



CONGREGATIONAL MANUAL

February 2025

This Congregational Manual shall serve as the repository of the rules, regulations and policies adopted by the Board of Directors.

**In accordance with All Faiths Bylaws, Article VIII, Section 5. Duties --
“The Board shall adopt rules, regulations, and policies for the conduct of their meetings and management of the Congregational affairs in accordance with the Bylaws of the Congregation and the Florida State Statutes.”**

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COMMITTEES OF THE BOARD OF DIRECTORS

FINANCE

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Finance Committee

REPORTS TO: Board of Directors

MISSION: The Board of Directors is responsible for overall management of the Congregation's financial resources. The Finance Committee acts as an advisory and oversight committee to help ensure the integrity of that financial management, including sound financial planning, prudent funds control practices, and transparent expenditure processes and reporting.

FUNCTIONS:

- Participate in long-range planning.
- Work with the Minister, Stewardship, and Fundraising Committees to help set fundraising goals.
- Prepare an annual budget to submit to the Board of Directors and ultimately to the membership for review and approval.
- Monitor, administer, and update the annual budget, including a review of projected monthly receipts and expenditures to ensure compliance, and recommend any Budget revisions to the Board of Directors.
- Establish and maintain relationships with financial services providers along with the Congregational Administrator and Treasurer.
- Review periodic reports from financial institutions that provide status of the Congregation's funds and ensure reconciliation with internal records.
- Screen committee and Member proposals and requests that require expenditure of non-budgeted funds, review proposed procurements with amounts expected to exceed \$500 and recommend the Board of Directors' approval, revision, or rejection.
- Review after-the-fact expenditure documents to ensure that sound procurement and cost control practices have been followed.
- Establish and maintain internal controls and procedures to ensure proper authorizations are obtained; expenditure and income records are complete, well organized, and accurate; legal and

regulatory requirements are met; and financial records of the Congregation are transparent and understandable to the Congregation and others with a need to know.

- Establish policy recommendations on procedures, proposals, and approvals for expenditures for Congregational events, committee activities, and fundraising activities that involve expenditures.
- Arrange for outside reviews of financial records as deemed necessary.
- Collaborate with All Faiths' Treasurer.
- Prepare the Finance Committee's submittal for the Annual Report for the Annual Meeting.

SUNDAY SERVICES

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

REPORTS TO: Board of Directors

MISSION: To provide support to the Minister and Congregation in providing for high quality and inspirational Sunday morning and other services.

FUNCTIONS:

- Work with the Minister to plan and provide the Sunday services.
- Plan the order of service
- Coordinate the music selections with the Music Director
- Discuss ways our services can be enhanced
- Coordinate visiting speakers
- Schedule Worship Associates
- Make recommendations about improvements of physical facilities for services
- Discuss ways to increase lay participation in services
- Provide information to the Congregation about services via newsletter, emails, and website
- When requested, submit an annual budget request to the Finance Committee suitable for meeting the Sunday Service Committee's mission for the coming year.
- Prepare an Annual Report for the Annual Meeting.

MEMBERSHIP

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

REPORTS TO: Board of Directors

MISSION: To enhance the membership of the Congregation through welcoming, recruiting, including, and integrating members.

FUNCTIONS:

- Welcome visitors
- Maintain membership list
- Provide orientation sessions for those interested in membership
- Connect new members with members of common interest
- Coordinate New Member Recognition services
- Assist in recruiting and integrating new members
- Obtain information about members who leave
- Count attendance on Sundays
- Provide guest, visitor and new Member information to the Congregational Administrator
- Develop and make available information about the pathway to membership and information about the Congregation in general
- When requested, submit an annual budget request to the Finance Committee suitable for meeting the Membership Committee's mission for the coming year.
- Prepare an Annual Report for the Annual Meeting.

STEWARDSHIP/LEGACY

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Stewardship Committee

REPORTS TO: Board of Directors

MISSION: To promote shared responsibility among congregants for the stewardship of the Congregation through contemporaneous and future contributions of time, talents, and treasure. The Stewardship Committee's Pledge Drive work is primarily between November and February. The Legacy portion of the committee takes place continuously throughout the year.

