UNITARIAN UNIVERSALIST SOCIETY, CORALVILLE, IOWA

UUS SHARED MINISTRY – POLICIES AND PROCEDURES

Revised 4/2023

(minor copyediting done 10/23)

Amendments and additions to this Manual should be sent first to the Board of Trustees Governance Committee for standardization and inclusion.

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SECTION 1: BYLAWS

BYLAWS

Unitarian Universalist Society of Iowa City

Amended 12/19/21

ARTICLE I – IDENTITY

The name of this congregation is Unitarian Universalist Society of Iowa City, Iowa (hereinafter referred to as the Society, or UUS). It was founded in Iowa City in 1841 as the Iowa City Universalists. In 1968 the congregation was incorporated under its current name as an Iowa nonprofit corporation. It is a member of the Unitarian Universalist Association of Congregations.

ARTICLE II – PURPOSE

The purpose of this society is to be a religious community in accordance with the principles established by the Unitarian Universalist Association of Congregations, as guided by the mission statement adopted by the members of this Society.

ARTICLE III – MEMBERSHIP

UUS promotes the full participation of persons in its activities and membership endeavors without regard to race, color, gender identity, gender expression, physical or mental ability, affectional or sexual orientation, age, class, economic status, or national origin.

A. A member of the Unitarian Universalist Society is any person who has followed the appropriate membership preparation process at the time of joining. A member is further defined as someone who affirms the principles of the Unitarian Universalist Association, affirms the UUS covenant of right relations, signs the membership book, participates in UUS programs as able, contributes to the general operating budget annually and aligns with the mission and vision of the Society. The process for joining will be adjusted as appropriate when someone has previously been a member of another UU congregation.

B. Current members shall have voting rights at Society meetings once they have

been amember for at least 30 days.

C. Designation as a Life Member by the Board may be made in recognition of past contributions to the Society.

D. A member's name shall be removed from membership if:

1. The member dies.
2. The member submits a written request.
3. The member has a period of inactivity or lack of contribution to the operating budget for one year and all written procedures have been followed to have the member re-engage with no response.
4. The Board has removed the member by a two-thirds vote for actions that threaten the well-being of the congregation.

E. A former member can re-activate their membership by following the approved procedures to re-activate membership.

ARTICLE IV – MEETINGS AND OF THE SOCIETY

A. Each year, there will be at least two regular meetings of the Society. The Budget Meeting shall be called for the primary purpose of approving a budget. The Elections Meeting will be called in order to elect the Board and elected committees. Meetings shall be called by the Secretary at the direction of the President.

B. A quorum shall be constituted if at least 20% of the members eligible to vote are present A majority of the voting members present shall be required to carry any motion at a regular meeting. The Board may set a higher threshold for approval of important issues.

C. Special meetings of the Society may be called by six members of the Board of Trustees or upon written petition to the Secretary by 15% of the voting members. The purpose of the meeting must be specified, and any actions to be voted on must be communicated in advance. No other business may be conducted at a special meeting.

D. Notice of all meetings shall be communicated directly to all members at least 10 days before the date of the meeting. The notice shall specify the place, time, and business to be transacted at the meeting.

E. Absentee votes may be available to members who cannot attend a meeting due to incapacitation or travel. All absentee votes shall be submitted to the chair of the meeting on an official signed ballot, prior to the meeting being called to order. If the issue is amended during discussion at the meeting, the absentee vote shall not be counted. In specific cases, the Board may decide absentee ballots are not to be allowed for a given meeting. If so, such decision must be included in the notice of the meeting.

ARTICLE V – QUALIFICATIONS FOR NOMINEES; PROCEDURES FOR NOMINATIONS

A. The following leadership positions shall be filled by election by the congregation at an annual Elections Meeting: Trustee, Vice President, Secretary, Treasurer, Endowment Committee member, and Leadership Development Committee member.

B. Only a qualified voting member (who has been a member for at least one year and has served on at least one committee or team) may serve on the Board of Trustees, Leadership Development Committee, or the Endowment Committee. Any qualified voting member may run for any open position.

C. In general, none of the leadership positions may be filled by the same person for more than one consecutive term. However, there might be an exceptional case, where continuity in leadership is needed, when one or more terms of leadership may beextended by a maximum of one year. This requires the approval of a two-thirds majority vote of those in attendance at the Elections Meeting.

D. Terms of office shall begin on July 1. The Board shall have the power to fill vacancies until the next Elections Meeting.

E. There are three methods by which a voting member may seek election to a leadership position:

    1. Nominee: The Leadership Development Committee shall nominate at least one candidate, known as a "nominee," for each open position.

    2. Self-declared candidate: Any qualified voting member interested in serving in a leadership position may declare candidacy by doing the following:

        a. Submitting their name to the Leadership Development Committee by three months prior to the Elections Meeting; and

        b. Submitting to the Leadership Development Committee the signatures of 10 voting members who support that candidate. The deadline for this is one month prior to the Elections Meeting.

    Self-declared candidates will be offered the same preparation, orientation, support, and publicity as nominees, except that nominee shall be designated as such in the Society newsletter and any other publicity generated by the Leadership Development Committee.

    The Leadership Development Committee may, but need not, select a self- declared candidate as their nominee.

    3. Nominations from the floor at the Elections Meeting: Any qualified voting

member may nominate themselves or any other qualified voting member from the floor at the annual meeting. A voting member nominated from the floor by another shall not be a candidate and shall not be elected unless thenomination is accepted by that voting member.

The Leadership Development Committee shall arrange for the names and brief biographies of each nominee and self-declared candidates to be published in the Society newsletter and posted prominently at the Society prior to the Elections Meeting.

ARTICLE VI – BOARD OF TRUSTEES

A. The Board of Trustees, hereinafter referred to as the Board, shall consist of four Trustees, the President, Vice President, Secretary, Treasurer, and Past President. All Board members shall serve a three-year term. The Minister shall serve as an ex officio, non-voting member.

B. The Board shall have general charge of the affairs of the Society, including supervisionof its property and funds, conduct of its business, and control of its administration, implementation of its mission, vision, and formulation of policies. Policies may be established by the Board to define specific roles and responsibilities of Board members.

C. Regular meetings of the Board shall be held each month. The time and location of such meetings shall be made known to the general membership. Board meetings are open; however, the Board may meet in closed session to discuss personnel or legal matters. Special meetings may be called by the President or by the majority of the Board. Motions are passed by a simple majority of members present, unless specified otherwise in these Bylaws. A Board Quorum consists of 6 voting members. The President, as a member, has voting rights and may exercise them at their discretion.

D. All Board members are expected to attend Board meetings and retreats, participate actively in congregational life, and abide by all covenants established by the Board and the Society as a whole.

E. A Board member may resign by giving notice in writing to all Board members. They may also be removed by a vote of two-thirds of the other Board members or by a two-thirds majority of voting members present at a special meeting called for that purpose.

F. Should a vacancy occur on the Board, the Board may appoint a successor. The appointee shall serve until the next congregational meeting, when an individual shall be elected to complete the remainder of the term. Occurrence of vacancies shall not disrupt the established rotation of terms of service.

ARTICLE VII – OFFICERS

A. The officers of the Society shall be the President, Vice President, Past President, Secretary, and Treasurer. They shall be elected by the congregation, in accordance with Article V. Each year, the congregation shall elect a new Vice President. That person will serve as Vice President for the first year. They will be President the second year and Past President the third year. The duties of each officer are as follows:

    1. The President shall be chairperson of the Board, shall preside at meetings of the Board and of the Society, and provide leadership for fulfilling the currentmission and vision of the Society. The President shall sign all legal contracts and conveyances as determined by the Board.

    2. The Vice President shall prepare to become President the following year and

perform all duties prescribed by the Board or delegated by the President. In the absence of the President, the Vice President shall serve as Acting President.

3. The Past President shall provide leadership in long-range planning and perform other duties as prescribed by the Board.
4. The Secretary shall oversee communications and records as needed forgovernance, including records of meetings of the Board and of the congregation, and a roster of the voting members of the Society. The Secretary shall perform other duties as prescribed by the Board.
5. The Treasurer shall receive and have custody of all money and other propertyof the Society entrusted to their care and shall disburse the same under the direction of the Board. The Treasurer shall keep a complete account of the finances of the Society and render a current statement at each regular meeting of the Board and a statement of the prior fiscal year to the membership of the Society after its close. The Treasurer shall provide appropriate accounts and documents for a periodic audit, conducted by parties designated by the Board and in accordance with Board-established policy.

B. The Executive Committee is comprised of the officers of the Society. The Minister is a non-voting ex officio member. The Executive Committee shall carry forward the program and plans of the Society and Board. It shall exercise the powers and duties of the Board between meetings of the Board when necessary. It shall report promptly to the Board all actions taken. It shall prepare an agenda for each Board meeting and shall gather and evaluate relevant data pertaining to each item of the agenda. It shall have such further powers and duties as the Board shall assign.

ARTICLE VIII – CONTRACTS AND CONVEYANCES

A. Contracts authorized by the Board shall be signed in the name of the Society by the President and by the Secretary or Treasurer.

B. Any deed, mortgage, or other instrument involving the transfer of an interest in real property shall be approved by a two-thirds majority of the Board and a majority of voting members at a congregational meeting duly called for that purpose. It shall be executed by the President and the Secretary or Treasurer.

ARTICLE IX – THE SOCIETY STAFF

A. The Minister

1. The Minister as head of Staff is delegated the authority and accountability ofthe day-to-day administration and Ministerial operations of the Society in

accordance with all UUS policies and procedures, and except as is expressly limited by Board approved policies.

2. The Minister shall be responsible for leading spiritual, programmatic and administrative work of the Society and serve as a spiritual leader of the Society. The Minister shall have freedom of the pulpit and shall have freedom to express their opinions outside the pulpit, but not to represent the Society without authorization from the Board or the membership.
3. In the event of a Ministerial vacancy, the congregation shall elect a Search Committee to consist of seven members of the Society. It shall present a candidate for Minister to the Society.
4. The Board may appoint a committee to select an interim Minister. An interim Minister shall have the same responsibilities and privileges as a settled Minister.
5. Election or dismissal of a Minister must take place at a meeting of the Society duly called for that purpose and requires that:
    i. 40% of the members eligible to vote are present, and
    ii. of those members present 80% vote in the affirmative.

B. Other Employees

1. UUS employs other Staff as the Board and Minister deem necessary.
2. All Staff must abide by UUS Board approved policies.
3. Each employee will have a written job description which will be updated regularly as is outlined by the Personnel Policy Manual.
4. Disciplinary action of an employee may be imposed at the discretion of the Minister or direct supervisor following the procedures outlined in the Personnel Policy Manual.
5. An employee may be terminated by the Minister or direct supervisor after they have consulted with the Executive Committee so long as they have followed all applicable laws and Board Policies set forth in the Personnel Policy Manual. The Board must be notified promptly.

ARTICLE X – COMMITTEES

A. There are 2 **elected** committees.

1. The Endowment Committee

    a. The Endowment Committee shall consist of five members elected by the Society. The term of office will be five years. The terms shall be staggered so that one term expires annually. One new member is elected at each UUS Elections Meeting except as may be necessary to replace any member who

does not complete their full term of office. The committee will elect their own chairperson(s).

b. The Endowment Committee shall raise, conserve, and adMinister funds for the UUS from memorials or as an endowment for investment. The committee shall carry out its responsibilities in accordance with policies and procedures

approved by the Board. The committee's accounts shall be audited regularly by persons designated by the Board.

2. The Leadership Development Committee

a. The Leadership Development Committee shall consist of five members. The term of office shall be three years. The terms shall be staggered so that not more than two members are elected at each UUS Elections Meeting, except as may be necessary to replace any member who does not complete their full term of office. The committee will elect their own chairperson(s).

b. The purpose of the Leadership Development Committee is to provide qualified candidates for those leadership positions that are elected by the congregation; assist the Board in supporting the active, ongoing, intentional cultivation of UUS leaders; and help develop leadership skills at every level, including individual members, committees, and Board members.

B. Should a vacancy occur on the Endowment or Leadership Development Committees, the Board, upon recommendation from the Leadership Development Committee, may appoint a successor. The appointee shall serve until the next Elections Meeting, when an individual shall be elected to complete the remainder of the term. Occurrence of vacancies shall not disrupt the established rotation of terms of service.

C. Additional elected and non-elected committees may be established or dissolved by theBoard. All additional committees, interest groups, or activities must follow the values, principles, and covenants of the Society. Those that require a budget, have a public face, or require endorsement by the Board shall be approved by the Board per UUS policy.

ARTICLE XI – AMENDMENTS

Amendments to Articles of Incorporation or Bylaws must be approved by a congregational vote. They may be proposed by the Board or by petition of 20% of the voting members. The proposed amendment shall be contained in the notice of the meeting of the Society at whichit will be voted upon. A two-thirds majority of members present at a duly called meeting of the Society shall be necessary to enact an amendment, provided a quorum is present.

ARTICLE XII – RULES OF ORDER

The rules contained in *Robert's Rules of Order*, latest edition, shall govern Board and congregational meetings of the Society in all cases in which they are not inconsistent with these Bylaws.

ARTICLE XIII – INDEMNIFICATION

The Society shall indemnify any person who is or was a Trustee or Officer of the Society against any liability asserted against such person and incurred in the course and scope of their duties or functions within the Society to the maximum extent allowable by law, provided the person acted in good faith and did not engage in an act or omission that is intentional, willfully or wantonly negligent, or done with conscious indifference or reckless disregard for the safety of others. The provisions of this article shall not be deemed to limit any power or exclude any right of the Society to provide an additional or other indemnity or right from any member, officer, trustee, employee, or other person.

ARTICLE XIV – DISSOLUTION

In the case of the dissolution of the Society, all of its property, real and personal, after paying all just claims upon it, shall be conveyed to and invested in the Unitarian Universalist Association or its legal successor, and the Board of Trustees of the Society shall perform all actions necessary to affect such conveyance.

Bylaws reviewed and amended by the Board on
December 15, 2021, Approved by the Congregation on
December 19, 2021, 2020

SECTION II: BOARD POLICIES

Introduction

What is Shared Ministry Governance? This approach best enables a congregation to fulfill its mission – to achieve both the outward results of quality of life and the inward quality of life to which it is called. Part of this process involves using written *policies* to delegate the Board's authority to the Staff and congregation. This is not new at UUS. Policymaking, formal and informal, has certainly been a part of leading our congregation at least since 1961 when the American Unitarian Association and American Universalist Church merged and probably before then. Policies that give prerogative to congregation and Staff to act without seeking Board approval help us do our work efficiently and effectively. What is new is the concerted effort of the Board to create and maintain this document, the Board Policy Book, to help guide the efforts of the Staff, Congregation and Board to carry out the Mission and Vision of UUS.

Since we are a mission-driven organization and the Bylaws give specific authority to the Board of Trustees for the i*mplementation* of UUS's mission, we thought it worthwhile to include the Mission and Vision statements in the document. These statements were approved at a congregational meeting on January 5, 2020.

Mission Statement:

We are a welcoming, spiritually diverse home. We act on our values:

Honor the Earth
Advocate for racial and social
justice Foster deep connections
Embrace the ongoing quest for meaning

Vision Statement:

We aspire to be a more inclusive, loving, diverse congregation that welcomes all people. We will defend and celebrate the Earth, confront racial and social injustice, and nurture deep connections.

UUS Covenant of Right Relations

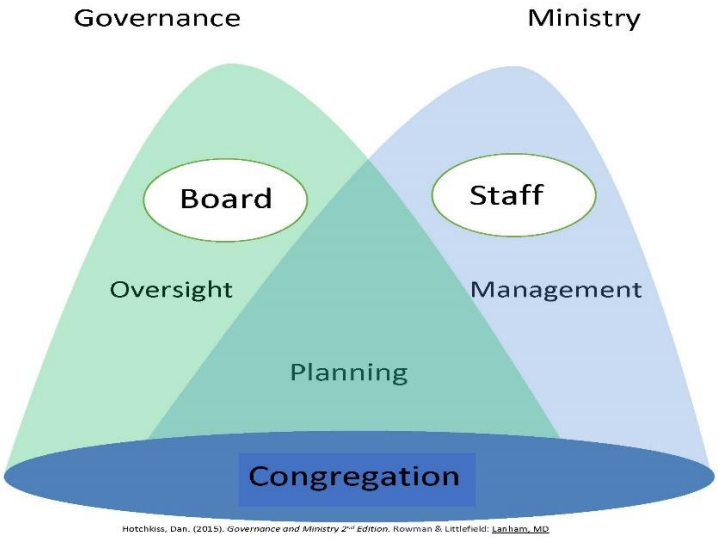
The well-being, strength and reputation of this Unitarian Universalist Society depend on our relationships. We believe that members bring their best intentions into their relationships with the society members and friends, youth and children, Staff, leaders, and clergy. *Through this covenant we make a formal commitment to act with mutual trust and respect in our community. This covenant is a public statement to remind each of us of our explicit responsibilities in maintaining a healthy congregation.*

As individuals and members of our society we covenant to:

- Engage from a place of individual authenticity and strive to be our best whole selves
- Celebrate diversity as a source of energy, inspiration, and growth
- Model the behaviors we all aspire to loving kindness, responsibility, gratitude, accountability, and forgiveness
- Work to sustain a safe environment that encourages us to share our values and beliefs, and nurtures our spiritual and ethical growth
- Communicate with mutual respect to better understand one another, realizing that we may ultimately agree to disagree
- Have the courage to discuss our values, beliefs, opinions, feelings, and reactions with those who do not share them, as well as with those who do
- Take responsibility for personally addressing issues as we encounter them through dialog with the appropriate individual or group
- Be accountable for our words and actions; realizing that none of us is perfect, seek as well as offer forgiveness, and respond with compassion if our words have been unintentionally hurtful
- Support collaboration by asking for and offering help, and express our gratitude to others for their efforts
- Engage in congregational decision-making, actively seeking and sharing information, and supporting the decisions made by the congregation

Board Held
Approved by the Board 2/12/2020
Approved by the Congregations 5/24/2020
Reviewed/Updated/Approved by Board 3/17/2021

In 2019, the Board began its transition to shared ministry as is explained in the book by Dan Hotchkiss, *Governance and Ministry, 2nd Edition*.



Hotchkiss's integrates the roles of the congregation, the Board, and the Staff (led by the Minister). The responsibility for successful functioning of UUS is shared between the congregation, Minister and Staff and the Board. This model also makes a clear distinction between *governance* being the primary responsibility of the Board, and *ministry* being the primary responsibility of the Staff. Briefly, Hotchkiss tells us that governance is the process of holding and controlling human and material resources and making sure they are used to serve its mission. Ministry is the rest of what the congregation does to carry out the mission and vision - the daily activity of building a community, managing resources, and transforming lives.

As a governing body, the Board has the primary responsibility of *oversight*, an important aspect of governance. Oversight involves articulating a mission, choosing major goals, delegating responsibility to those who do the daily work, and keeping the congregation's money, property, and people safe while assuring that the congregation lives in harmony with its own values.

The Minister and Staff are authorized by the Board, through policies, to lead the work of the ministry. The Minister and Staff have the primary responsibility for *management*, unencumbered by the need to receive permission or approval from the Board on a day-to-day basis.

Good policies free the Staff to do their work. The Minister and Staff shall coordinate the work of *ministry teams* who perform specific tasks and functions.

Planning is the process of envisioning the future of the congregation and is a shared activity of the Board, Staff, and congregation. Effective planning requires wide support of the Board, the Minister, and Staff, and the membership. Many organizations get so immersed in their governance and management responsibilities that planning for the future gets less attention than it needs. Ideally, applying a policy-based governance model will allow UUS to effectively plan, oversee, and manage its mission.

In 2019, UUS reorganized our governance and ministry to be more effective and allow those doing the work to be able to do so without having to bring all requests to the Board and then having the delay in waiting for the Board directive to the request.

1.0 Board Governance Responsibilities

1-1 Role of the Board

The Board holds the authority and responsibility for the congregation as an institution, as designated in the bylaws. Though composed of individuals, the Board must operate as a single entity in service of the mission of the congregation. In conducting its oversight obligation, the Board is responsible for monitoring reports provided by Staff and conducting scheduled evaluations of the progress of the Society makes in achieving its goals.

To maintain transparency, all records except those that are confidential are available to the congregation to be viewed. A request can be made to the Board Secretary.

Board Held
Adopted 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1-2 Policy Creation

The Bylaws authorize the Board to create, revise and review policies. Policies are general statements of direction and purpose that allow users to exercise good judgment in the daily operation of UUS and promote the efficient use of resources. Policies must conform to UUS Bylaws. Procedures explain how things get done.

The Board records in this policy book any action intended to authorize others to make decisions or control multiple decisions over time.

*See Procedures
Board Held
Adopted 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1-3 Conflict Management Policy

Purpose: To provide a quick, effective, and consistently applied method for UUS members and friends to reach a resolution of issues or concerns within the congregation.

The Right Relations Committee, as part of its charge, functions as an internal conflict management team for the congregation.

When conflicts arise between and among UUS members, committees, the Minister and/or Board, individuals are encouraged to speak directly with the person, committee, Minister and/or Board with whom they have an issue. The individual takes ownership of the specific difficulty and efforts to reach a resolution. In keeping with our Principles and the UUS Right Relations Agreement, the goal of the conversation is to take steps toward conflict resolution and reconciliation. If such a one-on-one conversation does not resolve the conflict, or if the person is hesitant to address the issue directly, then they are encouraged to ask assistance from the Minister or the Right Relations Committee.

It is assumed that people will not ordinarily speak to non-involved individuals without first attempting to address the issue directly with the party/parties with whom they have a concern. If an individual is speaking to others about the issue instead of following this policy, it is expected that the others will help make the conversation a rehearsal for speaking directly to the party/parties involved in the conflict, or as rehearsal for bringing the concern to the Minister and/or the Right Relations Committee.

*See Procedures
Board Held
Revised and approved by the Board 2/12/20
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1-4 Policy on UUS Events

All UUS functions and meeting groups are to follow UUS policy, procedures, and guidelines whether meeting on the building grounds or off site. In addition, events that are for or include persons under age 18 shall follow UUS Child and Youth Safety Guidelines.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1-5 Policy on Board Motions by Email

Because business requiring prompt action will sometimes arise between Board meetings, the Executive Committee has the authority to call for an email vote. They will decide whether full Board participation is warranted or not for the vote. To maintain a transparent decision-making process such motions should only be made when absolutely necessary.

*See procedures
Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1-6 Policy on Responding to Emergency Situations

During times of natural disasters, war, or unforeseen emergency situations, the Board along with the Minister, is responsible for decision making for the Society including creating policies and procedures that protect the safety and wellbeing of its members and Staff.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1-7 Board Work Products

In carrying out its responsibility for planning, the Board will collaborate with the Minister, Staff, and congregation to keep the mission and vision statements and the strategic plan current, reviewing them minimally every 5 years. As these products are revised, they must be adopted by the congregation.

Annually, the Board will produce and adopt.
1. Open Questions: An annual short list of questions about the Society's future. No more than 3 questions. This will serve as a basis of ongoing planning conversations for the Board, the Minister, and Staff, as well as the congregation.
2. Vision of Ministry: Based on the open questions, an annual vision of ministry is developed by the Board, Minister, and Staff consisting of a short list of top priority areas or goals where the Society will advance its work in the coming year.
3. Annual Review:
Every year the Board and Minister will do an annual review.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.2 Board Officers and Trustees

The officers and trustees of the Board shall perform their duties as outlined in the bylaws with additional duties as prescribed below.
*See Bylaws

Board Held
Board Adopted 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.2-1 The Board President

The president facilitates Board meetings and works in partnership with the Minister to ensure productive partnership between the Board and Staff. In addition, they are responsible for:

- Providing leadership for fulfilling current mission and vision of the Society.
- Signing important contracts and conveyances as determined by the Board.
- Being a spokesperson for the Society when necessary, as determined by the Board.
- Conducting all business meetings of the Society.
- Developing communications with the congregation as necessary on the Board's work.
- Other tasks as determined by the Board.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.2-2 The Vice President

The Vice President assists and substitutes for the president upon request. The vice president shall serve on, and chair committees as directed by the Board.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.2-3 The Past President

The past president shall serve, and chair committees as directed by the Board and serve as a resource for the Board.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.2-4 The Secretary

In cooperation with the Staff and president, the Secretary is responsible for maintaining good Society records. They will file the minutes and record the text of new or revised policies and

procedures in the minutes. The Secretary takes minutes at the executive and monthly Board meetings. The Secretary makes sure there is a record of any business outside the monthly meetings.

*See Procedures
Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 6/15/2022

1.2-5 The Treasurer

The Treasurer shall serve on the Finance Committee. They will provide a monthly report on the Society's financial status to the Board. At Board meetings they will be a resource for financial matters and budget questions. The Treasurer is authorized to act on the Board's behalf on financial matters when action is required between regular meetings of the Board and may act in consultation with the Executive Committee when needed.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.2-6 The Finance Trustee

The finance trustee supports fulfillment of the Board's governance and oversight as prescribed by the Board. The finance trustee chairs the Finance Committee and the Social Justice Action Fund Team.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.2-7 The Trustees at large

There will be (3) three Trustee at large positions. They support fulfillment of the Board's governance and oversight as prescribed by the Board. They may chair or co-chair a committee and perform other duties as prescribed by the Board.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.3 Expectations of Board Members

1.3-1 Prepare For and Attend Meetings

Monthly Board Meetings: The UUS Board of Trustees will hold monthly Board meetings. Meetings are open to members of the society. Meeting minutes are taken by the Secretary and approved at the next business meeting.
The President will facilitate the agenda for the monthly Board meetings.
The Executive Committee will prepare the items for the agenda.
The President will make the monthly Board agenda available prior to the monthly meeting.
The Secretary will prepare the Consent Agenda Items prior to the monthly Board meeting. This should include Executive Committee Meeting minutes, Board meeting minutes, and Board meeting highlights.

Each month the Board will meet to discuss matters of business, oversight, and governance. The Executive Committee meets in the week prior to this meeting to set the agenda.
The Board Secretary records and approves all its actions in the minutes, for ease of reference for both the Executive Meeting and any Board meetings.

As part of the preparation for the meeting each Board member must review the committee reports, Minister and Staff reports, finance reports, and any other special materials for review provided prior to the meeting. While review is necessary, reports will not normally be subject to Board discussion except when they require Board action or raise issues of compliance with Board policy.
Other Meetings – In addition to monthly Board meetings there are other meetings that Board members are expected to attend including:

New Board Member Orientation - New Board members are expected to attend a Board orientation session in the beginning month of their term.

Board Retreat – Each year there will be a Board retreat for part of a day. Other Staff may also attend part of that meeting at the Board and Minister's discretion.

Closed Sessions –The UUS Board of Trustees desires as much of its business as possible to be conducted in an open and transparent manner. Member attendance at Board meetings is encouraged to promote an informed congregation. However, the Board recognizes that because of the sensitive nature of some limited number of subjects it may be necessary for the Board to meet in closed session without member participation. This is usually done after the close of a Board meeting.
The Board may meet in closed session only for the following purposes:

- Evaluation or discipline of or other discussions relating to Staff and or Minister
- Legal or potential legal issues
- Contract matters

- Other matters which the Board believes require confidentiality to protect a member's privacy

Notice that a closed session will be held at an upcoming Board meeting shall be placed in the agenda and notice of that Board meeting. Only matters which have been scheduled and noticed for a Board closed session may be discussed in that closed session.

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

No other person(s) shall attend closed sessions except upon invitation of the Board.
No minutes of discussions at closed sessions shall be taken. The Secretary shall keep a notebook of notes from the session that any Board member can view.
No decision shall be taken by the Board in closed session.

Special Meetings – Other special meetings to conduct Board business may be called from time to time. These instances are rare, and Board members should make every attempt to attend.

Congregational Meetings – The Board will hold at least 2 congregational business meetings per year as is outlined in the Bylaws.

Committee Meetings – Board members may serve on Board related committees.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.3-2 Board Covenant

Considering the Board's responsibility to "envision the future, create long-term goals and policies and ensure organizational performance", we covenant to the following:

1. As representatives of the congregation, we will cultivate a wide range of contacts and encourage the consideration of diverse views when developing policy decisions.
2. To cultivate an informed membership, we will promote transparency regarding Board goals, processes, and Society issues while seeking to maintain optimal communication among Board, Minister, Staff, and congregation.
3. Recognizing the importance of wholesome relationships for effective Board function, we will demonstrate ongoing interest and concern for one another through a process of check-in at the beginning of each meeting.
4. Giving the Board's work high priority in our schedules, we will provide relevant written documents in advance of meetings, review materials in advance, arrive on time, and commit to ongoing learning. If we are unable to attend a Board meeting, we will notify the Board President or member of the Executive Committee by phone prior to the meeting.

