

Updated 06/23/2025

SouthWest Unitarian Universalist Church

# **Congregational Information and Policy Manual**

SouthWest Unitarian Universalist Church

6320 Royalton Rd.

North Royalton, OH 44133

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### **Groups Providing Exploration of Special Interests and Socializing**

(These groups will often have a documented protocol that is more detailed than the following summaries.)

#### **Evening Book Group**

The Evening Book Group meets periodically read and discuss spiritual books.

#### **Wednesday Book Group**

The Wednesday book group meets every Wednesday afternoon from 1:00-3:00 pm discuss books on social justice issues, spirituality, and world religions.

#### **First Wednesday Coffee**

A gathering to socialize over breakfast at a local restaurant.

#### **Garden Committee**

The Garden Committee ensures an attractive landscape on the church property.

#### **Happy Hour**

Happy Hour provides an opportunity to connect with others and engage in good conversation over Zoom.

#### **Meditation Group**

The Insight (Vipassana) Meditation Sit occurs every Monday, except holidays, from 1:30 to 3:15 pm in the church Sanctuary. Meditation is either guided or silent and may include dharma talks which clarify many aspects of the teaching over time.

#### **Poetry Group**

The Poetry Group gathers poetry enthusiasts to share poems (your own or ones you enjoy) and learn more about poetry and poets.

#### **Women's Fellowship**

Periodically, individuals who identify as women meet to socialize over a lunch or dinner.

#### **Men's Fellowship**

Periodically, individuals who identify as men meet to socialize over a lunch or dinner.

#### **Women's History Group**

The Women's History Group reads books and shares stories about the many largely unknown women who worked and suffered in their attempts to achieve equality for all women. Their efforts have made our lives easier.

## **Standing Committees**

(Standing Committees are authorized by the Board of Trustees and approved by the Congregation members at the Annual Meeting. Often, Standing Committees will have an approved budget for expenses. Committees will usually have a documented protocol that is more detailed than the following summaries.)

### **Building and Grounds Committee**

Led by the Head of Building and Grounds, the committee has the general responsibility for church property maintenance, repair, additions and alterations. Church property includes buildings, grounds, equipment, furnishings, appliances, and information technology systems.

### **Care Team**

The mission of the Southwest Unitarian Universalist (SWUU) Care Team is to work collaboratively with our Minister in providing compassionate support to Members and Friends of our church community in times of stress and in times of celebration. The team works in an organized and caring manner so that congregants of all ages, races, religions, gender identities, or disabilities feel included. Complete confidentiality is assured at all times. The Care Team is comprised of trained volunteers drawn from church membership.

### **Hospitality Committee**

The Hospitality Committee is comprised of volunteers drawn from church membership and friends. The Hospitality Committee leads and coordinates Coffee Hour after Sunday services, and facilitates extra "fun" events involving refreshments, which are always yummy and filled with friendship. The committee may also support periodic fundraising events.

### **Membership Committee**

The Membership Committee welcomes visitors and helps them become familiar with the SWUU community, so that they can become more involved. They also continue checking in with our current members and friends to ensure they are getting what they need from SWUU.

### **Racial Justice Accountability Ministry**

The Racial Justice Accountability Ministry supports and uplifts antiracist policies, mindsets, and actions in support of our community including African Americans, Latinx, Indigenous, Asian, Pacific Islander, and other non-white groups. The Ministry promotes continuous learning at the individual, congregational, and community level that actively promotes anti-racism.

### **Social Justice Committee**

The Social Justice Committee has two main responsibilities. First, the committee leads and coordinates the Monthly Focus Offering. Recipients are non-profit, local organizations with work consistent with our church values. Second, the committee works with volunteers serving food and interacting with the Urban Hope Community on the 2nd Sunday of the month. Our congregation offers financial support, along with food and clothing donations to Urban Hope, which is a UU gathering place for Cleveland neighbors on the Near West Side.

### **Stewardship Committee**

The Stewardship Committee promotes and supports the short-term and long-term financial health of SouthWest UU Church (SWUU). The committee leads and coordinates fundraising events and activities. Further, the committee works to engage and educate the congregation about the financial health of our church.

### **Worship Team**

The Worship Team works in conjunction with the minister to plan and execute Sunday Worship services. The team reviews past services and discusses monthly themes to generate ideas for sermons and readings. The team also arranges for guest speakers for the Sundays the minister is off. Requirements to join the team include comfort and skill in public speaking, the ability to choose meaningful readings that fit the theme and subject of the service, and the ability to coordinate effectively with others. The Worship Team meets once per month, scheduled on a monthly basis.

### **Music Committee**

The Music Committee helps coordinate the music program along with the minister, collaborative pianist, and choir director. This includes suggesting hymns for Sunday services, soliciting, scheduling, and assisting special music performers, providing ideas and support for music from diverse sources, and managing the budget for piano tuning and sheet music. The Music Committee also assists the pianist in finding and supporting backup performers in her absence.

### **Shared Ministry Team**

The Shared Ministry Team conducts regular appraisals of the minister and the overall congregation to be compiled in a report reserved for review by the minister and the Board of Trustees. The team also resolves internal conflict when it arises and helps reach a meaningful resolution, develops strategies and activities to reaffirm our covenant and keep it relevant, and evaluates the state of our ministry and monitors the health of the congregation as a whole.

**Approved by Board of Trustees on April 17, 2025**



## Building and Grounds Policy

Led by the Head of Building and Grounds, the Building and Grounds Committee shall have the general responsibility for church property maintenance, repair, additions and alterations. Church property includes buildings, grounds, equipment, furnishings, appliances, and information technology systems.

The Committee is authorized to make decisions on routine maintenance, repair, additions, and alterations to the property or aesthetic elements of the building. Significant alterations or alterations that exceed the annual budget requires approval by the Board of Trustees.

Banners, signs, flags, or other miscellaneous signage that are exterior-facing or outside of the church (intended for the general public) should only be permitted if the messaging is in line with SWUU's history of congregational advocacy, public witness, and/or agreed upon values (such as through a congregational vote). This intentional and demonstrated history of public witness, advocacy, and education in regards to the social justice message of the sign should be present prior to posting a sign. Examples of this policy in action include our progress pride banner and our Black Lives Matter banner, both installed in 2024. Our faith has a long history of LGBTQ+ advocacy. Our congregation is a certified Welcoming Congregation. And our involvement in events such as Cleveland Pride demonstrate that we put our faith in action. Similarly, our Congregation formally adopted the 8th Principle in 2023. We are committed to living into that adoption, and these banners are symbols of that commitment.

Any member may submit proposals for alterations to the property or aesthetic elements of the building, or addition of items of permanence (including, but not limited to appliances, furnishings, and wall adornments). Upon receipt of such proposal, the Committee shall either (1) make a decision on a course of action regarding the proposal, or (2) submit a recommendation to the Board of Trustees on a course of action. No member, group of members or Committee shall undertake any alterations to the property or aesthetic elements of the building, or addition of items of permanence without obtaining approval from the B & G Committee and/or Board of Trustees.

**Approved with Edits by the Board of Trustees on April 17, 2025**

## POLICY ON FACILITY USE

It is the policy of Southwest Unitarian Universalist Church (“SWUU” or the “Church”) to make its facilities available for rent by not-for-profit individuals and organizations for events not directly related to Church business as follows:

1. The events are deemed appropriate for the building and consistent with the principles of SWUU.
2. SWUU reserves the right to deny, for any reason, use requests from any particular individual or organization.
3. The renter agrees to and signs the Rental Agreement and pays the specified rental fees and security fees in the timeline specified in the Rental Agreement.
4. Areas available for rent:
  - a. The Sanctuary, including sound equipment, chairs, the Foyer, the Reception Room, and the Kitchenette.
  - b. The Reception Room may be rented alone, including the Foyer and Kitchenette.
  - c. The Fellowship Hall, including the Kitchen and Nursery area.
5. Administration:
  - a. Generally, inquiries will come to the Minister, who will determine if the potential renter’s event is appropriate and consistent with the principles of SWUU.
  - b. The Minister will notify the head of Building and Grounds and the Board of Trustees of the potential rental event.
  - c. Assuming no objections from Buildings and Grounds or the Board, either the Minister, the Building head, or a Board member will reach out for a volunteer Event Coordinator(s) for this specific event.
  - d. The Event Coordinator will coordinate with the renter, ensure the Rental Agreement is signed, collect fees, and will be present at the event. On a case by case basis, the Event Coordinator may decide to be present at start and close of the event.
6. Exceptions:
  - a. The Minister with Board input may determine that a potential renter is so closely aligned with SWUUs values, that the normal use fees and/or security deposit will be reduced or waived altogether.
  - b. Recurring Rentals. The Minister with Board input may determine that the normal use fees and/or security deposit will be reduced or waived altogether.

**Policy and Rental Agreement with revisions approved by the Board of Trustees of the Southwest Unitarian Universalist Church (SWUU) on November 21, 2024.**

**Replaces Policy on Facility Use and Appendix dated Jan 18, 2012**

**SOUTHWEST UNITARIAN UNIVERSALIST CHURCH  
FACILITY RENTAL AGREEMENT**

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**EVENT INFORMATION**

**Description of Event:**

**Date(s) and Time(s):**

**Rooms to be rented:**

**Sanctuary      Reception Room      Kitchenette      Fellowship Hall      Kitchen**

**Piano Use:      Yes      No**

**Other Information (including recurring use as appropriate):**

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**RENTER INFORMATION**

**Organization or Individual Name:**

**Address:**

**Telephone:**

**Email:**

**Contact Person:**

**Telephone:**

**Email:**

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**COST OF RENTAL:**

**Security Deposit:**

**To be paid by:**

**Use Fee:**

**To be paid by:**

**RENTER SIGNATURE:**

**DATE:**

By signature above, Renter agrees to the cost of rental and to abide by the requirements on the following pages.

**SWUU REPRESENTATIVE:**

**DATE:**

**STANDARD FEES: (Use Fee for a 4-hour period.)**

<b>\$100</b>	<b>Security Deposit (Refundable. See below)</b>
<b>\$400</b>	<b>Sanctuary (includes use of Reception Room, and Kitchenette)</b>
<b>\$75</b>	<b>Piano Use</b>
<b>\$100</b>	<b>Reception Room only (includes Kitchenette)</b>
<b>\$100</b>	<b>Fellowship Hall</b>
<b>\$50</b>	<b>Kitchen</b>
<b>\$100</b>	<b>Security Deposit.</b> To be paid by a Renter prior to use of facilities, to be retained by SWUU in whole or in part to effect repairs to any damages caused as a result of event activities or for violations of the Rental Agreement. The Security Deposit will be returned to the Renter after it has been verified that no damage to the facilities of violation has occurred.

**ROOMS AND EQUIPMENT (See Floor Plan, p. 5)**

The floor plans show the location of the Church rooms available for rental. The Church's portable tables and chairs may be used in all rooms except the kitchen.

**Sanctuary.** The Sanctuary of SWUU is first and foremost a place of worship. However, SWUU makes available the Sanctuary to individuals and organizations who wish to hold ceremonial events or present artistic performances. The piano is available for use with special permission and for an additional fee. Sound equipment (microphones, microphone stands, amplifier/speakers) are available for use at no additional charge. Chairs in the Sanctuary seat approximately 75 people. Rental of the Sanctuary includes use of the Reception Room.

**Reception Room.** The Reception Room may be rented alone (excludes use of Sanctuary – see note below). A table and several chairs are available, making this space primarily suitable for group meetings of up to 15-20 people.

**Kitchenette.** A small kitchenette contains sink, coffee pot and tea kettle, mugs, microwave oven, small refrigerator and dishwasher. All food, beverages, napkins and tablecloths, dishes and eating utensils shall be supplied by the Renter.

**Fellowship Hall.** The Fellowship Hall is a multi-function room, seating up to approximately 50 with tables and chairs. There is a serving window and counter between the Fellowship Hall and the Kitchen.

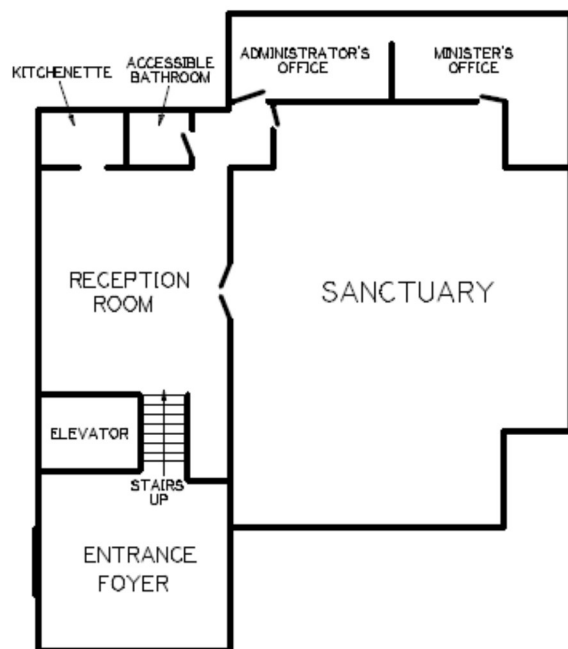
**Kitchen.** The Kitchen is available for use alone or in conjunction with events in the Fellowship Hall, Sanctuary, or Reception Room. Use is complementary for incidental use (such as making coffee/tea and serving refreshments). However, all food and beverages, napkins and tablecloths, dishes and eating utensils shall be supplied by the Renter.

#### **RULES FOR USE**

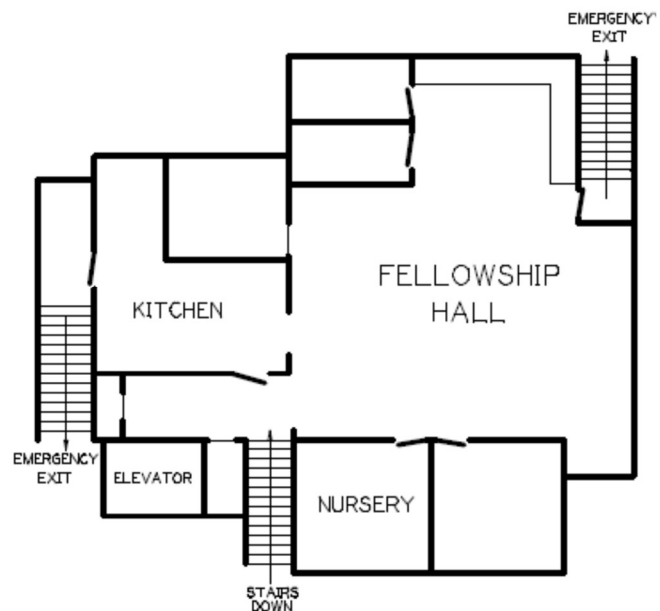
1. The Renter shall be responsible for ensuring that only the specified facilities reserved are used during the event.
2. Use of Church tables and chairs is complementary. Set up and take down shall be
3. undertaken by the Renter.
4. Use of the piano in the Sanctuary is strictly prohibited unless its use is specifically allowed by the Rental Contract. A fee for use will be charged except for use at weddings, commitment ceremonies, bat/bar mitzvahs, memorial services, funerals or other phase-of-life ceremonies. Note: The piano use fee does not include the services of a pianist. If desired, the services of a pianist from SWUU may be available for a fee to be established directly with the pianist.
5. The piano's protective covering shall not be moved unless piano use is permitted by the Rental Agreement. No article shall be placed on the piano except musical scores.
6. The piano shall not be moved.
7. Portable stages, sound equipment, sets and lighting, kept to a minimum, may be added to the Sanctuary for an event under the following conditions:
  - a. Any such items must not mar the finish of Sanctuary walls, floors or ceiling. No nails, screws or other devices may be used to affix structures or equipment to the Sanctuary.
  - b. Special care must be given to protecting the piano.
  - c. Furnishings shall not be removed without permission.
  - d. A plan of any proposed set, equipment and lighting design must be submitted with the rental request and approved in advance.
8. The Renter shall be responsible for returning all furniture to its original arrangement, for picking up and removing trash, and for turning off all lights and locking all windows and doors upon departure.
9. The Renter shall be responsible for the behavior of all event participants.
10. The presence and/or consumption of food and beverages in the Sanctuary is strictly prohibited.
11. SWUU prohibits the serving of alcohol.
12. Candles may be used only with advance permission and only in fireproof containers. Protection shall be used so as to prevent candle wax from dripping on to carpets. Any decorations within 3 feet of any candle shall be fireproof.
13. Smoking is absolutely prohibited anywhere in the building or within 25 feet of any building entrance.