FUNCTIONS:

- Initiate and oversee the Annual Stewardship Campaign.
- Complete Annual Campaign in time so the Treasurer and Finance Committee have pledge information prior to preparing the draft annual budget for Congregational approval.
- Promote stewardship practices by congregants throughout the year by:
 - Working with the Minister and the Worship Committee in developing stewardship messages for services, when appropriate;
 - Working with the Minister and the Membership Committee to ensure that new members are informed about stewardship expectations;
 - Promoting legacy giving options as outlined in the legacy brochure entitled "*WHO will carry forward the good work of All Faiths in perpetuity? I will.*"
 - Engaging with the UUA and the Southern Region to assess current stewardship practices and solicit their counsel regarding improvement.

- When requested, submit an annual budget request to the Finance Committee suitable for meeting the Stewardship Committee’s mission for the coming year.

SOCIAL ACTION AND OUTREACH

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

REPORTS TO: Board of Directors

MISSION: To encourage individual members and groups in the Congregation to foster social action projects.

ORGANIZATION: The Social Action and Outreach Committee is formed by the leaders of the teams the Congregation votes to engage. The Congregation will periodically be polled to name the social action and outreach priorities that All Faiths will emphasize in the upcoming months. All members and friends are members of the committee.

FUNCTIONS:

- Meet quarterly or as needed.
- Work with the team leaders to recruit, screen, and implement social action projects that meet the committee’s purpose.
- Assist the teams with all the tasks required to ensure success of the committee’s general purpose.
- Inform the Congregation about social action projects and how members can participate.
- Submit requests to the Adult Programs Committee to offer educational programs that broaden knowledge and understanding of social issues from a Unitarian Universalist perspective.
- Submit requests to the Board and work with the Minister to take Issues of Conscience to the Congregation for adoption.
- Take action to raise the Congregation’s awareness of and involve the Congregation in actions addressing Issues of Conscience which are supported by the UUA.
- Ensure that each project has a dedicated leader and several Members before it is deemed a project of the committee.
- When requested, submit an annual budget request to the Finance Committee suitable for meeting the Social Action and Outreach Committee’s mission for the coming year.
- Prepare an Annual Report for the Annual Meeting.

COMMUNICATIONS

Date Adopted: February 2022

Date Reviewed/Revised: September 2024

Reviewing Party: Cong. Admin.

REPORTS TO: Board of Directors

MISSION: To produce informative, entertaining, and well-written communications to keep members and friends informed and to publicize All Faiths in the local community.

FUNCTIONS:

- Produce a monthly newsletter.
- Develop and maintain a website.
- Provide news releases and obtain publicity for All Faiths programs, events, activities, and community involvement.
- Provide timely and up-to-date information to members and friends about services, programs, meetings, events, and care and support.
- Maintain contact with printer to produce printed materials.
- When requested, submit an annual budget request to the Finance Committee suitable for meeting the Communications Committee's mission for the coming year.
- Prepare an Annual Report for the Annual Meeting.

BUILDING AND GROUNDS

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

REPORTS TO: Board of Directors

MISSION: To ensure that All Faiths facilities and grounds are maintained properly to meet the needs of the Congregation.

FUNCTIONS:

- Maintain the buildings, grounds, gardens, and parking lot.
- Maintain the interior and exterior building to include painting lighting, décor, appliances, carpets, chairs, doors, windows, deck, exterior furniture, security systems, walkways, parking lot, lawns, shrubs, mailbox, flag pole, and signs.
- Communicate any unbudgeted expenditures for maintenance, repair, acquisition to the Finance Committee prior to making the expenditure.
- Maintain adequate maintenance supplies in coordination with the Congregational Administrator.
- When requested, submit an annual budget request to the Finance Committee suitable for meeting the Building and Grounds Committee's mission for the coming year.
- Prepare an Annual Report for the Annual Meeting.

POLICIES AND PROCEDURES
SECTION 100 PERSONNEL POLICIES

Date Adopted: February 2022

Date Reviewed/Revised: May 2024

Reviewing Party: Board of Directors

Scope: This policy pertains to all staff and hourly employees except for the Minister and Congregational Administrator.

This section addresses personnel policies including hiring, disciplinary action, Board and Minister responsibilities related to personnel, expectations of employees, and other employee-related issues. The types of employees All Faiths may have on staff at any time are listed below with a short description of that type of employment.