5. Using dialogue and creative interchange, we agree to seek common ground in making democratic decisions in the best interests of the Unitarian Universalist Society and in support of its mission and goals.
6. Once a decision has been made, as Board members we will support the Board's decision, and the implementation of the decision, and avoid undermining speech or actions.
7. Using positive communication skills, we will listen and speak to one another with respect and with the assumption of good faith. When encountering destructive communication patterns among ourselves or within the congregation, we will model and strongly encourage constructive alternatives.
8. Recognizing our ownership for Board process, we will acknowledge requests for a process check when one of us is uncomfortable with the ongoing discussion or proceedings. The Board uses a designated process observer/timekeeper for each Board meeting. That responsibility rotates and does not include the president and the Secretary.
9. We will observe confidentiality meeting in closed session.
10. E-mail will be used with care and respect, especially regarding personnel matters.

Board Held
Approved 7/2017
Reviewed 9/2019
Reviewed/Updated 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.3-3 Conflict of Interest Policy

Purpose
The purpose of the Conflict-of-Interest Policy is to protect the Unitarian Universalist Society's interest in situations when a governing member's loyalties may be divided between UUS and other interests. This policy is intended to supplement, but not replace any applicable state and federal laws governing conflict of interest applicable to non-profit and religious organizations.
Policy
All governing members of the Unitarian Universalist Society shall carry out their duties keeping the best interest of UUS in mind.
Definition
A governing member is an Officer or Trustee of the UUS Board of Trustees, or any member of a committee with Board-delegated governing powers such as the Endowment Committee, Leadership Development Committee, and the Finance Committee.

A conflict of interest exists whenever a governing member of UUS has interests or duties that may hinder or appear to hinder their ability to act with undivided loyalty to UUS and its mission. A conflict of interest arises when a governing member:

I. Stands to gain or lose financially because of an action of UUS in which they have a decision-making role.

II. Cannot set aside their personal preferences as an individual consumer of UUS' services to act on behalf of the whole Society and its mission.
III. Has a close relationship with someone who has a conflict of interest as defined above. A close relation includes any person, corporation, nonprofit, or other entity with which the governing member has a pre-existing personal, family, or business relationship.
IV. Faces any other situation that impairs, or reasonably appears to impair, their independence of judgement.

*See Procedures
Board Held
Reviewed/Updated 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.3-4 Discipline and Removal of Board Members

The Board recognizes that there are some instances in which a Board member may need to be removed. In exercising its power under the bylaws to remove an officer or Board member, the Board will follow procedures as they are outlined in the procedure section.

*See bylaws.
*See Procedures
Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.4 Board Committees, Task Forces, Teams, and Interest Groups Policy

The Board has the authority to create or dissolve committees. Committees exist to help the Board govern. Committees will develop their own charge. They can create policy proposals but must submit these proposals to the Board for final approval. All committees will keep minutes/notes which Board members can review in advance of monthly Board meetings. The Board shall appoint its members and lay members to Board committees for specific terms of service. Nominees of lay members to serve on Board committees may be presented by the chair(s) of a committee or the Executive Committee or the President of the Board.

In addition to committees, the Board and Ministry may develop ad-hoc or specialized committees and task forces to assist the congregation in carrying out its mission and achieving its vision. Creation of such committees and teams shall be approved by the Board of Trustees and Ministry for either a specified period of time, or for completion of a specified purpose, and will end when that time or purpose is completed.
These specialized committees and task forces must also keep minutes/notes. Committee minutes

should be submitted to the Board President to be made available to the Board prior to monthly Board meetings. Ministry appointed special teams or task forces should submit their minutes to the Minister or designated Staff person.

The Minister may create and dissolve Teams to assist Ministry with their work. The Minister and Staff will determine how these Teams function, if they need to keep minutes, to whom they report to and how they evaluate their effectiveness.

Interest and affinity groups which arise from members interests and may form with the permission of the Minister as long as their purpose, values and practices are in accordance with the Seven Unitarian Universalist principles and the mission and vision of UUS. The Minister is responsible for how they will form their guidelines, policies, and procedures.

The Minister is ex- officio member of all committees and may or may not attend meetings.

*See Procedures
Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021, Revised 10/20/21

Board Committees

1.4-1 The Executive Committee

The Executive Committee is comprised of the officers of the Society. It shall exercise the functions outlined in the Bylaws. It may provide other functions as requested from the Board.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.4-2 The Leadership Development Committee

The Leadership Development Committee shall be elected and carry out their duties as is defined in the bylaws.

Board Held
Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.4-3 The Endowment Committee

The Endowment Committee is responsible for the administration of the Endowment Fund as authorized by the Society's bylaws. It is elected by the congregation. The Endowment Committee shall have the following powers and duties:

Contributions

The Committee shall be responsible for soliciting gifts to the Endowment Fund and for

making members and friends aware of its nature and purpose.

Investment

The Committee is authorized to invest the funds under its management consistent with the principles, purposes, and policy statements of the Society. The Committee may retain an investment counselor for this purpose subject to approval by the Board. The investment of endowment funds shall have the goals of

1) Security of principal.
2) Reasonable liquidity
3) Social responsibility
4) Optimal returns

Oversight

The Committee shall be responsible for monitoring transfers to and from the Endowment Fund. Any proposal or action which in the opinion of the Committee is not in conformance with Endowment Fund policy shall be brought to the attention of the Board.

Chalice Society Administration

The Committee shall adMinister the Chalice Society, comprising members and friends who have made deferred gifts to the Society. With their consent the Committee shall also recognize such members and friends and thereby encourage deferred giving to the Endowment Fund.

New Endowment Fund Creation

The Society empowers the Committee to create additional endowment funds according to the wishes of the donors. Such gifts and bequests shall be submitted to the Board for approval and must be in harmony with the principles and mission of the Society. New endowment funds should not be established by drawing on existing endowment funds.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.4-4 Finance Committee

Monitors the overall fiscal status of the congregation, provides regular reports to the Board, creates the budget for each fiscal year to be approved by the Board and congregation, develops, and maintains policies and procedures for financial management with final approval from the Board, and delivers a finance report at congregational meetings as directed by the Board.

The Finance Trustee is the chairperson. Committee members include the Board Treasurer, a representative from the Endowment Committee, a representative from the Stewardship Team, and the Office Administrator. The committee meets at least once a month.
Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.4-5 Personnel Committee

Advises/assists the Board in maintaining up-to-date policies related to human resource management. This includes policies related to processes for performance feedback, administrative practices, grievance process, benefits, leave and sabbatical time off, professional misconduct, professional development, equal employment opportunity, and ensuring these policies comply with applicable employment laws. In addition, the Minister may make specific requests to the committee in matters of administration or on difficult personnel matters but does so at the discretion of the Minister as head of Staff. The committee has no Staff management authority and does not take part in supervision or personnel decision-making as this authority lies with the Minister. The committee has a minimum of 3 members, including **the Vice President** who is the co-chair of the committee. They meet a minimum of quarterly.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021, Revised 10/20/21

1.4-6 Governance Committee

Advises/assists the Board by reviewing and keeping the Board Policy Book and UUS Bylaws up to date. The Committee will create new policy proposals as directed by the Board. New policy proposals or modifications must be approved by the full Board before they are included in the Board Policy Book. Polices do not require congregational approval. The Committee will review the Bylaws every 3 years minimally or as needed. New proposed bylaw modifications must be submitted to the Board for approval prior to submission to the Congregation for final approval. The Governance Committee has a minimum of 3 members, including **the Past President** who is chair or co-chair of the committee. They meet a minimum of quarterly.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021, Revised 10/20/21

1.4-7 Right Relations Committee

Promotes the practice of right relations to build a loving, trusting, and healthy congregation. Functions as an internal conflict management team for the congregation. Assists with the development of a Congregational Covenant of Right Relations and a Conflict Management Policy and Procedure. The committee has a minimum of 3 people with at least one Board member who is chair or co-chair of the committee, meets at least twice annually, and as needed for conflict management or other business. This committee will submit their minutes to the Board for review unless the record is confidential.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

1.4-8 Mission and Vision Review Committee

Assists the Board and Staff in developing tools and evaluating.

- The Society's success in achieving the Annual Vision of Ministry.
- An annual, mutual performance evaluation with the Minister and the Board.
- The Society's effectiveness in carrying out its Mission and Vision
- Triennial Evaluation of the Minister on their wider Pastoral role.
- The satisfaction of its members.

There are many ways that they may engage in this responsibility, from utilizing formal congregational assessment tools, self-evaluation tools, to taking an intentional look at a few areas of ministry each year.

This committee has a minimum of 3 people and a Board member as chair or co-chair. They meet at least 3 times per year.

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

2 Delegation to the Staff

2-1 Global Delegation to the Minister as Head of Staff and Accountability

The Board delegates all its authority to manage the general affairs, work, and resources of UUS, except as expressly limited by these policies, to the Minister as Head of Staff. All Staff members are accountable to the Minister. The Minister is accountable to the Board. The Minister is an ex-officio member of all committees and teams.

Board Held
Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

2-2 Senior Staff Team

(Minister, Congregational, Administrator, DCL, DRE, Music Director)
The Minister is head of the Senior Staff Team. The Minister manages the work of UUS in collaboration with other members of the Senior Staff Team which including the Congregational Administrator, Director of Congregational Life, Director of Religious Education, and the Music Director. Each of these Staff team members reports directly to the Minister. The Board expects the Senior Staff Team, individually and jointly:

- To lead and unify the paid and volunteer Staff in directing their efforts toward the fulfillment of the UUS mission and goals.
- To ensure compliance with the Bylaws, Board Policies, and applicable laws and regulations.
- To uphold a high standard of ethical and professional conduct.
- To accomplish the goals contained in the vision of ministry by developing annual goals for its work as a team.
- To develop policies and procedures that pertain to ministry. They are not subject to Board approval.
- Provide monthly reports of ongoing activity of the ministry to the Board.

When there is conflict with the policies and procedures the Board and the Minister will resolve the conflict jointly.

Board Held
Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

2-3 Staff Accountability

All members of the Staff are accountable to the Minister. The Minister is accountable to the Board and congregation.

Board Held
Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3 Guidance and Limitations

3.1 Personnel Decisions

The Board expects the Minister to take to lead in the selection, hiring, supervision, and discharge of all paid Staff.

Board Held
Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.1-1 Hiring Senior Staff

Before filling senior Staff positions, the Minister will consult with the Board, and appoint a Search Committee.
After receiving the Search Committee's recommendation, the Minister will consult with the Board and present their final candidate. The Minister is expected to keep the Board updated on the Search Process.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.1-2 Hiring Non-senior Staff

Before filling non-senior Staff positions, the direct supervisor of the vacant position should consult with lay leaders, other Staff, and must consult with the Minister before extending a job offer. The Minister has final decision-making authority.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.1-3 New Positions

New positions are normally created through the budget process. The Minister may create and fill temporary positions if they can be funded within established budgetary limits.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.1-4 Employment At-Will

All paid Staff are employees at will, unless the Board approves the terms of a contract that states otherwise.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.1-5 Discipline and Termination

Prior to discharging a paid Staff member, the Minister must ensure that the decision complies with applicable laws, Board policies, contracts, and the personnel Manual. The Minister, after consultation with the Executive Committee of the Board, may terminate a senior employee's employment. A supervisor, in consultation with the Minister, may terminate non-senior Staff (part-time and temporary/casual employees). The Minister must promptly notify the Board when an employee has been terminated.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.2 Care for Paid Staff

The Society intends to be a fair, ethical, and attractive employer; to achieve high Staff morale and productivity; and to protect members of the Staff from all forms of injustice and abuse related to their employment.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.2-1 Supervision

Each employee will be assigned an immediate supervisor.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.2-2 Compensation and Benefits

As part of the annual budget process, Finance Committee will review compensation and benefits for all paid Staff and recommend adjustments for the coming year.

*See Procedure
Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

3.2.3 Personnel Manual

The Congregational Administrator and the Personnel Committee will maintain an up-to-date Personnel Manual incorporating Board personnel policies that will be reviewed by the Personnel Committee. The Personnel Manual must provide adequate policies and procedures to give practical effect to the following principles and how Staff may address their concerns regarding:
Nondiscrimination
Harassment
Grievances/Resolution of employer complaints
Whistleblower Protection
Sexual Harassment
Accommodation for Disability

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4 Care of Members and Guests

See Bylaws Regarding Membership
*See Procedures
The Minister, Staff and Board must take all reasonable care to prevent harm to members, guests, program participants, and other people directly affected by the Society. In doing so, the Board and Ministerial Staff may appoint committees, teams, or task forces to address specific concerns regarding congregational well-being.
Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-1 Health and Safety

The Minister and Staff must ensure that all Society programs are safe for participants and Staff; that facilities are maintained in a safe, sanitary, and secure condition; that required licenses and inspections are kept up to date; and those hazards are corrected promptly.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-2 Childcare Request Policy

The Unitarian Universalist Society (UUS) is a community that thrives on the participation of its members in all age groups and family situations. Therefore, UUS provides childcare to enable parent(s)/guardian(s) with young children to fully participate in activities.

*See Procedures
Ministry Held
Approved by Board 10/9/2014
Reviewed/Updated/Approved by Board 3/17/2021

4-3 Safe Congregations Policy for Children and Youth

As Unitarian Universalists, our commitments to the inherent worth and dignity of every person and to justice and compassion compels us to create for our children and youth a safe environment which protects their physical, mental, and emotional well-being and promotes their spiritual growth.
These policies are directed at those working with our children and youth. However, all members of the Unitarian Universalist Society (UUS) carry a responsibility to provide a safe and caring community in which our children and youth are respected, their self-worth is affirmed, and in which spiritual, social, and intellectual growth is encouraged.

The UUS reserves the right to evaluate circumstances on a case-by-case basis. The UUS may enforce more restrictive standards than stated in these policies and procedures if they are in the best interest of our children's and youths' safety and comply with local, state, and federal laws and guidelines.

We will achieve these goals by the following processes, which are further developed in the Safe Congregations procedures:

- Selecting and screening all Society Staff and volunteers who work with children or youth.
- Supervising our children and youth and those who work with them.
- Providing a specific process by which allegations of abuse are reported and investigated.
- Requiring those at risk of incident or accusation to refrain from contact with children or youth.

Definitions:

1. *Paid Staff*: Any Minister or employee who is paid by UUS.
2. *Child*: Anyone aged from infancy to under 12 years.
3. *Youth*: Anyone aged from 12 to under 18 years.
4. *Adult*: Any person who has reached his/her 18th birthday or as defined by state law.
5. *Volunteer*: Any unpaid person engaged in or involved in activities and who is entrusted with the care and supervision of children and youth, or a person who directly oversees and/or exerts control or oversight over minors or adults.
6. *Sexual Abuse*: The employment, use, persuasion, inducement, enticement, or coercion of any minor or adult to engage in, or assist any other person to engage in, any sexually explicit conduct or any simulation of such conduct for the purpose of producing any visual depiction of such conduct or rape and in cases of caretaker or inter-familial relationships, statutory rape, molestation, prostitution, or other forms of sexual exploitation of a minor (child or youth) or adult, or incest with a minor (child or youth) or adult, or as defined by federal and state law. This includes and is not limited to unwelcome sexual remarks, jokes, advances, leering, whistling, or sexual gestures; sexual touching, fondling, molestation, assault, or other intimate physical contacts; compelling another person to engage in a sexual act by threats or fear or undue influence; and providing or displaying pornographic materials to another person.
7. *Emotional Abuse*: Verbal or nonverbal conduct including mental exploitation, degrading communication, or humiliating or threatening conduct that may or may not include bullying or as defined by state law.
8. *Abuse*: the non-accidental injury, exploitation, neglectful treatment, or the maltreatment of a child (from birth to 18 years) by any person under circumstances that show that the child's health, welfare, or safety are harmed.

*See Procedures
Ministry Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-4 Smoking

UUS is a smoke-free workplace. Smoking and vaping are not allowed anywhere inside the UUS facilities, or on UUS grounds, except for within 20 feet of the designated smoking area, which is located by the bike racks on the north side of the parking lot.

Board Held
Approved 10/20/20
Reviewed/Updated/Approved by Board 3/17/2021

4-5 Alcohol and Illegal Drugs Policy

UUS maintains a drug-free workplace, recognizes that responsible consumption of alcohol might be acceptable at occasional functions and will do so in a safe and responsible manner adhering to state and local laws and Board Policies.

*See procedures.
Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-6 Emergency Planning

The Minister and Staff must create and maintain a written plan for responding reasonably to foreseeable emergencies, including accident, illness, fire, toxic conditions, weather problems, threatening communications, power outages, and natural disasters. Additional policies may be developed by the Minister, Staff, or Board.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-7 Inclement Weather Policy for UUS

There are times when the Society office may be closed, or it may be necessary to cancel services due to inclement weather. When the weather is predicted to be inclement making travel difficult and dangerous, the Minister will make the decision as soon as reasonable about whether to cancel Sunday services or close the Society office.

Ministry Held
Board Approved 9/8/2016
Reviewed/Updated/Approved by Board 3/17/2021

4-8 Child Protection

Because of the Society's responsibility for children and youth in its care, the Staff must write and maintain clear procedures for the selection, training, and supervision of anyone who works with persons aged eighteen and younger adhering to state and UUS Child and Youth Safety Guidelines.

*See Administrator for specific policy and procedures.
Ministry Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-9 Disruptive Behavior

In order to sustain an atmosphere that is truly open to a wide variety of individuals, the Society must firmly and promptly address behavior that threatens the physical or emotional safety of any adult or child or chills the free exchange of opinions and beliefs. When such behavior occurs, the Minister must take immediate action if required and report promptly to the Board, recommendations any further disciplinary action, which may include termination of Society membership.

*See Administrator for specific policy and procedures.
Ministry Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-10 Harassment

Employees, volunteers, and agents of the Society are specifically prohibited from acts of harassment, including sexual harassment against any member or participant in Society activities or any employee or applicant for employment.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-11 Firearms

The Society prohibits anyone other than on-duty law enforcement officials or off-duty law enforcement officials hired by the Society from carrying a firearm on Society property.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-12 Building Security

The Staff must ensure that access to Society building is limited to those who have legitimate business there.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-13 Universal Access

The Society intends to make its premises and activities safely and conveniently accessible to person with disabilities. The Minister and Staff must ensure that Society facilities, programs, and policies meet or exceed all applicable legal requirements and that the Society engage in continual learning improvements in this area.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

4-14 Memorial Garden Interment

The UUS Memorial Garden is a religious non-perpetual care cemetery for interment of human cremains. Interment is limited to UUS members and friends (friend is defined here as one who attends, contributes financially, and volunteers to further the work of the UUS mission and vision), past members and friends, an acknowledged spouse or partner, and minor child of a member or friend. Internment of individuals beyond this list may be allowed in special circumstances if approved by the Board of Trustees. Prior to any interment (burial or scattering) an application provided by UUS must be received and approved accompanied by a signed release for the individual's relatives (as defined in Code of Iowa 523I.102:41) relinquishing all rights to interment, relocation, or disinterment of the decedent's remains. Only human cremains may be interred in the Garden, though other space on UUS grounds may be provided for animal cremains. UUS is the sole service provider for any interment and retains all discretion as to use of the Garden and UUS grounds. There is no direct cost for interment, however a voluntary contribution to the UUS Memorial Fund is encouraged to maintain the function and integrity of the Garden. UUS will maintain a permanent Memorialization Record for each interment. In the event that UUS should relocate, a representation of soil from the Garden will be moved to its new location, but the Garden will not be moved in its entirety. The Board of Trustees has final authority regarding use and management of the Memorial Garden and interments.

See Procedures 4-14, Memorial Garden
Board Held
Approved by the Board 10/20/2021
Updated/Approved by Board 6/15/2022

4-15 Congregational Meetings

Meetings of UUS members called by the Board Secretary at direction of the Board President will provide notice to the members at least ten (10) days prior to the meeting date by announcement in the monthly and the weekly Voice. In the event that the meeting is to be conducted both in-person and by electronic means (multi-platform), the notice shall include the login address to be used to participate and the login time. UUS is only responsible for providing the direct electronic feed to a virtual service provider. Each member who chooses to participate electronically is

responsible for that member's means of accessing the electronic feed. No action taken at a multi-platform meeting shall be invalidated on the grounds that the loss of, or poor quality of, a member's individual connection prevented participation in the meeting.

Quorum

Establishment of the required quorum for an in-person meeting will be established by the Secretary using the number of registered participants and any absentee ballots submitted prior to the meeting. Establishment of a quorum for a multi-platform meeting will be established by the Secretary using the number of participants present in-person and on-line and any absentee ballots submitted prior to the meeting. On-line participants will be required to log-in to the multi-platform meeting separately from any other service or meeting prior to the congregational meeting being called to order. Non-members can view the meeting recording on-line after the meeting.

Assignment of the Floor

A member who seeks recognition by the chair shall rise if in-person or make the request using the dialogue function of the electronic multi-platform meeting. The chair shall have the discretion to recognize the order of speakers in any order the chair so chooses. A member who intends to make a motion or request that under the rules may interrupt a speaker shall rise if in-person or use the dialogue function of the electronic meeting to be recognized and shall thereafter wait a reasonable time for the chair's instructions before attempting to interrupt the speaker by voice. No person may speak on any motion for more than two minutes, and not more than once, so long as there are others who have not spoken who desire the floor, except that persons having special information may, with the permission of the chair, reply to questions.

Video Display

During a multi-platform meeting, the chair, the Secretary, or their assistants shall cause a video of the chair to be displayed throughout the meeting, and shall cause display of the video of the member currently recognized to speak or report.

Motions

Motions known to the Chair prior to the posting of the meeting notice shall be included in the meeting notice. Members who know in advance they intend to make a motion or amendment to the published agenda shall submit that in writing prior to the meeting to the Secretary. During a multi-platform meeting, a member intending to make a main motion or offer an amendment from the floor shall before or after being recognized, post the motion to the online area designated by the Secretary for this purpose, preceded by the member's name, or submit the written motion in-person. The Secretary or any assistants appointed for this purpose shall cause the text of all motions or other pending questions to be displayed prior to a vote being conducted.

Voting

Votes shall be taken by members rising in favor or opposition, if the meeting is only held in-person. Voting on motions or amendments submitted in writing prior to the meeting or offered from the floor during a meeting shall be decided by a polling of in-person and on-line participants to determine a majority in favor or opposed. Final voting for a multi-platform meeting shall be conducted by the anonymous voting feature of the Internet meeting service designated by the Board of Trustees. Ballots sent via USPS are considered absentee ballots. A member may abstain from voting on a specific motion or election of an officer, but such abstentions do not count as a yes or no vote and do not influence the outcome of a vote in any manner. A "majority" is more than half of the votes cast by persons entitled to vote, excluding blanks and abstentions, unless the UUS Bylaw's require more than half of the votes cast for a specific circumstance.

Parliamentarian

The chair of a meeting may appoint a person to act as parliamentarian for that meeting. The role of the parliamentarian is to offer advice to the chair and answer questions regarding *Robert's Rules of Order* and application of UUS policies and procedures when a point of order is raised by a member. The chair may choose to accept the opinion of the parliamentarian or submit the question to the assembly for a vote in support or in opposition to the parliamentarian's ruling.

Board Held
Approved by the Board April 20th, 2022

5 Care for Material Resources

All Staff and the Board must take all reasonable care to prevent harm to the Society's financial assets, property, credit, and tax exemptions, and develop administrative practices and procedures designed to prevent such harm. The Board is ultimately responsible for all financial activities of the Society.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

5-1 Endowment

The Society shall maintain the Endowment Fund, held, and managed separately from all other funds, as a repository for gifts and bequests.

A. Restricted I - General Funds

The General Endowment Fund provides the Society with a source of funds for operating expenses, emergencies, and major capital improvements.

B. Restricted II - Donor Named and Special Purpose Funds

Two of these funds are adMinistered by the national UU and monitored by the Endowment Committee. The remainder are adMinistered by the Committee.

C. The Endowment Committee shall provide a quarterly report to the Board of Trustees and the congregation that identifies the current amounts in the General Fund (corpus and earnings) and in all Restricted Donor Named and Special-Purpose Funds.

D. The Endowment Committee shall keep minutes/notes of each Committee meeting and provide those to the Board of Trustees following each Endowment Committee meeting."

Board Held through the Endowment Committee
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021,
Reviewed/Updated/Approved by the Board November 17, 2021

5-1.1 Endowment Administration

The Endowment Fund shall be adMinistered by the Endowment Committee as authorized in the Society's bylaws. The overarching responsibility of the Committee is to manage the Endowment Fund to continue its existence in perpetuity.

The Committee is specifically charged with protecting and preserving the Corpus of the Endowment Fund[ii], as explained in the Endowment Fund procedures document.

The Endowment Committee shall have the following powers and duties:

Contributions

The Committee shall be responsible for soliciting gifts to the General Endowment Fund and for making members and friends aware of its nature and purpose.

Investment

The Committee is authorized to invest the funds under its management consistent with the principles, purposes, and policy statements of the Society. The committee may retain an investment counselor for this purpose subject to approval by the Board. The investment of endowment funds shall have the goals of:

1) Security of principal
2) Reasonable liquidity
3) Social responsibility
4) Optimal returns

Oversight

The Committee shall be responsible for monitoring transfers to and from the Endowment Fund. Any proposal or action which in the opinion of the Committee is not in conformance with Endowment Fund policy shall be brought to the attention of the Board.

Chalice Society

The Committee shall adMinister the Chalice Society, comprising members and friends who have announced their intention to make deferred gifts to the Society. With their consent the Committee shall also recognize such members and friends and thereby encourage deferred giving to the Endowment Fund.

New Endowment Funds

The Society empowers the Committee to create additional Restricted II endowment funds according to the wishes of the donors. Such gifts and bequests shall be submitted to the Board for approval and must be in harmony with the principles and mission of the Society. New Restricted II endowment funds should not be established by drawing on existing endowment funds.

Board Held through the Endowment Committee
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

5-1.2 Endowment Spending Authorization

Money within the General Endowment Fund may be spent following the guidelines described below.

Administrative Expense

The Society empowers the Committee to spend a portion of the Endowment Fund to meet reasonable administrative expenses, not to exceed 0.75 percent in any year.

General Endowment Fund

1. Annual Spending Allocation (ASA) - For each fiscal year[iii], the Committee shall determine how much of the General Endowment Fund can be spent for any of the purposes cited in Section 1 and how much must be retained. The ASA shall be in a range from two percent (2%) to five percent (5%) of the total balance in the General

Endowment fund (as of December 31) with a target or expected figure of three percent (3%).

The proposed ASA shall be reported by the Committee to the Board within the first two months of the fiscal year. Before the end of the fourth month of the fiscal year, the Board shall announce how much of this allocation it plans to spend during the year and how much can be reinvested. If no such announcement is forthcoming, then the entire sum shall be retained for reinvestment.

The Committee shall evaluate the ASA rule annually to appraise its sustainability.

2. Supplementary spending. After deductions for 1) administrative expenses, 2) the Fund Corpus, and 3) the annual spending allocation, any amount of the remaining balance in the General Endowment Fund may be spent, *with the following stipulations:*

   a. All eligible UUS members are given the opportunity to vote, by absentee ballot if necessary.
   b. Passage of the measure requires a simple majority of eligible members, vote to be determined and announced at a special meeting of the congregation, with a quorum present.

3. No amount of the General Endowment Fund corpus shall be spent or permanently distributed except in the event of an actual or impending dissolution of the Society.

Board Held through the Endowment Committee
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

5-1.3 Endowment Lending Authorization

General Endowment Fund

Any amount of the General Endowment Fund including the Fund Corpus may be lent to support the Society subject to the following conditions:

1. The loan must have a specific repayment schedule and an interest rate not less than the average annual rise in the US BLS Consumer Price Index over the preceding 20 years.
2. Any loans from the General Endowment Fund are subject to the following stipulations:
   a. All eligible members are given the opportunity to vote, by absentee ballot if necessary.
   b. If the loan results in withdrawal of funds from the corpus, passage of the measure requires a 2/3 majority of eligible members in a vote to be announced at a special meeting of the congregation with a quorum present.
   c. If the loan does not result in withdrawal of funds from the corpus, passage of the measure requires a simple majority of eligible members, vote to be determined and announced at a special meeting of the congregation with a quorum present.
3. After approval by the congregation the loan agreement shall be executed in writing and signed by the Society president. Copies of the agreement shall be made part of the permanent records of the Society.