14. No item shall be pinned, taped or otherwise attached to walls.
15. Use of facilities not specified in the Rental Agreement or other violations of the Principles of this policy shall result in forfeiture of the Security Deposit.
16. If an event has to be cancelled for any reason (including bad weather), the Renter shall be responsible for notifying SWUU by calling the Church (leaving a voice mail message if the phone is not answered) and shall also be responsible for notifying all anticipated participants of the cancellation. The Use Fee for a session will be returned in full if cancellation occurs more than 3 days prior to the scheduled session. If cancellation occurs less than 3 days prior to a scheduled session, 50% of the Use Fee for that session shall be forfeited as a Cancellation Fee.
17. Security Deposit. A Security Deposit shall be paid prior to the event. The deposit will be returned if no damage occurred during the event or if the rental is cancelled. If any damage to the physical space or equipment of the Church occurs during the event, the Renter shall be fully responsible for immediately notifying the Church and, with the approval of the Church, repairing the damage. In the case of such damage the security deposit will not be returned.
18. SWUU, its employees and officers shall not be responsible or liable for loss or damages by reason of theft, fire, or other cause.

**Rental Agreement approved by the Board of Trustees of the Southwest Unitarian Universalist Church (SWUU) on November 21, 2024. Replaces Appendix to Policy on Facility Use dated January 18, 2012.**



**Upper Level Floor Plan**



**Lower Level Floor Plan**

## Church Covenant

By the covenant, we, the members of SouthWest UU Church establish these guidelines for how we will be with each other.

**We will strive to listen to each other with an open mind and respond with compassion and respect.**

**In times of conflict, we agree to be both sensitive and honest, and to speak directly with each other.**

**We agree to share the responsibilities necessary for the life of our church community.**

We promise to follow these guidelines and be held accountable in our interactions as a community.

## SWUUList Guidelines

A vital, growing congregation usually has numerous small groups. The SWUUList can be another small group; a place to share our feelings, a place to learn about and to support one another. The SWUUList is an opt-in email chat group that members and friends may participate in by requesting to be added to the group. Please contact [office@swuu.org](mailto:office@swuu.org) for information on how to join. **Note: this is a more informal group and has a smaller membership than the official church email blast mailing list.**

### Appropriate posts to the SWUUList include:

- **Sharing of personal joys and sorrows.**
- **Requests for ideas and resources.**
  - When responding to such messages, please consider whether to respond privately or to the entire group. Your email program provides the means to do either. Private replies are a great way of affirming, consoling, or congratulating someone. Don't reply to the whole group unless it is furthering the conversation.

- **Discussions on matters of theological, philosophical, and political interest.**
  - We intend this list for dialogue. It's tempting to forward inspirational or political pieces received from outside source to others who you feel will appreciate them and it may be appropriate to do so with a limited mailing list of your own. For the purposes of SWUUlist, please refer to outside sources with an internet link, or include a short excerpt in your message, and begin the dialogue by telling us how this piece affects you personally.
- **Announcements of Congregational activities.**
  - As in any small group, we need to be aware of who is not a part of the conversation. If you have an announcement that everyone in the Congregation should see, please make sure that you send a copy to the Forum Editor ([forum@swuu.org](mailto:forum@swuu.org)) and to our Church Administrator ([office@swuu.org](mailto:office@swuu.org)) for the Order of Service or official church email blasts.
- **Brainstorming: how we can do things differently to improve the operations of the Church.**
  - It would also be inconsiderate to take our online brainstorming too far if a key person involved in that area of Church life is not a part of the conversation. **We shouldn't assume that someone is on the SWUUlist just because their email address is in the Church Directory.**
  - Please remember, too, these promises from our Congregational Covenant:
    - "We will strive to listen to each other with an open mind and respond with compassion and respect."
    - "In times of conflict we agree to be both sensitive and honest, and to speak directly with each other."

There is certain to be some healthy give-and-take in our conversations online. But there are times when a conversation should be taken off-line. Some differences are better dealt with by private e-mail or by talking in-person. Conversations should be taken off-line when there are issues that are not relevant to the group.

**Please be sensitive to your tone.** Having no human voice or facial expression to convey the feelings with which a message is sent, e-mail can be easily misinterpreted. There are times when we need to express our anger, sarcasm, doubt, and disagreement—but when doing so, be aware of how it may be received.

**To send a message to the group,** send it to [swuulist@gaggle.email](mailto:swuulist@gaggle.email)



If you are new, please introduce yourself with a quick message of hello and what brought you to us.

**To unsubscribe** from SWUUlist, click on the UNSUBSCRIBE link at the bottom of a SWUUlist message.

**To reply** to the sender of a message, hit the REPLY button in the ribbon above the message. To reply to the entire group (usually not necessary), click REPLY ALL.

**In general, please be aware of the group and its purpose.** You may wish to occasionally share a joke or an inspirational piece that you pick up elsewhere in cyberspace, but please do not bombard the list with such postings, or with chain letters, virus warnings, and other crazy stories out there, unless you have a personal interest in them.

**Enjoy one another's company!**

### Policy on Business Solicitation

This document outlines the policy of Southwest Unitarian Universalist Church ("SWUU" or the "Church") regarding outside solicitations on Church property or using Church resources (such as the Phone Directory, Forum email list or SWUUList).

Outside solicitations are defined as solicitations for funds by individuals or groups that are not sponsored by SWUU. Outside solicitations compromise two types:

- commercial or for-profit (i.e., business goods and services)
- non-profit and not-for-profit (e.g., the Girl Scouts)

Except for individuals being allowed to post their business cards on a bulletin board maintained for such purpose, there shall be no outside solicitation for commercial or for-profit purposes on Church property or using Church resources.

Bulletin board postings are limited to standard-sized business cards. Only one card per person is permitted.

Outside solicitation for non-profit and not-for-profit purposes on Church property or using Church resources shall be limited to students enrolled in the R. E. program, who may do such fundraising as selling Girl Scout cookies.

**This revision to the policy was approved by the Board of Trustees of the Southwest Unitarian Universalist Church on February 15, 2012 as indicated in the minutes of the Board of Trustees meeting held on that date.**

## Conflict Resolution Policy

### 1. Conflict resolution policy rationale and principles

#### *To seek the truth in love.*

We strive to adhere to our Seven Guiding Principles, our Statement of Purpose, and the tenets of our Covenant. However, conflict is inevitable in any community of people engaged in creating meaning in their lives. A conflict policy founded in love and reason can help reach a meaningful resolution that protects the overall health of the congregation and its members.

#### *To dwell together in peace*

It is the hope of all that when conflict does arise, involved parties will be able to resolve the matter themselves. However, certain circumstances may prevent such a resolution from being reached. It is important that we recognize that unresolved conflict can foster an unhealthy atmosphere not only for the involved parties but also for the congregation as a whole. This justifies the need for an effective conflict resolution policy.

#### *To help one another.*

We all have an obligation to address matters that threaten the health of our SWUU community. This policy outlines the procedures that may be initiated by any person in our community (friends, members, staff including the minister) when he or she wants or identifies the need for assistance in resolving conflict. We believe that conflict resolution can be greatly enhanced through education in effective communication. Therefore, as part of “ongoing individual and spiritual growth” in our Statement of Purpose, the Shared Ministry Team will encourage and sponsor programs and workshops to further this goal.

### 2. Conflict resolution policy definition of conflict

“Conflict” as used in this policy includes when a problem or situation arises where there are differing points of view. At this fundamental level, conflict is not necessarily a bad thing. If you avoid conflict, you are missing out on half of the opportunities to connect with people. Simply by being humans with a wealth of unique experiences and perspectives, we are naturally going to have differences; this is common and natural. Working through conflict can bring people closer together, while on the other hand, avoiding conflict usually creates some distance between people. If we want richer and fuller relationships, we must learn to deal effectively with conflicts or differences. The choice of how to respond to conflict often is the most salient factor in preventing its escalation. However, there will be times when these differences are significant enough that it can reasonably be said that the conflict:

- Undermines or threatens the atmosphere of trust, respect, and cooperation that is necessary to the well-being of SWUU and its parts

- Is divisive or harmful to the reputation of SWUU within the larger community or within the Unitarian Universalist movement

It is helpful to consider conflict with respect to increasing levels of intensity. When conflict is not dealt with effectively during the earliest stages, it can often progress to more damaging levels. Being aware of these levels can help individuals recognize when conflicts are escalating into unhealthier forms. The levels of conflict in order are as follows:

Level 1: Problems or concerns about a situation are noted

Level 2: Disagreement about the problem forms

Level 3: Factions develop among the members of the larger group

Level 4: A crusade mentality develops (right vs. wrong)

Level 5: Members consider leaving or wanting others to leave

### 3. Conflict resolution procedure involving church friends/members

In general, SWUU's conflict resolution policy has two distinct levels: resolution that occurs informally and independent of outside mediation, and conflict that involves seeking formal assistance to reach resolution

- Attempt to resolve the conflict independently

The work of the Shared Ministry Team will play a vital role in empowering members of the congregation to handle conflict effectively when it arises. As stated in "*To Help One Another*" under part A, the Shared Ministry Team will assist our SWUU community in acquiring the basic communication skills to minimize and resolve potential conflict in its earliest stages.

To promote the proactive mindset for dealing with conflict in the most productive way possible, an informational pamphlet will be available to all church friends and members so they can approach conflict resolution in a respectful and effective way. The pamphlet will include the following list of strategies for dealing with conflict and hopefully avoiding its escalation:

- remember the covenant we all adhere to
- voice your concerns clearly and directly
- avoid involving third parties not connected to the conflict for reasons other than resolution (triangulation)
- listen to understand, not to judge
- be aware when you are reacting out of defensiveness
- keep an open mind and an open heart
- feel free to seek guidance from the minister or a Shared Ministry Team member on how to articulate your concerns and to whom

- Seek mediation assistance from the Shared Ministry Team

There are instances where conflict cannot be resolved independent of outside assistance. Such reasons may include the following:

- The involved parties are unable to resolve the conflict on their own
- One of the involved individuals is uncomfortable with any form of confrontation and requires assistance to reach a meaningful resolution
- The situation is of a very serious nature and requires immediate attention

When the Shared Ministry Team has been called to serve as a mediating body, the process is then formalized. It is then the Shared Ministry Team's responsibility (per their charge) to assist all involved parties in developing the most meaningful resolution to the conflict possible. Anonymous requests to the Shared Ministry Team to resolve issues are not acceptable. It is not the goal of this policy to dictate the process the Shared Ministry Team will follow as they seek the most appropriate resolution to each individual conflict. However, this policy recommends that when conflict reaches the Shared Ministry Team:

- they meet with all individuals directly involved in the conflict, where at least a supermajority of the committee is present during each discussion. The committee members can meet with the individuals separately or together as they deem fit
- they feel the freedom to seek information from other individuals not directly involved in the conflict who may be able to provide significant insight that can lead to a more meaningful resolution
- they feel the freedom to seek outside counsel from pertinent professionals (legal, psychological, etc...) as they deem necessary
- they make every effort to maintain confidentiality and respect the privacy of the individuals involved
- they take detailed notes of their meetings/conversations that pertain to conflict resolution that become part of church record. These files will be placed in a sealed envelope with the names of the involved individuals on the outside and stored in a locked file cabinet accessible by Shared Ministry Team members only
- they address the conflict resolution process in a timely manner and work as expeditiously as feasible

- Review by the SWUU Board of Trustees

If the resolution worked out by the Shared Ministry Team is not accepted by all the involved parties, they may request a review by the board of trustees. The board of trustees will meet with the Shared Ministry Team members, where they will provide a synopsis of the conflict and a rationale for their proposed resolution. It will then be the responsibility of the board to either uphold the decisions of the Shared Ministry Team, or to reject them. If the board rejects the Shared Ministry Team's conclusions, it will then be

the responsibility of the board to assume the mediation role and review the conflict with the involved individuals. The board will then in essence be a second mediating body.

- Seek outside mediation

The decision of the Shared Ministry Team is considered binding (unless overturned by the SWUU Board of Trustees). If one of the involved persons continues to consider the resolution unacceptable, their next step is to contact the UU District Representative.

#### **4. Conflict resolution procedure involving church employees/staff**

When conflict involves staff members or other employees of the congregation, the resolution procedure must consider the special nature of that individual's position in the church. Therefore, the procedure will vary slightly from Section C. In essence, parts 2 and 3 will be bypassed, and staff/employees should seek outside mediation directly if the conflict progresses past part 1. If the conflict involves the minister or the religious education director, they are advised to contact their UUA Good Officer who will serve as an advocate on their behalf. Other staff or employees are asked to seek district or regional mediation. Resources for contacting outside representatives can be found on the UUA website.

**Conflict Resolution Policy approved by the SWUU Board of Trustees January 6, 2016**

Updated February 2016, approved March 10, 2016 as noted in Board minutes.

### **Preamble**

We, the Southwest Unitarian Universalist Church, hereinafter referred to as SWUU, as a religious community, recognize the importance of creating communities where everyone, and especially our children (ages 0 through 11) and youth (ages 12 through 18), are safe. We recognize that religious communities—which should be dedicated to the creation of safe environments for all their members—are particularly vulnerable to incidents of abuse because of the high level of trust, the welcoming spirit and the strong reliance and need for volunteers, especially in children and youth programs.

We recognize the importance in a religious community of those very factors of trust, welcome and volunteer commitment, and the necessity to adopt procedures to guard against incidents of abuse. We further realize that institutions operating in the best manner possible with all due concern still cannot guarantee an absolutely risk-free environment.

As a people of faith, we look to our Unitarian Universalist Principles to guide our policymaking. We apply our affirmation of the worth and dignity of all people and our search for justice to these procedures which support our being together in community.

We recognize that to adequately address the need for safe environments, it will mean making changes and sacrificing some convenience, yet we know it is our responsibility to respond to the reality of our situation and to our children and youth.

We also recognize that Ohio teachers are mandated reporters of suspected abuse or neglect. It is our intent to conform to state guidelines regarding the issue of safety of our children, which can be found at <http://codes.ohio.gov/orc/2151.421>

In this spirit, we endorse the following procedures for Church events.