- *Exempt Employees.* Employees that are classified as exempt are automatically excluded from minimum wage and overtime requirements that the Fair Labor Standards Act (FLSA) provides, as well as any state overtime regulations. Rather than an hourly wage, exempt employees are paid a salary. The employee and Minister shall establish a mutually acceptable work schedule.
- *Hourly Employees/Hourly Contractors.* Hourly employees/hourly contractors are paid by the hour for work performed. They shall schedule and perform work in accordance with the schedule set by the supervisor in consultation with the Board of Directors. The employee contractor and supervisor shall establish a mutually-acceptable work schedule.
- *Contract Employees:* Contract employees are paid per a contract negotiated prior to the initiation of work. The contract will specify the scope of work to be completed, timeframe for completion of work, the compensation that the contractor will be paid, and the schedule for payment of the work completed by the contractor.

Policy # 101 Hiring

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to applicants who wish to be considered for employment or as an independent contractor at All Faiths Unitarian Congregation.

Policy/ Procedure: The Board of Directors has the sole authority to hire and develop contracts on behalf of the Congregation.

Policy # 102 Interview and Hiring Process

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the process of hiring applicants who wish to be considered for employment at All Faiths Unitarian Congregation.

Policy/ Procedure: The Board of Directors has the sole authority to hire and develop contracts on behalf of the Congregation.

A. Identify/Advertise Position. When a position for employment is identified as available, the Board of Directors will consult the Minister and associated Committee Chairs to develop and post an advertisement to recruit applicants which will list the job title, overview of responsibilities, and salary.

Applicants will be asked to respond and forward any materials requested to the Board of Directors Chair to be evaluated by the full Board of Directors for consideration.

B. Interviewing Applicants. The Board of Directors, in consultation with the Minister and associated Committee Chairs, will identify viable applicants and schedule interviews within fifteen (15) days. Applicants not being considered will receive a letter from the Board within 10 (ten) days of application advising the applicant that they will not be considered.

Interviews will be conducted by one (1) Board Member, the Minister, and one (1) Committee Chair if available, and the Congregational Administrator as a group interview.

During this interview, the group will gather relevant experience and work history, outline the job description, and ask relevant questions.

C. Reference Checks. The Board Chair will request three (3) personal references and check these references following the interview.

D. Hire/Not Hire Decision Process. Once references have been checked for applicants being considered, the Board Chair will convene the group conducting the interview to make final recommendations to the Board of Directors. The Board of Directors will then decide to accept or decline the recommendation. If declined, the applicant will be notified of the Board's decision by the Chair within three (3) days and the group will begin the hiring and interviewing process for a second round.

E. Notifying Successful Applicant. If accepted, the applicant will be notified of the Board's decision by the Chair within three (3) days and schedule a time to participate in orientation. The Chair and Finance Chair will follow up with a letter of hire detailing start date, job description, naming the direct supervisor, salary, and benefits, if applicable.

Policy # 103 Termination/Disciplinary Action

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the process of terminating employees/contractors of All Faiths Unitarian Congregation whose conduct has created question or concern for the congregation, except for the Minister.

Policy/ Procedure: The Board of Directors has the sole authority to terminate employees/contractors on behalf of the Congregation.

A. Authority to Terminate. Employees/contractors are considered at-will employees, with exception of the Minister whose termination must follow the process stipulated in the bylaws. The Board of Directors may terminate employment with due cause at any time. The employees/contractors may negotiate a resignation and terminate their employment with a two-week notice.

B. Potential Disciplinary Actions. Employees/contractors may be afforded the following disciplinary process, although this process is not necessary for termination:

Step 1. Verbal Warning. A verbal warning will be given to the employee/contractor regarding performance during a face-to-face interview with the Minister and a member of the Board. A note that a verbal warning was given will be entered into the personnel file of the employee/contractor.

Step 2. Written Warning. A written warning will be given to the employee/contractor regarding their performance during a face to face interview with the Minister and a member of the Board. The employee/contractor must sign that s/he has received this written warning and the warning must document that further performance issues will result in further disciplinary action. The original must be kept on file.

Step 3. Written Counseling. A written counseling will be given to the employee/contractor regarding their performance during a face-to-face interview with the Minister and a member of the Board. The employee/contractor must sign that s/he has received this written counseling and the counseling must document that his/her performance issues will be brought to the Board as a recommendation for termination. The original must be kept on file.

C. Board Determination. The Board of Directors will consider recommendations if they are accompanied by documentation of a verbal warning, a written warning, and a written counseling provided by the Minister. Depending on the Board's decision, the following actions will be taken.