Endnotes:

1. A memorandum to the Board from the Endowment Committee dated June 8, 2015, contains the following resolution respecting the General Endowment Fund: *Any spending from the Fund shall be limited to earnings above that needed to maintain the Corpus.*
2. The Corpus is defined as the aggregate market value of all gifts and bequests to the Fund adjusted for changes in the cost of living.
3. The UUS fiscal year is January 1 to December 31.

Board Held through the Endowment Committee
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

5-2 Cash and Designated Checks from the Sunday Offering

UUS donates all its cash contributions to outside agencies. This is coordinated by the Social Justice Coordinating Team.

*See Procedure
Board Held through the Finance Committee
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

5-3 Accounting and Financial Policies

5-3.1 Fundraising/Sponsorship

Fundraisers are an important part of active congregational life, providing funds for the Society as well as for approved charitable causes. Sometimes outside groups will approach UUS or one of our groups to sponsor an event. All fundraising/sponsorship activities must be reviewed by the Finance Committee who will send their recommendations to the Executive Committee. The Executive Committee will either approve it or take it to the Board for further discussion. The beneficiary of the fundraising event must align with the mission and vision of UUS and the principles of the UUA. The event must be consistent with our not-for-profit status. The Finance Committee will oversee procedures to govern the fundraising process.

Board Held
Reviewed/Updated by Finance Committee 3/21
Approved by the Board 4/21/21

5-3.2 Gift Acceptance

UUS encourages the solicitation and acceptance of gifts to fund its activities and fulfill its mission. All types of gifts may be accepted by UUS at the absolute discretion of the Board of Trustees.

Recognition of gifts will not include naming space, art, or programs. The Finance Committee will oversee procedures to govern the process of accepting and acknowledging all types of gifts.

Board Held
Reviewed/Updated by Finance Committee 3/21
Approved by the Board 4/21/21

5-3.3 Spending Authority and Responsibility

The Board delegates spending authority to the Minister, Staff, and team chairs for the financial management of the budget lines allocated to their areas. They are accountable to all Board approved policies and procedures managed by the Finance Committee. They must manage expenses within the parameters of the overall budget amount. Spending in excess must be reviewed by the Finance Committee who will bring it to the Board for final approval.

Board of Trustees
The Board of Trustees is ultimately responsible for the financial management of all activities of UUS. The Treasurer is authorized to act on the Board's behalf on financial matters when action is required between regular meetings of the Board. The Board of Trustees maintains the following authority and responsibilities:

- To approve any use of Board designated funds.
- To review financial reports at each Board meeting.
- To ensure that training is provided to all those involved in any aspects of the Financial Policy to enable all parties to fulfill their financial oversight role.

The Finance Committee
The Finance Committee is responsible for monitoring the overall fiscal health of the congregation. Working with the Stewardship Team and Endowment Committee, the Finance Committee will monitor the financial needs of UUS and determine when deviations from existing funding polices need to be recommended to the Board. The Finance Committee, through the Treasurer, will regularly report to the Board of Trustees on the fiscal health of the congregation. At the direction of the Board, the Finance Committee will give a report at congregational meetings as to the financial health of the congregation. The Finance Committee is accountable to all decisions of the congregation at the congregational meeting, and to all Board policies and direction from the Board.

The Board of Trustees delegates the following authority and responsibility to the Finance Committee (See Finance Committee Procedures):

- To develop and maintain procedures for congregational bookkeeping that set appropriate financial controls.
- To develop and maintain procedures for all fundraising efforts within the congregation.

- To create an annual budget for each fiscal year for approval by the Board and congregation.
- To review all over-budget and off-budget expenditure proposals and provide guidance to the Board of Trustees as to the feasibility of said expenditures. The Finance Committee has the authority to decide what account, fund, or line-item such expenditures are drawn from.
- To ensure that the financial accounts of the congregation are balanced and well-maintained.
- To limit vendor credit accounts to prudent and necessary levels. The Finance Committee shall make no contractual commitment for bank loans, corporate credit cards, or for real estate leases or purchases without specific approval of the Board.

Endowment Committee

The Board of Trustees delegates the authority and responsibility to the Endowment Committee to develop and maintain policies procedures for managing our Endowments, including gifts and disbursements. (See Endowment Committee Policy & Procedures).

Congregational Administrator

The Congregational Administrator is responsible for the day-to-day financial management of the organization, including coordinating with administrative Staff and vendors to ensure financial controls are met. The Congregational Administrator is accountable to all policies and procedures in the Board policy handbook. The Administrator will designate an individual or individuals responsible to oversee the day-to-day financial responsibilities when the Administrator is unavailable short or long term and has a written procedure approved by the Finance Committee.

The Board of Trustees delegates the following authority and responsibility to the Congregational Administrator:

- To pay bills, receive funds, and maintain bank accounts.
- To account for donor restricted and Board designated funds separately from general operating funds, and clearly apply the restrictions applicable to these funds.
- To file required reports in a timely manner, including reports on the financial results of UUS operations according to the schedule established by the Finance Committee.
- To sign checks up to $2,000. Checks for amounts greater than $2,000 shall require the additional signature of the Treasurer, Finance Trustee, or Board President.
- To sign contracts on behalf of the congregation. New long-term contracts must be reviewed by the team or committee with oversight of the affected budget line and sent to the Board for approval and to the Finance Committee for documentation. Renewal contracts for services or vendors previously approved by the Board of Trustees, or for short-term services within the scope of a team or committee's authority and budget may be signed without official Board approval.

Stewardship Team
The Stewardship Team is responsible for overseeing the annual stewardship campaign for the congregational operating budget, and for monitoring the status of pledges and pledging members. The Stewardship Team is accountable to all policies and directions from the Finance Committee and the Board.

The Board of Trustees delegates the following authority and responsibility to the Stewardship Team:

- To develop and maintain procedures for the Stewardship program, including establishing timelines and campaign goals.
- To develop and maintain proper procedures for monitoring and notifying members and pledging friends as to the status of their financial pledges.

Staff and Team/Committee Leaders
UUS Staff and team/committee chairs are responsible for the financial management of the budget lines allocated to their areas and are accountable to all policies and directions from the Finance Committee and the Board.

The Board of Trustees delegates the following authority and responsibility to all UUS Staff and team/committee chairs who control budgeted funds:

- To manage expenses within the parameters of the overall approved budget. The Congregational Administrator will monitor all spending and report to the Finance Committee on variances and the reason for these variances.
- To seek approval from the Executive Committee for unbudgeted spending or special fundraising.

Board Held
Board Approved June 2020
Reviewed/Updated by the Finance Committee 3/21
Approved by Board 3/17/2021

5-4 Financial Audits

As determined by the Finance Committee or at the request of the Board, the Board will engage a qualified professional to conduct an audit or review of the Society's financial records including the Endowment.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

5-5 Asset Protection

The Minister, Staff, and Board, must take all reasonable care to ensure that Society assets are protected from loss or theft, including:

5-6 Adequate insurance

The Board must assure that there is adequate insurance to protect against property losses, liability for injuries to others, corporate liability, personal liability of Board members and Staff, and for all personnel with access to material accounts of funds.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

5-7 Maintenance of the Society property and equipment to keep it in working order, subject to reasonable wear and tear.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

5-8 Reasonable steps to protect the Society's intangible property

This includes intellectual property (property created by UUS for UUS), electronics data, and paper files from significant damage or loss.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

5-9 Document Retention

The Minister and Staff must maintain written procedures to govern the backup, retention, and destruction of the Society's documents, giving definite retention periods for classes of financial, business, pastoral, personnel, and corporate records in both paper and electronic forms.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

6 Oversight

6.1 Mission Focus

The Board's duty of care is to ensure that UUS's human and material resources are used for the benefit of its mission. This will be fulfilled through monitoring regular reports and by evaluating UUS's progress toward achieving the goals established in the Annual Vision of Ministry.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

6.2 Monitoring

6.2-1 Monthly financial statements

Monthly financial reports will be provided to the Board that show the overall financial performance compared to the budget. The reports will include a summary of significant financial or operational issues. These reports will be available to any member who wishes to examine them.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

6.2-2 Quarterly financial statements

Quarterly financial statements will show the overall financial position of UUS. These must include a complete balance sheet and funds statement, detailed statements of operations, and a statement of cash flow.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

6.2-3 Programmatic Monitoring

On a schedule to be agreed upon annually by the Minister and the Board, the Minister must provide reports to the Board regarding:

- Progress on achieving the Annual Vision of Ministry
- Compliance with applicable Board policies
- Each report will focus on selected areas of progress and compliance, so that all in the course of the year the entire Vision of Ministry and all points of the policy compliance are covered.

Board Held
Adopted by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

6.3 Evaluation

Everyone responsible for the work on behalf of UUS will engage in a continual process of evaluation. The purposes to be accomplished through evaluation are to foster excellence in ministry work by ensuring that all the UUS leaders:

- Practice open communication and regular feedback
- Meet performance standards appropriate to their roles
- Maintain effective working relationships with one another
- Focus on achieving goals as approved by the Board and Staff

Board Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

6.3-1 Annual Board and Senior Minister Evaluation of Annual Vision of Ministry

Annually, as part of the creation of the Annual Vision of Ministry, the Minister and Board will together review their respective contributions to the fulfillment of the prior year's Annual Vision of Ministry.

Included will be the Society's success or difficulties in achieving the prior year's Vision of Ministry goals. This report should include the Ministry, Board, and congregation's effectiveness in their respective roles.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

6.3-2 Annual Staff Evaluation

The Minister must ensure that all Society employees are assigned an immediate supervisor, who will provide an up-to-date job description and complete a timely annual process of goal setting and performance evaluation. Individual Staff goals and performance reviews are confidential among employees, supervisor, and the Minister to be shared only as necessary to support Society decision-making or as required by law.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

6.3-3 Annual Evaluation of Board Committees

The Board must ensure that the 5 Board Committees are engaged in meaningful work that supports the Board in its actions. Each year the committee chair will fill out an evaluation report that states what the goals for the year were and how the committee did in fulfilling those goals. This report shall be submitted to the Administrator at the end of the liturgical year in time for the Annual Report.

Board Held
Reviewed/Updated/Approved by Board 3/17/2021

6.3-4 Annual Ministry Teams Evaluation

The Minister must ensure ministry teams are engaged in work supportive of the Annual Vision of Ministry. The Minister will work with Staff to determine how teams develop goals and how they will report progress at the end of the liturgical year.

Board Held
Board Approved
Reviewed/Updated/Approved by Board 3/17/2021

6.3-5 Minister's Triennial Performance Evaluation

Every 3 years the Board and Minister will assure there is an evaluation of the Minister on their wider pastoral role.
The Board and Minister will together appoint an ad hoc Review Committee made up of three Members of the Society that are mutually acceptable to each party. Working with the Board and Minister, the Committee will design and facilitate a review of the Minister's performance. The goals of the evaluation are to call the congregation's attention to the mutual, relational nature of ministry and the respective responsibilities of all who contribute to its success, and to help the Minister remain motivated, creative, and flexible. The Committee's report to the Board, together with a written response from the Minister, will be published to the Society along with the Board's plan for addressing any recommendations, it may contain.

Board Held
Board Approved 10/21/20
Reviewed/Updated/Approved by Board 3/17/2021

SECTION III – PROCEDURES

1. 1-1 Policy on Policies Procedure:

A. A need for a policy may be identified by members of the congregation, the Minister, Staff, Board of Trustees, Committees or Teams.

B. A draft of a proposed policy or procedure is created by an appropriate party after seeking input from those most affected. It is then reviewed by the Minister, appropriate Staff person, committee, or team before sending to the Board's Governance Committee.

C. The proposed draft is forwarded to the Governance Committee for finalization.

D. The Governance Committee then sends the finalized policy or procedure to the Board of Trustees for consideration.

E. Policies will contain the date of the Board of Trustees meeting when the policy was adopted or revised.

F. Policies may be revised or rescinded by the Board of Trustees at some later date.

G. The Secretary will maintain the minutes of all Board actions regarding changes to the policies and procedures. Following approval of such changes by the Board, the chair of the Governance Committee will transmit the changes to the Administrator to file in the master document.

H. The Secretary will record the minutes of all Board actions regarding changes to the policies and procedures in their monthly minutes.

I. At a minimum Policies and Procedures will be reviewed every three years. The Governance Committee will determine this process. They may send the policy or procedure to the appropriate group chair, Staff person, Minister, or Board for review and feedback. The Board will give final approval of the recommendations from the Governance Committee.

J. All policies and procedures will be held by the Administrator. Many procedures may not need to be passed by the Board.

K. The Minister has the authority over all Ministry related Policies and Procedures and is responsible for keeping such policies and procedures updated.

Board Held
Approved by the Board 7/11/2013

Reviewed/Updated/Approved by Board 6/15/2022

1. 1-2 Conflict Management Procedure

When approached for assistance in conflict management, the Minister and/or the Right Relations Committee will take the following steps:

1. Be an active listener
2. Ask if the individual has spoken directly with the other person, committee, team, Minister or Board
3. If there has been no direct communication, ask if the individual is willing to speak directly with the other person, committee, team, Minister or Board (other entity).
4. Encourage direct communication regarding the issue or concern with the other entity/entities.
5. Ask if the individual would like the Minister or a Right Relations Committee member to accompany and support them in the conversation with the other entity/entities.
6. Point out that if the individual is not willing to have direct communication with the other entity, there is small likelihood that the situation can be resolved. Suggest that the individual cease pursuing the issue with anyone other than the other entity involved and either find a way to directly communicate with the other entity or let it go.

If the concern pertains to UUS Staff, the Right Relations Committee will inform the Minister in writing. If the issue is urgent or serious, speak to the Minister as well.

In cases where the conflict could result in threatening, offensive or disruptive behavior, the Right Relations Committee will follow the guidelines in the UUS Policy and Procedures Handbook, for instance the Disruptive Behavior Policy.

In cases where the conflict centers on the Board and/or Minister to the extent that their ability to resolve the conflict is in question, and only after all the above procedures are followed and do not resolve the issue, the Right Relations Committee may approach the Mid America Region Executive to inform them of the situation and to seek external support for resolution.

Revised 2/4/2020
Board Approved 3/11/20
Updated

1.2-4 The Secretary Procedures

A. Formal meeting minutes and any motions made not during a formal Board meeting shall be presented for approval at the next regular Board meeting.

i. Unless decided otherwise by the Executive Committee, these records shall be included as part of the consent agenda.
ii. The Secretary shall make these records available to the Board in a timely manner, in the same way that other monthly reports are submitted for the consent agenda (i.e., placed in the Board's Dropbox folder for that month).

B. The monthly summary of Board meeting highlights shall, when possible, be presented to the Board for review and comment via email.

i. The approval of this summary will NOT require a formal vote and will NOT appear on the monthly digest of non-meeting motions.
ii. In order to meet print deadlines, it may not always be possible to solicit input from the Board prior to submittal of the highlights to the Office Administrator. In such cases, the Secretary shall give advance notice to the Board to this effect.
iii. Monthly Board meeting highlights are provided as a convenience to the members of the Society and are not considered a formal record of Board proceedings. If these highlights conflict with official minutes, the minutes will constitute the official record.

C. Any errors to the monthly highlights which are deemed serious enough to warrant correction shall be submitted by the Secretary to the Congregational Administrator for correction in the next month's newsletter.

Approved by the Board 1/09/2014
Updated by the Board on 11/11/2015
Reviewed/Updated/Approved by Board on 6/15/2022

D. Congregational Meetings

The Secretary will work with Staff and the Board president to make sure the voting list is accurate and that all congregational meeting materials are prepared and sent 10 days prior to a congregational meeting.

The Secretary will take minutes at all congregational meetings.

1-3.3 Conflict of Interest Procedure

Conflict of Interest Procedures
Governing members of UUS shall disclose any personal interest which they may have in any matter pending before the Society. Possible responses include:

- Disclosure in the minutes of the nature of the conflict.
- Asking the conflicted member to leave the room during discussion and voting related to the conflict.
- Resignation from the Board or committee.

Governing members of UUS shall, at the start of their term, disclose in writing any existing or foreseeable conflicts of interest. Additional attestations shall be made during their term as circumstances change. Attestations will be kept by the Board Secretary and be made available to any member of the Board or committee who requests to see them.
Any individual who is permitted to obtain a list of UUS members, friends, donors, or other affiliates shall refrain from using such information for personal or private solicitation purposes at any time.

Unitarian Universalist Society Conflict of Interest Disclosure

Name:
_____

Employer:
_____

Other Organizations Affiliated with as a Governing Member:
_____
_____
_____

Please list any additional existing or foreseeable conflicts of interest that may arise during your term as a governing member of the Unitarian Universalist Society:
_____
_____
_____
_____
_____

Signature: _____Date:
_____

Board Held
Adopted by the Board 7/11/2019
Reviewed 10/21/20

1.3-4 Discipline and Removal of Board Members Procedures

Removal of a Board member for Misconduct Procedure
The Secretary will notify the member in writing and offer a hearing before the Board. Pending such a hearing, the Board may suspend the member's voting privileges during Board meetings.
Removal of a Board member for Absence from Board Meetings Procedure
If an officer or Board member misses more than three meetings in a twelve-month period, the Board *may* choose to address the absences. If so, the Secretary will notify the member in writing that the member may appear at the meeting to ask the Board to excuse the absences, or the Board may request the member's resignation. If the Board decides to remove one of its members for any reason, it must do so by a two-thirds majority vote at a special meeting called for that purpose.

Board Held
Approved by the Board

1.4 Board Committees, Task Forces, Teams, and Interest Groups Procedures

A. Will have a mission statement or committee charge including an explicit statement on how the committee implements the mission/vision of the UUS and UUA Seven Principles.

B. Will operate under the guidance of right relations.

C. Will have written records, policies, and procedures.

D. Will have annual goals and provide a report to be included in the annual report for the May congregational meeting.

E. Will provide ongoing communication with the congregation.

F. Will have a designated leader(s) who is a member of UUS, plan for leadership development and rotation of leadership.

G. May request funds to be included in UUS budget or as special needs arise and will be accountable to the Board of Trustees for the use of such funds. Operational Committees may not fund raise on their own without specific approval of the Board of Trustees or its designee.

H. Board Committees will have a member from the Board, to offer support and guidance in strengthening the effectiveness of its ministry. This person may be the

chair or may co-chair with a lay member.

I. Board Committees will keep minutes and make sure they are available for Board members to review ahead of Board meetings.

Ad-hoc or Specialized Committees and Task Force Teams

The Board of Trustees and Minister may establish specific policies for ad-hoc and specialized committees and task forces at the time the committees are created.

Interest and Affinity Groups

A. Interest and Affinity Groups will discuss, at least once each year, how the group advances the mission/vision of the UUS or the Seven UUA Principles.

B. Interest and Affinity Groups are informal groups. They must let the Director of Congregational Life know they are meeting as well as all pertinent details. They may provide a report to be included in the UUS Annual Report for the May congregational meeting.

Board Held

Approved by the Board of Directors, 9/26/13
Updated by the Board

Endowment Committee Procedures

A. Monies designated for any endowment fund should be transferred by the UUS treasurer from the UUS bank accounts to the appropriate endowment account within 30 days of receipt of a designated donation or of final approval by the Board to apply an undesignated gift to endowment. Every effort will be made to make transfers within the 30-day time period. The UUS office will maintain records of all donations to the endowment and will report all gifts to the EC chairperson as they are received, including the amount, donor, and contact information. An appropriate acknowledgement will be made by the EC in a timely manner.

B. **Jean Reese Fund:** Jean Reese was a long-time member of the Unitarian-Universalist Society and through her will has made a generous bequest to us. A portion of her bequest will be used to create a dedicated fund as a memorial to her and to honor her. Based on her personal interests of gardening and her dogs, we are creating a fund to support the outside development and maintenance of our property beyond the general ongoing maintenance.

1. The fund will be used to fund the development of the property outside of the UUS building. This includes all the lands owned by the UUS that surround the UUS building. Proposals will be submitted to the Endowment Committee for specific projects.
2. A Corpus of $50,000 shall be maintained, while allowing for multi-year projects. The existence and size of this corpus should be re-examined periodically.
3. The Endowment Committee shall receive and review requests for funds from the Jean Reese Fund and forward any proposal deemed acceptable by the Committee to the Board of Trustees for final approval.
4. The Board shall be responsible to accept, reject, modify, or return the proposal for modification to the Endowment Committee.

Endowment Held
Approved by the Board 10/21/20
Reviewed/Updated/Approved by Board 6/15/22

1.4-5 The Personnel Committee Procedures

The committee will receive and forward to the Board an annual report on Staff positions, benefits, and the use of job descriptions and performance evaluations per general templates reviewed by the committee.
The committee meets at least quarterly and has a minimum of four members appointed by the Board to three-year terms.
One member of the Board will serve on this committee as co-chair with one lay member selected by the committee.
The congregational Administrator may serve as non-voting Ex-officio member to the committee.
In the event of a Staff grievance that cannot be resolved at the supervisory level, the Board or executive committee will appoint an ad hoc committee in each case including at least one member of this Personnel Committee.
They will submit their minutes to the Board for review.

Board Held
Approved by the Board 10/21/20

4-0 Lifetime Membership Appointment Procedures

Recommendations for Life Membership may come from Membership Associates, the Pastoral Care Team, the Minister, the Director of Congregational Life, or any member of the congregation.

Upon a majority vote of the Board, the Life Member's history with UUS will be documented, published in the newsletter and, if appropriate, a celebration will be held. A certificate of recognition or other memento of the event may be created and presented to the Life Member.

Ministry Held
Approved by Board 1/09/2014
Reviewed/Updated

4-1 Voting Procedures – Ministry Held

A. Eligibility to Vote

The Staff are responsible to maintaining an accurate voting list. Anyone who is not eligible to vote will be contacted by email, USPS, or phone. Changes will be recorded and added to the updated voting list. The President and Secretary of the Board of Trustees, and a senior Staff person, will determine exceptions and resolve challenges to this policy and procedure.

If a congregant is not on the voting member roster but wants to vote in an election, the person may vote by paper ballot, the ballot will be accepted, but marked for research to determine eligibility.

B. Absentee Voting

Absentee paper ballots will be made available a minimum of fourteen days prior to the close of voting**.** The Election Administrator will maintain the voting roster and will record the distribution and receipt of absentee ballots. These ballots will be returned in an unmarked envelope, which will be inserted in an envelope with the voter's name on the outside. These ballots will be opened on the day the election closes, and the outside envelope discarded after voting closes. Absentee ballots will be included in the counting of ballots. If an issue is amended during discussion at the meeting, the absentee vote shall not be counted for that specific issue.

C. Electronic Voting

In UUS multi-platform voting, election ballots and the text of known motions are emailed to all members via email or USPS depending on the member's preference prior to the congregational meeting. Amendments or motions arising during the meeting will be decided by a majority vote polling in-person and on-line participants. The Board of Trustees will

designate the electronic voting platform to be used and an Election Administrator. All final voting, except for paper absentee ballots, for a multi-platform meeting will take place through the designated electronic voting platform during a time period designated by the Board. Announcement of the voting results will take place the first Sunday following close of the voting period. The Election Administrator is authorized to resolve individual problems or requests involving the casting of electronic ballots.

Ministry Held
Approved by Board 3/13/2014 updated 5/14/2015
Reviewed/Updated 4/20/2022

4-2 Childcare Request Procedure

Events that UUS provides childcare for include, but are not limited to:

- Society sponsored workshops and special events (e.g.: Festival of the First Breads, Leadership Development workshop);
- Adult Religious Education classes
- Membership classes
- Society-wide fundraisers (e.g.: Treats and Talent Auction)
- Sunday and other worship services
- Congregational meetings
- Religious Education special events and trainings (e.g.: Special Needs Support Group, Parent Orientation, Teacher Orientation)

Childcare is not provided for recurring committee/group meetings.

UUS committees/groups wishing to offer childcare at their special event(s), with the exception of worship services, should submit a childcare request to the Nursery Supervisor at least two (2) weeks in advance. Requests for childcare will be reviewed by the Nursery Supervisor, with possible consultation of the Director of Religious Education (DLRE), Board and/or Executive Committee, in consideration of the childcare budget, and need to include:

- committee/group name
- committee/group's contact person with phone and/or email
- event/meeting name
- date(s) with start and end time
- expected number of children attending and ages; and
- Special requests or instructions (ex: snacks or special activities to be provided at the cost of the committee/group).

After a request has been approved, the Nursery Supervisor will notify paid childcare workers and volunteers. Once childcare arrangements have been made, the Nursery Supervisor will send the committee/group's contact a confirmation, including the name of the childcare providers and contact information. If no one is available, the Nursery Supervisor will let the

committee/group's contact know one (1) week in advance, and it will be the responsibility of the committee/group to find volunteers for the event(s). Volunteers must be members or friends of UUS.

Ministry Held
Approved by the Board 10/09/2014
Reviewed/Updated

4-3 Safe Congregations Procedures for Children and Youth

Selection and Screening of Staff and Volunteers

This policy applies to all committees, task forces, affinity groups and organizations that function under the umbrella of the Unitarian Universalist Society. It also applies to other groups and events sponsored by and using the facilities of the Unitarian Universalist Society. For example, when Youth Conferences are held at Unitarian Universalist Society, all adult advisors must complete the screening process described below or be screened by their society or another organization satisfactory to the DLRE or Minister. This policy does not apply to groups or organizations utilizing UUS facilities strictly on a rental or fee basis.

A. Children and youth teachers, youth advisors, volunteer nursery helpers, Minister and employees currently serving shall sign the Code of Ethics form annually and have a criminal records check, which shall be updated every year by the DLRE or designee. Existing teachers must attend regular child safety training sessions.
B. Persons regularly scheduled to work or volunteer with children and youth and who are new to the positions or who have not served within the past year, shall be screened, and processed in accordance with this policy: Minister, paid Staff, volunteer nursery workers, all religious education teachers (except substitutes), and youth group advisors. The following shall be required:
   i. Primary Screening Form with photographic proof of identity. Exemptions are made for youth without photo identification.
   ii. Two references requested by the Unitarian Universalist Society shall be secured by phone or face-to- face interview by the DLRE or designee prior to the person beginning work with children or youth. Reference interviews will be documented on the Teacher Reference Form and the original will be kept in a secure file three years after an individual no longer works with children or youth.
   iii. Applicant's authorization form for criminal records request.
   iv. Criminal records check updated every year.
   v. Code of Ethics Form (signed annually by parents or guardian and applicant.).
   vi. Youth advisers, RE teachers and paid nursery workers must attend regular child safety training sessions facilitated by the DLRE.
   vii. DLRE or designee shall interview paid childcare workers and retain notes of the

interviews for three years after the person is no longer employed.

C. The DLRE may utilize adult or teen volunteers 14 years of age or older recruited on short notice when necessary to properly supervise activities. No such person shall be utilized unless of character satisfactory to the DLRE or designee. The individual must complete the secondary screening form prior to serving.

D. For RE Teachers who are under age 18 the following is required:
   i. Volunteers under age 18 shall not supervise high school students.
   ii. Primary Screening Form with photographic proof of identity, signed by parent or guardian and applicant. Two references requested by the Unitarian Universalist Society shall be secured by phone or face-to-face interview by the DLRE or designee prior to the person beginning work with children or youth. Reference Interviews will be documented on the Teacher Reference Form and the original will be in a secure file for three years after an individual no longer works with children or youth.
   iii. Applicant's authorization form for criminal records request signed by parent or guardian and applicant.
   iv. Criminal records check updated every year.
   v. Code of Ethics Form (signed annually by parent or guardian and applicant).
   vi. Youth advisers, RE teachers and volunteers and paid nursery workers must attend regular training sessions facilitated by the DLRE.
   vii. DLRE or designee shall interview paid childcare workers and retain notes of the interviews for three years after the person is no longer employed.