## **Procedure Statement**

The child and youth protection procedures contain the following sections:

1. Screening and Selection of Workers with Children and Youth
2. Supervision Requirements
3. Transporting Children and Youth
4. Procedures for Reporting, Response, and Removal of a Worker
5. Resources
  - Code of Conduct for Workers with Children and Youth
  - Information about Mandatory Reporting of Child Abuse and Neglect
  - Information on obtaining criminal background checks
  - Incident Report Form

These procedures will apply to all SWUU Church sponsored events such as:

Sunday Church School

Events sponsored by the Religious Education Committee, which includes children

Our Whole Lives classes

Coming of Age Programming

Youth Group

UU Youth Conferences (CON) sponsored by groups outside SWUU (YAC, OMD, CER)



## **Screening and Selection of Workers with Children and Youth**

**1. Qualifications:** With the exception of parents assisting in their child's program as required or as requested, all other workers, defined as those persons both volunteer and compensated who provide direct care or supervision of children or youth at SWUU Church events, must have the following qualifications:

- Adults who work with children and youth must have been active in SWUU Church for at least six months except for interns. Adults who work with children must be at least 18 years old. Adults who work with youth must be at least 25 years old.
- A special category of "intern" shall be created for youth and young adults between the ages of 12 and 18 who are well known to the church and have been active in SWUU for at least two years.
- Upon application, including references, these youth can be considered to be the second "adult" in the classes from toddler age through age 11.
- Upon agreement by the RE Chair these ages may be waived for certain individuals or special circumstances.
- Nursery workers, who are hired employees, must complete an application and provide three references. These references should be people who have known the potential worker for at least three years, preferably in relation to previous work with children or youth. Government-issued photo identification, such as a driver's license, may be requested.
- Potential workers with children and youth who have not been members for one year, and are not known to the church members, will be asked to complete an application form and supply three references. These references should be people who have known the potential worker for at least three years, preferably in relation to previous work with children or youth. Government issued photo identification, such as a driver's license, may be requested.

## **2. Criminal Background Check:**

All compensated and volunteer workers will be asked to consent to a criminal background check and such check may be performed. The check will be to screen people who have had a child related or violent offense in the past. The R.E. Committee will develop procedures for screening these volunteers and keeping the information they obtain confidential. The R.E. Chair or President of SWUU Church will be responsible for ensuring this procedure occurs.

### 3. Code of Conduct:

All adults working with children and youth and youth working in positions of leadership must sign the SWUU Church Code of Conduct form. A copy of this form is included in the Resource section of this document.

### Supervision Requirements

Best practices for safety require that for children and youth, there will be a minimum of two adults scheduled to supervise groups. For groups of children that exceed 18, the Director of Religious Education or R.E. Chair will prescribe appropriate supervision. Exceptions for unexpected circumstances only may be made by the primary on-site adult leader. This policy protects both the children and the adult in that it minimizes the opportunity for abuse as well as minimizes the risk of false accusations.

For the purposes of these requirements a “group” is defined as those children and youth who have been assigned to a nursery, or individual class or specific program or activity within the context of that class, as well as youth who are taking part in a planned, organized component of their program.

If two “groups” are under a total of 18 children and youth and are meeting within visual sight of each other, a total of two adults are sufficient to supervise both groups. So long as each adult is in visual sight of another they are not considered alone with the children.

Corporal punishment may not be used under any circumstances.

**It is preferred that no worker be alone with a child or youth either on-site or off-site.** If an occurrence arises such that a worker is alone with a child or youth, another worker in the program shall be notified about such occurrence, either before the meeting or promptly afterward. If a teacher finds him or herself with only one child to teach, they should invite a parent to join them, return the child to the church service or give the child the choice of assisting with the preschool group.

## **Transporting Children and Youth**

### **Transportation To and From SWUU Events**

It is the responsibility of the parents or guardians to provide or arrange for safe transportation to and from SWUU Church events. If a child is transported by a member of the church, SWUU Church strongly recommends that all youth and children ride with adults who meet the requirements below.

### **Transportation during SWUU Events**

All drivers of vehicles containing minors other than their own children must be at least 25 years of age and must provide proof of insurance and a valid driver's license.

There must be enough functioning seat belts for everyone, and everyone must wear a seat belt. When transporting young children, the driver must follow the state's laws for the use of car seats and booster seats and its regulations as to where children should be seated in the vehicle. Whenever possible, and with children under 12 years old, it is recommended that there be two adults per vehicle. The need for seat belts supersedes the need for two adults to be in each vehicle, however upon arrival at the destination, a minimum of two adults must accompany a group of children or youth under 12 when offsite.

Written permission of the parent/guardian of all minor passengers will be obtained prior to being transported. This permission will include all relevant details pertaining to the event, such as date and location, name of driver(s) whenever possible, time of departure and time of return. Emergency contact information including name of physician, health insurance information and consent to treat in case of an emergency must accompany all minors who are being transported by adults other than their parents. During travel, the forms will be kept by the driver of the vehicle, or the responsible adult traveling with a group using an alternate form of transportation, i.e. bus or train.

Youth age 12 to 18 will have a Permission/Consent form and a Release/Waiver form on file for regular Sunday morning outings to local public places such as: Book and Bean, Metroparks. These outings may be supervised by one adult, unless special circumstances warrant otherwise. An event related Permission/Consent form will be required for non-public activities such as trips to a member's home or distant off-site events (more than 5 miles).

No driver may be sleep deprived, consume alcohol or use any form of drug that can affect physical or mental performance during or before carrying out his/her duty as a driver.

## **Reporting of Incidents, Response, and Removal of a Worker with Children and Youth**

Definition of Abuse – Those who work with children and youth on a regular basis should recognize that child abuse is generally defined as the following:

- Physical Abuse – bodily injury to a person. This includes, but is not limited to hitting, biting, scalding, burning and strangulation or suffocation.
- Physical Neglect – the failure to adequately provide the essentials of life, such as food, shelter, clothing, and medical care.
- Sexual Abuse – the exploitation of a child or youth for the gratification of an adult. It includes, but is not limited to inappropriate touching, intercourse, incest, rape and sodomy as well as exhibitionism, voyeurism and use of children in pornography.
- Emotional maltreatment – the failure to provide love, care, support and guidance necessary for healthy psychological development. This includes, but is not limited to verbal abuse, such as excessive teasing, belittling, and rejection.

In general, sexual contact with a minor less than 13 years of age, whether the age is known or unknown is considered a felony. If the complainant is four or more years younger than the sexual partner, a felony has occurred.

**Mandatory Reporters** – Definitions of persons required to report and what must be reported under the laws of the State of Ohio, and an explanation of procedures to follow when making a statutorily required report are found in the Resources section of this document.

**Reporting Procedures** – When an incident has occurred at a SWUU event, the following steps must be followed:

- All persons affiliated with a SWUU Church event, including compensated workers, volunteers, adults or youth, who acquire knowledge or a reasonable suspicion that one or more children or youth at a SWUU event has been sexually molested or exploited, injured or has been the victim of significant objectionable conduct shall: i) Immediately report the incident to the person or persons in charge of the event and ii) Complete an “Incident Report” form found in the Resources section of this document. (“Incident Report” hereinafter referred to as incident report.)
- The person in charge of an event to whom a report of molestation, injury or objectionable conduct is made shall submit a copy of the Incident Report as completed by the worker who reported the incident to the SWUU Church Minister, hereinafter referred to as the Minister, unless the incident involves the Minister, in which case the incident report should be submitted to the SWUU Board President, hereinafter referred to as the Board President. If indicated, the Minister will then assist the person who reported the incident in reporting the incident to the local authorities of the jurisdiction in

which the incident occurred (in most cases, Child Protective Services, or the Department of Social Services). In all cases (except those allegations directly involving the Minister) the Minister should be kept informed of what is happening.

- If indicated, reporting procedures must be implemented within the 24 hours following the incident. In the event that a person who is not part of the program in which the incident occurred, or is not part of the SWUU event in which an incident occurred, acquires knowledge or a reasonable suspicion that a child or youth at a SWUU Church event has been sexually molested or exploited, injured or been a victim of significant objectionable conduct, that person is asked to follow the procedure outlined above beginning with the first step, by reporting the incident to the person in charge of the event and completing an “Incident Report” form found in the Resources section of this document.

### **Response to Media Inquiries**

Only the Board President or the Minister should speak for SWUU Church. In general, the following requirements apply when a member of the media requests information about an allegation of abuse occurring at a SWUU event:

- So long as the individual contacted has reason to believe that the incident has been reported to the proper authorities, he or she should refer the inquiry to the proper authorities for a substantive response to the inquiry.
- Because of the issue of confidentiality, in the best interests of the child or youth, specific cases should not be discussed in a public context. The inquirer should always be referred to the proper authorities. If the individual being asked for information has reason to believe that the matter has not yet been reported to the proper authorities, a statement that the speaker wishes to protect the confidentiality of the apparent victim, and for that reason declines to add details, is the most appropriate response to further media inquiry.
- The Board President or the Minister can freely discuss what steps we have taken to guard against abusive situations.
- In litigation, details provided by any person with even apparent authority of the SWUU Church may be used.

### **Removal of a Worker with Children or Youth**

Should circumstances or events arise that indicate or cause reasonable suspicion that an adult worker is no longer a suitable person for working with children or youth at events hosted by the SWUU Church, steps will be taken to remove said adult from involvement or contact with children or youth.

Any person with concerns about an adult worker shall contact the Board President, the Minister, or the RE Director—who will then assess the need for removal. The Board President, Minister, or the RE Director will consult with the necessary parties and determine if action is necessary. In taking such action, the SWUU Staff will afford the affected worker an opportunity to know the accusations against him or her, to know the evidence supporting such charges, and the right to reply to or rebut such charges. Our relationships with each other, will guide our actions and decisions.

It is understood that such action will be handled with due caution and discretion, and that the professional Staff of the SWUU Church has the full support of the congregation in following through on such action for removal.

Any person who is deemed to not be a suitable person to work with youth will be invited to participate in the church community in other activities. A person deemed to be a sexual offender whose offense involved children, will be prevented from involvement in all youth related activities.

**This update to the SWUU Child and Youth Safety Policy was approved by the Board of Trustees of the SouthWest Unitarian Universalist Church (SWUU) on March 10, 2016, as indicated in the minutes of the Board of Trustees' meeting held on that date.**

## **Resources for the SouthWest Unitarian Universalist Congregation Child and Youth Protection Procedures**

### **Code of Conduct for Adults and Youth in Leadership Positions**

Adults and youth in leadership positions who work with children and youth at The SWUU Church events are expected to always have the best interests of children and youth at heart. Adults are expected to nurture the physical, emotional, and spiritual growth of children and youth by fostering an environment of kindness, trust, respectfulness, and fun. No one's enjoyment should ever be at the expense of another person's health or self-esteem. Our charge to children and youth workers is to encourage kindness and genuineness among the children and youth, and to discourage unkindness and falseness. In this manner, we intend to create an environment in which children and youth will be able to explore the spiritual and religious nature of their lives, both as individuals and communities. In light of this, there are some specific expectations that SWUU has of adults and youth in leadership positions that work with children and youth. They are as follows:

**Sleep** – Workers at SWUU events are expected to get enough sleep so that they will be alert and able to maintain good judgment and clear thinking. We expect each worker to take individual responsibility for getting 'enough' or 'a reasonable amount' of sleep each night, so that they may perform their expected duties in a competent and professional manner.

**“Friendship” with Youth** – Although we hope that youth and adults will have genuine fondness for one another, any adult who looks to youth for “friendship” is not sufficiently mature to be in a supervisory position. A “friendship” is reciprocal, where neither person has more responsibility for the health of the relationship than the other. This is antithetical to the adult/youth relationship, where the adult is the one who assumes primary responsibility for maintaining appropriate boundaries and cultivating an atmosphere of health and trust. It is expected that relationships that an adult has with youth who have grown to adulthood will not become exploitative.

**Unofficial Contact with Youth** – Sometimes a genuine Unofficial Contact with Youth mentoring relationship will develop between a youth and an adult. These can be not only healthy, but also transformative for both. However, it is our concern that a “predator,” who does not have the best interest of the youth at heart, will try to disguise an unhealthy relationship with a youth as a mentoring relationship. Therefore, if you wish to be in contact with a youth outside the normal channels of SWUU-sponsored events, it is imperative that your behavior both be and appear to be above reproach. Any relationship you develop with a youth outside of The SWUU Church events must be with the knowledge and consent of the parents or guardians. Furthermore, you should let an appropriate member of the church know what you are doing (such as Board President, Minister, RE Committee). This is for the protection of the youth from potential predators, but also for your own protection. You will best protect yourself from false accusations of misconduct by keeping SWUU and the parents and guardians aware of

your actions.

**Sexualized Behavior** – It is never appropriate to engage in any manner of sexual behavior with a child or youth. This refers not only to explicitly sexual behavior, but also to sexually provocative behavior or language. It is not appropriate to tell jokes with sexual content, for example, or to make “double entendres.” Physical expressions of affection such as hugs have their place, but it is best to allow the child or youth to initiate them and the adult must be sensitive not to allow them to be prolonged.

**Confidentiality** – Effective relationships between youth and the adults who work with youth, and youth who work with youth in leadership positions are established through trust, understanding, patience and the emotional bonds that develop. Confidentiality is an important component of this process, but there are limits to confidentiality and circumstances under which the confidential relationship must be broken. Sometimes you will learn that a child or youth is the victim of abuse, is suicidal, has a serious drug problem, etc. **FOR THE SAFETY OF BOTH THE YOUTH AND YOURSELF, YOU MUST NOT KEEP SUCH INFORMATION TO YOURSELF.** For this reason, never give children or youth the impression that you will keep secrets for them. For the most part, a covenant of confidentiality will mean that you do not repeat information told to you in confidence. However, when information is of a major crisis nature, encourage the child or youth to seek help from a parent or other authority figure. In addition, you yourself **MUST** consult with a person of greater authority in the church about an appropriate course of action. If in doubt, it is best to initiate this conversation. Adults and youth in leadership positions who work with children and youth under the aegis of SWUU are responsible not only to the children and youth, but to the church as well. **Remember: you are acting both ethically and legally as an agent of the SWUU Church.**

### **Accordance with this Code of Conduct**

Any SWUU Church person working with children or youth who disagrees with any provision of the code is free to discuss their opinions with the leadership of SWUU Church. However, until such time as the Church chooses to alter any portion of its provisions, the worker must abide by the code as written.

By signing below, the signatory indicates that they have read this Code of Conduct and agrees to abide by it. If a worker violates any of its provisions, they may be removed as a worker at SWUU events.

---

Signature of Worker with Children and Youth

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Date

---

Printed name of worker



## **Information about Mandatory Reporters of Child Abuse**

What follows is a summary of the Child Abuse and Neglect Statutes in effect in Ohio. Ohio designates individuals, typically by professional group, who are mandated by law to report child maltreatment. Any person, however, may report incidents of abuse or neglect. Statutes are constantly being revised and updated; therefore, the reader should not rely on this summary for legal advice. The source is National Clearinghouse on Child Abuse and Neglect of the United States Department of Health and Human Services ([www.calib.com/nccanch/pubs/sag/manda.pdf](http://www.calib.com/nccanch/pubs/sag/manda.pdf)).