1. Board Decision to Terminate. The Board will determine if termination is appropriate. If so, the employee/contractor will be notified by the Board Chair or Minister immediately followed by a letter of termination that outlines the disciplinary steps taken, the Board's decision, and a termination date within five (5) days. The Board Chair will require the employee/contractor to return all Congregational property such as keys etc.

2. Board Decision Not to Terminate. If the Board determines that termination is not appropriate, the Chair and the Minister must meet with the employee/contractor within five (5) days to review the job description, the disciplinary process, and an agreement developed by the Board documenting timelines for expected improvement that will result in termination if not satisfied. This is a face-to-face meeting and the employee/contractor must sign this agreement and the original will be kept on file.

Policy # 104 Stages of the Disciplinary Process

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees and contractors of the Congregation and guides the process for disciplinary action.

Policy/ Procedure: Employees and contractors may be disciplined as provided herein. The types of discipline shall include verbal warning, written warning, written counseling, and termination of employment.

A. Types of Discipline:

1. *Verbal Warning.* Either the Minister or the Board of Directors may issue to any employee or contractor a verbal warning. This warning must be documented that it was given and must be entered into the personnel file of the employee or contractor. There shall be no grievance or appeal of a verbal warning.
2. *Written Warning.* Either the Minister or the Board of Directors may issue to any employee or contractor a written warning. If the employee disagrees with a written warning, he/she has the right to prepare a written rebuttal which shall be attached to the employment agreement in the personnel file. There shall be no grievance or appeal of a written warning.
3. *Written Counseling.* Employees and contractors may be reprimanded in writing upon the concurrence of the Minister and the Board of Directors. If the employee or contractor disagrees with a Written Counseling, he/she has the right to prepare a written rebuttal which shall be attached to the Written Counseling in the personnel file. If an employee or contractor receives this level of discipline a recommendation for termination will be considered. There shall be no grievance or appeal of a written reprimand.

B. Termination. All employees and contractors, except the Minister, are at-will employees and contractors. Termination may be considered at any time.

Policy # 105 Employee Supervisory Feedback and Evaluations

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the process when evaluating employees and contractors of All Faiths Unitarian Congregation, with exception of the Minister and Congregational Administrator.

Policy/ Procedure: Employees shall periodically receive feedback by the Minister. Employees will participate in a performance evaluation when requested by the minister.

A. Effect of Completion. Satisfactory completion of the supervisory feedback and/or evaluation process shall not alter the at-will status of employment.

B. Job Description. In connection with the annual evaluation, the employee/contractor, the Minister, or the Board of Directors, may request a review of an employee's/contractor's job description. The Minister shall conduct the review with input from the Board of Directors, related committees, and the employee/contractor whose position is undergoing review.

C. Procedures for Review. Each employee/contractor employed longer than 10 months shall be subject to a performance review by the Minister with the input of the Board of Directors and Congregation Members with whom the employee/contractor works on a regular basis.

1. *Written evaluations.* All evaluations shall be in writing. A copy of each evaluation shall be reviewed with, signed by, and given to the employee/contractor. The evaluation shall then be forwarded to the Board of Directors which shall review, may comment upon, and shall sign the evaluation. A copy of the evaluation shall be filed in the Personnel File.
2. *Disagreement with evaluation.* If the employee/contractor disagrees with an evaluation, he/she may write a rebuttal which shall be attached to the evaluation and become a part of it.

Policy # 106 Background Check/Code of Ethics

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the process of meeting the requirement of background checks of employees and contractors of All Faiths Unitarian Congregation.

Policy/ Procedure: The Congregation shall conduct criminal background checks of all employees/contractors. All employees/contractors are expected to participate in a background check prior to their being offered employment. All new employees/contractors will be hired on a provisional basis pending the outcome of the criminal background check.

A. All Faith's Commitment. All Faiths Unitarian Congregation is a not-for-profit religious organization. Our commitments as Unitarian Universalists to the inherent worth and dignity of every person and to the values of justice and compassion compel us to create a safe environment that protects children and adults from harm and promotes spiritual growth

B. Applicants' Responsibilities. All persons seeking employment at All Faiths Unitarian Congregation shall:

1. Complete an application or resume detailing their relevant experience and education.
2. Complete a "Sexual Misconduct and Abuse Questionnaire for Employment" including the authorization and release of information.
3. Review and sign "The Code of Ethics for Working with Children and Youth."