E. Responsibility of DLRE for Implementation of Selection and Screening
   i. The DLRE shall be responsible for overseeing completion of the appropriate paperwork, except where noted, and for checking references. The Minister shall follow up to ensure that the reference checks have been completed appropriately.
   ii. The DLRE shall verify the identity of anyone working with children or youth by photo identification. Exemptions are made for youth without photo identification.
   iii. Anyone expressing interest in ongoing volunteer work with children or youth in the Society must first attend Society services regularly for at least six months unless the Minister and DLRE determine otherwise after screening.
   iv. Criminal records checks including the National Criminal Database, Iowa Sex Offender Registry, and Iowa Department of Human Services' Child Abuse Registry check, shall be initiated, and reviewed by the DLRE. States that do not participate in the National Criminal Data base will also be checked if relevant. Results of the reference and background checks shall be maintained in writing and retained in locked files by the DLRE.

v. Disqualification: Conviction of any of the following offenses shall preclude the individual from working with children or youth: (1) Any offenses involving illegal drug use, sale, or manufacturing thereof (2) any sex offense, (3) any felony within the past 12 years or (4) any offense involving violence against any person. The DLRE and Minister may make exceptions to the foregoing on a case-by-case basis by documented agreement. The DLRE may disapprove any person wishing to work with children or youth if he/she feels substantial concern that the person may have committed any of the crimes listed above, even if there is no conviction.

vi. If it is determined by the Minister and DLRE in consultation with the President of the Board of Trustees that a potential volunteer should have restricted access to children or youth, he/she shall be required to sign a limited access agreement and shall not be allowed to have any further contact with children or youth. If the same is determined for a potential paid Staff person, the person shall not be hired.

vii. The Minister and DLRE will keep securely all information required to be gathered by this policy for three years past the time an individual is no longer employed, volunteering or, for a disqualified individual, a member or friend of the congregation.

I. Training and Supervision

A. Staff members, RE teachers, youth advisors and childcare workers shall receive a copy of the Safe Congregation Policy Statement, and shall be trained by the DLRE, Minister or designee to understand the following:

ii. The definition of child abuse,
iii. Sexual and physical abuse symptoms,
iv. What constitutes inappropriate conduct,
v. Society policies and practices that govern working with children or youth,
vi. That there are civil and criminal consequences of misconduct,
vii. Reporting procedures for observed or suspected misconduct, and
viii. The rationale behind screening procedures.

B. Children and Youth Supervision Requirements

i. Nursery

a. At least two appropriately screened childcare workers (at least one of whom is an adult) will be present at all times in the nursery.

b. On occasions when the regular adult is not available for service in the nursery,

then another adult approved by the DLRE may serve, upon completion of the secondary screening form.

c. The responsible adult in the nursery will maintain attendance records and ensure that each child who is signed in has a completed enrollment form in accordance with religious education procedures.

d. All children supervised in the nursery shall be signed in and out by the responsible adult in the nursery. A check-in check-out policy will be used to ensure that the child is released only to the parent or guardian bringing the child to the nursery, or by a person authorized by that parent or guardian.

e. Childcare workers shall be in high school or older. Iowa labor laws state that youth under 15 must acquire a work permit and work no more than four hours per day between the times of 7:00 am – 7:00 pm. Refer to Iowa Workforce regulations.

f. Childcare workers must have a CPR certificate that includes infant/child resuscitation.

ii. General Children and Youth Supervision

The building will not be open to children or youth for any activity until 2 adults are present.

a. On Sunday mornings the DLRE will circulate throughout the classrooms and nursery.

b. At least two appropriately screened adults or an appropriately screened adult and youth volunteers shall be present at all times in other (non-nursery) classrooms when children or youth are present.

c. No child under third grade will be dismissed from religious education class except to a parent, guardian, or other appropriate supervisor.

d. Society functions providing childcare require at least two screened childcare workers.

e. On occasions when the regular adult is not available for service, then another adult approved by the DLRE may serve, upon completion of the secondary screening form.

f. RE teachers will maintain attendance records and ensure that each child who is signed in has a completed enrollment form in accordance with religious education procedures.

g. The DLRE will provide teachers with contact, medical, and special needs information on each child registered.

h. There shall be no illegal drugs or weapons at events sponsored for the children and youth. Volunteers and Staff shall not consume alcohol or illegal drugs prior to or while caring for children. During Society events, alcohol, prescription medicines, over the counter medicines and tobacco products will be out of reach and out of view of children and youth.

iii. Supervision Requirements for Field Trips, Youth Gatherings, Vehicle Rides and Lock-ins.

a. The DLRE shall develop procedures compatible with these policies for supervision for field trips, youth gatherings, vehicle rides and lock-ins. These procedures shall be included or appended to this document.

b. Procedures for field trips, youth gatherings, vehicle rides, and sleepovers shall follow the Youth Conference Planning Manual whenever appropriate.

c. Permission slip and medical release form is required for each child or youth.

d. Adult volunteers who plan to take the children outside of the building for a walking trip must inform DLRE prior to the event. The DLRE will check and make sure the parents have given permission on the registration form for short walking trips. There must be at least two adults or an adult and youth volunteer accompanying children and an appropriate adult/child ratio (See Department of Human Services' guidelines for Staff-to-child ratio.)

e. For field trips by cars, adult volunteers must obtain permission slips and medical release forms from the RE Office in advance of the field trip. These

must be signed by at least one parent and returned to the adult in charge before the child may participate in the field trip.

f. All drivers must have a valid and current driver's license and shall have abstained from the use of alcohol or medications that carry warnings that taking the medication may impair their performance of operating a motor vehicle for at least 12 hours before the field trip. Individuals who use illegal drugs shall not operate a motor vehicle for the transport of UUS children and youth. The DLRE is responsible to check and copy drivers' licenses.

g. Each vehicle must have an appropriate adult child ratio. At no time shall an adult be alone in a vehicle with a child or youth. If an additional passenger cannot be found, the parent parents or guardians may sign a release to waive the policy.

h. All personal vehicles used for field trips must carry auto liability insurance with minimum limits in accordance with the laws of the State of Iowa.

i. Every person transported in the vehicle must wear a seatbelt. Children six and under must be in appropriate car seats. Children six to eleven years must be secured in a child restraint system or be in a safety belt (See Iowa Department of Motor Vehicles).

II. Reporting Procedures for Suspected Child Abuse

A. Anyone who suspects child abuse, including the Minister, an employee, volunteer, member, or attendee of the Society, should immediately notify the Minister, the President of the Board of Trustees or the DLRE of these, whoever receives the information shall be responsible for reporting to the others. In the event that the charges involve a Minister, the next point of contact shall be the Board President, who shall then notify and consult with the Executive of the MidAmerican Region or the UUA Department of Ministry. Any person making a report of child abuse that has reason to believe that immediate protection for the child is advisable shall also make an oral report to the Coralville Police Department or other appropriate law enforcement agency.

B. Procedures for dealing with reports of abuse or neglect are found in the attached document, "Report of Suspected Abuse," which outlines duties of the person receiving

the report, as well as the DLRE, Minister and the Board President.

C. If the report involves a Society employee or volunteer, then the Minister, the Board President and the DLRE shall additionally:

i. Collect and review all pertinent facts regarding the incident or charges
ii. Review application and reference forms kept on the person
iii. Determine what, if any, actions need to be taken; and
iv. Carefully document all meetings, conversations, information, etc. regarding this matter, and keep all this information as confidential as the circumstances warrant.
v. In the event that knowledge of the incident becomes public, the Minister and the Board President shall designate a spokesperson for the Society. The spokesperson shall use the text of a prepared statement to answer the news media and convey the incident to the congregation, taking care to safeguard the privacy of all parties involved.
vi. The Minister, the Board President and the DLRE shall carefully document the handling of the incident, and report the incident, as appropriate, immediately to the child's or youth's parents, the Department of Human Services, and the Society's insurance company.
vii. The Minister, the Board President and the DLRE (or one of them) shall consult an attorney for advice as to what steps are necessary or prudent to protect the interests of the children and the Society.
viii. The Minister, the Board President and the DLRE shall determine how to address the incident within the congregation.
ix. If the accused is the Minister, DLRE or Board President, that person shall be removed from the decision-making process, and the remaining two shall select a third person as a replacement.

D. Actions by the Society regarding Employees, Volunteers, Members and Attendees.

If the Minister, Board President and DLRE jointly conclude that allegations of child abuse or neglect justify protective measures, then they shall implement one or more of the following actions:

i. Require a limited access agreement
ii. Determine who in the Society and the larger community should be notified, and means of notification
iii. Notify DHS and/or the Iowa City Police Department
iv. Suspend or terminate volunteer duties, recommend termination or other disciplinary action for an employee or Minister to Board of Trustees (By-laws, Article IX, or in the case of a member, recommend action to the Board of

Trustees (By-laws, Article III).

v. Any other action which in the opinion of the Minister, DLRE and Board President are in the interests of the Society, the Society community, or children or youth, and in compliance with UUS By-laws.

E. Procedures for Working with and Caring for a Person Against Whom Allegations of Abuse or Neglect Have Been Made.

Under this policy, the persons charged with the responsibility for determining, for Society purposes, whether allegations of abuse or neglect justify protective measures, are the Minister, the DLRE and the Board President.

i. Treat the accused with dignity and support.
ii. If the accused is a paid Staff person, a volunteer, or a member, that person shall be suspended from all activities involving the supervision or care of children, youth, or other vulnerable persons. This is true for an incident that allegedly occurred either during Society activities or outside the realm of the Society.
iii. Regardless of where or under what circumstances any incident is alleged to have occurred, if the Minister, DLRE and Board President have placed restrictions upon an employee or volunteer, those restrictions shall remain in effect until all allegations have been cleared to the satisfaction of the Board of Trustees.
iv. The Minister, DLRE and Board President may remove the person from service at their discretion, and for employees, that removal may be with or without pay. The temporary suspension remains in effect until all allegations have been resolved.

F. Procedures for Working with and Caring for a Person Who Has Engaged in Abuse or Neglect.

Because we affirm the inherent worth and dignity of every person, we do not believe any person should be automatically excluded from participation because of their actions. However, we have responsibility to insure the well-being of all of our attendees. The ability of some perpetrators to change their behavior is uncertain. If someone wishes to participate in this Society who has been convicted or is the subject of a “founded” report by DHS of abuse or neglect, we will welcome that individual. However, the person's participation may be limited to ensure the safety of all.

i. Restricted Access

a. If it is determined that any person should have restricted access to children and youth), he/she shall be required to sign a limited access agreement and shall not be allowed to have access to children and youth except as consistent with that agreement. The Minister, DLRE and Board President shall determine

if a limited access agreement is necessary, and the terms of that agreement.

Monitoring Policies and Procedures

A. The DLRE shall provide a copy of the Safe Congregation Policies and Procedures (SCPP) to the membership committee and the office Administrator. The office Administrator shall cause the summary of the SCPP to be placed in new member packets. The DLRE shall have the SCPP posted on the Society website and annually the DLRE shall cause a reminder of the SCPP to be placed in the newsletter and order of service.

B. The DLRE shall have responsibility for implementing screening procedures, reference checks, annual record checks and initial training for all volunteers working with children and youth, and the office Administrator shall have those responsibilities for all employees, including the Minister. The Board shall see that these responsibilities are performed.

Ministry Held
Approved by Board in 2009, revised and approved 02/12/2015
Reviewed/Updated

4-5 Alcohol and Illegal Drugs Procedures

A. The event planner/host is responsible for informing the Minister, Board President, and Administrator of an event at which alcohol will be served. The notification will include the name of the event, the name of the responsible event planner/host, the location, the date, the time, and that the event will include the serving and use of alcoholic beverages. An Alcoholic Beverage Event Notification Form may be used and is available on the UUS website at (link to be determined.}

B. The Administrator will keep an ongoing file of these e-mail notifications covering the preceding two years (A two-year lookback.)

C. The event host/planner is responsible for communicating the policy to servers and wait Staff and for monitoring the implementation of these procedures. The event planner/host shall report departures from the policy/procedures to the Minister, Board President or Administrator for follow-up.

D. Only wine, beer, and champagne will be allowed at UUS sponsored events. No spirits or 'hard liquor' will be provided. Participants may provide their own alcohol for their own consumption.

E. At all events where alcoholic beverages are served, equivalent access to non-alcoholic beverages will be provided, including comparable attractiveness, prominence, and accessibility.

F. At UUS sponsored events, NO alcoholic beverages will be sold on UUS premises at any time, either directly or indirectly, through voluntary contributions or otherwise. There will **not** be a container available for the deposit of coins, bills, or donations where alcoholic beverages are serviced or on serving tables.

G. At fundraising events the solicitation and collection of free-will donations with appropriate signage and clearly designated collection containers must be conducted in a manner completely independent of any provision of alcoholic beverages.

H. Alcoholic beverages may not be served to anyone under age 21. <u>All</u> servers must be 21 years of age or older. In general, serving of alcoholic beverages will be restricted to the designated serving table(s), unless servers are acting as wait Staff filling specific orders from persons seated at tables, such as might occur at an auction dinner. Anyone servicing alcohol must exercise reasonable care to assure that the served person is 21 or older and shall ask for an ID to verify that person's age if in doubt or refuse to serve the person. Anyone observed providing alcohol to underage persons will be reported immediately to the Minister, Staff or event planner/host in charge who will intervene to stop the behavior and will report the incident to the Board

President.

I. Those serving alcohol must not pressure adults who wish to refrain to accept alcohol. Any Board member observing such pressure must report the incident to the event planner/host, Minister, or Board president.

J. Alcoholic beverages must be clearly labeled, and their serving tables must have appropriate signage. Non-alcoholic beverages and food must also be served at any event in which alcohol is served. Tables for alcoholic beverages will be widely separated from tables providing non-alcoholic beverages.

K. Two persons age 21 or older must attend any station serving alcohol. All alcoholic beverages not consumed during the event must be removed from the event location or stored in a locked cabinet. Persons under 21 will not assist in the clean-up of service tables for alcoholic beverages nor discarded drinks or glasses.

L. At any event, especially those involving children and youth, alcoholic beverages must be served at a separate station from other beverages. Alcoholic and non-alcoholic beverage stations should be widely separated.

M. Alcohol will not be served to any person who appears to be intoxicated or otherwise unable to use such beverages responsibly. UUS members and Staff will take appropriate actions to prevent an intoxicated person from driving or doing anything to cause themselves or others harm. Inappropriate behavior due to alcohol will be dealt with according to relevant church policies (Disruptive Behavior, Safety, etc.).

N. A UUS special event conducted as a free-will donation does not require an alcohol permit or license. If a UUS sponsored event requires a liquor license, the licensee must also carry dram shop/liquor liability insurance. Special event licenses are available for 5 or 14 consecutive days. A Sunday Sales privilege is also required for a Sunday event. Applications for such licenses or permits must be submitted at least two months prior to the event. Instructions for licenses and permits are available through the Iowa Alcoholic Beverages Division at https://abd.iowa.gov/licensing/insurance-licensing-forms.

O. All use of alcoholic beverages must conform to all applicable federal, state, and local laws.

P. Rental Alcohol Use Policy: **Alcohol Use** – If alcohol is to be served, only wine, beer and champagne may be served. NO alcoholic beverages will be sold on the premises at any time, either directly or indirectly, through voluntary contributions or otherwise. There will **not** be a container available for the deposit of coins or bills. The responsible party will ensure alcoholic beverages will not be sold to or served by anyone under the legal age on church premises. All Iowa laws and city ordinances

must be followed by the responsible party. A separate Alcohol Policy Agreement will be signed by the responsible party.

Board Held
Approved by the Board 4/14/2016
Reviewed/Updated

4-7 Inclement Weather Procedures

1. The Administrator will announce by email, post on the website, and list on the KCRG TV cancellation list when Sunday services are cancelled or when the office will be closed during the week. In the absence of the Administrator, the Minister or designee will make the announcements.

2. Committees, teams, and other groups may make decisions about meeting and activity cancellation and will use their own email methods to distribute information.

3. If there is inclement weather and the office remains open, but an employee is unable to travel to work, the employee should notify the Minister about what time they will be able to report to work. The Minister and employee will consult together on whether the employee can get their work done from home or use vacation or personal hours for this time. Childcare workers will report to the DLRE if they are unable to report for work. The custodian will report to the Administrator if he is unable to report to work.

4. If the office has been closed during the week due to inclement weather, employees will not be required to use personal or vacation time and will be paid.

5. Volunteers should call to find out if the office will be open before traveling. Volunteers should always use personal discretion when deciding whether to report for activities and duties and notify the office of their decision.

6. In the absence of the Minister, the President of the Board of Trustees or a designee will decide to cancel services or close the office.

Ministry Held
Approved by Board 4/09/2015
Review/Updated

4-14 Memorial Garden Procedures

Cremains interment in the Garden must be approved by the Minister or President of UUS after receiving an application form. Cremains shall be in a biodegradable bag and accompanied by a certificate from a licensed crematory. Cremains may be buried or scattered in the Garden as designated on the application form and done at a date and time agreeable to UUS by a person designated by UUS. No plaque, permanent marker, or other object or plant is allowed to identify an interment. UUS will maintain a permanent Memorialization Record that lists the name of the individual interred, date of interment, date of birth and death of the individual, and approximate location in the Garden of the cremains (i.e. northeast, northwest, southeast, southwest Garden quadrant), the approved application form and crematory certificate. Family or friends may add an obituary or other life story data to the Record. There is no direct cost for an approved interment, but a voluntary donation ($500) to the UUS Memorial Fund is encouraged. No advance reservation is required and requests for interment may be made at any time, though advance requests are encouraged. A legal release form must be signed by a relative of the decedent. The Memorial Garden Team will supervise maintenance of the Garden and the Memorialization Record. The Finance Committee will oversee expenses related to the Garden subject to approval by the Board.

Board Held

Approved by the Board October 20, 2021

5 Care of Material Resources

5-1 Operating and Capital Budgets Procedure

The Staff and or team review the current year's budget and seek input on how much money will be needed by that committee for the next year. The amount given to a committee is based on that projected need, spending history from previous years, and the overall availability of funds, the Annual Vision of Ministry, and any Strategic Plan currently in effect. The Board reviews the proposed budget meeting and votes to approve the proposed budget before taking it to the congregation.

Teams are expected to stay within their budgeted funds each year. Mid-year requests for additional funding should not be necessary except in very unusual circumstances.

FINANCE PROCEDURES

5-2 Accounting Procedures

5-2.1 Cash Disbursements Process

1. Vouchers with attached invoice/receipt and approval from authorized personnel (Staff and group leaders who oversee budget lines or approved funds) are turned in to the Administrative Assistant, who verifies that the voucher request is complete and agrees to the invoice/receipt attached, then enters in QuickBooks Online (QBO). The voucher is initialed and dated once recorded. Voucher and invoice/receipt is then scanned and attached to QBO. Hard copy is filed in unpaid vendor folder.

2. Mailed vendor invoices are given to the Congregational Administrator, who opens them, initials approval on the invoice and notes the appropriate account number, then gives the invoice to the Administrative Assistant to record in QBO. The Administrative Assistant also scans the invoice and attaches to QBO, then files hard copy in unpaid vendor folder.

3. Weekly, the Administrative Assistant prints checks for all outstanding invoices and vouchers, matches up checks and invoices/vouchers and gives to the Congregational Administrator, who signs checks and obtains 2nd signature as needed, according to spending authority policy.

4. Signed checks with related invoices/vouchers attached are returned to the Administrative Assistant, who attaches check and 1st stub to remittance and mails to vendor/payee. The second stub is attached to the invoice and filed in paid invoices folder.

5. When credit card statement is received, the Congregational Administrator makes copies and distributes to cardholders to attach receipts and document appropriate account number. Statement copied and attached receipts are given to the Administrative Assistant to record,

scan, and attach in QBO, and file in unpaid invoice folder. Once the credit card has auto-paid, the Administrative Assistant marks the paid date and files in vendor folder.

6. At the end of the month, the Congregational Administrator obtains the electronic bank statements via online access and scans for unusual items, then gives statements to the Administrative Assistant to reconcile the accounts. A reconciliation report is printed and attached to the bank statement and returned to the Congregational Administrator to review to ensure balance agrees to general ledger at end of month, scans outstanding checks and deposits for items that need investigated, then signs approval and files. Treasurer receives bank reconciliations and attached statements for review at monthly Board meetings.

7. A check register report is generated at the end of the month for the Treasurer to review.

8. At the monthly finance committee meeting, the Treasurer is provided a folder with bank reconciliations/statements and the check register for review.

9. Once a check has been outstanding for 3 months (not been cashed), the Administrative Assistant performs due diligence to find out why the check was not cashed and makes every effort to get check cleared. If check does not clear, unclaimed property reporting due diligence is performed and reported. Documentation of efforts made are maintained in bank reconciliation file.

5-2.2 Cash Receipts Process

1. After Sunday services, two members of the Hospitality Team count the offering together. They open all envelopes, verify the number of checks as well as the total value and input data on count slip. They also count cash and input data on count slip. The count slip is totaled, then placed with cash and checks in a bag and placed in the lockbox in the reception area.

2. The Congregational Administrator unlocks the lockbox and opens the bag with the Administrative Assistant, and they recount the offering together. They prepare a deposit slip and ensure the total on the deposit slip matches the count slip. If there are discrepancies (over $20), they notify the Hospitality Team members who counted and determine the solution.

3. The Congregational Administrator records the deposits in Realm (specifying donor name, date, amount, pledge campaign, memo details, etc.) and takes the deposit to the bank. They then provide the deposit slip and bank receipt to the Administrative Assistant. The Administrative Assistant verifies that the deposit total agrees to the bank receipt, then records in QBO and files.

4. A separate deposit is made for non-offering receipts. Cash and checks that come in throughout the week and in the mail are placed in the lockbox. Once a week, the Congregational Administrator and the Administrative Assistant open the Dropbox, count the cash and checks, and create a deposit slip following the process for weekly offerings above.

5. On a weekly basis, the Congregational Administrator pulls an electronic deposits report from Realm showing dates, amounts and accounts for the Administrative Assistant to record in QBO.

6. At the end of the month, the Congregational Administrator obtains the electronic bank statements via online access and scans for unusual items, then gives statements to the Administrative Assistant to reconcile the accounts. A reconciliation report is printed and attached to the bank statement and returned to the Congregational Administrator for her review. The Congregational Administrator reviews to ensure balance agrees to general ledger at end of month, scans outstanding checks and deposits for items that need investigated, then signs approval and files. Treasurer receives bank reconciliations and attached statements for review at monthly Board meetings.

5-2.3 Payroll Process

1. At the beginning of the year, once the budget is approved, the Congregational Administrator prepares a detailed spreadsheet of salary/hourly wages and benefits by employee for the Treasurer to approve. Once approved, the Congregational Administrator updates QBO for changes to individual employees.

2. All hourly Staff prepare timesheets, either physically or in Google Docs.

3. On the 25th of each month, hourly Staff provide their timesheet for the previous 26th of the month through the 25th of the current month to their immediate supervisor for approval. Each supervisor sends the approved timesheets to the Administrative Assistant for their review. The Administrative Assistant reviews the timesheets for proper calculations, approvals, etc. then gives the timesheets to the Congregational Administrator to process payroll.

4. The Congregational Administrator processes payroll in QBO. Once payroll is processed, a payroll report is emailed to the Administrative Assistant (and cc to Treasurer). The Administrative Assistant verifies that the hours submitted by the employee confirms and agrees to the totals on the timesheets. The Congregational Administrator submits ACH information on bank's website for disbursement and the Administrative Assistant prints checks for remaining employees. Checks are given to the Congregational Administrator for signature,

she signs checks, and obtains 2nd signature as needed, according to spending authority document.

5. Once signed, the checks are returned to the Administrative Assistant for disbursement to employees or mailing.

5-2.4 Petty Cash Process

1. A petty cash box is maintained at $75 for minor cash needs of the organization. The Administrative Assistant will make disbursements as needed from petty cash funds while maintaining a receipt for each cash disbursement including the date, amount, requestor, and account to be charged. Only the Administrative Assistant and Minister will have access to the petty cash box key.

2. On a quarterly basis, or as needed, the Congregational Administrator will count the petty cash box, including receipts for cash disbursements made and replenish the fund as needed. Petty cash fund replenishment will follow the cash disbursements process.

5-3 Fundraising

5-3.1 Types of Fundraisers/Sponsorships Allowed

All UUS fundraisers/sponsorships must be reviewed by the Finance Committee and their recommendations sent to the Executive Committee. The Executive Committee will approve it or take it to the Board for further discussion, subject to the processes and exceptions listed below. Types of fundraising/sponsorships allowed at UUS includes (but may not be limited to): events charging admission or selling items (dinners, concerts, book sales, etc.), collection bins or drop-offs (food/clothing drives), and requests for cash donations or sponsorships. Fundraisers/sponsorships may be held to support UUS and its programs, or for other outside approved organizations such as nonprofits. Any fundraiser/sponsorships held on behalf of UUS or by a UUS group is governed by these procedures, regardless of whether the fundraiser/sponsorship is held on UUS grounds. Any outside person/group requesting to raise funds at or through UUS must have a UUS group as a sponsor. Political fundraisers for individual candidates or parties are not permitted but support for causes related to an election or political event may be considered.

5-3.2 Process for Requesting a Fundraiser/Sponsorship

The Finance Committee will maintain a Fundraising/Sponsorship Request Form to solicit all relevant information about the requested fundraiser/sponsorship. The form is published on the website.

This form must be submitted to the Finance Committee no less than two weeks before the beginning of the proposed fundraising/sponsorship activity, when possible. The Finance

Committee will review the request and pass along a recommendation to Executive Committee in a timely manner. (UUS Staff may require additional information after approval to coordinate fundraising events, see Ministry policies on calendaring and events for further information.)

All monetary fundraisers conducted for an outside beneficiary must have all funds deposited into the UUS bank account, earmarked for the fundraiser. Bills related to the fundraiser, including the final disbursement of funds, will be paid following the regular Cash Disbursement process Any costs related to the fundraiser shall be consistent with the intent of the fundraiser. All expenses will be deducted from and shall not exceed proceeds unless otherwise provided by other sources.

A record of the result of all fundraisers shall be submitted to the Congregational Administrator for documentation.

Games of chance, raffles, gambling or similar activities involving risk must be conducted in accordance with the Iowa Code Chapter 99B and any applicable Iowa Administrative Rules. Fundraisers involving alcohol must abide by existing UUS policies and procedures regarding alcohol use, as well as all state and national laws governing the sale and distribution of alcohol.

Fundraisers That Do Not Require Approval

- Annual or on-going fundraisers held by UUS groups (monthly offering partners, annual Auction, etc.) do not need to seek recurring approval unless:
    - the fundraiser undergoes significant changes in format or time
    - or the fundraiser is held following a hiatus of more than one year
- Youth fundraisers, including RE Program fundraisers (bake sales, annual Coffee House, etc.) and individual children and youth enrolled in UUS's RE program selling items for Scouts, school, or other non-society activity. The DLRE will use their discretion, in consultation with the Minister and Staff, to handle any conflicts that might arise.
- Sales of books, CDs or other items by guest speakers, musicians, and others whose appearance is otherwise approved by the Minister or Board of Trustees.
- Activities pursuant to a rental agreement where a rental fee is paid.
- Activities that request contributions intended only to cover expenses associated with that event (e.g., food, supplies, equipment rental) are not considered fundraising events under these procedures

5-4 Gift Acceptance
UUS urges all prospective donors to seek the assistance of personal legal and financial advisors in matters relating to their gifts, including the resulting tax and estate planning consequences.

5-4.1 Gift Acknowledgement
UUS will provide an end-of-year tax receipt for all gifts, or earlier by a request to the office. If donors request anonymity, only the Congregational Administrator, Minister, and finance Staff and leaders will be made aware of the donor's or donors' identity for tracking purposes.

5-4.2 Gifts for a Designated or Restricted Purpose

Designated Gifts to Established Funds

UUS will accept designated gifts for the operating budget, as well as for established restricted funds, including but not limited to the General Endowment Fund, the various established named endowments, the Memorial Fund, the Minister's Discretionary Fund, and the various justice liability funds (see current list at bottom of document).

UUS will also accept gifts designated for solicitations to fund special projects or campaigns that have been reviewed by the Finance Committee and approved by the Board of Trustees, and the Endowment Committee when appropriate.

3-4.3 Designated Gifts for Non-established Purposes
Donors are encouraged to designate an existing fund that fulfills the desired purpose rather than create a new fund with its own set of restrictions that need to be separately managed.

Gifts designated to other restricted purposes, such as to increase a specific area of the budget, to fund an unsolicited activity or project, or to create a new designated fund or endowment must be reviewed by the Finance Committee and approved by the Board of Trustees, and the Endowment Committee when appropriate. The Finance Committee will ensure that before approval, an appropriate governing body (UUS Staff, committee, or team) has accepted responsibility to manage and track use of the donation.

The Finance Committee will work with the donor on a Gift Agreement document detailing the terms of the gift, including the disbursement of unused funds (see Disbursement of Unused Designated Gifts below).

The Endowment Committee has created procedures and instructions governing gifts to any existing or new endowment funds.