### **Ohio: Who Must Report**

- Physicians, including hospital interns or residents; dentists; podiatrists; practitioners of limited branches of medicine or surgery; registered nurses; licensed practical nurses; visiting nurses; other health care professionals; speech pathologists; audiologists; coroners;
- Licensed school psychologists; administrators or employees of child day-care centers, certified child-care agencies, or other public or private children services agencies; residential camps, or child day camps; schoolteachers; school employees; school authorities;
- Licensed psychologists; independent marriage and family therapists or marriage and family therapists; persons engaged in social work or the practice of professional counseling; agents of county humane societies;
- Persons rendering spiritual treatment through prayer in accordance with the tenets of a well-recognized religion.

### **Circumstances**

When they are acting in their official or professional capacities and know or suspect that a child under 18 years of age or a mentally retarded, developmentally disabled, or physically impaired child under 21 years of age has suffered or faces a threat of suffering any physical or mental wound, injury, disability, or condition of a nature that reasonably indicates child abuse or neglect.

### **Privileged Communication**

An attorney or a physician is not required to make a report concerning any communication made to him or her by one of his or her clients in the attorney-client relationship or the physician-patient relationship if the attorney or physician could not testify with respect to that communication in a civil or criminal proceeding, except that the client/patient is deemed to have waived any testimonial privilege with respect to that communication and the attorney or physician shall make a report with respect to that communication, if all of the following apply:

- The client or patient, at the time of the communication, is either a child under 18 years of age or a physically or mentally handicapped person under 21 years of age;
- The attorney or physician knows or suspects, as a result of the communication or any observations made during that communication, that the client or patient has suffered or faces a threat of suffering any physical or mental injury, disability, or condition of a nature that reasonably indicates abuse or neglect of the client or patient; and
- The attorney-client relationship or the physician-patient relationship does not arise out of the client or patient's attempt to have an abortion without the notification of her parents, guardian, or custodian.
- The physician-patient privilege shall not be grounds for excluding evidence regarding a child's injuries, abuse, or neglect, or the cause of injuries, abuse, neglect, in any judicial proceeding resulting from a report submitted pursuant to the reporting laws.

Reports of abuse should be made to your local Children's Protective Services Agency or you may use this toll-free number for reporting abuse: Ohio 1-800-422-4453 (1-800-4 A CHILD)

### **Implementation and Education**

The Minister and/or RE Director will be responsible for developing procedures for implementation of this plan and education of the congregation and RE teachers.

Many thanks go to the Ohio Meadville UUA, Olmsted UUC, Church Mutual, Live Oak UU Church and First UU Church of San Diego for sharing their Safety Documents personally or online.

## **Information on Obtaining Criminal Background Checks**

### **Through First Advantage:**

First Advantage is the preferred vendor of the Ohio-Meadville District's insurance carrier, Church Mutual, for accessing each state's Sex Offender Registry Database. Contact the O-MD Staff to implement this screening mechanism. Further information may be found at [www.churchmutual.com/screen](http://www.churchmutual.com/screen)

Through the State Bureaus of Criminal Identification:

### **Ohio**

Identification Division

Ohio Bureau of Criminal Identification and Investigation

1580 State Route 56

P.O. Box 365 London, OH 43140

1-740-852-2556 ext. 217

1-740-466-8204 ext. 217

**SouthWest Unitarian Universalist Church  
Incident Report Form**

Name of Child/Youth \_\_\_\_\_

Date & Time of Incident \_\_\_\_\_

Type of Injury \_\_\_\_\_

Describe the Incident (including where and how it occurred):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Others who were present and/or involved: \_\_\_\_\_

\_\_\_\_\_

Caregiver name: \_\_\_\_\_

First Aid Given: \_\_\_\_\_

Other action(s) taken: \_\_\_\_\_

Was the parent/guardian contacted? Y N    How? \_\_\_\_\_

Which parent/guardian was contacted? \_\_\_\_\_

Who contacted them? \_\_\_\_\_ What time were they contacted? \_\_\_\_\_

Additional Contacts or Actions: \_\_\_\_\_

\_\_\_\_\_

Additional Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature of Injured Person (Parent/Guardian if a minor) \_\_\_\_\_

Printed Name: \_\_\_\_\_

Signature of person completing this report: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Signature of DRE or Minister \_\_\_\_\_ Date \_\_\_\_\_

SouthWest Unitarian Universalist Church policy affirms that all groups or individuals speaking on behalf of the congregation abide by IRS regulations for congregations concerning political advocacy and lobbying. The following “*Summary: The Three Point System*” is from the UUA booklet, “*The Real Rules; Congregations and the IRS Guidelines on Advocacy, Lobbying, and Elections*,” p. 4. The entire booklet may be found at [www.uua.org/therealrules](http://www.uua.org/therealrules).

### SUMMARY: THE THREE-POINT SYSTEM

The IRS regulations on the activities of congregations can be summarized as follows:

- 1. ISSUE ADVOCACY:** Without limits on time, effort and expense, congregations and their representatives may engage in issue advocacy through activities such as educating and mobilizing congregants and the general public. Example: encouraging the public to show concern for global warming by reducing carbon emissions. Please note that issue advocacy is only acceptable if it does not involve political campaign intervention (see below).
- 2. LOBBYING:** Within narrow limits on time, effort and expense, congregations and their representatives may engage in lobbying—defined by the IRS as advocating for or against specific pieces of legislation—as an “unsubstantial” portion of an organization's activities. The IRS has not provided a strict rule for what constitutes “unsubstantial,” and evaluates on a case- by-case basis. However, courts and the IRS have ruled in the past that lobbying activity constituting 5% or less of total activities is acceptable. “Total activities” includes the total amount of money, staff, and volunteer time that goes into running the organization. While the 5% amount is not a strict rule, it can be used as a guidepost for an organization's lobbying activities. Example: encouraging a city council, state legislature, and/or Congress to pass a particular law to reduce carbon emissions.
- 3. POLITICAL CAMPAIGN INTERVENTION:** There is a total limit on partisan activity, which the IRS calls political campaign intervention. Congregations and their representatives can do nothing that advocates for or against candidates for public office or political parties. This includes fundraising on behalf of candidates and donating meeting space, among other things. Example: supporting a particular candidate or party because of their stance on carbon emissions. Election-related activities such as candidate questionnaires and forums may be acceptable if certain guidelines are followed; consult section C., “Political (Electoral) Activities” of this guide ( [www.uua.org/therealrules](http://www.uua.org/therealrules)) for details.

**Please Note:** The restrictions on lobbying and political campaign intervention described here apply only to a congregation as a legal entity, or to a person or group speaking in the name of the congregation. A minister or congregation member may freely engage in these activities as an individual. However, if the person(s) are identified by or likely to be associated with the congregation, it may be helpful to clearly state that they are speaking as individuals.

**SWUU Policy on Political Advocacy and Lobbying approved by the Board of Trustees of the SouthWest Unitarian Universalist Church (SWUU) on May 12, 2016 as indicated in the minutes of the Board of Trustees' meeting held on that date.**

This website is owned and operated by Southwest Unitarian Universalist Church, referred to in this policy as “we.” We recognize that visitors to our site may be concerned about the information they provide to us and how we treat that information. This privacy policy addresses those concerns. This policy may be changed or updated from time to time.

If you have any questions about our Privacy Policy, you can contact us at [office@swuu.org](mailto:office@swuu.org), or by calling us at 440-877-1686.

The first principle of Unitarian Universalism is to covenant to affirm and promote the inherent worth and dignity of every person. We believe that this principle impels us to protect the privacy of visitors.

### Statistical Information Collected

We reserve the right to collect anonymous browser metadata of visitors to our site. Metadata includes, but is not limited to browser type, operating system version, IP address, country of origin, and referral data. This information is only used for statistical purposes and cannot identify you as an individual.

### Usage and Disclosure of Personal Information

Our site collects personal information from our visitors only on a voluntary basis. Personal information may include but is not limited to name, address, phone number, and e-mail address. We do not require this information to access any part of our website. We do not sell or rent this information to third parties.

The personal information we collect is only used by us to process a request that has been placed by a visitor. Information required by the Universalist Unitarian Association to register new members of the church will be provided to them only as needed.

### Usage of Photos

We believe that usage of photos of SWUU members and events on our website more accurately represents Southwest Unitarian Universalist Church as an entity. As such, we occasionally include photographs taken by members of church activities on our website and social media presence.

In order to protect the privacy of SWUU members and visitors, we generally do not provide personal identification along with photographs. In cases where identification is warranted, it will only be included with explicit permission of the person or the parent, if the person is a minor, being photographed.

If you see a photograph of yourself or your child that you prefer not be included on the site, or if you would like to ensure that no photo of you or your child is used on the site, contact us via the information in this document. We'll make the necessary arrangements to comply with your request.

All copyrights remain with the original photographer. Effort will be made to include credit to the photographer if requested by them.

## Usage of Names

Occasionally the names of members and visitors may be mentioned on the website or our social media presence. In order to protect the privacy of these individuals, personally identifiable information such as images, phone number, address, or e-mail will not be included without explicit permission. The text [name withheld] will be used where a person's name would otherwise appear if a request to remove their name is received.

## Limit of Liability for Third Party Sites

Our websites or social media presence on third party sites may contain hyperlinks to websites operated by parties other than Southwest Unitarian Universalist Church. These hyperlinks are provided for your reference only. We do not control such websites and are not responsible for their content or privacy policies. The inclusion of hyperlinks to other websites does not imply any endorsement of the material on these websites or any association with their operators.

Additionally, when interacting with our social media presence on third-party sites such as Facebook, Yahoo, Twitter, et. al., this privacy policy does not apply. In these cases, refer to the Privacy policy of the applicable site instead.

## Information Accuracy

SWUU makes every effort to ensure that information on our website and social media presence is correct. If inaccuracies are present, we will make an effort to correct them in a timely manner. To report any erroneous information on our site or social media presence, please contact us via the contact information at the beginning of this document.



**Policy approved by SWUU Board of Trustees on August 11, 2016, as indicated in the minutes of the Board of Trustees meeting held on that date.**

### Introduction

This policy is intended to set basic guidelines for web content created by and curated by Southwest Unitarian Universalist Church. The scope of this document's guidelines includes, but are not necessarily limited to, SWUU's website and social media presence.

### Delegation of Authority

Authority to create, moderate, and manage social media content is delegated to a minimum of two (2) individuals approved by the Communications Committee and the SWUU Board of Trustees as Content Moderators. Individuals managing SWUU's website and social media presence (heretofore referred to as the 'web presence') shall use this document as a guideline for all duties.

If an event should arise in which the proper action to be taken is unclear, these individuals should refer to the Communications Committee for guidance.

### Content Guidelines

The below list is a general guideline for what is expected from the SWUU web presence and is not intended to be exhaustive. Content Moderators should strive to adhere to the guidelines below as part of their duties.

- The content should be consistent with the Seven Principles of Unitarian Universalism and SWUU's Mission Statement.
- News and other content should be added to the SWUU web presence a minimum of once per week by responsible parties.
- Content created by moderators on behalf of SWUU should generally promote events and activities involving Southwest Unitarian Universalist Church or its affiliates.
- All announcements should concisely set out the "Who, What, When, Where, Why, How, and How Much" as necessary.
- All content should be written in clear, grammatically correct prose.
- Any required changes to existing content (such as announcements) should be done on a timely basis.

- Any multimedia content such as photographs, digital video, or audio excerpts should be of good quality and where possible should attribute the original copyright holder.
- Where applicable, content should adhere to the *SWUU Website and Social Media Privacy Policy*.

## Third Party Content on Social Media

Content created by third parties on SWUU's social media presence is subject to review by Content Moderators to ensure it meets guidelines set forth in this policy. As social media is highly dynamic, content must be reviewed frequently to ensure it complies with this policy. This content should generally adhere to the following additional guidelines:

- The content should be consistent with the Seven Principles of Unitarian Universalism and SWUU's Mission Statement.
- The content should not violate third-party content policies of applicable social media sites (such as Facebook or Yahoo).
- The content should not contain objectionable content, including but not limited to slander, libel, violations of copyright, profanity, or off-color humor.
- Interactions between visitors should be respectful. The SWUU social media presence should be curated as a safe, healthy place for civil discussion with no place for hostile speech or personal attack. While incidents may be infrequent, heated discussions between visitors should be encouraged to take place as private conversations rather than as part of the SWUU social media presence.
- Chronic issues with certain visitors to the SWUU social media presence should be brought to the attention of the Communications Committee for further guidance.

Visitors to SWUU's web presence should understand that any content that does not meet the above guidelines or is deemed inappropriate by Content Moderators is subject to moderation or deletion. Furthermore, content that is deemed unlawful or illegal will be reported to the proper authorities.

**Policy approved by SWUU Board of Trustees on September 14, 2016, as indicated in the minutes of the Board of Trustees' meeting held on that date.**

## SHARED MINISTRY TEAM POLICY

The Shared Ministry Team is a standing committee with a minimum of three church members serving three-year terms on a staggered basis. There is no limit to the number of terms an individual can serve, but they must be up for re-nomination every three years. Potential members are to be nominated by the minister. The minister will provide twice as many nominees as there are vacancies and has the option of nominating outgoing members serving in the final year of their term. All nominees must have been attending SWUU for a minimum of five years and be church members in their year of nomination. New members will be elected by the Board of Trustees from the provided candidate pool prior to the start of the new church year. Desired qualities in candidates include objective outlooks, good listening skills, empathy, approachability, patience, good mediation skills and a capacity to consider the well-being of the entire church congregation.

The Shared Ministry Team will fulfill four major functions

- A) To conduct regular appraisals of the minister and the overall congregation to be compiled in a report reserved for review by the minister and the Board of Trustees
- B) To deal with internal conflict when it arises and help reach a meaningful resolution
- C) To develop strategies and activities to reaffirm our covenant and keep it relevant
- D) To evaluate the state of our ministry and monitor the health of the congregation as a whole

To these ends, the Shared Ministry Team will rely on four main documents as a source of counsel

1. SWUU's Congregational Covenant
2. SWUU's Statement of Purpose and Mission Statement
3. UU Guiding Principles
4. SWUU's Conflict Resolution Policy

**Policy approved by SWUU Board of Trustees on September 14, 2016, as indicated in the minutes of the Board of Trustees meeting held on that date.**

## FORUM POLICY STATEMENT

**Modified in 2016, originally adopted November 26, 2002**

The Forum is the newsletter of Southwest Unitarian Universalist Church (SWUU). Publication occurs on a regular basis which is determined by the editors. Usually it is monthly and appears on or before the 1st. The intended readership consists primarily of the minister, other staff, members, and friends of SWUU. Other readership may include former members and friends and other UU clergy and laypersons. Issues of The Forum also appear on the SWUU website, available to the general public. This policy statement applies to the web version as well as the printed version, with one exception. The web version should not contain contact information other than that which is official to SWUU.