C. All Faiths' Responsibilities

1. *Screening, Vetting, Interviewing, Selecting.* The authorized individual/committee will screen the applications, contact references, conduct formal interviews with the candidates, and select the final candidate for the position.
2. *Provisional Offer of Employment.* The authorized individual/committee will extend an offer of employment to the final candidate as per related policies. The offer of employment shall include information regarding the provisional nature of the hire pending the outcome of the criminal background check.

3. *Criminal Offender Record Information (CORI) Follow-up.* Based upon the Criminal Offender Record Information (CORI), the Minister shall make a final decision regarding retention of the employee/contractor. The employee/contractor, the appropriate committee and the Board shall be informed in writing of the decision.

Policy # 107 Job Descriptions

Date Adopted: February 2022

Date Reviewed/Revised: January 2025 Reviewing Party: Board of Directors/Minister

Scope: This policy provides direction to employees and contractors who require written descriptions of their job responsibilities and are required as a condition of employment.

Policy/ Procedure: As a condition of employment, a written job description and employment agreement, prepared by the Minister in consultation with the Board of Directors, shall be maintained in the personnel file for each employee/contractor.

Policy # 108 Supervision

Date Adopted: February 2022

Date Reviewed/Revised: January 2025 Reviewing Party: Board of Directors/Minister

Scope: This policy guides the supervision process for all staff and hourly employees except for the Minister and Congregational Administrator.

Policy/ Procedure: The responsibility for supervision of staff and hourly employees falls to the Minister. Supervision does not include hiring, termination, or contract review.

A. Frequency. Supervision sessions for exempt, hourly, and contract employees will be scheduled face-to-face and at least once per month.

B. Purpose. Supervision sessions will be used for collaboration, review and feedback of responsibilities, and the creation of work plans. Issues raised in supervision related to performance will be shared with the Board of Directors as deemed necessary by the Minister.

Policy # 109 Conditions of Employment

Date Adopted: February 2022

Date Reviewed/Revised: January 2025 Reviewing Party: Board of Directors

Scope: This policy defines job classifications and conditions of employment.

Policy/ Procedure: All Faiths shall comply with Department of Labor standards for classifying employees, will provide clear guidance to its employees, and will have non-discriminatory hiring practices.

A. Employee Classifications

1. *Exempt Employees.* Employees that are classified as exempt are automatically excluded from minimum wage and overtime requirements that the Fair Labor Standards Act (FLSA) provides, as well as any state overtime regulations. Instead of an hourly wage, exempt

employees are paid a salary. The employee and Minister shall establish a mutually acceptable work schedule.

2. *Hourly Employees/Hourly Contractors.* Hourly employees/hourly contractors are paid by the hour for work performed and shall schedule and perform work in accordance with the schedule set by the supervisor in consultation with the Board of Directors. The employee/contractor and supervisor shall establish a mutually acceptable work schedule.

B. Conditions of Employment

1. *Employment terms.* Each employee/contractor's terms and conditions of employment, including benefits and grievance procedure, shall be as provided in these policies.
2. *Duties.* A written job description and employment agreement, as prepared by the Supervisor in consultation with the Board of Directors, shall be maintained for each employee/contractor's position.
3. *Equal Opportunity Employer.* All Faiths Unitarian Congregation is an equal opportunity employer. This means All Faiths agrees not to discriminate against any potential exempt or hourly employee or contractor because of race, color, religion, national origin, gender, physical or mental health, or age. All Faiths also will not discriminate due to a person's gender identity or sexual orientation.

Policy # 110 Personnel Files

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the implementation, maintenance, and access to personnel files.

Policy/ Procedure: Employee files and their contents shall be managed as follows:

A. File. Each employee/contractor shall have a personnel file maintained by the Congregational Administrator.

B. Contents. The personnel file shall include a copy of the job description, a copy of past and present employment agreement, a copy of each written evaluation, letters of commendation, records of disciplinary actions, and other regulatory and appropriate documents.

C. Review of Files. Each employee/contractor may review their own personnel file upon request and in the presence of the Congregational Administrator. Access is granted only to the Congregational Administrator, Minister, and the Chair of the Board of Directors.

Policy # 111 Compensation and Salary Review

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Finance Committee

Scope: This policy guides the process to compensate employees/contractors, with exception of the Minister.

Policy/ Procedure: Compensation procedures will be as outlined below.