Disbursement of Unused Designated Gifts
Funds held in designated non-endowment accounts may be rolled into the operating budget, the General Endowment Fund, or may be designated for another purpose by the Board if the restricted purpose is concluded and not all funds were spent. Any donor requirements on unspent funds, such as returning them to the donor or reallocating them to another restricted purpose,

should be included in the original Gift Agreement approved by the Board. Later amendments to the Gift Agreement may be made by the donor with Board approval.

5-4.4 Gifts with No Designated Purpose (General donations)
Undesignated gifts will be applied to the operating budget as non-pledge donations if the value is under $2,000, and to the General Endowment if the value is $2,000 or more, unless determined otherwise by the Board of Trustees. The Congregational Administrator is responsible for alerting the Board of any undesignated gifts over $2,000. The Finance Committee and the Congregational Administrator will make a good faith effort to ensure the gift has no designated purpose before applying the funds.

5-4.5 Types of Accepted Gifts
Typically accepted forms of giving and their restrictions include:

Cash

UUS will accept cash gifts in any form, including check, electronic payments, and money transfers (ACH), and credit card payments.

Pledges

UUS welcomes support in the form of pledges to a specified campaign such as the annual stewardship campaign for the Operating Budget or a Capital Campaign. Campaign pledges should preferably span no more than three years.

Stock & Securities

UUS will accept stock or other negotiable instruments as a vehicle for donors to transfer assets to the organization so long as the security is marketable, has no restrictions that would prevent UUS from converting them to cash, and will not generate any undesirable tax consequences for UUS. Transfer and recording the value of the asset shall be done in a consistent manner and in compliance with accounting standards.

Legacy Gifts

UUS welcomes deferred gifts that will be used to provide support to UUS upon receipt of the gifts at the donor's death, including charitable gift annuities, trusts, bequests, and life insurance beneficiary designations. The Chalice Society exists for the recognition and acceptance of legacy gifts to the General Endowment.

Real Estate

UUS will accept gifts of real estate including developed property, undeveloped property, or gifts subject to a prior life interest. Valuation of the gift is the responsibility of the donor. Prior to acceptance of real estate UUS may require an initial review of the property to ensure that the

property has no hidden or undesirable contingencies, encumbrances, or liabilities such as environmental damage or liabilities. In the event that the initial inspection reveals a potential problem, the Board of Trustees shall retain an independent qualified inspection firm to conduct an appropriate audit. The cost of the audit may be at the expense of the donor. When appropriate, a title binder shall be obtained by UUS prior to the acceptance of the real property gift. The cost of this title binder shall be at the expense of the donor. The final determination on the acceptance of real estate shall be made by the Board of Trustees in its absolute discretion.

Non-Cash in Kind Contributions

UUS shall accept "in kind" donations; non-cash contributions of goods, services, or time, when the donation complements the programs and operations of UUS. In kind donations must be approved by the Staff person or group chair overseeing the specific program or operation benefitted by the donation, or by the Board of Trustees if no appropriate program exists. The donor is responsible for determining the fair value of the gift. The Congregational Administrator will record the date and description of the donation in the donor records, which are distributed annually for tax purposes, or upon request. The Congregational Administrator shall also send a non-cash contribution letter acknowledging any donations over a fair value of $250, or by request. Any tangible goods accepted by UUS may be used, sold, or otherwise disposed of at the discretion of the overseeing Staff person or group chair.

Other Tangible Property

All other gifts of tangible property will be accepted by UUS if the property is marketable or fulfills the mission of UUS, does not carry any undue restrictions on the use, display, or sale of the property, and does not require any unreasonable carrying costs. The final determination on the acceptance of tangible property gifts shall be made by the Board of Trustees. Unless otherwise agreed upon with the donor, the property will be sold as soon as practicable.

Other Gifts

All other types of gifts may be accepted by UUS at the absolute discretion of the Board of Trustees. Consideration will be given to the time and costs involved in assessing and structuring the gift before accepting it.

5-4.6 Gifts Not Accepted

UUS will not accept gifts that would result in a violation of its articles of incorporation or risk losing its status as a 501(c)(3) not-for-profit organization. UUS will also not accept gifts that are too difficult or too expensive to adMinister in relation to their value, would result in any unacceptable consequences for UUS including harm to its reputation, or are for purposes outside UUS's mission. Decisions on the acceptance or refusal of a gift shall be made by the Board of Trustees in its absolute discretion.

5.5 Current Established Designated Funds Accepting Contributions:

Endowment Funds
(all endowment funds are overseen by the Endowment Committee):

General Endowment Fund

Provides the Society with a source of funds for operating expenses, emergencies, and major capital improvements.

Program Fund-Detiger (Donor Restricted)

Provides a source of financial support for community-wide programs that bring attention and credit to the Society.

Jean Reese Fund (Board Designated)

Provides a source of funds for the development of property outside of the UUS building (not including regular maintenance of grounds).

Music Enhancement Fund (Board Designated)

Provides a source of funds for the purchase and maintenance of the Society's musical instruments and for other music needs.

Operating Funds:

Memorial Fund

Provides a source of funds for purchase **of** items that support the work done at UUS facilities or to add beauty to the buildings and grounds. Donations to the fund may be used to operate and maintain the UUS Memorial Garden and Memorialization Record. Overseen by the Finance Committee, managed by the Board of Trustees.

Reviewed/Updated/Approved by the Board October 20, 2021

Minister's Discretionary Fund

Provides a source of funds for the Minister to help those in need in our community. Overseen and managed by the Minister.

Free Lunch Program

Provides a source of funds to assist the UUS Free Lunch Team. Overseen and managed by the Free Lunch Team.

Teen Reserve Fund

Provides a source of funds to support RE programming for UUS teens. Overseen and managed by the Director of Lifespan Religious Education.

Social Justice Giving

Holds the funds raised for the chosen monthly UUS community partner agencies, as well as other social justice agencies supported by the UUS Social Justice Team. Overseen and managed by the Social Justice Team.

Facilities Fund

Formerly the Capital Campaign Fund. Holds funds raised for the purchase of the UUS property at 2355 Oakdale Road, the construction of UUS facilities, and the payment of the building mortgage. Overseen and managed by the Treasurer of the Board of Trustees.

Immigration Action Fund

Provides a source of funds for supporting the various projects of the UUS immigration Action Team, including supporting trips to the US/Mexico border, and the Chico Mendez Reforestation Project in Guatemala. Overseen and managed by the Immigration Action Team.

Circle of Friends Fund

Provides a source of funds to support the several local immigrant families that UUS supports through our Circle of Friends program, adMinistered by the Immigration Team. Overseen and managed by the Immigration Action Team.

Social Justice Action Fund

Provides a source of funds for Board-approved social justice programming or support. Overseen and managed by the Board of Trustees.

Prison Ministry Fund

Provides a source of funds to assist the UUS Prison Ministry Team in their programming, including direct support of incarcerated UUS members. Overseen and managed by the Prison Ministry Team.

5.6 Current Established Designated Funds Not Accepting Contributions:

Faith in Our Future Fund

Supports major upgrade of the building or meeting space whether onsite or at a different location. This includes construction of a substantial change in the facility. Does not include maintenance, or operational changes.

Board Held
Approved by the Board 1/19/12
Reviewed/Updated/Approved by Board 3/17/2021

Personnel Policy Manual

For

The Unitarian Universalist Society (of Iowa City)

2355 Oakdale Road
Coralville, IA 52245

Date Adopted: January 1st, 2020

Last revised: April 5th, 2022

WELCOME

Welcome to the Unitarian Universalist Society (UUS). We are glad to have you as a member of our Staff and hope you will enjoy working for UUS and contributing to our liberal religious community.

Working together, we will help to ensure that the administrative, operational, and other needs of the congregation are met. This will support volunteer members of UUS to do their work.

This Manual is not a contract and can be modified or changed at any time. If any benefits or requirements in this Manual differ from your Letter of Hire or most recent Letter of Agreement, the terms of your Letter supersede those of this Manual.

If you have any questions or suggestions concerning information in this Manual, please feel free to contact the Minister or your Supervisor.

Again, welcome!

ABOUT THIS MANUAL

This Manual has been prepared to help you understand some of the policies and procedures of UUS. You should familiarize yourself with the content of this Manual as it provides basic information about our expectations, policies, procedures, and benefits. Nothing in this Manual is intended to create or creates an employment agreement, express or implied, or a contract that employment or any benefit will be continued for any period of time.

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

All employees are hired on an *at-will* basis unless stated otherwise in a written individual employment agreement signed by the Board President and/or Minister or prohibited by law. This means that the employee may terminate the employment relationship at any time, for any reason, with or without notice, and UUS retains the same right.

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. This Manual replaces all previous personnel policy manuals or handbooks and any inconsistent policies. Material changes will be reported to all employees. Benefits or Staff requirements in this Manual do not supersede those in your most recent annual Letter of Agreement unless specifically noted in an addendum to your Letter of Agreement signed by your Supervisor/the Minister.

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

DIVERSITY AND INCLUSION EQUAL EMPLOYMENT OPPORTUNITY

Unitarian Universalist principles affirm the inherent worth of each human being, and commit to working towards justice, equity, and compassion in human relations. UUS believes that policies advancing diversity, equity, and inclusion are essential in creating social change which responds to historical and current practices of discrimination. Additionally, we believe that significant diversity among our Staff makes for a richer, more dynamic organization. UUS is committed to addressing the systemic prejudices and biases found within all parts of society by, among other things, working to ensure that 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.

UUS 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. UUS 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 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, or retaliation; or denying employment benefits because an applicant or employee reported harassment, discrimination, or retaliation or participated in the reporting and investigation process.

Employees who have questions about discrimination, harassment, or retaliation in the workplace, or who believe this policy has been violated, should report their concerns immediately to their Supervisor/Minister, or a Board officer.

HARASSMENT

Harassment of any kind has no place in the workplace. UUS is committed to promoting an environment that is professional and respectful. Any harassment regarding race, color, religion, age, sex, sexual orientation, gender identity, national origin, disability, veteran status, genetic information, or any other protected status will not be tolerated. UUS expects all employees to conduct themselves in a professional manner with concern and respect for their colleagues, congregational members, and others served by UUS. Similarly, we expect all employees to be free from harassment from congregational members and others encountered while serving UUS. Harassment by anyone in the workplace is unlawful.

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. Such conduct includes pictures, jokes, comments, epithets, innuendoes, name-calling, 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 UUS-related activity. Any employee who believes that they have been harassed by another employee, Supervisor/Minister, a congregant, or any other person who the employee encounters in the course of employment should report that conduct immediately to their Supervisor/Minister or officer of the Board. If the report or complaint involves the Supervisor/Minister, or if the Supervisor/Minister is unavailable, the individual making the complaint or the individual receiving the report or complaint should immediately report the complaint to an officer of the Board. The UUA Ministries and Faith Development Staff Group is available to assist with complaints involving Ministers.

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:

- submission to the conduct is made either explicitly or implicitly a term or condition of employment;
- submission to or rejection of such conduct is used as a factor in employment decisions affecting an individual; or
- the conduct unreasonably interferes with an individual's employment or creates an intimidating, hostile, or offensive employment environment.

Some examples of conduct which may constitute sexual harassment, depending on the circumstances, include but are not limited to, the following:

- Unwelcome sexual advances, whether or not it involves physical touching; sexual assault, or coerced sexual acts;
- Requests for sexual favors in exchange for actual or promised benefits such as a favorable review, salary increases, promotions, or other benefits;
- Unwelcome suggestions regarding, or invitations to, social engagements or social events;
- 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;
- Unwelcome or coerced physical proximity or physical contact which is of a sexual nature or sexually motivated;

- Use of offensive or demeaning terms which have a sexual connotation;
- Inappropriate remarks of a sexual nature;
- Sexual gestures, suggestive comments, sexually-insulting comments, epithets, jokes, or name-calling; written or verbal references about sexual conduct;
- Communication or displaying sexually suggestive objects, pictures, cartoons, or websites in writing, electronically, or verbally;
- Sex stereotyping, such as when 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
- 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, ability to do their job, name-calling, etc.

Any employee who believes they have been sexually harassed by another employee, a Supervisor/Minister, or any other person encountered in the course of employment, including a congregant, should report that conduct immediately to their Supervisor/Minister or a Board officer. If the report or complaint involves the Supervisor/Minister, or if the Supervisor/Minister is unavailable, the individual receiving the report or complaint should immediately report it to an officer of the Board.

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

PROCEDURE FOR RESOLUTION OF EMPLOYEE COMPLAINTS

UUS takes allegations of discrimination and/or harassment seriously. If you believe you have been discriminated against and/or harassed by another employee, a Supervisor/Minister, or any other person encountered in the course of employment, you should take the following steps:

- Communicate immediately with your Supervisor. If the report or complaint involves your Supervisor, you should report it to the Minister. If the Minister is your Supervisor, you should report it to an officer of the Board, who will bring it to the Executive Committee of the Board to assign a Board member to provide prompt investigation and follow up. You may be asked to put your complaint in writing.

- The Supervisor, Minister, or Executive Committee may appoint an ad hoc committee to

advise the employee and/or involve the Personnel Committee.

- An investigation will then be initiated, and evidence will be gathered. The investigation will normally include an interview of the employee, the accused, and any relevant witnesses.
- The Minister or Board President shall then take appropriate action. The complainant should be notified that appropriate action has been taken.
- If either the complainant or the alleged harasser objects to the resolution, they may seek a review by UUS's Board. The resolution recommended by the Board will be binding upon UUS, the complainant, and the alleged harasser.

GRIEVANCE PROCEDURE

Effective communication is essential for productive working relationships. Grievances arise when communication fails or when an employee feels they have been unfairly denied a right or benefit of employment. Employees are encouraged to discuss any concerns about work or suggestions for improving operations directly with the person(s) involved in the grievance whenever possible. If grievances cannot be solved directly, employees may report issues to their Supervisor and go through the Procedure for Resolution of Employee Complaints as documented for discrimination/harassment above.

WHISTLEBLOWER PROTECTION

The Society prohibits retaliation against employees or other persons who in good faith report a suspected violation of state or federal law, such as harassment, fraud, or misappropriation of Society assets; a suspected danger to public health or safety; or suspected violations of UUS policies.

Employees should report concerns to their Supervisor and go through the Procedure for Resolution of Employee Complaints as documented for discrimination/harassment above. Written reports are preferred, but verbal reports will be accepted if an Employee is uncomfortable putting a concern into writing. An employee who retaliates against anyone who has made such a report is subject to discipline up to and including terminations of employment.

ACCOMMODATIONS OF DISABILITY

UUS provides reasonable accommodations to enable an individual with a disability to perform the essential functions of their job in compliance with state and federal law. If an employee is unable,

or finds it difficult, to perform all the functions of their job due to a disability, they should inform their Supervisor/Minister about the disability and discuss the type and nature of any assistance or adjustment that would enable the employee to perform the essential functions of the job.

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

CATEGORIES OF EMPLOYMENT

Full-Time: An employee who regularly works the congregational year or 12 months of continuous full-time service at an average of 40 hours or more per week is considered a full-time employee.

Part-Time: An employee who regularly works for the congregational year or 12 months of continuous service for fewer than an average of 40 hours per week is considered a part-time employee. Part-time employees scheduled to work at least 15 hours per week are eligible for benefits according to the benefit plan descriptions in this Manual.

Casual/Temporary Employee: 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. Regardless of whether an employee is scheduled to work for a limited period of time the employee will be considered "at-will." Casual/Temporary employees are entitled to benefits consistent with the provisions of benefit plans offered by UUS or as required by law.

FLSA 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").

Non-Exempt Employees are 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.

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

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.

WORK SCHEDULES AND PAY

ORIENTATION

A new employee's Supervisor/Minister will introduce the new employee to their co-workers and orient them to their work area and job responsibilities. The Administrator will assist in onBoarding new employees in regard to setting up initial paperwork and office procedures and access.

JOB DESCRIPTIONS

Written job description has been prepared for each job position at UUS that contains a summary of duties and responsibilities. Job descriptions are to be reviewed and updated annually and more frequently as necessary. It is impossible to list or to describe all of the duties of a particular job. Moreover, from time to time, changes in jobs will occur to reflect temporary or long-term changes in Staffing or operational needs. A Supervisor/Minister has the authority to assign duties, responsibilities, or functions to their employees even though the duties have not been assigned in the past or are not specifically mentioned in the employee's job description.

LETTERS OF HIRE AND AGREEMENT

New employees will receive a Letter of Hire, documenting the agreed upon hours, salary/wage, benefits, and paid time off for their position. Every year subsequent all employees will receive an updated Letter of Agreement with the current terms of employment. Letters of Hire and Letters of Agreement must be signed by the employee, the Minister, and the Board President. Employees will receive a copy of their signed Letters and the originals will be filed in the employee's personnel file.

EMPLOYMENT AUTHORIZATION

Federal law requires that prospective employees must show proof of eligibility to work in the United States by completing Form I-9 within 3 days of time of hire. When applicable, employees must provide an original document or documents to the employee's Supervisor/Minister that establishes identity and employment eligibility from the date employment begins.

HOURS OF WORK

The Supervisor/Minister will work with employee's to establish individual work schedules, which may change from time to time based on the needs of UUS and at the discretion of the Supervisor/Minister. Attendance at meetings outside of established work schedules at the request of the employee's Supervisor/Minister will be considered time worked. Employees may occasionally be required to attend Staff retreats or off-site events which are relevant to their positions.

TIMEKEEPING AND OVERTIME

Non-exempt employees must submit a written record of their time worked on a monthly basis, consistent with the recordkeeping provisions of the Fair Labor Standards Act ("FLSA") and state law. Exempt employees must submit written records of paid leave used for recordkeeping on a monthly basis but are otherwise not required to track hours.

From time to time, employees may be required to work in excess of their regularly scheduled hours. Any time worked by a non-exempt employee in excess of 40 hours in a workweek will be overtime which must be approved in advance. Paid holidays, sick days, vacation days, or any other paid time off does not count as time worked for purposes of calculating overtime. Non-exempt employees will be paid time and one-half for all hours over 40 in a workweek. Exempt employees do not receive overtime pay when working in excess of 40 hours.

PAY AND PAYROLL DEDUCTIONS

UUS strives to offer its employees equitable and competitive wages and salaries commensurate with its ability, resources, and sound policy. Pay adjustments generally will be considered for all employees 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.

Deductions made from employees' wages are reflected on a pay stub. 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 the employee has authorized the deduction. Paychecks and pay stubs should be reviewed when they are received. If an employee believes a mistake has occurred, or if there are any questions, the Administrator should be contacted immediately.

Employees are paid monthly by check and available on payday. Employees may have their pay electronically deposited into a personal checking or savings account each pay period by authorizing direct deposition and providing required information to the Administrator.

CORRECTIONS OF ERRORS IN PAY

It is UUS's policy to comply with federal and state laws governing payment of wages, and UUS makes every effort to ensure employees are paid correctly. Occasionally, however, mistakes may happen. When mistakes occur, employees should call them to the Administrator's attention immediately. The Administrator will promptly investigate the issue and make any corrections necessary.

PERSONNEL INFORMATION AND FILES

It is very important that employees keep up-to-date all the information provided to UUS 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 the employee's home, and contacting friends or family in case of emergency. Please notify the Administrator promptly of any changes in:

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

UUS maintains personnel files for each employee that contains new hire paperwork, performance reviews, and other documents related to the Employee's employment. An employee is allowed to have a written response to any document added to the file. Employees may review the contents of their file in the presence of the Administrator or Minister at a mutually agreed upon time.

PROFESSIONAL EXPENSES

UUS provides eligible employees with an annual budget for professional expenses. Eligibility is determined by position requirements and UUA recommendations.

Appropriate uses of these funds include professional association expenses, expenses related to attendance at professional meetings (UUMA, LREDA, UUMN, AUUA, and similar organizations), district events and General Assembly, continuing education and professional development to support the position and the Society, subscriptions to professional publications and books, limited expenses related to Staff celebrations and team-building activities, and other necessary related experiences. Questions about the appropriateness of an expense should be brought to the Minister as Head of Staff. All professional expenses over $300 must be approved by the Minister. The amount of each employee's professional expense budget will be determined annually based on available congregational resources and UUA recommendations.

POLICIES APPLICABLE TO EMPLOYMENT

ABSENTEEISM AND TARDINESS

Each employee is 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.

Employees should keep their Supervisor/Minister/colleagues informed of any absences or anticipated tardiness occurring during scheduled work times and should work to avoid leaving the office unattended during open hours.

Personal appointments should be scheduled before or after work hours, if possible.
Excessive absenteeism or repeated tardiness may result in discipline up to and including termination of employment. Any employee who fails to report to work for three or more consecutive scheduled workdays will be considered to have voluntarily terminated employment, effective immediately.

PROFESSIONAL ATTIRE AND CONDUCT

Employees should maintain a professional appearance that is appropriate to their position and UUS. Name badges should be worn when employees are on duty on Sunday or at major congregational events.

ALCOHOL AND ILLEGAL DRUGS

UUS 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 UUS premises or property is prohibited. Under no circumstances may an employee 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. A violation of this policy may be grounds for immediate disciplinary action up to and including termination.

Generally, the UUS workplace is alcohol-free. UUS recognizes that responsible consumption of alcohol might be acceptable at occasional functions. On such an occasion, all employees are expected to uphold an atmosphere of professionalism and respect for those who choose not to participate. Any Staff function at which alcohol is served must first be cleared with the Supervisor/Minister. It is expected that employees consuming alcohol at UUS functions do so in moderation and in the spirit of maintaining a safe and comfortable environment for all.

SMOKING

UUS is a smoke-free workplace. Smoking and vaping is not allowed anywhere inside the UUS facilities, or on UUS grounds, except for within 20 feet of the designated smoking area, which is located by the bike racks on the north side of the parking lot.

CONFIDENTIALITY

Employees may have access to confidential information about UUS, 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 UUS's premises, copied, transmitted, or in any other way used for any purpose by employees outside the scope of their employment. Employees have the right to use and share information about their personal wages and benefits. All requests for information concerning past or present employees received from organizations or individuals should be directed to the Supervisor/Minister.

COMPUTERS, INTERNET, EMAIL, AND OTHER RESOURCES

UUS provides a wide variety of communication tools and resources to employees 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 UUS-provided technology, use should be reserved for legitimate business use and not for more than incidental personal use.

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

- transmitting obscene, harassing, offensive or unprofessional messages;
- 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;
- transmitting any of UUS's confidential or proprietary information, including member/friend data or other materials covered by UUS's confidentiality policy.

UUS reserves the right to monitor and review the content of employee emails or the use of the Internet at any time. Employees should not consider their Internet usage or email communications to be private. Personal passwords are not an assurance of confidentiality, and the Internet itself is not secure.

Employees are required to store passwords, equipment serial numbers, account information, etc. for all UUS computers and accounts, as well as for software, applications, and websites so that they may be accessed by other UUS Staff or leadership as necessary. The Administrator may

require employees to submit passwords to a central repository and provide updated information when necessary.

All materials, information and software created, transmitted, downloaded or stored on UUS's computer system are the property of UUS and may be reviewed and inspected at UUS's discretion.

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

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

With prior authorization, employees may use their own personal electronic devices (computers, tablets, phones, etc.) for work-related purposes, provided the devices have appropriate security software and the employee agrees to follow appropriate data protection and back-up practices. Any files or software belonging to UUS may only be downloaded and used for UUS-related work provided the employee maintains proper documentation regarding the files downloaded in the event that future retrieval is required. In addition, upon employment termination for any reason, the employee agrees to give UUS access to any personal electronic devices and passwords, to allow UUS to retrieve and/or delete all UUS files and documents from them. In the event that UUS does not request such access, then the employee agrees promptly to return, to the extent practicable, and to delete any and all UUS-related documents and copies thereof from any such devices or backups.

The employee is responsible for any maintenance, repair, or replacement of a personal device required or used, irrespective of the amount of work usage or the cause of the damage unless agreed to in writing by UUS. However, the employee must provide UUS with immediate notice should a personal device containing UUS software or files be lost or stolen.

MEDIA INQUIRIES

Only authorized spokespersons for UUS (Minister, President of the Board, other designated leaders) may communicate directly with the media on behalf of the entire congregation. All requests for information about UUS from the media should be directed to the Administrator who will refer them. 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 them get back to you?"

CONFLICT OF INTEREST/OUTSIDE EMPLOYMENT

Employees shall not engage in any other employment or business activity that is incompatible or in conflict with their duties, functions, or responsibilities as a UUS employee. Activities that may constitute a conflict include use of UUS's time, facilities, equipment or supplies, or the use of the title, prestige, or influence of UUS for private gain or advantage .

An employee shall not engage in any outside activity which, by its nature, hours, or physical demands, would impair the employee's performance of the duties of their position at UUS; reflect negatively on UUS; or tend to increase UUS's obligations or costs for benefits such as sick leave or long-term disability benefits.

Employees may discuss outside employment opportunities with the Minister/Supervisor to ensure compatibility. If UUS and the employee disagree that outside employment creates a conflict of interest or the appearance of a conflict of interest, UUS retains the right to make the final determination.

EMPLOYMENT OF RELATIVES AND MEMBERS

Members of an employee's family may be considered for employment; however, relatives may not supervise one another. "Relative" means a spouse, domestic partner, parent, sibling, child, grandparent, grandchild, or person in a close personal relationship with the employee.

As a general policy, employment of members of UUS will be avoided because a member who becomes Staff will necessarily forfeit certain benefits of membership to appropriately perform the Staff role. For some positions, hiring a member may add significant enough value to counteract the potential risks associated with employment of a member.

MEDICAL DOCUMENTATION

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

VEHICLE USAGE AND EXPENSE REIMBURSEMENT

Employees using their own cars for UUS-related business may be paid mileage at the current business rate per mile as established by the Internal Revenue Service. Mileage will be reimbursed monthly upon request by the employee and approval by the Supervisor/Minister. Trips must be authorized by the employee's Supervisor/Minister. Employees must have a current and valid driver's license and proof of insurance. Employees may not take unauthorized passengers on such trips. All tickets for parking and traffic violations are the responsibility of the employee. The employee must pay all fines promptly and will not be reimbursed by UUS. The use of hand-held

cell phones or texting is strictly forbidden when driving on UUS-related business.

Other approved expenses incurred by an employee on behalf of UUS will be reimbursed according to UUS's expense reimbursement policies and procedures.

SAFETY AND ACCIDENTS

The safety of employees, as well as members and visitors, is of paramount concern. All employees are expected to abide by accepted safety standards and any other UUS policy regarding safety of children and youth, disruptive conduct, or any other safety-related policies at all times. They should know the whereabouts of fire extinguishers, first aid kits, and defibrillators.

Any unsafe condition, equipment or practice observed by an employee should be reported immediately to the Supervisor/Minister. All on-the-job accidents or injuries to employees, no matter how minor, should be reported immediately to the Supervisor/Minister and an Incident Report be filed with the Administrator. Workers compensation insurance carriers will be notified as appropriate. In the event of a fire or other emergency, established emergency procedures should be followed.

PERSONAL PROPERTY

UUS cannot be responsible for damage to or loss of personal property, including loss or damage to vehicles or other property in or on UUS property. Employees should report any lost items to their colleagues so that the item can be returned if it is found. If an employee finds an item, it should be immediately turned in to the Administrator or to the Lost and Found.

WORKPLACE THREATS AND VIOLENCE

Threats, threatening behavior, or acts of violence against persons by anyone on UUS property will not be tolerated. The possession or use of weapons, firearms, ammunition, etc. is prohibited on the property of UUS 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 UUS property pending the outcome of an investigation. If UUS determines that a Staff member has violated this policy, UUS may take appropriate disciplinary action that may include, but is not limited to, suspension and/or termination of employment, and/or legal action as appropriate.

All employees shall inform their Supervisor/Minister of any behavior which they have witnessed or experienced, which they regard as threatening or violent.

INSPECTION RIGHTS

Congregations, like other organizations, are sometimes the victims of theft. UUS has on its premises storage facilities such as desks, file cabinets, closets, and storage areas for the use of employees. The storage of any unauthorized alcohol, weapons, explosives, or illegal drugs or drug-related paraphernalia is prohibited on UUS premises. UUS reserves the right to allow the Minister, Supervisor, or Board President to open and inspect any desk, file cabinet, storage closet, or storage area at any time and without prior notice or consent. Employees may not use personal locks on UUS-owned desks, cabinets, closets or storage areas.

PERFORMANCE AND CONDUCT EXPECTATIONS

SUPERVISION AND PERFORMANCE REVIEWS

Supervisors/Ministers assist employees in learning their jobs and identifying priorities and goals. New employees may be subject to a 30- or 90-day review. On a regular basis, Supervisors/Ministers meet with employees who report to them, reviewing job performance, goals and priorities, assessing needs, and working through challenges. Any employee performance concerns should be discussed with the employee and documented. To complement ongoing performance feedback, a formal written performance review will also be conducted on an annual basis.