Four types of articles and other items are appropriate for publication. The editor(s) may occasionally use related pictures. These should follow the Photography Policy, which is a subset of SWUU's Website and Social Media Policy. Authors' names should accompany all pieces. The four article types are:

1. Factual news stories about SWUU including Sunday Services, committee and other group meetings, and other programs and activities. A monthly church calendar may appear with each issue.
  2. Factual news stories about significant activities of SWUU members and friends such as their short poems, meditations, or announcements that they think will interest the congregation.
  3. Factual news stories about events and actions of the Unitarian Universalist Association and the Region.
  4. Opinion pieces written by SWUU members and friends. A statement such as the following must accompany all opinion pieces: "The views expressed in this article are those of the author and do not necessarily reflect those of the editor(s) or of the congregation."
- Persons submitting material to The Forum should follow the general guidelines published for this purpose in each issue. All submissions should be edited minimally and mostly for compliance with the guidelines. All opinion articles must be consistent with the values contained in the UUA member congregation's covenant, and with the SWUU covenant. The editor(s) determines suitability for publication, in consultation with the minister and board president if necessary. Their decision is final.
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  - **Policy approved by SWUU Board of Trustees on September 14, 2016, as indicated in the minutes of the Board of Trustees' meeting held on that date.**

## Alcohol Policy

- 
- **Purpose of Alcohol Policy**
  - Minimize SWUU's liability and the possibility of an alcohol-related tragedy
  - Ensure that no alcohol is served to underage people
  - Make events comfortable for drinkers and non-drinkers
  - Ensure that alcohol is not abused at official SWUU events

### **Policy**

- Beer and wine are the alcoholic beverages which may be served.
- When alcoholic beverages are served at any function held in the church building an attractive, non-alcoholic beverage must always be available.
- Alcoholic beverages may not be served at events which are intentionally and primarily designed for children and/or youth.
- All alcoholic beverages remaining after an event shall be removed from the church immediately following the event.
- If alcohol is served, it must be accompanied by food.
- Alcohol may not be sold at any church event directly or indirectly by voluntary donations. This includes unopened bottles of wine.

**Policy approved by SWUU Board of Trustees on September 14, 2016, as indicated in the minutes of the Board of Trustees meeting held on that date.**

## CANCELLATION OF SUNDAY MORNING SERVICES

The following is the policy of SouthWest Unitarian Universalist (SWUU) Church on the decision to cancel Sunday morning worship service due to extreme weather or unexpected emergencies:

In the event of extreme weather or unexpected emergencies, the decision to cancel Sunday morning worship service will be made by the Minister in consultation with the Board President. The Worship Associate will be notified. If the Minister is not in the pulpit on such a day, the decision will be made by the Board President in consultation with the Worship Associate. The guest speaker will be notified. The Minister and/or the Board President will disseminate the news of the cancellation via the appropriate media (e.g. SWUU's website, SWUUList, a recorded message on the church phone.)

**Policy approved by the Board of Trustees on November 15, 2016, as indicated in the minutes of the Board meeting held on that date.**

## ENDOWMENT INVESTMENT AND DISTRIBUTION POLICY

### Purpose

SouthWest Unitarian Universalist Church (SWUU) shall have a separate endowment fund, entitled The SWUU Endowment Fund, to assure the long-range financial future of the Church, to help manage financial emergencies, and to fund capital needs and special projects that support the vision and mission of the church.

### Management

1. The Board of Trustees and the Treasurer shall govern the endowment fund and shall serve as the custodian of the Endowment Investment and Distribution Policy.
2. The Board of Trustees and Treasurer may provide for such professional counsel on investments or legal matters as it deems best and may incur reasonable expenses in the execution of its duties. The expenses shall be paid from the endowment.
3. When there is significant activity in the fund, the Board of Trustees & Treasurer shall report to the congregation at its Annual meeting in June.
4. This Endowment Investment and Distribution Policy may be amended only by a simple majority vote of the active members of the congregation.

### Contributions

1. Gifts to the SWUU Endowment Fund shall be deposited to the SWUU account with the UUA Common Endowment Fund (UUA-CEF). The UUA-CEF "is a diversified investment fund
2. seeking current income and long-term investment returns through portfolio allocation and professional asset management with UU socially responsible investing goals."
3. The SWUU Endowment Fund will accept non-restricted gifts or gifts restricted for the general endowment. Gifts that uniquely limit the use of income may be declined. Non restricted gifts are encouraged. The Board of Trustees and Treasurer shall have the right to refuse gifts that it judges to be inappropriate or that require an inordinate commitment of legal or financial services.

### Distributions

Our intent is to protect and preserve the corpus of the endowment over the long term. When needed for special projects or budget deficits, the Board and Treasurer will limit distributions to a portion of the growth of the total market value of the assets over the past fiscal year, not including contributions during that fiscal year. Such distributions must be approved by a simple majority of the active members as part of the budget approval process at the annual June meeting.

In the event of a serious financial problem, the Board and Treasurer may distribute funds larger than the above guidelines. Such a distribution must be approved by a simple majority of the active members at the annual June meeting or at a special meeting scheduled for this purpose.

### Dissolution



In accordance with Article 10 of SWUU Church By-laws, in the event of dissolution of SWUU Church, assets in the SWUU Endowment Fund will be given to the Unitarian Universalist Association.

**Policy approved by the SWUU Board of Trustees and Treasurer on 06/13/2024.**

**Policy approved by greater than 70% of SWUU members at the annual church meeting on 6/16/2024.**

## SERVICE ANIMAL POLICY

As Unitarian Universalist congregation we follow our first Unitarian Universalist Principle, “The inherent worth and dignity of every person.” Our policy is consistent with the United States’ Department of Justice’s “Americans with Disabilities Act” (ADA), even though religious organizations are not considered public accommodations, and are exempt.

The Americans with Disabilities Act (ADA) and Ohio [RC § 955.011](#), define a “Service Animal” as an animal that has been trained to perform work or tasks for the benefit of a person with a disability. (ada.gov and ORC)

Consistent with the ADA, only limited inquiries are permitted of person with a Service Animal. People may ask two questions: (1) “Is the Service Animal required because of a disability?” and (2) “What work or task has the service animal been trained to perform?”. People **cannot** ask about the person’s disability, require medical documentation, require documentation for the service animal or ask that the service animal demonstrate its ability to perform the work or task.

SWUU expects Service Animals and their handlers to meet the following expectations:

- Service Animals are to remain with their handlers.
- Service Animals do not sit on the furniture.
- Service Animals must be harnessed, leashed, tethered. Unless these devices interfere with the service animals’ work or the individual’s disability prevents using these devices. In that case, the individual must maintain control of the animal through voice, signal or other effective controls.
- Service Animals may make noise as an alert, such as to notify a handler of an impending physical danger to the individual.
- Service Animals do not obstruct an area used for emergency evacuation.
- Inform the minister and/or greeters of any safety issues, special considerations or dangers the animal may pose to children or adults in attendance so that these concerns can be addressed and shared with the congregation.

- Sign this policy.
- Assume financial responsibility for damages
- A Service Animal may be asked to leave SWUU and its grounds if the animal's behavior is inappropriate. For example, a service animal that displays vicious behavior towards people or whose presence or behavior fundamentally alters the nature of a program or activity.

Members of the congregation will be instructed not to beckon or call, pet, or attempt to engage the Service Animal in play.

SWUU does not permit Emotional Support Animals (ESA) during worship service or church gatherings.

As a faith community SWUU agrees to uphold our first principle as mentioned above. Circumventing this policy or passing off an ESA animal companion as an ADA Service Animal would not be in line with our principles.

I understand and agree to the policy.

\_\_\_\_\_ Date \_\_\_\_\_

**Policy approved by the SWUU Board of Trustees on November 12, 2019, as indicated in the minutes of the Board meeting held on that date.**

## DISRUPTIVE BEHAVIOR AND RECONCILIATION POLICY

The Covenant of SouthWest Unitarian Universalist Church is our guidance for right-relations. It reads:

By this Covenant, we, the members of SouthWest Unitarian Universalist Church establish these guidelines for how we will be with each other.

By committing ourselves to this Covenant we will build an environment of trust that fosters personal growth among our members and friends. We will ensure the opportunity for free and responsible discussion of religious ideas while promoting an atmosphere of joy and celebration in our church community.

\*We will strive to listen to each other with an open mind and respond with compassion and respect.

\*In times of conflict we agree to be both sensitive and honest, and to speak directly with each other.

\*We agree to share the responsibility necessary for the life of our church community.

\*We promise to follow these guidelines and be held accountable in our interactions as a community.

While openness to a wide variety of individuals is one of the prime values held by our congregation and expressed in our principles, we affirm the belief that our congregation must maintain a secure atmosphere where such openness can exist. When any person's physical and/or emotional well-being or freedom to safely express their beliefs or opinions is threatened, the source of this threat must be addressed firmly and promptly, even if this ultimately requires the expulsion of the offending person or persons from the church.

Protecting and respecting our community is important and sacred work. There have been times when the disruptive behavior of an individual within the church building has led members to voice their concerns about one or more of the following:

1. Perceived threats to the safety of any adult or child;
2. The disruption of church activities;
3. Diminishment of the appeal of the church to its potential and existing membership.

## REPORTING THE DISRUPTIVE BEHAVIOR

Any person who believes that they have witnessed or experienced disruptive behavior, or who has disruptive behavior incident reported to them should report it to the Minister; a member of the Board of Trustees or paid church staff.

The church will make every attempt to maintain confidentiality by disclosing the identity of the individuals involved only on a “need-to-know” basis and as necessary to investigate and resolve the complaint but cannot guarantee absolute confidentiality.

The church will not retaliate against anyone who brings forward a complaint. All church leaders and staff are required to immediately report any knowledge of disruptive behavior, harassment, abuse or misconduct to the Minister and/or the Board of Trustees.

## IMMEDIATE RESPONSE

The Minister and/or the leader of the group involved will undertake an immediate response to such behavior directly with compassion and concern. It is the intention that those involved with the response will make an effort to understand power imbalances and cultural differences that might be at play in the situation.

This may include asking the offending person or persons to leave or suspend the meeting/ activity until such a time as it can safely be resumed. Should any of these actions be taken without the Minister being present, the Minister must be notified. A follow-up letter detailing what steps were taken before returning to the activities involved will be sent by the Minister to the offending party or parties.

## MORE DELIBERATE RESPONSE

Situations not requiring immediate response will be referred to an ad hoc committee appointed by the Board of Trustees. The committee will respond in terms of their own judgment observing the following:

- a. The committee will respond to problems as they arise
- b. The committee will collect all necessary information.
- c. Persons identified as disruptive will be dealt with as individuals;
- d. To aid in evaluating the problem, the following points will be considered:
  - **DANGEROUS:** Is the individual the source of a threat or perceived threat to persons or property?

- **DISRUPTIVE:** How much interference with church functions is occurring?
  - **OFFENSIVE:** How likely is it that prospective or existing members will be driven away?
- e. To determine the necessary response, the following points will be considered:
- **CAUSES:** Why is the disruption occurring? Is it a personality conflict between the individual and others in the church that may be resolved through mediation? Is it due to a professionally diagnosed condition of mental illness? If yes, is the individual willing to seek treatment to address the behavior or limit the disruption?
  - **HISTORY:** What is the frequency and degree of disruption caused in the past?
  - **PROBABILITY OF CHANGE:** How likely is it that the problem behavior will diminish in the future?

The committee will decide on the necessary response on a case-by- case basis. However, the following three levels of response are recommended:

- **LEVEL ONE:** The committee shall inform the Minister of the concern and both the Minister and a member of the committee shall meet with the offending individual to communicate the concern and implement the Conflict Resolution Policy found in the SWUU Personnel Policy manual to mitigate the concern. The UUA website has additional information to assist entitled, “Reconciliation as a Spiritual Practice”. The committee will notify the Board of Trustees of the unresolved concern. The complaint will be referred to the Board of Trustees should the individual refuse to participate or the individual has been in significant resolutions before and the committee infers that repeat interventions have not been successful.
- **LEVEL TWO:** The Board may determine that offending individual(s) needs be excluded from the church and/or specific church activities for a limited period of time, with reasons and the conditions of return made clear in a written notification.
- **LEVEL THREE:** The Board of Trustees, after careful consideration, may determine that the offending individual(s) are excluded from the church premises and all church activities. It may also include be removal from membership. Notification of such a decision will be made in writing by the Board and will explain the individual’s rights and possible recourse

Both the situation and response should be documented in writing and kept as a confidential document in a secure church file. If the situation or similar behavior

by the same individual(s) reoccurs, this will allow for a paper trail and show what steps were previously taken to address the behavior/situation.

### **POSSIBLE REINSTATEMENT OF REMOVED INDIVIDUALS(S)**

Any request for reinstatement must be made in writing by the member who was removed from membership. The request must contain information concerning the rationale for the reinstatement: 1) a statement of understanding of the reason for which they were removed from membership and 2) an explanation in detail how circumstances and/or conditions have changed, such that reinstatement would be justified. The request shall go to the Board who will review the request within forty-five (45) days as to reinstate or remove the individual(s). The decision of the Board shall be final and not subject to further appeal. A reinstatement request may be made no sooner than one year from the date of the removal letter.

**Policy approved by the SWUU Board of Trustees on August 11, 2020 as indicated in the minutes of the Board meeting held on that date.**

## POLICY FOR BUDGET OVERSIGHT AND CONTROL

An Operating Budget for the fiscal year, July 1—June 30 is developed as follows.

The Treasurer drafts an initial budget based on submissions/input from: Board, Minister, Staff, and Relevant Committees

The Treasurer submits the proposed budget the Board, which in turn approves and recommends the budget to the Congregation for approval at its Annual Meeting.

The budget contains estimated income amounts and expenditures for the fiscal year in several categories. It is expected that income amounts for each category will be at or above the budgeted amounts, while expenses for each category will be at or below the budgeted amounts throughout the year.

### Expense Excesses

The Treasurer shall monitor expenditures on a regular basis. If actual expenditures are greater than anticipated, the Treasurer shall review the rate of expenditure with the relevant responsible party. The goal will be to establish a plan assuring the total amount will not exceed the budgeted amount.

It is the general responsibility of defined responsible parties to assure that expenses are maintained within the budgeted amounts. The expense categories of a typical budget and the associated responsible parties are as follows:

Minister compensation	Board
Staff Compensation	Board
Rent/Mortgage	Board
Child Care	Board
Committee expenses	Relevant committees/Board
Staff Programs	Staff
UUA & District Dues	Board
Operating Expenses	Office / Grounds

The Treasurer will review expenses exceeding budget with the board at the monthly Board meetings. As appropriate, the Board and Treasurer will decide on appropriate follow-up actions. The Treasurer shall update the Board on expenditures over budget, and if needed, the Board will work with the Treasurer on a plan to resolve the difference from budget.

### Income Shortfalls

The Treasurer shall monitor operating income amounts on a regular basis. There must always be sufficient funds to cover expenses. However, it is recognized that the timing of income cannot always be controlled. There may be occasions when there is insufficient cash flow to pay necessary expenses. In such cases, the Office Administrator and the Treasurer are authorized to withdraw funds on a temporary basis from capital funds (such as the Building Fund savings account) to cover operating expenses. Such withdrawals must be re-deposited as soon as increased cash flow permits. Such withdrawals must be immediately reported to the Board. The Treasurer and Board will determine a plan of action as necessary to resolve any continuing issues of this kind.

### **Income Excesses**

If operating income will exceed operating expenses the Board may increase the budget for existing categories or new expenses. The revised budget shall not exceed by more than 5% the last budget approved by the Congregation. The revised budget may not exceed projected income.