A. Amount. Compensation for each employee/contractor shall not exceed the amount budgeted for the position by Congregational vote at the time of approval of the Congregation's budget. The compensation shall be stated in the budget prepared by the Board upon the recommendation of the Minister and Finance Committee.

B. Pay Period. Employees/contractors shall be paid monthly.

C. Salary Placement/Advancement. The Minister, Board of Directors, and Finance Committee shall rely on UUA fair compensation guidelines, which describe the basis for the minimum, middle, and maximum ranges. The guidelines state that the minimum range is appropriate for employees new to the position with little or no experience in the job. The recommendations further state that, presuming satisfactory evaluations, an employee could expect to move to the middle range after approximately five years in the position. The employee could expect to move to the maximum range after approximately ten years in the position.

Note: Meeting UUA guidelines is a high priority, but not a guarantee, as compensation is subject to budgetary limitations.

D. Annual Salary Recommendations. The Board submits salary recommendations on each employee/contractor based on job evaluations, longevity, realistic budget allowances, and other relevant factors to the Finance Committee in January of each year. If the Finance Committee differs with the recommendation, it shall notify the Board about its concerns and the rationale for those concerns.

The Finance Committee will then present its compensation recommendations to the Board as part of the proposed annual budget. Once approved, compensation will be clearly described in the renewal of MOUs at the beginning of each fiscal year.

E. Tax Documentation. Employees/contractors will receive tax documents by February of each year.

Policy # 112 Leaves and Benefits

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy guides the process of allocating leaves and benefits for employees not including the Minister and contractors.

Policy/ Procedure: All Faiths shall provide fair compensation and reasonable leave time for its employees.

A. Leaves.

1. Definitions. The following definitions apply to leave time and employee benefits.

- a. Day:* For purpose of leaves, a "day" shall mean the number of hours an employee regularly works in a day. In the case of employees without fixed daily schedules, "day" shall mean, during the preceding three months, the average number of hours an

employee worked per week, excluding overtime, divided by 5. For example, for an employee working or averaging 25 hours per week, a day shall consist of 5 hours.

- b. Congregational Year: The Congregational year for leave purposes begins April 1 of one year and ends March 30 of the following year.
- c. Month: An employee accrues benefits if the employee begins employment on or before the 15th day of the month. Therefore, if the employee begins employment after the 15th day of the month, the employee accrues no leave benefits in that month.

2. *Vacation.*

- a. Paid Vacation. Paid vacation shall be available to employees working 25-40 hours per week. Employees working 25-34 hours per week shall receive ten (10) days of paid vacation per calendar year. Employees working 35-40 hours per week shall receive fifteen (15) days of paid vacation per calendar year.
- b. Carryover. Employees are encouraged to use their vacation time in the year in which it is earned. Employees may carry over from one calendar year to the next up to five days of vacation.
- c. Scheduling Vacation Time. Vacation shall be scheduled at a time convenient for the Congregation and with the permission of the Minister and concurrence of the Board of Directors. Employees shall give reasonable notice to the Minister of a request to take vacation.
- d. Cash Out. Vacation time must be used as time off. There is no provision for payment in lieu of vacation time. If an employee resigns or is terminated accrued time will not be paid.
- e. Usage. Vacation time may be used in increments of not less than one (1) day for employees.

3. *Sick Leave.*

- a. Accrual. Sick leave shall be available to employees working 25 or more hours per week. Employees working 25-34 hours per week shall receive 3 days of sick leave per calendar year. Employees working 35-40 hours per week shall receive 5 days of sick leave per calendar year.
- b. Carryover. Employees who work 25 or more hours per week may not carry accrued sick leave from one calendar year to the next. Any additional accrued time on the books at the end of the calendar year or in the event of resignation or termination shall be forfeited.
- c. Usage. An employee who must be absent due to illness shall notify the Minister or Congregational Administrator as soon as s\he is aware of the need to be absent.

- 4. Compensatory Time. Although the employer cannot compel an hourly employee to work more hours than the employee's regular schedule, should a need arise periodically, the employer may offer time off as compensation for time worked over and above the employee's regular hours. No more than 30 hours of compensatory time shall be

exchanged in any one year. Furthermore, compensation time shall only be accrued and used with the supervisor's prior approval and shall be used as soon as possible at the employer's discretion and convenience. Hourly employees who earn compensation time must document and report its accrual and use on their time sheets.