DIFFICULTIES ON THE JOB

In every organization, there are situations where an employee's performance does not measure up to the standards of the job established by UUS, or where they do not conform to work or conduct expectations. In such cases, UUS will strive to help employees succeed in their work. However, continued employment depends on UUS's needs and the employee's ability to satisfy performance and conduct standards.

We hope problems will be resolved at an early stage with open communication between the employee and the Supervisor/Minister. When improvements are necessary in the conduct or performance of an employee, the Minister/Supervisor will attempt to give the employee written advance notice of the problem and that their job is in jeopardy if satisfactory improvement is not made. However, because of the circumstances or the nature and seriousness of the conduct or performance deficiencies involved, the Minister/Supervisor, after consulting with the Board President, may immediately terminate an employee's employment without prior notice.

WORK AND DISCIPLINARY GUIDELINES

Certain guidelines must be observed by all employees to protect the integrity of UUS. Violations may result in disciplinary measures including verbal warnings, written warnings, or termination. Disciplinary measures will be applied by the Supervisor in consultation with the Minister, Board, or Personnel Committee as appropriate and documented in the employee's file.

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

- Failure to perform work in a manner acceptable to UUS.
- Absenteeism or tardiness.
- Leaving work without permission.
- Failure to report absences as required.

- Discrimination, harassment, or retaliation as described in this Manual.
- Unauthorized possession of weapons.
- Disclosure of confidential information.

- Smoking in unauthorized areas.
- Failure to report-on-the job injuries.
- Working another job while absent.
- Failure to accurately complete or permitting another person to complete the employee's timecard.
- Theft or dishonesty.
- Falsifying records or information (or misuse or unauthorized manipulation of any computer or electronic data processing equipment, or system).
- Discourteous or disrespectful treatment of others.
- Taking UUS property without paying for it or without written permission.
- Reckless, careless, or unauthorized use of UUS property, equipment or materials.
- Improper or profane language.
- Violation of any other UUS policy or the standards of conduct generally applicable to a professional and respectful workplace.

SEPARATION PAY

If an employee's position is terminated for reasons unrelated to work performance or employee conduct, the employee is eligible for 2 weeks of severance pay, calculated as the regularly scheduled hours x the hourly pay rate for non-exempt hourly employees, for each year of employment up to a maximum of 16 weeks.

If an employee is dismissed for misconduct or poor performance, no severance will be paid and all benefits will cease at the time of dismissal. Accrued, unused vacation will be paid regardless of the cause of dismissal. Sick leave and personal time are not subject to payment at the end of employment.

RESIGNATION/RETIREMENT

Resignations and Retirements are voluntary terminations of employment initiated by the employee. Employees resigning from UUS are requested to provide at least one month's notice to allow for adequate planning and a smooth transition without undue strain on other Staff. If covered by health benefits, resigning Staff members may be eligible to continue their health insurance under the provisions of COBRA (Consolidated Budget Reconciliation Act of 1985). UUS does not have a policy to provide separation pay for voluntary terminations. Accrued, but unused vacation time is paid at the end of employment. Sick leave and personal time are not subject to payment at the end of employment.

BENEFITS: TIME OFF POLICIES

HOLIDAYS

The following are holidays for which an employee is paid:

- New Year's Day
- Martin Luther King Jr. Day
- Memorial Day
- Fourth of July
- Labor Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Day
- Floating Winter Holiday (to be approved by the Minister/Supervisor and taken between December 23rd and January 1st)

If a paid holiday falls on a scheduled day off, the workday immediately preceding or following will be observed as the holiday.

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. 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.

VACATION

UUS grants paid vacation to regular employees scheduled to work at least 20 hours per week at their regular rate of pay as negotiated in their Letters of Agreement, or based on their length of service with UUS according to the schedule below, as appropriate:

Length of Service	Annual Amount of Vacation
0-3 years	2 x employee's regularly scheduled weekly hours
4-6 years	3 x employee's regularly scheduled weekly hours
7+ years	4 x employee's regularly scheduled weekly hours

Vacation accrues each pay period and employees may not use more than the amount accrued without approval of the Supervisor/Minister. Increases in vacation accrual rate will be made on the first day of the month following the anniversary date of the year in which an employee completes their 4th or 7th year of employment.

Part-time, hourly employees regularly scheduled to work 10-19 hours per week will accrue paid vacation at the rate of 1 hour per 20 hours worked. This works out to approximately 2 and 3 hours per month for those scheduled to work 10 and 15 hours per week, respectively. If the employee chooses to use paid vacation to request Sundays off, the specific Sundays must be scheduled in consultation with the Supervisor/Minister.

Vacation time must be requested in advance and can only be taken with the approval of the Supervisor/Minister. In the event of conflicting vacations requests, vacation generally will be granted in the order the requests are received, in accordance with length of service and consistent with workload requirements.

Employees may carry over from one year to the next no more than 50 percent of the employee's annual accrual amount. Vacation cannot be carried over in subsequent years above the 50% limit. Upon termination, employees will be paid for accrued, but unused, vacation time.

SICK LEAVE

All employees are eligible for Sick Leave. Sick leave is earned upon hire.

Employees who work more than 20 hours per week will accrue sick leave at the rate of 6 hours per month up to a maximum of 360 hours. Sick leave may be carried over from year to year.

Sick leave may be used in the event the employee is unable to work due to the employee's own or an immediate family member's illness, injury or other medical condition. While employees are encouraged to schedule appointments outside of work time as much as possible, sick leave may be used for routine dental or medical appointments for the employee or for the employee's child, spouse, parent or parent of spouse.

Employees must notify their Supervisor/Ministers before their starting time if they are ill and unable to come to work. Employees may be required to provide a physician's statement regarding their medical condition.

BORROWING SICK/VACATION LEAVE DAYS

During the first year of employment, a full-time employee may borrow as many as 40 hours of vacation and/or sick leave in the case of emergency. Requests to borrow must be approved by the employee's Supervisor. Leave earned subsequent to borrowing is credited to the debt until the debt is zero. If an employee leaves employment before the leave debt is reduced to zero, the appropriate amount of pay will be deducted from the employee's final paycheck.

PERSONAL DAYS

Employees who work over 20 hours a week are credited with Personal Leave at the beginning of each calendar year. One hour of Personal Leave annually is granted for each hour scheduled to work weekly up to 40 hours. Personal Leave must be approved in advance by the employee's Supervisor/Minister. Unused Personal Leave does not carryover at the end of the year, and is not paid out at termination of employment.

LEAVES OF ABSENCE

From time to time, employees may need to have extended time away from work in order to address certain urgent issues. During such leaves, an employee may use their accrued sick/vacation and personal time and any applicable insurance coverage (in addition to any paid leave provided for specific circumstances as laid out below). When possible, such leaves must be requested in advance in writing and require the approval of the employee's Supervisor/ the Minister. The exact nature of the leave and its anticipated length must be included in the written request. Employees are expected to return to work upon the expiration of the leave as granted. If prevented from returning as expected, the employee must immediately notify their Supervisor/the Minister.

FUNERAL OR BEREAVEMENT LEAVE

Employees working over 15 hours a week will be granted the following bereavement leave:

- Up to 10 work days 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).

Details including how much leave will be granted must be decided in conversation with the employee's Supervisor/Minister. Additional time may be requested from Supervisor/Minister.

JURY DUTY

UUS 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/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 UUS.

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.

UNPAID FAMILY AND MEDICAL LEAVE

UUS is too small of an organization to be covered by Family Medical Leave Act ("FMLA"). However, consistent with UU Values, UUS voluntarily provides certain aspects of the FMLA which allows an employee, after 12 months of employment, to take up to 12 weeks of unpaid leave due to the employee's own serious health condition; for the birth, adoption, or placement for foster care of a child; or to care for a family member (child, spouse, or parent) with a serious health condition. The employee's position will be held for them for the duration of their leave. This leave may be taken all at once or intermittently over a 12-month period, depending on the circumstances. Medical certification is required.

All employees who take FMLA leave must give thirty days' notice, or in case of unforeseen circumstances, as much notice as possible to their Supervisor/Minister. Accrued sick and vacation time may be applied to cover unpaid leave. Employees will continue to be covered by other benefits that are a part of their employment agreement with UUS (insurance premiums, etc.), but employees will not accrue vacation or sick time during unpaid leave. Employees will continue to be responsible for their portion of insurance and other benefit contributions during leave.

PAID PARENTAL LEAVE

All employees who become natural or adoptive parents are eligible for up to 12 weeks of unpaid parental leave as laid out under the FMLA provision above. Parents who have been employed by UUS for over 12 months will receive 6 of those 12 weeks paid. The rate of pay for weeks of paid parental leave is based on wages for the employee's regularly scheduled workweek. All parental leave must begin within six weeks of the birth or adoption. Rather than taking twelve consecutive weeks of leave, the equivalent number of days may be spread out over up to a year, at the discretion of the Supervisor/Minister. Such intermittent parental leave must be used within one year of birth, placement, or whenever the leave begins, whichever is first. Paid Parental Leave benefits apply only to adoptions in which the child is new to the parent(s).

Employees who know they will be taking Parental Leave are asked to give their Supervisor or the Minister as much notice as possible, but at least 30 days' notice of the anticipated departure date and whether they intend to return to employment.

EXTENDED MEDICAL LEAVE

Employees, who work a minimum of 10 hours per week, have been diagnosed with a serious illness or disabling condition by a physician and have exhausted their vacation, sick and personal leave

benefits, may be paid extended sick benefits at 50% of their regular pay. Extended medical leave goes into effect after all other leave (sick and vacation) has been used and lasts until the earlier of:
1) the release to return to work by the physician, 2) approval for long-term disability payments, or 3) 90 days, whichever occurs first. Vacation and other time-off-with-pay benefits do not accrue during this period. If the employee recovers and is able to return to their normal schedule before the earlier of the 90-day period or when long-term disability insurance takes over, UUS will pay the employee at 100 percent of pay on the day of their return to work.

UUS also reserves the right to request a second opinion from a physician chosen by UUS on any medical leave of absence. If an employee is covered by UUS's health insurance, UUS portion of the health insurance premium will continue to be paid by the Employer during the unpaid medical leave. UUS will also continue to pay the premium for long-term disability, life insurance, and dental insurance.

MILITARY LEAVE

Employees who are members of the uniformed services of the United States (including the National Guard or other reserve unit) will be granted paid and unpaid leaves of absence in accordance with state or federal law to perform military duties on a voluntary or involuntary basis. Requests for military leave of absence must be made in writing and should include verification of the duty call from military authority, the date the leave is to commence, and the expected date of return.

Employees may choose to use any accumulated vacation time or professional development time for all or part of the period of military service. Leaves of absence in excess of any available vacation or professional development time will be without pay. In accordance with applicable law, eligible employees will be reinstated to the same job upon returning from an authorized military leave of absence.

PAID PROFESSIONAL DEVELOPMENT LEAVE

UUS is committed to ensuring its employees have the time to pursue continuing education and professional development opportunities. Current positions who may be eligible for paid study leave under this section include the Director of Lifespan Religious Education, the Director of Congregational and Community Engagement, and the Congregational Administrator. Program Staff positions, which include the Director of Lifespan Religious Education and Director of Congregational and Community Engagement, receive 80 hours of paid study leave professional development leave a year, to be arranged with their Supervisor/Minister. The Congregational Administrator receives 40 hours a year of paid professional development leave. Staff in these positions who work less than 40 hours a week will receive professional development leave at amounts prorated for their FTE.

Appropriate uses of professional development leave include time each week within defined working hours for personal study and reflection or continuing education, enrollment in professional development courses outside of working hours, attendance at professional meetings (UUMA, LREDA, UUMN, AUUA, and similar organizations relating to the employee's position), UUA district events, General Assembly, and extended periods of study or professional development during which the employee is not actively engaged in congregational work.

SUNDAYS OFF

UUS recognizes that many of its employees' job descriptions require them to work on Sundays, and that working every weekend may not be conducive to the work-life balance that is important to all of us. Regular full-time employees will generally work a schedule that includes one open weekend per month with their 40 hours of work scheduled for Monday through Friday of that week. Part-time, hourly employees will accrue paid vacation that can be used to request Sundays off, with pay, for the same purpose. In both cases described in this section, the specific Sundays will be scheduled in consultation with the Supervisor/Minister.

SABBATICAL LEAVE

UUS believes that employees in program Staff positions benefit from periodic sabbaticals to study, reflect, and renew their ministries. Current positions who may be eligible for sabbatical leave under this section include the Director of Lifespan Religious Education and the Director of Congregational and Community Engagement.

To be eligible to apply for a sabbatical leave, new hires in eligible positions must work half-time or more hours per week, demonstrated a good work record of at least 7 years of continuous employment, and currently be in good standing with UUS. Other requirements may also apply. Information about sabbatical leaves may be obtained from the Minister.

When an employee is first eligible for sabbatical leave, they will have 1 month accrued. Thereafter, the employee will be eligible for 1 month of sabbatical leave every other year. The sabbatical period should be determined well in advance (one year is recommended) so that the employee may plan for the most profitable use of the period granted and so the congregation can adequately provide for the employee's absence. An employee should discuss their plan for what study, reflection, spiritual renewal, continuing education, or community service activities they will do during sabbatical leave with the Minister when they begin planning their leave period and solidify plans at least a month before sabbatical leave begins. The Minister has final approval of the sabbatical plan.

Salary will be paid normally during sabbatical leave. Study leave and vacation still accrue during a sabbatical but should be taken at another time during the year unless authorized by the Minister. Professional expenses, if used for sabbatical travel, are subject to IRS Regulations. Unused

sabbatical leave is not paid out at termination of employment. Staff who take sabbatical leave agree to not resign for a minimum of three months following the end of each sabbatical leave.

FAMILY FLEXIBILITY POLICIES

BABY AT WORK PROGRAM

Employees who have an infant under one year of age may obtain permission to bring their baby to work with them for an extended amount of time. All instances will be decided on a case-to-case basis, considering the employee's responsibilities, necessary hours of work, workspace, safety concerns, and other aspects of the employee's specific position. When a request is granted, a written agreement will be developed containing the necessary requirements for the care of the baby at work, including appropriate space and supervision of the baby. Terms of the duration of the agreement will be established.

UUS retains the right to refuse, end, or limit an employee's ability to bring their baby to work at any time before or during the terms of the written agreement. The employee's Supervisor or appointee will regularly monitor the implementation of the agreement to evaluate its continued success for UUS and for the employee.

Employees making use of this policy assume all risks and dangers inherent in having their child at UUS. The employee agrees to indemnify, defend, and hold harmless UUS and/or any officer, employee, or other representative of UUS from and against any and all liabilities incurred out of, based upon, or in connection with having his/her baby at work, except for damages arising out of bodily harm to the employee or baby, or damage to the employee's personal property resulting directly from sole negligence of UUS.

CHILD OCCASIONALLY AT WORK POLICY

UUS allows employees to bring their children to work with them for temporary periods of time when childcare or school arrangements do not work as planned (e.g. childcare worker is sick, school is cancelled, etc.) or when the employee is unable to complete work at home and needs to care for the child while completing a task (e.g. work is confidential, database driven, involves classroom preparation, etc.).

Employees are required to obtain advance permission from their Supervisor/Minister whenever possible and alert coworkers that a child is accompanying them before bringing them to UUS. The employee is required to supervise their child at all times. UUS retains the right to refuse, end, or limit an employee's ability to bring their child to work at any time. The employee's Supervisor will monitor the use of this policy for its effect on the employee and the work environment.

The employee assumes all risks and dangers inherent in having his/her child at UUS. The employee agrees to indemnify, defend and hold harmless the Unitarian Universalist Society and/or any officer, employee or other representative of UUS from and against any and all liabilities incurred out of, based upon, or in connection with having his/her child at work, except for damages arising out of bodily harm to the employee or child, or damage to the employee's personal property resulting directly from sole negligence of UUS.

INSURANCE AND RETIREMENT EMPLOYEE BENEFITS

The benefits outlined in this Manual represent significant additional compensation to eligible employees. Outlined below is a brief summary of the types of employee benefits currently available through UUS. These benefits are subject to change at any time at the discretion of UUS. In the event of any discrepancy between the benefits outlined below and the Summary Plan Description ("SPD") or Plan documents, those documents will govern. Any questions about employee benefits should be directed to the Administrator or Minister.

HEALTH INSURANCE BENEFITS

Employees who are expected to work at least 750 hours per year may enroll in the group health insurance plan sponsored by UUS. UUS will cover premium costs for employees and dependents according to the following schedule:

- For full-time employees (2080 hours annually), UUS pays 100% employee/75% family of the Bronze plan or the employee can apply that amount toward the Silver or Gold plans.

- For part-time employees scheduled to work between 1040 - 2079 hours annually, UUS pays 50% employee/40% family of the Bronze plan or the employee can apply that amount toward the Silver or Gold plans.

- For part-time employees scheduled to work between 750 - 1039 annually, the employee is required to pay the full cost of the health medical plan insurance premium.

Employees will be required to make their required contributions by payroll deduction or timely payment as appropriate.

Employees enrolled in one of the High Deductible plans offered by the UUA (Bronze or Silver w/HAS) have the option to enroll and authorize elective contributions (pre-tax salary reduction contributions) in a Health Savings Account (HSA). HSA's are provided through the UUA's Highmark BCBS group plan, adMinistered by PNC Bank. UUS does not contribute anything towards employee's HSAs.

Consistent with federal law, if an employee has health insurance through another qualified group plan (i.e. spouse's employer plan), UUS will reimburse the incremental cost of the employee's

coverage up to the value of the health benefit the employee qualifies for in the above chart. The reimbursed amount is calculated as the difference between the cost of individual coverage and the cost of employee + spouse coverage in the other plan.

Further information concerning the UUA health plan may be obtained from the Supervisor/Minister or by going to https://www.uua.org/finance/compensation/health.

GROUP DENTAL, TERM LIFE, AND LONG-TERM DISABILITY INSURANCE

Employees who are expected to work 750 hours per year are enrolled in term life insurance and long-term disability insurance through the group plan sponsored by the UUA. UUS pays 100% of the cost of Long-term Disability insurance and term life insurance.

Employees who work 750 hours per year may also enroll in group dental insurance. UUS pays the premium cost for dental coverage according to the following schedule:

- For full-time employees (2080 annually), UUS pays 80% of the employee/50% family premium.

- For part-time employees scheduled to work between 1040 hours-2079 hours annually, UUS pays 40% employee/25% family of the premium.
- For part-time employees scheduled to work between 750 hours -1039 annually, the employee is required to pay the full cost of the dental insurance premium.

Further information concerning these policies is available from the Supervisor/Minister or by going to https://www.uua.org/finance/compensation/uua-insurance-plans

WORKERS' COMPENSATION INSURANCE

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

All on-the-job injuries or illnesses, regardless of severity, should be reported immediately to the employee's Supervisor/Minister. Employees may be required to provide a written report on the illness or accident and a physician's statement in order to receive worker's compensation benefits, or to return to work.

RETIREMENT BENEFITS

UUS has adopted the Unitarian Universalist Organizations Retirement Plan (UUORP). The plan is

an IRS qualified, defined contribution, 401(a)/(k) multiple employer, Church retirement plan designed to help ensure employees of UUA-related organizations have an opportunity to accumulate savings for their retirement years. An employee's entry into the plan is on the first day of the month following or coincident with, the employee's date of hire. Every employee has the option to enroll and authorize elective contributions (pre-tax salary reduction contributions) immediately upon employment, irrespective of hours worked or scheduled.

UUS is an Automatic Enrollment congregation. All employees will, by default, have an employee contribution of 1% of gross pay withheld from their monthly paycheck and contributed to the retirement plan in their name unless the employee opts out by signing an enrollment waiver or elects another level of contribution in writing.

In addition, in keeping with the Employer's Participation Agreement on file with the UUA Office of Church Staff Finances, UUS contributes 10% percent of the employee's gross wages for each employee who has met the Plan's qualifications.

To be eligible for employer contributions, the employee must satisfy the Plan's Year of Eligibility Service provision: an individual must have a) worked a minimum of 1,000 hours during a twelve (12) consecutive month period defined in the Plan, or b) have successfully completed a UU Ministerial Internship.

If an employee is employed at more than one participating UU congregation, concurrently or consecutively, their hours of service must be combined to make the initial determination of eligibility to receive Employer's contributions.

Per the governing Plan's provisions, employees who previously received Employer contributions at another UU participating congregation or employer are immediately eligible for Employer contributions at UUS.

UUS provides an enrollment form, a description of the plan, including investment options, to the employee at the start of employment. Each employee should review this material carefully and discuss any questions they may have with their Supervisor/Minister, with the Retirement Plan Staff at the UUA, and/or with a trusted personal financial advisor.

When an employee incurs severance from employment, they are ineligible to make or receive contributions.

More information can be found at: https://www.uua.org/finance/compensation/retirement.

PERSONNEL MANUAL ACKNOWLEDGMENT

By signing below, I acknowledge that I have received a copy of the Personnel Policy Manual of the Unitarian Universalist Society (of Iowa City). I understand that it is my responsibility to read the Manual and to comply with the policies, practices and rules of UUS as outlined therein.

Date	Print Name	Signature

Section V: Communications – Ministry Held

SECTION I: Introduction

Right Communication Policy

Purpose

Effective communication is essential to the life of any religious community. The Unitarian Universalist Society of Iowa City (UUSIC) employs a variety of communications resources to grow and strengthen its congregation and to raise awareness of its values and activities in the surrounding community. This policy:

1. Explains the underlying principles and best practices of effective communication.

2. Provides guidance to committees, groups, and members in using the many forms of communication available to pursue their individual goals.

3. Supports the mission of UUSIC as a free and inclusive religious community committed to the principles of Unitarian Universalism and the policies of the Unitarian Universalist Association (UUA).

Policy

Underlying communications between UUSIC members in all formats are the principles of respectful interaction. The *Right Relations Agreement*, adopted in 2011, highlights the precepts and role of communication:

1. Communicate with mutual respect in order to better understand one another, realizing that we may ultimately agree to disagree.

2. Take responsibility for personally addressing issues as we encounter them through dialog with the appropriate individual or group.

3. Be accountable for our words and actions; realizing that none of us is perfect, seek as well as offer forgiveness, and respond with compassion if our words have been unintentionally hurtful.

4. Actively seek and share information.

5. Express gratitude to others for their efforts in making collaborative work successful.

The Communications Committee terms the use of all communications practices and channels in accordance with these principles, *Right Communication*.

Practices

Efficient and respectful communication is essential to healthy relationships between congregation members. The basic principles for the responsible use of communications practices and channels are:

1. Listen actively and seek to understand the perspectives and opinions of others.

2. Communicate directly with the person or group involved; do not rely on second-hand information.

3. Be respectful and kind in choice of words, tone, and body language.

4. Express gratitude and appreciation to others for their contributions.

5. Honor all expectations of confidentiality, and avoid spreading gossip or negative criticism about members or groups.

6. Unless authorized to speak for the Society, always make it clear that you are speaking as a private individual and the Society does not authorize or endorse your message.

SECTION 2: Internal Communication Policy

Purpose

Whether conversing in person, exchanging emails, or commenting on Facebook posts, members should follow the principles of Right Communication. This policy provides guidance on the use of communication tools to help ensure respectful exchanges of information and opinion between members.

Email

Policy

When using email to conduct Society business, keep in mind that the content and style of private emails is often inappropriate for business emails, especially those sent to multiple persons. As a general rule, it is best to use email for organizational tasks such as arranging meetings and not for dealing with complex issues or mediating disputes since it is easy for recipients to object to a message's word choice or tone. Once an email is sent, it is out of the author's control. It can be copied and shared with those it was not intended for, embarrassing the author and others, and creating obstacles for future group effort.

Procedures

1. Use descriptive subject lines identifying the content of emails.
2. Adopt a measured tone and use respectful language.
3. Respond to emails promptly.
4. If you're responding to an emotional situation, however, wait until you can reply in a calm and reasoned manner before sending your response.
5. Never say anything about someone in an email that you wouldn't want that person to see. If someone wants to have an email conversation about someone else, invite them to meet with you in person.
6. If you are communicating about a private or sensitive matter that is likely to cause an emotional reaction in the recipient, it is strongly recommended that you meet with that person instead of emailing. If you cannot avoid using email, word your message with the greatest possible sensitivity to her or his feelings.
7.

Emails sent to or from UUSIC computers are considered property of UUSIC. **Do not send messages that contain confidential information about yourself, other members of the Society, or internal Society matters by email or other electronic means, such as texting. Either deliver those messages in person or place them in a password-protected location, such as Dropbox. Use email only to inform others that a message awaits them there.**

See Section 2 of the General and Administrative Policy Manual for Board motions by email.

Mass Email Policy

Emails intended for mass distribution may be sent only by Staff members approved by the Minister or Board of Trustees, or other individuals given permission in special cases.

Procedures

1. **Use mass emails only for Society purposes:**

    a. Administrative needs, e.g. announcements of congregational meetings, stewardship and endowment events.

    b. Time-sensitive Society news, e.g. announcements of memorial or special services, changes in service location or time, local events that directly impact the Society.

    c. Society-recognized community activities, e.g. Gay Pride Parade, CROP Walk.

2. To ensure privacy, address mass distribution emails to yourself with the names on the mailing list blind-copied.

Weekly E-news Policy

The weekly email sent out by the Administrator to all Society members provides current news and announcements. A slightly edited version with all confidential information deleted is posted on the website and social media. The Administrator establishes the deadline for inclusion. The Minister reviews the content and may remove items from the email.

Procedures:

1. Submit announcements to the Administrator by the deadline.
2. Make them short in order to keep the email a length that is easily read.
3. The Administrator may edit submitted announcements for space.

Monthly Newsletter Policy

The newsletter is produced the first of every month and contains news from Staff and committee members regarding events, deadlines, volunteer opportunities, upcoming activities, and Staff columns**. It is available in printed form, posted as a pdf to the website, and emailed to members upon request.** The Administrator establishes the deadline for inclusion.

Procedures

1. Submit articles and information for the newsletter to the Administrator by the deadline.
2. Sign all submissions.
3. Obtain permission from a parent/guardian before sending pictures of children, and do not identify them by name (see "Media Permission" section below).

Miscellaneous Mailings Policy

Mailings of printed material to UUSIC community are completed at the discretion of the Minister or the Board of Trustees and done by UUSIC Staff.

Order of Service Policy

Announcements to be inserted in the Sunday Order of Service are limited by topic priority (established by the Minister), length, and order of submission. The Minister reviews the content and may remove items from the Order of Service. The Administrator establishes the weekly deadline for inclusion. Additional methods to communicate information may be offered if insertion space is not available.

Procedures

1. Submit announcements to the Administrator by the deadline.
2. Make them short in order to fit the Order's limited space.
3. The Administrator may edit announcements for length.

Announcements Sunday Service Policy

Announcements during services are made by the Minister unless others are assigned or approved in advance. Announcements may concern church group activities or news of members' celebrations, personal concerns, life changes, etc.

Procedures

1. If news concerns others, obtain permission to share it before submitting an announcement request.
2. Submit requests to the Administrator by the deadline.
3. Keep announcements brief.
4. The Minister or Worship Associate may choose to cut the announcement from the service for purposes of time.

Coffee Hour Policy

Coffee hour is primarily a social time for the UUSIC community but announcements about Society business or activities may be made to those assembled.

Procedures

1. Ring the bell kept in Channing Hall to get the attention of Coffee Hour attendees in a gradual, respectful manner. Do not shout or make other inappropriate noise.

2. Keep all announcements brief and immediately useful, e.g. Open House is now occurring, Next week there will be a bake sale for Youth

Table Displays Policy

UUSIC-sponsored groups may promote their programs or conduct sign-ups in Channing Hall during coffee hour or at other designated times. All display materials are the responsibility of each group. The Society is not responsible for items displayed or left behind on tables.

Procedures

1. Obtain permission from the Minister or administrative personnel to set up your display in Channing Hall during Coffee Hour or other designated time.

2. Set up table display before coffee hour or other event begins.

3. Assign at least one member representing the group to monitor or hand out materials, answer questions, etc.

4. Remove display materials, clean table, and store it in closet if it will not be used immediately afterward.

Notices Posted in UUSIC Building Signs Policy

Notices or information posted on UUSIC property must be accurate, relevant, and consistent with the goals and values of UUSIC.

Procedures

1. Tape to walls, doors, or windows only temporary notices concerning events, e.g. cancellations, room changes, notification of photo sessions, etc. Remove them promptly after the event is over.