### **Requesting an Addition to Budget**

A member of the Congregation or a group may request an expenditure outside the budget through application to the Treasurer. The Treasurer will review the request and will provide a recommendation to the Board. The Board may then act on the recommendation within the policy as described above.

**Approved by the Board of Trustees on August 22, 2024.**

**Replaces previous Policy dated December 8, 2020**

## **Social Justice Policy**

SouthWest Unitarian Universalist (SWUU) committees can take stands of support on social justice issues that have been approved by the Unitarian Universalist General Assembly (UUGA) or any relevant regional UU assembly.

Such endorsements must be by a majority vote of the committee members and be labelled as a SWUU committee endorsement and not an endorsement by SWUU as a whole.



When a committee endorses a social justice issue, the Minister and Board President must be informed of the committee's decision. Any public release of information about the endorsement must be approved by the Minister. The Minister is the official spokesperson for the Church and should be the one to respond to inquiries by the media or other agencies, or to designate a spokesperson on a particular issue.

**Approved by the Board of Trustees on 6/9/2021 contingent on passage of the SWUU by-laws change at the Annual Congregational meeting on 6/27/2021**

### A. Conflict resolution policy rationale and principles

**To seek the truth in love.** We strive to adhere to our Seven Guiding Principles, our Statement of Purpose, and the tenets of our Covenant. However, conflict is inevitable in any community of people engaged in creating meaning in their lives. A conflict policy founded in love and reason can help reach a meaningful resolution that protects the overall health of the congregation and its members.

**To dwell together in peace.** It is the hope of all that when conflict does arise, involved parties will be able to resolve the matter themselves. However, certain circumstances may prevent such a resolution from being reached. It is important that we recognize that unresolved conflict can foster an unhealthy atmosphere not only for the involved parties but also for the congregation as a whole. This justifies the need for an effective conflict resolution policy.

**To help one another.** We all have an obligation to address matters that threaten the health of our SWUU community. This policy outlines the procedures that may be initiated by any person in our community (friends, members, staff including the minister) when they want or identify the need for assistance in resolving conflict. We believe that conflict resolution can be greatly enhanced through education in effective communication. Therefore, as part of “ongoing individual and spiritual growth” in our Statement of Purpose, the Shared Ministry Team will encourage and sponsor programs and workshops to further this goal.

### B. Conflict resolution policy definition of conflict

“**Conflict**” as used in this policy includes when a problem or situation arises where there are differing points of view. At this fundamental level, conflict is not necessarily a bad thing. If you avoid conflict, you are missing out on half of the opportunities to connect with people. Simply by being humans with a wealth of unique experiences and perspectives, we are naturally going to have differences; this is common and natural.

Working through conflict can bring people closer together, while on the other hand, avoiding conflict usually creates some distance between people. If we want richer and fuller relationships, we must learn to deal effectively with conflicts or differences. The choice of how to respond to conflict often is the most salient factor in preventing its escalation. However, there will be times when these differences are significant enough that it can reasonably be said that the conflict:

1. Undermines or threatens the atmosphere of trust, respect, and cooperation that is necessary to the well-being of SWUU and its parts.
2. Is divisive or harmful to the reputation of SWUU within the larger community or within the Unitarian Universalist movement.

It is helpful to consider conflict with respect to increasing levels of intensity. When conflict is not dealt with effectively during the earliest stages, it can often progress to more damaging levels. Being aware of these levels can help individuals recognize when

conflicts are escalating into unhealthier forms. The levels of conflict in order are as follows:

- Level 1: Problems or concerns about a situation are noted
- Level 2: Disagreement about the problem forms
- Level 3: Factions develop among the members of the larger group
- Level 4: A crusade mentality develops (right vs. wrong)
- Level 5: Members consider leaving or wanting others to leave

- **C. Conflict resolution procedure involving church friends/members**

- In general, SWUU's conflict resolution policy has two distinct levels: resolution that occurs informally and independent of outside mediation, and conflict that involves seeking formal assistance to reach resolution

1. Attempt to resolve the conflict independently

- - The work of the Shared Ministry Team will play a vital role in empowering members of the congregation to handle conflict effectively when it arises. As stated in "*To Help One Another*" under part A, the Shared Ministry Team will assist our SWUU community in acquiring the basic communication skills to minimize and resolve potential conflict in its earliest stages.
  - 
  - To promote the proactive mindset for dealing with conflict in the most productive way possible, an informational pamphlet will be available to all church friends and members so they can approach conflict resolution in a respectful and effective way. The pamphlet will include the following list of strategies for dealing with conflict and hopefully avoiding its escalation:
  - 
  - Remember the Covenant we all adhere to
  - Voice your concerns clearly and directly
  - Avoid involving third parties not connected to the conflict for reasons other than resolution (triangulation)
  - Listen to understand, not to judge
  - Be aware when you are reacting out of defensiveness
  - Keep an open mind and an open heart

2. Seek mediation assistance from the Shared Ministry Team

There are instances where conflict cannot be resolved independent of outside assistance. Such reasons may include the following:

- The involved parties are unable to resolve the conflict on their own.
- One of the involved individuals is uncomfortable with any form of confrontation and requires assistance to reach a meaningful resolution.

- The situation is of a very serious nature and requires immediate attention.
- 
- When the Shared Ministry Team has been called to serve as a mediating body, the process is then formalized. It is then the Shared Ministry Team's responsibility (per their charge) to assist all involved parties in developing the most meaningful resolution to the conflict possible. Anonymous requests to the Shared Ministry Team to resolve issues are not acceptable. It is not the goal of this policy to dictate the process the Shared Ministry Team will follow as they seek the most appropriate resolution to each individual conflict. However, this policy recommends that when conflict reaches the Shared Ministry Team:
- - They meet with all individuals directly involved in the conflict, where at least a supermajority of the committee is present during each discussion. The committee members can meet with the individuals separately or together as they deem fit.
  - They feel the freedom to seek information from other individuals not directly involved in the conflict who may be able to provide significant insight that can lead to a more meaningful resolution.
  - 
  - They feel the freedom to seek outside counsel from pertinent professionals (legal, psychological, etc.) as they deem necessary.
  - 
  - They make every effort to maintain confidentiality and respect the privacy of the individuals involved.
  - 
  - They take detailed notes of their meetings/conversations that pertain to conflict resolution that become part of church record. These files will be placed in a sealed envelope with the names of the involved individuals on the outside and stored in a locked file cabinet accessible by Shared Ministry Team members only.
  - 
  - They address the conflict resolution process in a timely manner and work as expeditiously as feasible.
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### 3. Review by the SWUU Board of Trustees

If the resolution worked out by the Shared Ministry Team is not accepted by all the involved parties, they may request a review by the board of trustees. The board of trustees will meet with the Shared Ministry Team members, where they will provide a synopsis of the conflict and a rationale for their proposed resolution. It will then be

the responsibility of the board to either uphold the decisions of the Shared Ministry Team, or to reject them. If the board rejects the Shared Ministry Team's conclusions, it will then be the responsibility of the board to assume the mediation role and review the conflict with the involved individuals. The board will then in essence be a second mediating body.

#### 4. Seek outside mediation

The decision of the Shared Ministry Team is considered binding (unless overturned by the SWUU Board of Trustees). If one of the involved persons continues to consider the resolution unacceptable, their next step is to contact the UU District Representative.

### **D. Conflict resolution procedure involving church employees/staff**

When conflict involves staff members or other employees of the congregation, the resolution procedure must consider the special nature of that individual's position in the church. Therefore, the procedure will vary slightly from Section C. In essence, parts 2 and 3 will be bypassed, and staff/employees should seek outside mediation directly if the conflict progresses past part 1. If the conflict involves the minister or the religious education director, they are advised to contact their UUA Good Officer who will serve as an advocate on their behalf. Other staff or employees are asked to seek district or regional mediation. Resources for contacting outside representatives can be found on the UUA website.

**Policy approved by the SWUU Board of Trustees on March 10, 2016 as indicated in the minutes of the Board of Trustees meeting held on that date.**

## PERSONNEL POLICY MANUAL

### Welcome

Welcome to Southwest Unitarian Universalist Church! We are glad to have you as a member of our staff and hope you will enjoy working for the Congregation and contributing to our liberal spiritual 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 our Congregation to do their work.

This Manual is not a contract and can be modified or changed at any time by the SWUU Board. If an employee is given a specific Employment Agreement signed by the Minister and Board President that Agreement will supersede this Manual if there is any conflict between the two documents.

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

### About this Manual

This Manual has been prepared to help you understand some of the policies and procedures of Southwest Unitarian Universalist Church (SWUU), referred to herein as “Employer”, “SWUU” or “Congregation”. 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, SWUU will take into consideration the specific facts and circumstances of each situation.

All employees are hired on an ***at-will*** basis **unless stated otherwise in a written individual employment agreement signed by the President of the SWUU Board**. At-will means that the employee may terminate the employment relationship at any

time, for any reason, with or without notice, and the Congregation retains the same right. Your status as an at-will employee may not be changed except in writing, signed by the Minister and Board President.

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

If you have any questions or comments about this Manual, or if you need more information, please ask your Supervisor/Minister, or officer of the Board. 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. The Congregation 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. Our Congregation 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.

SWUU 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 applicable federal, state and local laws and without regard to race, color, sex, sexual orientation, gender identity, national origin, ancestry, age, uniform-service member status, veteran status, marital status, pregnancy, medical condition, or disability or any other classification protected by law.

Preference may be given to hiring people who have an understanding of Unitarian Universalism, who are in sympathy with Unitarian Universalist Principles and Purposes, and who are committed to living out those principles in the workplace. 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, retaliation; or denying employment benefits because an applicant or employee reported harassment, discrimination or retaliation or participating 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. SWUU 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 or any other protected status will not be tolerated. SWUU expects all employees to conduct themselves in a professional manner with concern and respect for their colleagues, congregational members, and others served by the congregation. Similarly, we expect all employees to be free from harassment from congregational members and others encountered while serving our congregation. 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 congregational meetings, social events, and any other Congregation related activity.

Any employee who believes they have been harassed by another employee, a supervisor, an agent of the Employer, a congregant, or any other person who the employee encounters in the course of employment should report that conduct immediately to their Supervisor/Minister. 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 the Board President, or the Shared Ministry Team. Every complaint or report of harassment will be promptly investigated. If the investigation indicates that an act of harassment has occurred, timely and appropriate action will be taken. Retaliation or reprisal against employees who report harassment claims is prohibited and will not be tolerated. Any violation of this policy will be treated as a serious matter and will result in disciplinary action, up to and including termination.



## SEXUAL HARASSMENT

While all types of harassment are prohibited, sexual harassment requires particular attention. Sexual harassment is prohibited and will not be tolerated. This policy applies to sexual harassment by members of the same gender as well as opposite genders.

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

- submission to the conduct is made either explicitly or implicitly a term or condition of employment;
- submission to or rejection of 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;
- Request 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 display of sexually suggestive objects, pictures, cartoons, or websites in writing, electronically, or verbally;
- Sex stereotyping, such as when the conduct or traits are considered inappropriate simply because they may not conform to other people's ideas or perceptions about how individuals of a particular sex should act or look; or
- Hostile actions taken against an individual because of that individual's sex, sexual orientation, or gender identity, such as interfering with an individual's work area, equipment or ability to do their job, name-calling, etc.

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

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

## **RESOLUTION OF OTHER TYPES OF EMPLOYEE COMPLAINTS/CONCERNS**

Effective communication is essential for productive working relationships. To that end, employees are encouraged to discuss any concerns about work or suggestions for improving operations in the following manner: Employees should present any complaint or grievance to their immediate supervisor and together discuss the problem, applicable rules or policies, and possible resolution(s).

When conflict involves staff members or other employees of the congregation, the resolution procedure must consider the special nature of that individual's position in the church. Any employee who is in conflict with another employee or member should review the SWUU Conflict Resolution Policy, contained in this document as an Appendix.

## **ACCOMMODATIONS OF DISABILITY**

SWUU 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 adjustments that would enable the employee to perform the essential functions of the job.

In most cases, SWUU will need medical documentation of the disability and of possible accommodations. SWUU 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. SWUU may also ask to speak to the employee's physician or health care provider to help 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 accommodations. SWUU may also ask the employee to submit to an independent medical or other appropriate examination, at the Congregation's expense.

## **HIRING**

Respect for personal privacy is a long and honorable tradition in UU congregations. We must balance this, however, with respect for congregations as trust-based communities where individuals may expect to be able to be vulnerable while being safe from exploitation. To ensure the safety of the SWUU congregation and staff, we may therefore elect to use background checks and reference checks in hiring.

Criminal background checks and state-mandated background checks will be completed on all finalist candidates before a Contract or Employment Agreement is signed. Reference checks and other types of background checks may be required, such as an online search, search of sexual offender lists maintained by a county or state agency, or social media search. Staff members may be required to repeat these background checks at intervals determined by the Board of Trustees. In all cases, reference and background checks are to be conducted by the committee responsible for making the recommendation to call or hire or their designee or the Supervisor/Minister. Information resulting from these checks will be kept confidential and shared only on a need-to-know basis.

All employees are responsible for disclosing any new criminal or civil charges brought against them during their period of employment to the Minister. The Minister is responsible for disclosing such charges to the President of the Board. Employment may be terminated if the employee is convicted of a sexual or serious criminal offense.

Where the position to be filled entails the use of a motor vehicle for Church business or activities, hire will be contingent on possession of a valid driver's license and proof of insurance. Such employees are responsible for notifying the Supervisor/Minister of any license suspension or revocation, conviction for a moving violation, or other restriction on driving or loss of insurance.

SWUU shall only consider persons for hire who have completed an application, written resume or questionnaire that includes a year-by-year educational, employment, and military service history preferably going back at least ten years. This history should include contact information for the immediate supervisor or other responsible reference for at least the last three positions held. When that is not possible, other people such as co-workers, who have known the applicant during this time may be identified.

SWUU shall only call, hire, accept for service or credential a person who has signed and/or agreed to abide by:

1. An authorization and release that permits SWUU to request and receive information related to any prior activity involving physical harm to or sexual abuse or harassment of any person or threat of any such conduct. This release shall hold harmless from liability any person or organization that provides information and shall hold SWUU harmless for treating any such information received in the best interests of SWUU and the UUA (Unitarian Universalist Association) and/or as prescribed by law.
2. A statement disclosing or denying any prior convictions for any crimes, both felonies or misdemeanors (to the extent permitted by law), and pledging to notify SWUU of

any arrest, charge, conviction, or other relevant information, such as motor vehicle license revocation, in the future.

3. A statement disclosing or denying any prior activity involving sexual misconduct, physical harm to or sexual abuse or harassment of any person on the basis of sex, race, religion, national origin, sexual orientation, age or disability, gender identity, or other protected status.
4. A Fair Credit Reporting Act Disclosure.

SWUU shall only credential, hire, or accept for service a person whose employment and educational history, and in the case of ministers and professional leaders, history of service has been verified. All references should be reviewed and contacted. Special considerations for ministers: Committees shall initially obtain from the minister at least two or three references for each congregation served.

All transcripts, letters, email messages, and other documents received, and all notes of conversations conducted as part of the reference check shall be retained as part of the person's personnel record if employed or accepted for service. This file shall be kept in a secure location in the church, for example, a locked file cabinet accessible only by the Board President and others as authorized by the Board of Trustees.

