall be considered obsolete and the Congregation's practices shall be modified to comply with the amended or restated Manual.

PART Z: APPENDIX

Acknowledgement of Receipt of First Unitarian Universalist Congregation of the Palm Beaches Personnel Policies

I have received a copy of the Congregation's Policies and Procedures Manual, which includes its Personnel Policies. I understand that the Manual provides a summary of the Congregation's operations and Personnel Policies and its expectations regarding my conduct. I understand I am to become familiar with its contents.

I understand that, except as may be required by state law, my employment with the Congregation is at-will. This means that neither I nor the Congregation is committed to an employment relationship for a specific period of time and the employment relationship may be terminated by me or the Congregation at any time, for any reason. The language used in this Manual and any verbal statements of management are not intended to constitute a contract of employment, either express or implied, nor are they a guarantee of employment for any specific duration.

I understand that no representative of the Congregation, other than the President of the Board of Trustees, has the authority to enter into an agreement of employment for any specified period and any such agreement must be in writing, signed by the President and me. We have not entered into such an agreement in this document.

Further, I understand that the contents of this Manual are summary guidelines and therefore cannot be not all-inclusive. This handbook supersedes all previously issued editions. No oral statements or representations can change the provisions of the handbook or any supplement. Except for the at-will nature of employment, the Congregation reserves the right to revise, delete, or add to any or all of the guidelines mentioned, along with any other procedures, practices, benefits, or other programs of the Congregation. These changes may occur at any time, with or without notice.

I have read and understand the above statements.

Employee Signature: _____

Date: _____

Print Name: _____