2. Submit large signs announcing upcoming events to the Minister or designated Staff for review. Approved signs will be assigned wall space in Channing Hall.

Public Bulletin Board Policy

The Public Bulletin Board may be used to display information for an indefinite length of time, including small signs or announcements of upcoming events, informational flyers, news articles, etc. The Bulletin Board is located to the right of the fireplace on the stage (east end) of Channing Hall. No permission is needed to post items there.

Procedures

1. Post only items that concern UUSIC, a UUSIC member (or former member) in the news, or a current event or social issue in keeping with UUSIC's mission.

2. Do not use the bulletin Board for personal news, advertisements for private businesses, or endorsements of political candidates or referendum issues.

Membership Materials Policy

Newcomer packets and Welcome Table display material are generated and updated by the Membership Coordinator and Membership Associates. All members have the responsibility to keep their contact information current and to request when they would like their information unlisted.

SECTION 3: External Communication Policy

Purpose

Through print and electronic channels, traditional and social media, members of UUSIC share information about the Society with the outside world. Since unauthorized or improper external communications could pose a risk to the UUSIC's reputation, it is important that both the purpose and content of all external communications align with the Society's mission and principles. This policy provides guidance on communications with external organizations and the general public.

Policy

External messaging should follow the policy on Right Communication. Before sending out a message, you must:

1. Unless authorized to speak for the Society, make it clear you are speaking as a private individual and the Society does not authorize or endorse your message.

2. Consider whether the information it contains is the kind the congregation wants to share.

3. Determine if the congregation's goals are correctly represented and aided by this particular use of media.

4. Use information accurately and honestly to advance a common purpose, not to pursue private ends.

5. Honor all expectations of confidentiality and avoid revealing details of conflicts or controversies within UUSIC.

6. Show respect for the roles, responsibilities, and rights of the Minister, Staff, other members of the congregation, and extend the principles of Right Relations to all non-members as well.

Publicity

UUSIC employs publicity to spread awareness of its activities and values throughout the community in order to grow the congregation and to carry out its mission of advancing positive change in the world. The policy that follows covers requirements, procedures, and means of support for members and groups seeking to publicize their activities for these purposes. In all circumstances listed, the mission of the Society, the principles of respectful communication, and the responsibility of representing the Society in a fair and responsible manner to others, underlie the choices to be made. Only authorized spokespersons for the Society (Minister, President of the Board, other designated leaders) may communicate directly with the media on behalf of the entire congregation.

Modes of communication covered by this policy include:

- Media requests, including inquiries for interviews, commentary, and information, TV/radio, newspapers, magazines, local/national media, and internet sites

- Press releases

- Marketing (paid and free)

- Society-authorized opinion pieces and letters to the editor

- Public demonstrations on behalf of the Society

Acceptable Uses of Publicity:

- Informing the general public of Society events and programming
- Society-sponsored external activities
- Public witnessing of UUA Principles and Purposes through action and word
- Crisis communication procedures

Prohibited Uses of Publicity:

- Partisan Communication, e.g. partisan political messages, endorsement of specific candidate, party, or campaign.
- Advertising for any business or activity that would result in financial gain of Staff or a congregation member, with the exception of Society-sponsored advertising.
- Use of Society name and/or images on unauthorized websites, blogs, social networking sites, direct mailings, etc. Only Staff and designated leaders may use external communications channels on behalf of the Society.

Procedures

Media Relations for Requests

Only authorized spokespersons for the Society (Minister, President of the Board, other designated leaders) may communicate directly with the media on behalf of the entire congregation.

1. Respond promptly to requests for information in order to maintain good relations with the media.
2. If you **are an authorized spokesperson** for the Society, speak to the media on behalf of the Society or assist in identifying the appropriate person to speak to them.
3. If you **are not an authorized spokesperson**, direct media calls to the Administrator, who will forward them to the appropriate person.
4. The Administrator will archive all media calls and responses.

Press Releases

The Communications Committee or UUSIC Staff review all press releases to ensure that they adhere to standards of media requirements, brevity, and UUSIC beliefs and principles.

1. E-mail proposed press releases to the Administrator.

2. The Administrator will forward releases to the appropriate Staff for review.

3. Staff will consult with the Communications Committee if necessary.

4. The Administrator will contact the press release's author within four working days with either its approval or denial.

Marketing

The Communications Committee or UUSIC Staff review all marketing proposals before being approved. Groups that wish to inform the general public of programming open to them are encouraged to use free marketing strategies, which include:

- public service announcements
- community calendars in newspapers
- online community bulletin Boards

Groups may also use paid advertising for special events.

1. Submit proposals to the Administrator with a detailed explanation of:

    a. Event, program, or service that includes the general public

    b. Group's aim or purpose in holding the event, etc.

    c. Manner in which the event will represent UUSIC principles and/or further its goals

    d. Name of the media outlet your group wishes to use, with name of contact person and her contact information, if available.

2. Include a cost estimate.

3. Request financial assistance from the Communications Committee if your group receives no funding, or if an opportunity arises for a funded group that extends beyond its budget.

Society Authorized Opinion Pieces and Letters to the Editor

Op-ed pieces and letters to the editor in print or online form are important ways congregation members can give public witness for UUSIC principles.

1. Write as a private individual if you've not been approved as a spokesperson for UUSIC.

2. If you mention UUSIC, state clearly you are not speaking for the Society as a whole or other members of the congregation.

3. If you are writing on behalf of UUSIC, submit your op-ed piece or letter to the editor to the Administrator. It will be reviewed by the Minister or Board of Trustees, in consultation with the Communications Committee, if necessary. The Administrator will inform you if your submission has been approved.

Public demonstrations on behalf of the Society

1. Do not use UUSIC or UUA name or symbols without permission.

2. When demonstrating, maintain respectful communication and act with quiet dignity and non-violence.

3. Before a media event, friends and members will be reminded of the presence of media.

Crisis Communication

When a significant event or grave situation occurs at UUSIC, communicate that information to the Minister and the Administrator as soon as possible. These include but are not limited to:

- natural disasters,

- accidents with injury at the Society or on Society business,

- law enforcement or firefighter notification and response at the building,

- death,

- or serious misconduct by Staff or UUSIC community member

1. In the event of a crisis or emergency situation, Staff and members will decline to speak with the media and refer all inquiries to the Administrator.

2. Communications based on timely and accurate information will be developed by the Minister and/or the Board President and delivered through the Office.

3. Emergency contact numbers of the Minister, Board President, and key Staff persons, as well as legal counsel, will be shared with each other so that statements can be issued within a few hours.

4. All official communications with the media in an emergency should be prompt, frequent, and transparent.

Electronic Media Website Policy

UUSIC has one authorized website, www.uusic.org, to provide information about Sunday services, groups and activities, events, initiatives, Staff, etc. to members and visitors. The website design-- which includes text editing, text style, color, graphics, graphics placement, and navigation--is the responsibility of the Website Manager and the UUSIC Communications Committee.

The Website Manager is responsible for keeping the website up to date. Designated members of the Communications Committee will be trained to provide back up when the Website Manager is not available. The committee also provides resources to the Website Manager by ensuring that content and photographs are available to refresh the website on an ongoing basis.

The Communications Committee will conduct a quarterly review of website content and design. The committee will also use tracking data for usage and member feedback to discern when changes need to be made to the website to ensure that the needs of members and visitors are being met.

Content

Content on the website must meet all the principles set forth in the UUSIC Communications Policy for appropriateness and Right Communication.

Staff supplies content such as sermons, monthly newsletters, announcements of upcoming events, and links to stories about the Society and Society members. Members may submit or suggest other content to the Website Manager, who decides whether or not to place it on the website. The Manager will provide an explanation for any content that is not accepted.

The Manager consults with the Communications Committee if uncertain about the acceptability of any content. The Committee will in turn consult with the Minister and Board if it can't reach a decision.

Each group and committee has a general information page. Groups are encouraged to use their pages to promote their interests and attract new members. Each page should include the name of the group, date last updated, copyright notice (if applicable), and contact name(s), including e-mail address and, if permission is granted, phone number. All other content, such as activities, photographs, etc., is optional but encouraged. Groups are responsible for maintaining the accuracy of their pages. The Website Manager will update or remove pages upon request of the group leader or spokesperson. If other Society members discover outdated or inaccurate content, the Website Manager will consult with the group before editing or removing it.

Appropriate Content

The Website Manager will not accept content that:

1. Sponsors, promotes, or serves a political party or action committee, a candidate for an elected office, the defeating of a candidate for an elected office, or a ballot proposal.
2. Promotes businesses or for-profit organizations.
3. May be considered obscene or offensive.

Privacy

Be cautious when submitting private information for posting on the website.

1. Photos and videos of adult members may be used, but individuals may request their images be taken down by the Website Manager at any time.
2. In announcements about special events or interest groups, include phone numbers and email addresses of contact persons only with their permission.
3. Obtain permission from parents before posting photos or videos of children.
4. Do not identify minors by first or last names.

For additional explanation, see the Media Permission Policy.

Submitting Content Procedures

5. Submit content or requests for change in content by email to the Website Manager or the Chair of the Communications Committee.
6. Identify the title of the web page, specify the paragraph number, and include the text of the desired edit.
7. Submit copy for large additions or edits as Microsoft Word documents (doc or docx) attached to an email.
8. Submit original digital photos (jpg or png) as email attachments.

Accessibility

The website should be accessible for everyone--easy to find and user-friendly. All reasonable effort will be made to ensure that the Society's website is fully accessible to users with disabilities. Information that is not accessible because of an individual's special needs may be provided in an alternative format.

External Website Links

The Society's website is designed to provide members and visitors with information about Unitarian Universalism and our values, beliefs, programs, and activities. UUSIC may wish to provide links to other sites that provide

additional information regarding the denomination, related organizations, organizations we support, or the local community. UUSIC permits the establishment of links to external websites that are in conformance with the Communications Policy and promote the values of UUSIC

Links to other websites must be approved by the Communications Committee. The principal link consideration is that the content is accurate, appropriate, and relevant for the Society's intended audience. The Communications Committee will review the appropriateness of each request according to the guidelines in the "Eternal Website Links" section below.

Links will not be granted to websites that:

- Sponsor, promote or serve; a political party or action committee, a candidate for an elected office, the defeating of a candidate for an elected office, or a ballot proposal
- Promote for-profit organizations
- Are personal homepages
- Contain pictures or text material that may be considered obscene or objectionable

UUSIC members or representatives of organizations wishing to establish external links on the Society's website must submit a written request (email is acceptable) to the Chair of the Communications Committee. The request should contain the URL address and a statement detailing how the link helps serve the needs of both organizations.

The Communications Committee will review the appropriateness of each request. The committee reserves the right to deny a link request if it is determined that the organization for which the application is made does not meet the criteria set forth in this policy, or if the information at the linked site does not provide truthful and accurate information. Staff has the right to remove any content that is deemed in violation of the principles of appropriateness or privacy without consultation of the content providers.

5. Remove any link at any time and for any reason and without notice to the sponsor of the linked organization, or
6. Revise this policy without prior notice when to do so is deemed to be in the best interests of UUSIC.

Website Disclaimer

Links

The website may provide, or third parties may provide, links to other Internet sites. Other sites may also have links to ours. The UUSIC has no control over such sites; the UUSIC does not endorse, and is not responsible for, any such sites or the information, material, products or services contained on or accessible through those sites. We encourage our visitors to be aware when they leave our site to read the privacy statements of each and every website that collects personally identifiable information.

Images & Words

Graphic images used on our site are not necessarily the exact depictions of people, places or things involved with or in UUISC jurisdiction. Although we use our best and reasonable efforts to ensure accuracy of content, we make no representations or warranties as to the accuracy or reliability of the content. While UUSIC makes the information contained in this website available to anyone, we retain copyright on all text, graphic images and other content.

No Liability

Under no circumstances will UUSIC be liable for any consequence relating directly or indirectly to any action or inaction you take based on the information, services or other material on this website. While the UUSIC will attempt to keep its website current, accurate, and complete, the UUSIC cannot guarantee, and will not be responsible for any damage or loss related to, the timeliness, accuracy, or completeness of the information, services, or other material on this website.

Social Media

The Communications Committee and designated members are responsible for ensuring that our authorized social media profiles are current, compelling, and respectful. Any UUSIC page on a social media platform is subject to the approval and management of the Communications Committee. Posts should be timely, relevant, and in line with UUSIC principles in order to foster engaged and meaningful communication with members and guests in online spaces. Posts or comments by individuals are subject to removal by the Communications Committee if deemed inappropriate or harmful. If a UUSIC group, activity, or committee has a public Facebook page, the Communications Committee will have at least one member serving as an Administrator for the page in order to effectively and efficiently manage content publicly associated with UUSIC. Any private UUSIC-related groups are not required to add a Committee member as an Administrator but are advised to have at least two Administrators at all times.

Facebook

Purpose

UUSIC's Facebook page is a tool for engaging our members, guests, and the Iowa City community. As such, it should be active, relevant, and multi-faceted.

- **Active:** UUSIC should post at least once every day, ideally between 11am-4pm. In addition, Administrators should respond to individual comments or posts when appropriate and in a timely manner.

- **Relevant:** Posts should reflect UUSIC's values, announce congregational updates, celebrate our members, or otherwise relate to community issues. (Note: See "External Website Links" under "Website" for a complete list of inappropriate links.)

- **Multi-faceted**: Links, pictures, event pages, photo albums should be utilized in addition to traditional text-based posts to take advantage of Facebook's variety of engagement tools.

Twitter, Tumblr, YouTube, Blogs

Other social media are not currently utilized by the Society. Once a robust Facebook community has been established, the Communications Committee will explore additional social media opportunities, such as Twitter. At that time, social media management tools (ThinkUp, HootSuite, etc.) will be considered to streamline the posting process.

Unitarian Universalist Society

Facilities Use Guide

2355 Oakdale Road, Coralville, IA 52241
319-337-3443
www.uusic.org

The congregation of the Unitarian Universalist Society (UUS) welcomes the use of our facilities by all whose activities are compatible with the goals and principles of Unitarian Universalism and the vision and mission of our congregation. Our policies and guidelines are intended to affirm our commitment to radical hospitality, ensure accountability, and enlist the cooperation and responsibility of all who wish to use our facilities.

How to Request a Facilities Use at UUS:

- Contact the Administrator to determine availability for your event
- With the Administrator, determine the appropriate Usage Fees for your requested use, based on the Facilities Usage Fee Schedule
- Fill out the Facilities Use Agreement & Terms and Conditions form
- Familiarize yourself with the applicable areas of the **Facilities Use Manual,** which includes this Facilities Use Guide as well as the following supplements:
    - Guide for Members & Congregational Events
    - Land Ministry Guide
    - Kitchen Guide
    - Wedding Guide
        - Wedding Agreement & Terms and Conditions form
    - Alcohol Policy Agreement
    - Safe Congregation Policy Summary
    - Safety & Security Guide

This Guide and accompanying Facilities Use Manual are meant to provide general information about our space and the responsibilities and restrictions that accompany its use. It is not comprehensive—additional guidelines or rules may be defined by the UUS Board of Trustees, our Minister, or our Administrator. Questions and Facilities Use requests can be directed to the Administrator (319-337-3443 or admin@uusic.org).

Unitarian Universalist congregations affirm and promote seven principles:

1. The inherent worth and dignity of every person.
2. Justice, equity, and compassion in human relations.
3. Acceptance of one another and encouragement to spiritual growth in our congregations.
4. A free and responsible search for truth and meaning.
5. The right of conscience and the use of the democratic process within our congregations and in society at large.
6. The goal of world community with peace, liberty, and justice for all.
7. Respect for the interdependent web of all existence of which we are a part.

Mission Statement**:**

We are a welcoming, spiritually diverse home. We act on our values:
Honor the Earth
Advocate for racial and social justice Foster deep connections
Embrace the ongoing quest for meaning

Vision Statement**:**

We aspire to be a more inclusive, loving, diverse congregation that welcomes all people. We will defend and celebrate the Earth, confront racial and social injustice, and nurture deep connections.

Using UUS's Facilities & Grounds

- Any person or group whose activities are compatible with the goals and principles of Unitarian Universalism and the vision and mission of our congregation are welcome to use our space. However, the congregation's programming needs will have priority for use of facilities.
- A Responsible Party, over the age of 18, must agree to and sign the Facilities Use Agreement and Terms & Conditions. This person will act as the primary contact, will attend the requested facilities use, and will ensure all guidelines, terms, and conditions are followed. If the Responsible Party cannot be present during the requested use, they will appoint a Named Designee, also over 18, to be on-site and act in their stead

- UUS does charge Usage Fees to offset the costs of facilities acquisition, utilities, maintenance, Staffing, and general wear and tear.
    - Congregational programming does not incur any fees.
    - Social Justice/Service Groups and Nonprofits whose activities relate directly to the principles of our congregation may be permitted use of the facilities at a reduced rate (50%) provided they list UUS as a co-sponsor of the event.
    - UUS Voting Members (those who have donated to the operating budget in the last year), may also use the facilities for free for certain Rites of Passage (including new baby dedications, weddings, memorials, coming of age services, renewal of vows ceremonies), and at a reduced rate (25%) for other personal events.
- A Damage/Security Deposit equal to half the total Usage Fee is required for non- congregational usage and must be paid in order to confirm a reservation. This deposit will be used in the event a group fails to meet its responsibilities for security and cleanup.
- Custodial Services are not included in the requested usage fees for use of the building. All set-up and clean-up must be completed by the User within the hours specified by the Agreement.
- Ongoing, regularly-scheduled use by non-congregation groups of any portion of the building must be confirmed in a written contract. A Damage/Security deposit appropriate for the use will be negotiated and paid. If the deposit is needed to recover the facilities from damage or a security breech, another deposit must be paid. A second loss of deposit may result in cancellation of all future scheduled uses.
    - Daily or weekly ongoing non-congregational facilities use requests must be approved by the Board of Trustees.
    - Approval for use of the congregation's facilities on one occasion does not guarantee approval for use in the future. UUS reserves the right to refuse use or cancel any already scheduled facilities use should the Agreement be violated or if the use is determined to conflict with UUS's programs and ministries.
- A Release of Liability Form is included on the **Facilities Use Agreement.** Signing of this form affirms the acceptance of the provisions of that Release. No non-congregation person or group may occupy the congregation facilities without signing the Release.
- A Facilities Use Agreement may be canceled up to 30 days prior to the event without penalty. Cancellations less than 30 days prior to the event may result in forfeiture of the total Use Fee and deposit. UUS reserves the right to cancel any Facilities Use Agreement should the Agreement be violated or if the use is determined to conflict with UUS's programs and ministries.

- There is a more stringent cancellation policy for weddings. See the **Wedding Guide** for details.

General Guidelines

- **Sponsorship**: A non-congregation group using our facility shall not use UUS's name or logo in any way other than to advertise the location of the event, unless congregational sponsorship is acquired by the Board of Trustees.

- **Hours**: Because of the heavy use of the facilities and grounds, and the priority given to UUS's programs and ministries, it is important that the hours for use stated in the Facilities Use Agreement be carefully followed. All aspects of use, including cleanup, must occur before the end time specified in the Agreement. Any additional time spend in the facilities will be rounded up to the nearest hour and deducted from the Damage/Security deposit or billed to the Responsible Party if in excess of the deposit.

- **Space**: All participants, including children, are confined to the areas of the facilities assigned in the Facilities Use Agreement. Common spaces, including the gathering space and main restrooms, may be used as a matter of course. Any areas used outside of those specified in the Agreement will be added to the Agreement at the rates specified in the Facilities Use Guide, and those rates will be deducted from the Damage/Security deposit or billed to the Responsible Party if in excess of the deposit.

    - There will be instances when the facilities will be in use by more than one user or group. Respect should be paid to all when considering noise levels, movement in and use of common areas, and in all other aspects of shared use.

    - The grounds may be used as a matter of course unless otherwise stated by the Administrator, subject to the guidelines specified in the **Land Ministry Use Guide**. Any rehabilitation needed to correct damage done to the grounds will be paid for from the Damage/Security Deposit or billed to the wedding party if the amount exceeds the Deposit.

- **Supervision of Children**: Children must be supervised at all times. If any space, including the Nursery, is used as a childcare room, at least two supervisors over the age of 16 must be present at all times. Please see the additional guidelines and rules set out in the **Safe Congregations Policy Summary.**

- **Smoking:** There is a designated smoking area with a cigarette waste container in the parking lot. Tobacco use of any kind, including smoking/vaping, is not allowed in the facilities under any circumstances, and smoking/vaping outside the facilities must occur within 20 feet of the designated smoking area and not elsewhere on the grounds.

- **Alcohol:** If alcoholic beverages are served, an **Alcohol Policy Agreement** must be signed alongside the Facilities Use Agreement.

- **Security**: The Responsible Party will be assigned a key or keycard when necessary for access to the facilities. Keys may not be lent to any other person involved in the requested use aside from a Named Designee appointed in the Facilities Use Agreement. The facilities must be locked after use, and keys and key cards must be returned to the UUS Administrator within 5 business days of the requested use unless agreed upon otherwise. If a key/card is not returned, keycard/lock replacement will be paid for out of the Damage/Security deposit or billed to the Responsible Party if in excess of the deposit.

- **Parking**: Parking is restricted to areas designated for that purpose. Please do not park or drive on the grounds.
- **AV Use**: Use of the Audio/Visual equipment, including screens, mics, cameras, and computers, must be requested in the Facilities Use Agreement. Training on equipment use may be required and will be provided by the UUS Administrator or a UUS AV volunteer.

- **Storage**: User groups are encouraged to secure permission from the Administrator before storing any items or food on Congregation property. The congregation is not responsible for any items of property that may be left by user groups on the premises.

Decorations, Set-up/Tear-down, and Cleaning Guidelines:

- All groups are responsible for the general welfare and security of the facilities. Please use the facilities with care and respect.

- No posters or signs may be attached to the walls. Be particularly careful of any artwork which may be displayed in classrooms. No removal or rearrangement of art objects is permitted.

- All spaces used must be returned to their original condition unless instructed differently (this includes removing trash to the outside dumpster, cleaning all kitchen equipment, returning chairs and AV equipment to their original locations, etc.).

- Full wastebaskets must be emptied and placed in the dumpster on the side of the building.

- Recycling is strongly encouraged.

- Any damage to the facilities, grounds, or UUS property will be paid for from the Damage/Security deposit, or billed to the Responsible Party should the amount exceed the deposit.

- If, in the opinion of the UUS Administrator, the facilities or grounds is left in a condition which requires extra custodial services, the additional custodial hours needed to return the facilities to original condition will be paid for from the Damage/Security deposit, or billed to the Responsible Party should the amount exceed the deposit.

Room Specific Guidelines

- **Sanctuary**: Respect for the beauty and value of the meeting room is encouraged for all who enter.

    - Beverages must be in containers with spill resistant lids; food use should be thoughtful and limited.

- Use of furniture (other than chairs) or equipment (such as sound system, piano, or fidgets) is not permitted unless specified in the Facilities Use Agreement.

        - The piano is available for use by trained musicians, but must be requested in the Agreement.

    - All equipment and furniture must be returned to its original arrangement unless otherwise instructed by prior agreement.

- **Kitchen**: The UUS Kitchen is fully equipped as a catering/commercial kitchen. Use of the countertops, sinks, and refrigerator is available to all users, but use of any other equipment or supplies requires either an applicable Johnson County Food License (for catering or commercial prep kitchen use), or a completed training session on safety and UUS kitchen guidelines. Anything more than casual use of the kitchen may require a higher Usage Fee.

- **Nursery & Classrooms:** Classroom supplies and equipment may not be used or moved unless negotiated into the Facilities Use Agreement. Nursery toys may be used in the nursery, but must be cleaned with antibacterial wipes or bleach solution and returned to their original locations before the end of the use.

Facilities Use Guide for Members & Congregational Events

This is a supplement to the Facilities Use Guide with information pertaining specifically to congregationally-sponsored events and events held by UUS members. Please refer to the Facilities Use Guide for general rules and restrictions pertaining to all UUS facilities usage.

Priority of Space:

- The congregation's programming needs will have priority for use of facilities. However, no non-congregational use will be cancelled solely to accommodate a subsequently scheduled congregational activity or event or member rite of passage.

- Members may reserve the facilities for weddings 6 months earlier than non-members (18 months vs. 12) in order to give preference of wedding dates to our congregation.

- There will be instances when the facilities will be in use by more than one user or group. Respect should be paid to all when considering noise levels, movement in and use of common areas, and in all other aspects of shared use.

Fees:

- Congregational programming does not incur any fees

- UUS Voting Members (those who have donated to the operating budget in the last year), may

use the facilities for free for certain Rites of Passage, which includes new baby dedications, weddings, memorials, coming-of-age services, and renewal of vows ceremonies. A donation to a UUS fund is always appreciated.

- If the UUS Custodian is available to provide setup or cleanup, Voting Members are responsible for paying the hourly rate for those services, which will be determined in advance, paid to UUS, and added to the Custodian's monthly payment.

- If the facilities, grounds, or UUS property is damaged as a result of a Voting Member's rite of passage, or, in the opinion of the Administrator, requires additional custodial hours to return the facilities to original condition, the Voting Member will be billed for the relevant costs.

- Voting Members may use the facilities at a reduced rate for other personal events, such as birthdays, anniversary parties, and retirement celebrations. See our Facilities Usage Fee Schedule for a list of rates.

- Any Use provided for free or a reduced rate as a benefit of membership is still subject to all requirements and guidelines provided for in the Facilities Use Manual.

Other Congregation-Specific Guidelines:

UUS Policy Adherence: Congregational use of the facilities must abide by the more stringent safe congregation rules, fundraising request policy, and all other applicable UUS policies as laid

out in the Policies and Procedures Manual (which can be viewed on the website or requested from the Administrator).

Security: Use of the facilities by a congregational group or activity does not require signing of a liability waiver or payment of a security deposit. Failure by a group of the congregation to meet its security responsibilities will result in a written/electronic reminder from the Administrator.
Three violations will result in the group being charged a closing fee for subsequent use until different leadership is assigned responsibility for the group.

Keys: Congregational group leaders may check out a building key and keycard for ongoing facilities access. When a leader steps down the keys must be returned to the UUS office or passed on to the new leader (and the office alerted to the new key-holder). Keys may be loaned to another member of the group when the leader is not able to attend a facilities use, but the leader is responsible for ensuring security responsibilities are met and that the key is returned to the leader after use. The leader will be billed the replacement cost of any lost key or keycard.

- Non-leaders may check out keys and key cards when extra are available, but may be expected to put down a key deposit. Keys checked out to non-leaders may not be loaned to anyone else. Keys may be called due back to the office at any time when needed by the Administrator for other uses.

Land Ministry Use Guide

UUS Kitchen Use Guide

Wedding Guide

This is a supplement to the Facilities Use Guide with information pertaining specifically to weddings. Please refer to the Facilities Use Guide for general rules and restrictions pertaining to all UUS facilities usage.

Our Commitment

The congregation of the Unitarian Universalist Society welcomes the use of our facilities by all individuals wishing to be married whose spiritual traditions, philosophies and values are compatible with the mission and principles of Unitarian Universalism. We believe a wedding is a sacred ritual and must be entered into with a mindful heart. Our Guidelines are intended to affirm our commitment to radical hospitality, ensure accountability, and enlist the cooperation and responsibility of all who wish to use our facilities. Please see our Facilities Use Guidelines
for general information regarding the use of our congregation's home.

Process for Holding a Wedding at UUS

1. Contact the UUS Administrator (337-3443, admin@uusic.org) to reserve your desired date
    a. Voting Members of the congregation may make a reservation for their ceremony up to 18 months prior to the desired date.
    b. Non-members of the society may not reserve the facilities more than 12 months prior to the desired date.
2. Choose your preferred Wedding package (Full or Service-Only). See below for details on each package.
    a. Voting Members of the congregation may receive any wedding package without a Usage Fee as a benefit of their membership, although a donation is always appreciated.
        i. Voting Members holding a wedding off-site may have a rehearsal dinner at UUS free of charge as a benefit of their membership, although a donation is always appreciated.
        ii. Any Use provided as a benefit of membership is still subject to all requirements and guidelines provided for here and in the rest of the Facilities Use Manual.
3. Review this Guide and the Facilities Use Manual before signing a Facilities Use Agreement. Payment of the Damage/Security deposit equal to half the total Usage Fee is required to confirm and hold your reservation.