No such documents received in connection with persons who are not employed or accepted for service shall be retained except as mandated by law; those not so retained shall be destroyed.

The committee may arrange with an outside agency to conduct sex offender and criminal background checks and other checks as recommended, depending on the position for which the person is being considered and its specific responsibilities. Such arrangements may require the use of additional disclosure and authorization forms required by the Fair Credit Reporting Act.

The impact of a criminal conviction history may vary depending on the unique circumstances presented in each case. The hiring authority must consider the nature of the crimes committed and their relationship to the job in question. The hiring authority must also evaluate whether the person could perform acceptably in spite of the conviction or whether the person can adhere to certain clear, agreed upon limits or boundaries to their activities within the church community. The hiring authority should consider an individual's efforts at rehabilitation, work record, and the remoteness in time of the conviction. These factors may provide facts to support a decision to hire a person despite their conviction history.

Lack of candor or honesty on an application form or resume--e.g. A denial of any criminal convictions when a background check reveals otherwise--should usually result in a rejection of the person or termination of the employee unless the individual is able to provide a very persuasive and adequate explanation for the discrepancy.

Except as stated previously, reference and background checks are to be conducted by the committee responsible for making the recommendation to call or hire. In most cases, to avoid needless inquiry and unnecessary expense, the background check should only be conducted on the committee's finalist. Once the recommendation is made and the finalist candidate accepts the position, the results of the reference and background checks are to be delivered to the SWUU Board President for retention or destruction.

## **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 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. Other types of employment forms may also be required from time to time as needed for benefit enrollment or other operational needs. These forms should be completed in a timely manner.

## **Categories of Employment**

Employee status is a combination of employee classification, employee designation, and other factors, including whether on leave of absence. The following sections describe employee classifications and general employee designations. See the Supervisor/Minister for questions regarding your current employee status. Employment status may also be defined by individual Employment Agreement.

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

**Part-Time:** An employee who regularly works for the Congregational fiscal year or 12 months is considered a part-time employee. Part-time employees scheduled to work at least 10 hours but less than 40 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". Although Casual/temporary employees may work forty hours per week, they are not eligible for most benefits, unless required by law.

## Fair Labor Standards Act (FLSA)

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

**Non-Exempt Employees** are compensated on the number of hours worked each work week and are entitled to be paid the minimum wage and overtime for hours worked over 40 in a work week.

**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.

**Unscheduled Hours and Overtime:** From time to time, employees may be asked to work additional hours beyond their normal work schedule. Any time worked by a non-exempt employee in excess of 40-hours in a work week 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 approved hours over 40 in a work week.

Non-exempt employees are prohibited from working significantly beyond their normal work schedule or working overtime, unless they obtain prior written approval from their Supervisor/Minister. Failure to obtain prior written permission may result in discipline, including termination.

Exempt employees do not receive overtime pay when working in excess of 40-hours.

**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, PAY AND CONDITIONS OF EMPLOYMENT

### HOURS OF WORK

Normal office hours are Monday through Friday as established in consultation with the

Supervisor/Minister. Some employees may be scheduled to work on weekends and evenings.

Your Supervisor/Minister will establish individual work schedules, which may change from time to time based on the needs of the Congregation 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. Continuing education may be required or encouraged for some positions and support may be provided for CE as outlined in an individual Employment Agreement.

### **MEAL AND BREAK PERIODS**

Employees are encouraged to take a 15-minute break for each 4-hour work period. Such breaks are considered paid time. Employees are expected to schedule their rest breaks at their discretion unless instructed otherwise by the Supervisor/Minister.

SWUU encourages all non-exempt employees who work six or more hours in a day to take a 30-minute unpaid meal period within the first five hours after starting work for the day. In addition, all non-exempt employees who work ten or more hours in a day are encouraged to take a second 30-minute unpaid meal period within the second five-hour period after starting work for the day.

Employees are relieved of all duties during their meal period.

### **TIMEKEEPING**

Non-exempt employees must submit a signed, 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. The number of hours worked should be indicated for each day of the month. Paid time off should also be noted in this record.

Timesheets are due by the first day of the month for hours worked the previous month.

### **PAY AND PAYROLL DEDUCTIONS**

SWUU is a fair compensation congregation which means that every effort is made to abide by compensation guidelines developed and updated by the Unitarian Universalist Association. For more information about these guidelines, employees may see the Minister or Treasurer.

Pay adjustments generally will be considered for all employees once a year and any adjustments will normally begin at the beginning of the fiscal year. Every effort will be made to provide annual cost of living adjustments. However, there is no guarantee of an annual pay adjustment. Any raises, other than cost of living adjustments, will usually be based on factors such as individual performance, job responsibilities and other

appropriate factors. Employees are generally paid monthly, not later than the 7th day of the month for work performed during the previous month. Direct deposit of paychecks may be required. Employees will be provided with information that reflects all required tax withholdings (federal, state and local) and other contracted deductions (e.g. retirement plan, health insurance premium contributions), if any.

### **CORRECTIONS OF ERRORS IN PAY**

It is SWUU's policy to comply with federal and state laws governing the payment of wages, and SWUU makes every effort to ensure employees are paid correctly. Occasionally, however, mistakes may happen. Paychecks and deductions should be reviewed when they are received. Employees are responsible for promptly notifying the Minister or Office Administrator of changes to or errors in their deductions or paycheck. The Minister/Office Administrator will promptly investigate the issue and make any corrections necessary. Any necessary adjustments are usually made and reflected in the employee's next paycheck.

### **PERSONNEL INFORMATION AND FILES**

It is very important that employees keep up to date all the information provided to SWUU 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 your Supervisor/Minister of any changes in:

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

SWUU maintains a personnel file for each employee that contains new hire paperwork, performance reviews, and other documents related to the employee's employment. An employee is allowed to write their response to any document added to the file. No document should be added to the employee's file without their knowledge as indicated by their signature or initials where appropriate. Employees may review the contents of their file in the presence of a SWUU representative at a mutually agreed upon time.

Personnel records, including applications, resumes, and reference checks must be maintained in a locked filing system administered by the Supervisor/Minister. Personnel files should not be generally accessible; an individual must have authorization from the SWUU Board President or Supervisor/Minister prior to gaining access to another employee's or volunteer's file. Materials such as medical records and criminal history



documents should be maintained separately from the main personnel file in a locked filing system. Access is generally not granted to these files which are protected under HIPAA (Health Insurance Portability and Accountability Act) and/or other state or federal laws. They are accessible to the SWUU Board President and Supervisor/Minister only and are to be kept confidential.

## **POLICIES APPLICABLE TO EMPLOYMENT**

### **ABSENTEEISM AND PUNCTUALITY**

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.

Personal appointments should be scheduled before or after work hours, if possible. All scheduled absences must be approved in advance by the Supervisor/Minister. Employees who are unable to report to work at their scheduled time must call their Supervisor/Minister as soon as possible to report the absence and the expected time of return to work.

Employees must call in each day they are absent, unless otherwise authorized by their Supervisor/Minister. Unscheduled absences (such as returning late from lunch or leaving work before the end of the workday) must be approved by the employee's Supervisor/Minister. If the employee expects to be absent the following day, they should inform their supervisor of that fact at the same time.

Any employee who fails to report to work without notice for three or more consecutive days will be considered to have voluntarily terminated employment, effective immediately.

### **PROFESSIONAL ATTIRE AND CONDUCT**

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

### **ALCOHOL AND ILLEGAL DRUGS**

SWUU 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 SWUU 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.

SWUU recognizes that responsible consumption of alcohol might be acceptable at occasional functions, but generally, the workplace is alcohol-free. On such occasions, 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 on the premises do so in moderation and in the spirit of maintaining a safe and comfortable environment for all.

### **SMOKING**

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

### **CONFIDENTIALITY**

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

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

All software that has been installed on SWUU systems is SWUU's property and is to be used for SWUU business only. Likewise, any data collected, downloaded, and/or created on SWUU computers is the exclusive property of SWUU and may not be copied or transmitted to any outside party or used for any purpose not directly related to SWUU business.

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

Any information regarding SWUU members, friends, or other SWUU employees which is compiled by SWUU, including but not limited to email addresses and contact information, is confidential and proprietary information and should be treated as such. Unauthorized disclosure of such information at any time could be highly prejudicial to SWUU members and SWUU. The employee(s) responsible for such unauthorized disclosure may be subject to disciplinary action up to and including termination.

All tools provided by SWUU or used for SWUU 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; or
- Accessing porn sites, chat rooms, or the Dark Web.

In the interests of direct and clear communication, email or text should not be used for communications with strong emotional content or as a way to express negative feedback or to confront issues that would be better served in a face-to-face manner.

SWUU reserves the right to monitor and review the content of employee emails or other such communications or employee use of the Internet and other SWUU equipment at any time. Employees should not consider their internet usage on SWUU computers or SWUU email or other SWUU communication tools to be private. Personal passwords are not an assurance of confidentiality and the internet itself is not secure. Employees must provide all passwords and access codes for SWUU computers, email, internet access accounts, voice mail, etc. to the Supervisor/Minister upon request.

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

Employees should take care to ensure the integrity of SWUU email accounts and passwords through use of strong, unique passwords and avoidance of phishing emails. Avoid clicking on links from unknown senders or use of suspect websites such as porn sites, chat rooms, etc.

If an employee believes that the SWUU computer system integrity has been compromised they should immediately notify the Office Manager, Minister, or Board President.

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

With prior authorization of the Supervisor/Minister, 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 SWUU may only be downloaded and used for SWUU related work provided the employee is given express written permission from SWUU and proper documentation is maintained regarding the files downloaded in the event that future retrieval is required. In addition, upon employment termination for any reason, the employee agrees to allow SWUU to retrieve and/or delete all SWUU files and documents from them. In the event that SWUU does not request such access, then the employee agrees promptly to return, to the extent practicable, and to delete any and all SWUU related documents and copies 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 SWUU. However, the employee must provide SWUU with immediate notice should a personal device containing SWUU software or files be lost or stolen.

### **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 SWUU employee. Activities that may constitute a conflict include use of SWUU time, facilities, equipment or supplies, or the use of the title, prestige, or influence of the congregation 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 SWUU duties; reflect discredit on SWUU; or tend to increase SWUU's payments for sick leave, worker's compensation benefits, or long-term disability benefits. An employee must obtain the prior approval of their Supervisor/Minister before engaging in any other such employment or activity.

If SWUU and the employee disagree that outside employment creates a conflict of interest or the appearance of a conflict of interest, SWUU retains the right to make the final determination.

Similarly, employees who enter into a business or personal relationship with a member or friend of SWUU must disclose such relationship to the Supervisor/Minister so that any potential or actual conflict of interest can be appropriately addressed. Employees who have questions about whether an activity violates this policy should discuss the matter with the Supervisor/Minister.

### **EMPLOYMENT OF RELATIVE 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, regular employment with the church is not open to members of the congregation except in rare and unusual circumstances and only with advance approval of the SWUU Board.

### **MEDICAL DOCUMENTATION**

From time-to-time employees may be required, as a condition of employment, to undergo a medical examination or otherwise to provide SWUU with requested medical 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 SWUU 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. Employees must log the starting and ending odometer readings for the trip or otherwise provide documentation of an accurate representation of the miles traveled. 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 SWUU. If any employee is involved in a traffic accident while operating their own vehicle on SWUU business, the employee is required to call a Police Officer to the scene of the accident. The employee is also required to report the accident immediately to the Supervisor/Minister.

The use of hand-held cell phones and/or texting are strictly forbidden when driving on SWUU related business. Employees are expected to follow applicable state or federal laws and regulations regarding the use of cell phones and PDAs. Employees who are charged with traffic violations resulting from the use of any cell phone or electronic device while driving will be solely responsible for all liabilities that result from such actions.

Other approved expenses incurred by an employee on behalf of SWUU will be reimbursed according to SWUU's expense reimbursement policy.

## **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 congregational 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 other safety equipment.

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 workers compensation insurance carrier. In the event of a fire or other emergency, the fire department and/or other emergency services should be called immediately, and all staff and members of the congregation should leave the premises.

## **PERSONAL PROPERTY**

SWUU cannot be responsible for damage to or loss of personal property, including loss or damage to vehicles or other property in or on congregation property. Employees should report any lost items to the Supervisor/Minister so that the item can be returned if it is found. If an employee finds an item, it should immediately be turned into the Supervisor/Minister.

## **WORKPLACE THREATS AND VIOLENCE**

Threats, threatening behavior or acts of violence against persons by anyone on SWUU property or while engaging in SWUU related activity will not be tolerated. The possession or use of weapons, firearms, ammunition, etc. is prohibited on SWUU property except for authorized law enforcement or security personnel.

SWUU is committed to providing a safe, violence-free workplace. Moreover, SWUU seeks to prevent workplace violence before it begins and reserves the right to deal with behavior that suggests a propensity towards violence even prior to any violent behavior occurring.

Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts on SWUU property may be removed and must remain off SWUU property pending the outcome of an investigation. If SWUU determines that a staff member has violated this policy, SWUU 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. Even without an actual threat, employees should report any behavior regarded as threatening or violent that is job-related and/or connected to SWUU employment and/or might be carried out on a SWUU controlled site. SWUU employees aware of a threat of imminent workplace violence, an actual ongoing act of workplace violence, or a violent incident that occurred on SWUU premises should immediately call 911 and contact the Minister. Retaliation against any employee who reports workplace violence is prohibited and will not be tolerated by SWUU.

Conduct that is prohibited under this policy includes, but is not limited to:

- Threats of any kind;
- Threatening, physically aggressive or violent behavior such as intimidation or attempts to instill fear in others;
- Other behavior that suggests a propensity towards violence which can include belligerent speech, excessive arguing or swearing, sabotage, and threats of sabotage of SWUU or employee property; or
- Defacing SWUU or employee property or causing physical damage to the facilities.

Any inquiries from any media representatives regarding any actual or potential instances of workplace threats and/or violence should be referred to the Minister or Board President for official information and comment.

### **INSPECTION RIGHTS**

SWUU reserves the right to inspect any and all work areas. The congregation has on its premises storage facilities such as desks, file cabinets, closets and storage areas for the use of employees and volunteers. SWUU reserves the right to open and inspect these areas without prior notice or consent. Employees may not use personal locks on SWUU owned desks, cabinets, closets, or storage areas.

The storage of any unauthorized alcohol, any weapons, explosives, or illegal drugs or drug-related paraphernalia is prohibited on SWUU premises.

### **MEDIA INQUIRIES**

All requests for information about SWUU from newspapers, television, blogs, radio or other types of media should be directed to the Supervisor/Minister. An appropriate response to a media inquiry would be, "I'm not the best person to



answer that question. May I contact the appropriate person and have that individual get back to you?"

The Supervisor/Minister, or in their extended absence the SWUU Board President, should be informed of the media contact as soon as possible.

## PERFORMANCE AND CONDUCT EXPECTATIONS

### ORIENTATION

Your Supervisor/Minister or a designated congregational leader will introduce you to your co-workers and orient you to your work area and job responsibilities. In some cases, a written job description has been prepared that contains a summary of duties and responsibilities (see Appendix C). In other cases, a written contract may be offered to an employee outlining responsibilities and hours of work. Of course, it is impossible to list or 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. Please keep in mind that your Supervisor/Minister has the authority to assign duties, responsibilities, or functions to you even though the duties have not been yours in the past or are not specifically mentioned in your job description or contract. If there is disagreement on these new duties, this should be handled according to the SWUU Conflict Resolution Policy.

### INITIAL REVIEW PERIOD/PROBATION

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

### SUPERVISION AND PERFORMANCE REVIEWS

Supervisors/Ministers assist employees in learning their jobs and identifying priorities and goals. They will meet with employees who report to them on a regular basis, reviewing job performance, goals and priorities, assessing needs, and working through challenges. Employees will also periodically be requested to identify goals and objectives to discuss with their Supervisor/Minister so that their work may be evaluated on the basis of the criteria they have helped to develop. Any employee performance concerns should be discussed with the employee and documented. In the same way, good or above-average performance should also be recognized and documented.



To complement ongoing performance feedback, a formal written performance review will also be conducted on a regular basis. Employees may also be asked to assess their own performance, their working situation and their relationship with their Supervisor/Minister. Staff are encouraged to be creative and show initiative in offering suggestions and ideas.

## **DIFFICULTIES ON THE JOB**

In every organization, there may be situations where an employee's performance does not measure up to the standards of the job established by the church, or where they do not conform to work or conduct expectations. In such cases, the Supervisor/Minister will strive to help employees succeed in their work. However, continued employment depends on SWUU'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 Supervisor/Minister should, after discussion with the SWUU Board President, give the employee written advance notice of the problem and that their job is in jeopardy if satisfactory improvement is not made. In extreme cases, the Minister or SWUU Board President may immediately terminate an employee's employment without prior notice.

## **WORK AND DISCIPLINARY GUIDELINES**

SWUU expects that all employees will conduct themselves in a manner consistent with the highest standards of professional conduct and that is conducive to creating a harmonious and pleasant work environment. This includes courtesy, respect, and working collaboratively and cooperatively, demonstrating the characteristics of high performing team members. As a staff of professionals in whom trust and power have been placed, all staff are called to be faithful both morally and legally to upholding professional relationships.

Certain guidelines must be observed by all employees to protect the integrity of the congregation. Violations may result in disciplinary measures including verbal warnings, written warnings, or termination. The Minister should inform the SWUU Board President of any disciplinary measures before they are taken.

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

- Failure to perform work in a manner acceptable to SWUU.
- Absenteeism or tardiness.
- Leaving work without permission.
- Failure to report absences as required.
- Discrimination, harassment, or retaliation as described in this Manual.
- The use, possession or sale of controlled substances (other than those used for bona fide medical purposes) or being under the influence of alcohol or other

controlled substances while working or while on SWUU premises, including meal and other breaks.

- Unauthorized possession of weapons.
- Unauthorized 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 time record (except in the case of authorized absence, such as medical leave)
- Theft or dishonesty.
- Falsifying records or information, or the misuse or unauthorized manipulation of any computer or electronic data processing equipment or system.
- Discourteous or disrespectful treatment of others.
- Taking SWUU property without paying for it or without written permission.
- Reckless, careless or unauthorized use of SWUU property, equipment or materials.
- Improper or profane language.
- Arrest and conviction for criminal offenses that are job related, including those that may affect the employee's ability to perform their job.
- Violation of any other SWUU policy or the standards of conduct generally applicable to a professional and respectful workplace.

## SEPARATION FROM EMPLOYMENT

### RESIGNATION/RETIREMENT

Resignations and Retirement are voluntary terminations of employment initiated by the employee. Employees who resign or retire are requested to give notice as stipulated in their Employment Agreement or at least two-weeks notice if they have no specific Employment Agreement.

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) Accrued, but unused vacation time is paid at the end of employment. Unused sick leave and other types of unused benefit time are not subject to payment at the end of employment.

### INVOLUNTARY SEPARATION OF EMPLOYMENT

Any employee who is absent for three consecutive days without notifying the Supervisor/Minister, or who fails to report to work on or before the expiration of a leave, will be deemed to have resigned, consistent with applicable law.

If employment is terminated for cause, such as poor performance, payment of accrued, but unused vacation time will be paid. Unused sick leave and other types of benefit time are not subject to payment at the end of employment. Such employees may be eligible to

continue their health insurance, if covered by health benefits, under the provisions of COBRA unless fired for gross misconduct. Some examples of gross misconduct are, but are not limited to:

- Stealing
  - Intentional destruction of SWUU property
  - Workplace violence
  - Sexual assault or rape
- 
- If an employee's position is terminated for reasons unrelated to work performance or employee conduct, the employee is eligible for 2 weeks severance pay, calculated at their regularly scheduled hours times their regular hourly pay rate.

## BENEFITS

The benefits outlined in this Manual represent additional compensation to eligible employees. Outlined below is a brief summary of the types of employee benefits currently available through SWUU. This summary is not intended to and does not create an express or implied contract, promise, or representation between SWUU and the employee. These benefits are subject to change at any time at the discretion of SWUU. In the event of any discrepancy between the benefits outlined below and the plan itself, the plan document will govern. Any questions about employee benefits should be directed to the Supervisor/Minister.

### GROUP INSURANCE PROGRAMS

#### Health insurance

Employees who are expected to work at least 750 hours per year (15 hours per week) may enroll in the group insurance plan sponsored by the UUA (Unitarian Universalist Association). The Congregation currently pays 80% of the premium for full-time employees for the standard PPO plan offered by the UUA. Part-time staff working 750 hours or more receive a prorated payment of the premium toward coverage of health insurance benefits. Eligible dependents may also be enrolled and SWUU pays 50% of the additional premium for dependents, again prorated for part-time staff according to the following schedule:

1820 hours per year (35 hrs. per week or more)	80% of employee/50% of dependent premium
1560-1819 hours per year (30-34 hrs. per week)	65% of employee/40% of dependent premium
1040-1559 hours per year (20-29 hrs. per week)	50% of employee/30% of dependent premium

750-1039 hours per year (15-19 hrs. per week)	40% of employee/25% of dependent premium
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Employees will be required to make their required contributions by payroll deduction or timely payment as appropriate. Consistent with federal law, if an employee has health insurance through another qualified group plan (i.e. spouse's employer plan), the congregation 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 for the spouse on the other plan 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>.

Another helpful link is for the UUA Health Plan insurance calculator:  
<https://secure.uua.org/leaders/insurance/calculator/index.php>

### **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. The congregation 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. The congregation pays the premium cost for dental coverage according to the same schedule as health insurance (see the table above). Employees will be required to make their required contribution. Further information concerning these policies is available from the Supervisor/Minister or by going to <https://www.uua.org/finance/compensation/uua-insurance-plans>

### **COBRA.**

If an employee is covered by a UUA medical or dental insurance plan, they have the right to choose continuation coverage if they lose their group health coverage because of a reduction in hours of employment or termination of employment (for reasons other than gross misconduct). The eligible dependents of the employee may also have the right to elect and pay for continuation coverage for a temporary period in certain circumstances where their coverage under the Plan would otherwise end. If you have any questions concerning your rights under the Consolidated Omnibus Budget Reconciliation Act (COBRA) please contact your Supervisor/Minister for details.

### **Workers' Compensation Insurance**

SWUU 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. Where possible, injuries/accidents should be documented in writing with photographs of the site of the accident/injury. Any unsafe conditions should be reported to the Supervisor/Minister, or in their absence, to the SWUU Board President. Employees may be required to provide a written report on the illness or accident and a physician's statement in order to receive workers' compensation benefits, or to return to work.

## **Retirement Benefits**

The UUA 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. 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.

In addition, if an employee meets the Plan's Year of Eligibility Service Provision, SWUU may contribute a percentage of the employee's wages and the employee has the option of making additional voluntary contributions on a pre-tax basis. Currently the percentage contributed by SWUU is 8% of base salary. This percentage is subject to change.

To 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 the 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 SWUU.

SWUU 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>

## TIME OFF POLICIES

### HOLIDAYS

SWUU generally observes the following holidays:

- New Year's Day
- Rev. Dr. Martin Luther King Jr. Day
- President's Day
- Memorial Day
- Fourth of July
- Labor Day
- Veteran's Day
- Thanksgiving Day and the day after Thanksgiving
- Christmas Day

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

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

Because SWUU operates on a fiscal year (July 1 to June 30) for all issues related to budget and finances, **vacation is earned and used on the basis of the fiscal year NOT a calendar year.**

For individuals who begin their employment within the fiscal year, vacation and other types of leave times will be prorated for the first fiscal year of their employment.

Four weeks of paid vacation time are provided per fiscal year, according to the number of hours per week an employee usually works. For example, a 15-hour a week employee would receive 60 hours of paid vacation per fiscal year. Except in extraordinary cases, employees may not take more than two-weeks of vacation consecutively.

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

Employees may carry over no more than **one week** of vacation time from one fiscal year to the next. Upon separation from employment, all employees will be paid for unused vacation time.

## **SICK LEAVE**

All employees are eligible for Sick Leave. Two weeks of paid sick leave are provided per fiscal year. Sick leave is NOT prorated for new employees.

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.

## **FUNERAL OR BEREAVEMENT LEAVE**

An employee will be granted up to 5 days of consecutive work days for paid bereavement leave to attend to arrangements and to take care of matters attendant to the death in the event of a death of an immediate family member (spouse/partner, child, parent); up to 3 work days for death of a member of the extended family (siblings, in-laws); and 1 work day for other relatives (aunts/uncles, nieces/nephews). Additional unpaid time may be requested from your Supervisor/Minister.

## **JURY DUTY**

SWUU 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.

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.

## **LEAVES OF ABSENCE**

From time to time, employees may need to have time away from work in order to address certain urgent issues. During such leaves, an employee may use their earned sick and vacation leave, unpaid leave and any applicable insurance coverage. When possible, such leaves must be requested in advance in writing and require the approval



of the employee's Supervisor/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 expiration of the leave as granted. If prevented from returning as expected, the employee must immediately notify their Supervisor/Minister.

## **FAMILY AND MEDICAL LEAVE (FMLA)**

Although currently not required by law, consistent with UU Values, SWUU voluntarily provides certain aspects of the Family Medical Leave Act (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/partner, or parent) with a serious health condition. Up to the conclusion of this leave period, an employee generally has the right to return to the same position. This leave may be taken all at once or intermittently, depending on the circumstances. Medical certification is required.

All employees who take Family Leave must give thirty days' notice, or in case of unforeseen circumstances, as much notice as possible to their Supervisor/Minister. All benefits continue as usual during paid periods of Family Leave covered under sick leave, parental leave, and long term sick leave policies discussed elsewhere in the Manual. During unpaid periods of leave, no time off with pay benefits will accrue and no contributions will be made to any retirement or insurance plans. The employee is responsible for paying the entire monthly premiums for health, dental, life, and long-term disability insurance coverages.

## **PARENTAL LEAVE**

After six months of employment with SWUU, all employees who become natural or adoptive parents are eligible for up to 12 weeks of paid parental leave. Parental leave must begin within six weeks of the birth or adoption. The rate of pay for weeks of paid parental leave is based on wages for the employee's regularly-scheduled work week. 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. 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/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



and sick leave benefits, may be paid extended sick benefits at 75 percent of their regular pay until the earlier of release to return to work by the physician, approval for long-term disability payments, or 90 days, whichever occurs first. Vacation and other time off with pay benefits do not accrue during this period. Extended medical leave goes into effect after all other leave (sick and vacation) has been used. 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, the congregation will retroactively pay the employee at 100 percent of pay.

SWUU also reserves the right to request a second opinion from a physician chosen by SWUU on any medical leave of absence. If an employee is covered by the UUA health insurance, the SWUU portion of the health insurance premium will continue to be paid by the Employer during the unpaid medical leave. SWUU 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.

## **SABBATICAL LEAVE**

The Congregation believes that employees in certain positions benefit from time spent in study, reflection, spiritual renewal, continuing education, or community service. This program is a privilege applicable to only certain positions, is completely discretionary, and may be suspended, terminated, or altered at any time.

To be eligible to apply for a sabbatical leave, the employee must work 15 or more hours per week, demonstrate a good work record of at least 7 years of continuous employment, and currently be in good standing with the Congregation. Normally, sabbaticals may not exceed six weeks within any twelve-month period. Other requirements may also apply. Information about sabbatical leaves may be obtained from the Minister or Chair/President of the Board.

## CONTRACTS

To ensure equity among employees all Contracts should contain some common elements:

- This Contract is an agreement between (Name of Employee) and the Southwest Unitarian Universalist Church (SWUU) of North Royalton, Ohio. In addition, each staff member is expected to follow the current Personnel Policy adopted by the Board of Trustees in all areas not specifically stipulated in this Contract. If there is a conflict between the two documents, the individual Employment Contract takes precedence.
- The Congregation, acting through its Board of Trustees, employs (name of Employee) as (specific job title of the Employee) under the terms set forth in this agreement, following a successful 90-day probationary period.
- The Employee will carry out the mutually agreed upon tasks as stated in the attached job description.
- The Employee will be supervised and supported by the Minister, including regular supervisory meetings and performance reviews as specified in the Personnel Policy.
- A statement of the number of hours to be worked and how those hours are to be worked if there are any specific requirements as to time of day, day of the week, etc. A stipulation of whether the position is exempt or non-exempt under the FLSA.
- Rate of pay both yearly and weekly. Salary will be paid in monthly installments. Four weeks vacation paid at the Employee's normal rate of pay and number of scheduled hours will be provided according to SWUU's fiscal calendar, with a maximum of two weeks taken consecutively. One week unused vacation may be carried over to the next fiscal year if requested by the Employee. Vacation is prorated for the initial fiscal year if the employee begins their employment within the fiscal year. (Note: an hourly rate of pay is NOT given for employees who are FLSA exempt.)

- Two weeks sick time paid at the Employee's normal rate of pay and number of scheduled hours will be provided according to SWUU's fiscal calendar. Please consult the current Personnel Policy for more information.
- Either the Employee or the Church may terminate this employment agreement by giving \_\_\_\_ days written notice or less than \_\_\_\_ days by mutual agreement.
- This agreement will be reviewed annually and will remain in effect until amended, replaced, or retired by mutual consent of all parties.

Some duties and responsibilities may be specific to individual employee contracts. This may include number of Sundays worked or, conversely, not worked per year; the ability to set one's own hours determined on need and in consultation with the Minister; any requirement to report to the Board on a monthly basis; percentage of salary provided per fiscal year for professional expenses and memberships; and continuing education requirements or sabbatical leave if determined advantageous for that position.

A current signed copy of each employee's contract should be kept in the employee's personnel file. Any changes in contract should be documented in a new contract, not simply by written notes kept by the employee or the Minister.

Each contract should be signed by the employee and the President of the Board of Trustees and dated.

## PERSONNEL POLICY ACKNOWLEDGMENT

***The Acknowledgment is not required by law but is helpful to have in the event of a dispute about the terms of the Manual or of employment. It should be maintained by the Congregation in a file with a copy of the Personnel Policy Manual. Any new employee should be given a copy of the Personnel Policy Manual and asked to sign this confirmation that it has been delivered.***

### **PERSONNEL POLICY MANUAL ACKNOWLEDGMENT**

By signing below, I acknowledge that I have received a copy of the Personnel Policy Manual of Southwest Unitarian Universalist Church of North Royalton, Ohio. I understand it is my responsibility to read the Manual and to comply with the policies, practices and rules of the Congregation as outlined therein.

Date	Print Name	Signature