4. Choose your officiant

a. The UUS Minister is available to officiate wedding ceremonies for a fee determined on an individual basis. UUS also has a list of alternative Unitarian Universalist Ministers if the UUS Minister is unavailable on your desired date.

b. Officiants of other religious groups or non-denominational ordination are allowed, but may require a conversation with the UUS Minister to ensure the values and principles of the officiant are compatible with UUS's mission and vision.

5. Pay the total Usage Fee at least 6 months prior to the wedding date. Failure to pay the total Usage Fee may result in loss of the facilities.

   a. Keys, kitchen use trainings (if necessary), and other instructions will be provided the week of the wedding unless otherwise agreed. Keys must be returned to the UUS Administrator no later than a week after the wedding.

Wedding Packages

Full Wedding Package ($1,500)

Includes:

- Rehearsal Day: Two hours in the Sanctuary or Grounds on the day prior to the ceremony for a rehearsal and to decorate/set up.
  - Use of the Fellowship Hall and kitchen for three hours for a rehearsal dinner may be added for an additional fee of $250.
- Wedding Day: Full use of the Sanctuary or Grounds, Fellowship Hall, and Kitchen for up to 12 hours (typically 11 am to 11 pm).
  - The conference room and a classroom may be used as dressing/waiting rooms.
  - If the ceremony or reception is planned on the grounds, the use of the Sanctuary and Fellowship Hall as a backup location for bad weather is included in the Usage Fee.
  - The Nursery may be added as a childcare space for an additional fee of $40. UUS rules and guidelines for use of the nursery and supervision of children (listed below) must be followed.
  - The facilities and grounds must be cleaned and vacated by 11 pm when a ceremony is held on a Saturday night. This includes returning all tables and chairs to their original positions.

Service-Only Wedding Package (Usage Fee: $600)

Includes:

- Rehearsal Day: Two hours in the Sanctuary or Grounds on the day prior to the ceremony for a rehearsal and to decorate/set up.
    - Use of the Fellowship Hall and kitchen for three hours for a rehearsal dinner may be added for an additional fee of $250.
- Wedding Day: Use of the Sanctuary or Grounds for up to 4 hours.
    - The conference room and a classroom may be used as dressing/waiting rooms.
    - If the ceremony or reception is planned on the grounds, the use of the Sanctuary and Fellowship Hall as a backup location for bad weather may be used for an additional fee of $100 each and will be paid for from the Damage/Security Deposit or billed to the wedding party if the amount exceeds the Deposit.
    - The Nursery may be added as a childcare space for an additional fee of $40. UUS rules and guidelines for use of the nursery and supervision of children (listed below) must be followed.

General Wedding Guidelines:

- Cancellation Policy: Weddings may be cancelled without penalty 6 months prior to the wedding date.
    - Cancellations made within 6 months of the wedding date will lose their Security/Damage Deposit.
    - Cancellations made within a month of the wedding date will lose the Total Usage Fee and the Security/Damage Deposit.
- All applicable rules and guidelines specified in the Facilities Use Manual must be followed. In particular:
    - Supervision of Children: Children must be supervised at all times. If any space, including the nursery, is used as a childcare room, at least two supervisors over the age of 16 must be present at all times. Please see the additional guidelines and rules set out in the Safe Congregations Policy Summary.
    - Alcohol: If alcoholic beverages are served, an Alcohol Policy Agreement must be signed alongside the Facilities Use Agreement.
- Custodial Services are not included in any wedding package. All set-up and clean-up, including table and chair placement and cleaning and drying all dishware, must be completed by the User within the hours specified by the Agreement.
    - If the UUS Custodian is available to provide setup or cleanup, the User and the

Administrator will determine the setup needs and a fee equal to at least 2 hours of the custodian's hourly wage will be added to the Agreement to provide those services. The fee will be paid to UUS and added to the Custodian's total monthly payment.

- Decorations and flowers may be placed in the sanctuary and fellowship hall although none may be attached to the walls or glass. Deposits will be forfeited in the event of damage.

- We encourage the use of bird feed or bubbles to celebrate your wedding. The throwing of rice and the release of balloons are prohibited for environmental reasons.

Room Specific Wedding Guidelines:

- Sanctuary: The Sanctuary can seat 275 and can be arranged in a variety of configurations.
    - The piano is available for use by trained musicians only.
- Fellowship Hall: The Fellowship Hall holds 300 seated at round tables of 8.
    - Use of UUS tables, chairs, and table settings (dinnerware, tablecloths, etc.) is included in the Full Wedding Package, and for Rehearsal Dinners. A member of the wedding party may be required to receive instructions on the location and use requirements of UUS equipment and property. All table settings must be cleaned and returned to their storage locations after use.
- UUS Grounds:
    - The Grounds are available for general use as a matter of course, unless otherwise specified in the Facilities Use Agreement.
    - In case of rain or other bad weather for an outdoor ceremony or reception, the Sanctuary may be used as a backup ceremony location and the Fellowship Hall as a backup reception location. The UUS Administrator must be notified prior to the ceremony if a backup location will be used.
    - All furnishings used outdoors (including chairs, tables, and table settings) must be rented and brought in from offsite. If tents are used, placement must be approved by the UUS Administrator to ensure no damage is done to the grounds.
    - Any rehabilitation needed to correct damage done to the grounds will be paid for from the Damage/Security Deposit or billed to the wedding party if the amount exceeds the Deposit.

- Kitchen: The UUS Kitchen is fully equipped as a catering/commercial kitchen. Caterers must provide appropriate Johnson County permits/certification if the kitchen will be used for more than plating or preparing precooked food. If no caterer is used, a member of the wedding party overseeing any food preparation in the kitchen must complete a training session on safety and UUS kitchen guidelines, provided by the UUS Administrator or a Hospitality/Kitchen volunteer.
    - Use of only the countertops, sinks, and refrigerator does not require a training or permit.
    - Any consumable or single use supplies must be provided by the wedding party.

FORMS

GENERAL FACILITIES USAGE TERMS AND CONDITIONS

On behalf of myself, or my organization or event, I, the undersigned, agree to Terms and Conditions set out below, as well as to the guidelines specified in the Facilities Use Manual and established by the Unitarian Universalist Society (UUS), located at 2355 Oakdale Road, Coralville, IA 52241. I assume all risks and dangers inherent in the use of these facilities and surrounding grounds, accepting them in "as is" condition. I agree to use my best judgment in the use of these facilities and to follow generally accepted safety principles. I waive and release UUS of any and all liabilities.

- **Responsible Person:** I (the person signing this Agreement) am at least 18 years old. I will attend the requested facilities use and will be responsible for my organization or event's use of the facilities and grounds and will ensure all guidelines, terms, and conditions are followed. If I cannot be present during the requested use, I will appoint a Named Designee, also over 18, to be on-site and act in my stead.
- **Payment:** I understand that UUS charges a Usage Fee for each requested space to offset the costs of facilities acquisition, utilities, maintenance, Staffing, and general wear and tear. I understand that a Damage/Security Deposit (hereinafter referred to as 'deposit') equal to 50% of the total Usage Fee is required to reserve my requested use. The deposit is due at the time this Agreement is signed, and will be returned, less any costs applied as described below, after my use. Payment of the total Usage Fee is due at least one (1) week in advance of the requested use. Failure to pay either the deposit or the total Usage Fee will result in the cancellation of my requested use and the nullification of this Agreement.
- **Cancellation Policy:** This Agreement may be canceled up to 30 days prior to the event without penalty. Cancellations less than 30 days prior to the event may result in forfeiture of the total Use Fee and deposit. UUS reserves the right to cancel any facilities use Agreement should the Agreement be violated or if the use is determined to conflict with UUS's programs and ministries.
- **Hours**: Because of the heavy use of the facilities and grounds, and the priority given to UUS's programs and ministries, it is important that the hours for use stated in this Agreement be carefully followed. All aspects of use, including cleanup, must occur before the end time specified in this Agreement. Any additional time spend in the facilities will be rounded up to the nearest hour, added to this Agreement, and deducted from my deposit or billed to me if in excess of my deposit.
- **Space**: I will ensure that all participants, including children, are confined to the areas of the facilities assigned in this Agreement. Common spaces, including the gathering space and main restrooms, may be used as a matter of course. The grounds may also be used as a matter of course unless otherwise stated by the Administrator, subject to the guidelines specified in the **Land Ministry Use Guide,** which I will ensure are followed. I understand that any areas used by my group outside of those specified in this Agreement will be added to the Agreement at the rates specified in the Facilities Usage Fee Schedule, and those rates will be deducted from my deposit or billed to me if in excess of my deposit.
- **Children**: I understand that children must be supervised and confined to areas assigned in this Agreement. If the nursery or any other space is used as a childcare room, at least two supervisors over the age of 16 must be present at all times. I will abide by the guidelines and rules set out in the **Safe Congregations Policy Summary.**
- **Smoking:** There is a designated smoking area with a cigarette waste container in the parking lot. I understand that tobacco use of any kind, including smoking/vaping, is not allowed in the facilities under any circumstances, and that smoking/vaping outside the facilities must occur within 20 feet of the designated smoking area and not elsewhere on the grounds. **(continued on reverse)**

- **Alcohol:** I understand that if alcoholic beverages are served, an **Alcohol Policy Agreement** must be signed alongside this Agreement, and that I will be responsible for ensuring compliance.
- **Cleanup:** I will ensure that all spaces used are returned to the original condition and set-up as when I arrived, unless instructed differently (this includes removing trash to the outside dumpster, cleaning all kitchen equipment, returning chairs and AV equipment to their original locations, etc.). If, in the opinion of the UUS Administrator, the building or grounds is left in a condition which requires extra custodial services, I understand that the additional custodial hours needed to return the facilities to original condition will be paid for from my deposit, or billed to me should the amount exceed my deposit.
- **Security**: I am fully responsible for any keys or key cards loaned to me. Only I may hold and use keys—I will not lend the keys to any other person involved in the requested use. I am responsible for locking the building after my requested use has ended. Keys and key cards must be returned to the UUS Administrator within 5 business days of the requested use unless agreed upon otherwise. If a key is not returned, keycard/lock replacement will be paid for out of my deposit or billed to me should the amount exceed my deposit.
- **Damage:** I understand that I am responsible for any and all damage to UUS property, equipment, and contents. No part of the building may be damaged or marred by any decorations or other items affixed to walls or ceilings. All costs incurred to repair damage will be deducted from my deposit. If any of the above charges exceed the deposit, I will be billed for all excess charges.
- **Liability:** On behalf of myself or my organization or event, I agree to indemnify, defend and hold harmless the Unitarian Universalist Society and/or any officer, employee, or other representative of UUS from and against any and all claims, demands, suits, actions, proceedings (formal or informal), investigations, judgments, deficiencies, damages, settlements, liabilities and expenses (including reasonable legal fees and expenses of counsel acceptable to UUS) as and when incurred arising out of, based upon, or in connection with the use of UUS's facilities for my event, except for damages arising out of bodily injury to persons or damage to property resulting directly from the sole negligence of UUS. *If any provision of this Agreement is held illegal or unenforceable in a judicial proceeding, such provision shall be severed and shall be inoperative, and the remainder of this Agreement shall remain operative and binding on the Parties.*

_____	_____	_____
Name of Responsible Party & Organization (if applicable)	Signature	Date
_____	_____	_____
UUS Administrator	Signature	Date

If signed outside of UUS, please return to the Administrator at 2355 Oakdale Road, Coralville, IA 52241

FACILITIES USE AGREEMENT

Responsible Party:_____

(Person requesting Use, responsible for implementing terms)

Phone #:_____

Address:_____

Email:_____

Named Designee:_____

(if Responsible Party cannot be on-site during Use)

Phone #:_____

Date Requested:	
Start Time:	AM / PM
End Time:	AM / PM
Estimated Attendees:	
Alcohol Policy Agreement?	YES NO
NonProfit Discount?	YES NO
Voting Member Discount?	YES NO
Key/Keycards Required:	

Group/Organization (if applicable):_____

Purpose of Requested Use: _____

Rooms Requested

*(see the **Facilities Use Guide** for a table of room names, capacity, usage rates, and discounts)*

Room	Total Usage Fee for Each Room
Total Usage Fee: DUE 1 WEEK BEFORE USE:	
Damage/Security Deposit: DUE UPON SIGNING: *(50% of Total Usage Fee)*	

The Damage/Security Deposit must be paid in full upon signing to confirm the facilities use reservation. The deposit will be returned to the Responsible Party after the event, less any amount needed to fix damages, replace keys/keycards, pay for custodial costs, or to cover any unauthorized additional space usage (see Terms and Conditions on the other side of this form for details). If the Damage/Security Deposit is not enough to cover any incidental costs, the Responsible Party will be billed for the additional costs.

Special Provisions, Rules, or Exceptions: _____

_____

For Office Use Only:

Date Facilities Use Agreement Signed:		Date Damage/Security Deposit Returned:	

Date Damage/Security Deposit Paid:		**List of Incidentals Billed to Deposit**	
Date Alcohol Policy Signed:			
Date Alcohol License Submitted:			
Date Kitchen License Submitted or Training Completed:			
Date Keys/Keycards Assigned:			
Date Keys/Keycards Returned:		Amount Billed on Top of Deposit:	$
		Date Additional Incidentals Paid:	

WEDDING FACILITIES USAGE TERMS AND CONDITIONS

On behalf of myself, my partner, and my wedding guests, I, the undersigned, agree to Terms and Conditions set out below, as well as to the guidelines specified in **the Facilities Use Manual** and established by the Unitarian Universalist Society (UUS), located at 2355 Oakdale Road, Coralville, IA 52241. I assume all risks and dangers inherent in the use of these facilities and surrounding grounds, accepting them in "as is" condition. I agree to use my best judgment in the use of these facilities and to follow generally accepted safety principles. I waive and release UUS of any and all liabilities.

- **Responsible Person:** I (the person signing this Agreement) am at least 18 years old. I will be responsible for my use of the facilities and grounds and will ensure all guidelines, terms, and conditions are followed.
- **Payment:** I understand that UUS charges a Usage Fee for each requested space to offset the costs of facilities acquisition, utilities, maintenance, Staffing, and general wear and tear. I understand that a Damage/Security Deposit (hereinafter referred to as 'deposit') equal to 50% of the total Usage Fee is required to reserve my requested use. The deposit is due at the time this Agreement is signed, and will be returned, less any costs applied as described below, after my use. Payment of the total Usage Fee is due at least six (6) months in advance of the requested use. Failure to pay either the deposit or the total Usage Fee will result in the cancellation of my requested use and the nullification of this Agreement.
- **Cancellation Policy:** This Agreement may be canceled up to 6 months prior to the event without penalty. Cancellations made within 6 months of the wedding date will lose their Security/Damage Deposit. Cancellations made within a month of the wedding date will lose the Total Usage Fee and the Security/Damage Deposit. UUS reserves the right to cancel any facilities use Agreement should the Agreement be violated or if the use is determined to conflict with UUS's programs and ministries.
- **Hours**: Because of the heavy use of the facilities and grounds, and the priority given to UUS's programs and ministries, it is important that the hours for use stated in this Agreement be carefully followed. All aspects of use, including cleanup, must occur before the end time specified in this Agreement. Any additional time spend in any room of the facilities will be rounded up to the nearest hour, added to this Agreement, and deducted from my deposit or billed to me if in excess of my deposit.
- **Space**: I will ensure that all participants, including children, are confined to the areas of the facilities assigned in this Agreement. Common spaces, including the gathering space and main restrooms, may be used as a matter of course. The grounds may also be used as a matter of course unless otherwise stated by the Administrator, subject to the guidelines specified in the **Land Ministry Use Guide,** which I will ensure are followed. I understand that any areas outside of those specified in this Agreement will be added to the Agreement at the rates specified in the **Facilities Usage Fee Schedule**, and those rates will be deducted from my deposit or billed to me if in excess of my deposit.
- **Children**: I understand that children must be supervised and confined to areas assigned in this Agreement. If the nursery or any other space is used as a childcare room, at least two supervisors over the age of 16 must be present at all times. I will abide by the guidelines and rules set out in the **Safe Congregations Policy Summary.**
- **Smoking:** There is a designated smoking area with a cigarette waste container in the parking lot. I understand that tobacco use of any kind, including smoking/vaping, is not allowed in the facilities under any circumstances, and that smoking/vaping outside the facilities must occur within 20 feet of the designated smoking area and not elsewhere on the grounds.

(continued on reverse)

- **Alcohol:** I understand that if alcoholic beverages are served, an **Alcohol Policy Agreement** must be signed alongside this Agreement, and that I will be responsible for ensuring compliance.
- **Cleanup:** I will ensure that all spaces used are returned to the original condition and set-up as when I arrived, unless instructed differently (this includes removing trash to the outside dumpster, cleaning all kitchen equipment, returning chairs and AV equipment to their original locations, etc.). If, in the opinion of the UUS Administrator, the building or grounds is left in a condition which requires extra custodial services, I understand that the additional custodial hours needed to return the facilities to original condition will be paid for from my deposit, or billed to me should the amount exceed my deposit.
- **Security**: I am fully responsible for any keys or key cards loaned to me. I am responsible for locking the building after my requested use has ended. Keys and key cards must be returned to the UUS Administrator within 5 business days of the requested use unless agreed upon otherwise. If a key is not returned, keycard/lock replacement will be paid for out of my deposit or billed to me should the amount exceed my deposit.
- **Damage:** I understand that I am responsible for any and all damage to UUS property, equipment, and contents. No part of the building may be damaged or marred by any decorations or other items affixed to walls or ceilings. All costs incurred to repair damage will be deducted from my deposit. If any of the above charges exceed the deposit, I will be billed for all excess charges.
- **Liability:** On behalf of myself, my partner, and my wedding guests, I agree to indemnify, defend and hold harmless the Unitarian Universalist Society and/or any officer, employee, or other representative of UUS from and against any and all claims, demands, suits, actions, proceedings (formal or informal), investigations, judgments, deficiencies, damages, settlements, liabilities and expenses (including reasonable legal fees and expenses of counsel acceptable to UUS) as and when incurred arising out of, based upon, or in connection with the use of UUS's facilities for my event, except for damages arising out of bodily injury to persons or damage to property resulting directly from the sole negligence of UUS. *If any provision of this Agreement is held illegal or unenforceable in a judicial proceeding, such provision shall be severed and shall be inoperative, and the remainder of this Agreement shall remain operative and binding on the Parties.*

Name of Responsible Party & Organization (if applicable)	Signature	Date
UUS Administrator	Signature	Date

If signed outside of UUS, please return to the Administrator at 2355 Oakdale Road, Coralville, IA 52241

FACILITIES USE AGREEMENT - WEDDING

Responsible Party:_____

(Person requesting Use, responsible for implementing terms)

Phone #:_____

Address:_____

Email:_____

Date Requested:	
Start Time:	
End Time:	
Estimated Attendees:	
Alcohol Policy Agreement?	YES NO
Voting Member?	YES NO
Key/Keycards Required:	

Name of Partner:_____

Phone #:_____

Officiant Name:_____ Phone #: _____

Wedding Package Requested: FULL ($1,500) CEREMONY ONLY ($600)

Rehearsal Date & Time: _____

Rehearsal Dinner ($250): YES NO Add Nursery ($40): YES NO

Additional Rooms or Services Requested

*(see the **Facilities Usage Fee Schedule** for a list of room names, capacity, usage rates, and discounts)*

Total Usage Fee: DUE 1 WEEK BEFORE USE:	
Damage/Security Deposit: DUE UPON SIGNING: *(50% of Total Usage Fee)*	

The Damage/Security Deposit must be paid in full upon signing to confirm the facilities use reservation. The deposit will be returned to the Responsible Party after the event, less any amount needed to fix damages, replace keys/keycards, pay for custodial costs, or to cover any unauthorized additional space usage (see Terms and Conditions on the other side of this form for details). If the Damage/Security Deposit is not enough to cover any incidental costs, the Responsible Party will be billed for the additional costs.

Notes: _____

For Office Use Only:

Date Facilities Use Agreement Signed:		**List of Incidentals Billed to Deposit**
Date Damage/Security Deposit Paid:		
Date Officiant Vetted:		
Date Alcohol Policy Signed:		

Date Alcohol License Submitted:			
Date Keys/Keycards Assigned:			
Date Keys/Keycards Returned:		Amount Billed on Top of Deposit:	$
Date Damage/Security Deposit Returned:		Date Additional Incidentals Paid:	

Alcohol Policy Agreement

If alcoholic beverages are served at an event at UUS's facilities or grounds, this Alcohol Policy Agreement must be signed and submitted along with the Facilities Use Agreement. The Responsible Party agrees to:

- Use proper discretion in the dispensing of alcoholic beverages. No person will be overserved (served when already obviously intoxicated).
- No alcoholic beverages shall be served to or by anyone under the legal age on the premises.
- No intoxicated person will be allowed to drive a motor vehicle from UUS property.
- All Iowa laws and Coralville ordinances shall be followed.

Cash Bars and Tips

It is understood that UUS does not have an Iowa State Liquor License, which must be held by any establishment to legally provide liquor for the receipt of money. If alcoholic beverages are to be sold, or tips solicited, the Responsible Party agrees to either:

- Procure an Iowa State Liquor License and submit a copy to the Administrator, or submit a copy of a caterer's valid License, prior to the facilities use.
- Ensure that no alcoholic beverages will be sold on the UUS premises at any time, either directly or indirectly, through voluntary contributions or otherwise. There shall not be present a container available for the deposit of coins or bills.

Indemnity

The responsible party agrees to indemnify and hold harmless UUS, its employees, and members for any damages or legal fees which may be sustained as a result of serving alcoholic beverages at any function held on UUS property.

_____ _____

RESPONSIBLE PARTY SIGNATURE DATE

(must be 21 years of age or older}

_____

PRINT NAME

Facilities Use Fee Schedule

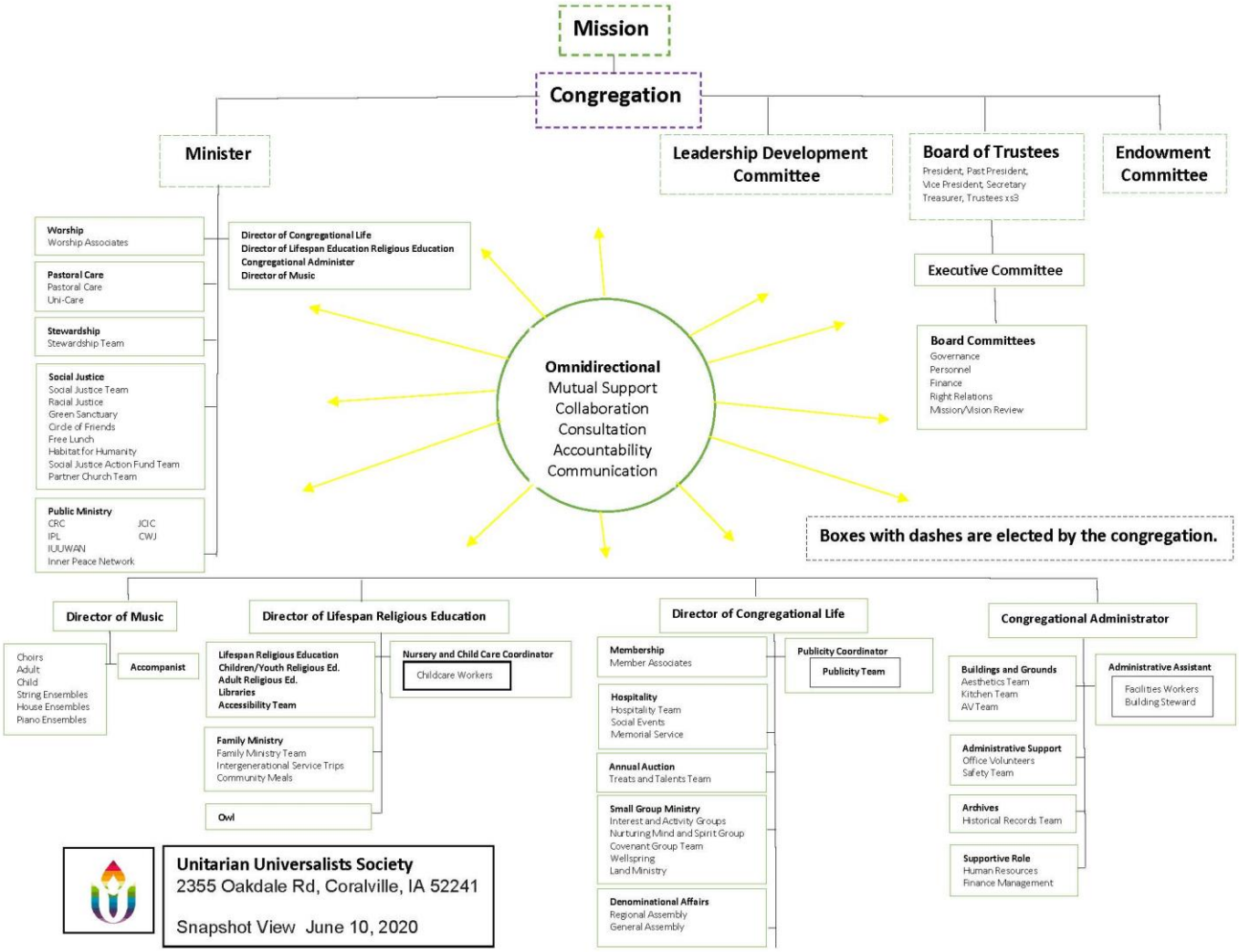
Room		Fee	NonProfits*	Members^
Sanctuary (seats 275). For the First 3 Hours:				
	Meeting	$100.00	$50.00	$25.00
	Concert/Performance/Public Event	$200.00	$100.00	$50.00
	For each additional hour:	$25/$50	$10/$25	$5/$10
Fellowship Hall (seats 300) For the First 3 Hours:				
	Meeting	$100.00	$50.00	$25.00
	Concert/Performance/Public Event	$200.00	$100.00	$50.00
	For each additional hour:	$25/$50	$10/$25	$5/$10
Concert/Performance/Public Event is defined as any event which has an increased risk of wear and tear on the facilities or property (i.e. requires AV equipment, extensive setup/teardown, etc.). The Administrator will make the determination of what constitutes a Concert/Performance/Public Event.				
Conference Room (Seats 15)	For the First 3 Hours:	$100.00	$50.00	$25.00
	For each additional hour:	$25.00	$10.00	$5.00
Sr. High Room (Seats 20)	For the First 3 Hours:	$60.00	$ 30.00	$ 15.00
	For each additional hour:	$20.00	$ 10.00	$ 5.00
Jr. High Room (Seats 20)	For the First 3 Hours:	$60.00	$ 30.00	$ 15.00
	For each additional hour:	$20.00	$ 10.00	$ 5.00
The Sr. High and Jr. High rooms can be combined for larger meetings.				
Other classrooms (Seat 10)	For the First 3 Hours:	$30.00	$ 15.00	$ 10.00
	For each additional hour:	$10.00	$7.50	$5.00
Kitchen				
When used in conjunction with another room.	For the First 3 Hours:	$75.00	$40.00	$20.00
	For each additional hour:	$15.00	$10.00	$5.00
When used as a stand-alone catering or commercial prep kitchen.	Per Hour:	$20.00	$10.00	$5.00
Nursery (Must be used in addition to another room)	For the duration of the event:	$40.00	$20.00	$0.00
Weddings				
	Full Wedding Package	$1,500.00	N/A	$0.00
Service-Only Package		$600.00	N/A	$0.00
Notes				

A Damage/Security Deposit equal to half the Total Usage Fee is required and must be paid in order to confirm a reservation. The total Usage Fee is due at least a week prior to the event. The deposit will be returned to the Responsible Party after the event, less any amount needed to fix damages, replace keys/keycards, pay for custodial costs, or to cover any unauthorized additional space usage (see the Facilities Use Guide for details). If the Damage/Security Deposit is not enough to cover any incidental costs, the Responsible Party will be billed for the additional costs.

Facilities usage fees do not include custodial services. Users are responsible for all setup and cleanup.

*Social Justice/Service Groups and Nonprofits whose activities relate directly to the principles of our congregation may be permitted use of the facilities at a reduced rate (50%) provided they list UUS as a co-sponsor of the event.

^ A Member for the purposes of facilities usage rates is someone who has signed the UUS membership book AND has made a donation of record to the UUS operating budget within a year prior to the date requested. They may hold rites of passage at UUS for no fee, although donations are gratefully accepted. Voting Members may use the facilities at a reduced rate (25%) for other personal events.
Other Fee Structures (such as percentage of ticket sales or fee per participant) may be negotiated with the Administrator when appropriate, but may require approval from the Board or Finance Committee.

[redacted]

UUS Organizational Chart (Snapshot View, 06/10/2020)