5. Personal Time Off

- a. Accrual. Employees shall be entitled to personal time off in an amount not to exceed two (2) days per year.
- b. Usage. Personal time off may be used as the employee sees fit and with approval of the Minister. Personal time off is to be used in increments of not less than one day.
- c. Carryover. Unused personal time off may not be carried over from year to year and will be forfeited in the event of resignation or termination.

6. Holidays.

- a. Eligibility: Employees working 25-40 hours per week are eligible for paid leave on the holidays designated in this policy. Employees working 1-24 hours per week may take these days off but will not be compensated. If a day off cannot be taken on the actual holiday, the employee and the Minister shall designate another day off.
- b. Designated Holidays. Days considered as holidays are: New Year's Day, Martin Luther King Day, Memorial Day, Fourth of July, Labor Day, Indigenous Peoples Day, Thanksgiving Day, the day after Thanksgiving, and Christmas Day.

7. Bereavement Leave. If an immediate family Member of an employee dies, the employee shall be eligible for up to five (5) days of bereavement leave and will be compensated for two (2) of those days. The determination as to an immediate family Member's status shall be made by the Minister.

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

9. Emergency Leave. At the discretion of the Minister, employees may be granted leave in situations involving emergencies within the immediate family. Such time off shall be deducted from sick and personal leave. In the event there is no sick or personal leave accrued, the employee will not be compensated.

10. Other Leave Time. Congregation employees shall be entitled other leaves as may be required by state or federal law.

B. Benefits.

1. Retirement. Employees who meet eligibility requirements shall be enrolled in the Congregation's retirement plan and are subject to plan requirements.

2. Disability Insurance. Employees may choose to be enrolled in a Disability Insurance plan. Employees pay the Disability Insurance premiums via payroll deductions.

3. Health insurance.

- a. Eligibility: After the first three months of employment employees are eligible for group health insurance benefits as described below as per UUA guidelines.

- b. Premium Payments: The Congregation shall pay 80% of group health insurance premium for each eligible enrolled employee for the base group medical plan selected by the Congregation. Employees shall pay for any balance of the premium exceeding this amount, including additional amounts for selection of an enhanced medical plan.
- c. Dependent Coverage: Employees may elect to cover their eligible dependents (as defined by the UUA health insurance policy) at their own expense.
- d. Alternate Coverage Options: Employees who have attained the age 65 or more, are enrolled in Medicare and work 40 hours per week or employees who have an alternative insurance plan may opt to waive participation in the group health insurance plan. Employees who are younger than 25 may provide proof of insurance coverage elsewhere.

Policy # 113 Grievance Procedure

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the process of an employee or independent contractor filing a grievance.

Policy/ Procedure:

Any employee or contractor of the Congregation may file a grievance and shall proceed as follows:

Level 1. Within 15 calendar days after the cause of the grievance, the employee/contractor shall informally discuss the problem with the Minister and shall identify the problem as a grievance or potential grievance.

Level 2. If the employee/independent contractor is not satisfied with the outcome of the discussion with the Minister, then the employee may, within 15 calendar days of the discussion with the Minister, submit a written statement of the problem and the requested solution to the President of the Board of Directors, with a copy to the Minister.

Level 3. The Board shall grant the employee time on the next Board meeting agenda to present his/her grievance. The Board shall respond to the grievance presentation of the employee/independent contractor. After the presentation and response, the Board may meet in closed session to discuss the grievance and the Board's decision. Within 15 calendar days of the meeting at which the presentation is made, the Board shall render its written decision on the grievance. The Board's decision is final.

Policy # 114 Bonuses

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the process for gifting a bonus to employees.

Policy/ Procedure: A special collection will be taken in December to provide employee bonuses. The Board supports having an announcement of this collection made in a letter form from the Board Chair. All staff/hourly employees will receive bonuses, amounts to be determined by the Board of Directors, as part of the special collection in December for bonuses.

Policy# 115 Equal Employment Opportunity

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to applicants who wish to be considered for employment or as a contractor at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. **Equal Employment Opportunity.** The Congregation affirms its commitment to equal employment opportunity for all individuals. Decisions about recruiting, hiring, training, compensation, benefits, and all similar employment decisions must be made in compliance with federal, state, and local laws and without regard to race, color, gender, sexual orientation, national origin, age, disability or any other class protected by law. Any discrimination in the workplace based upon any protected classification is illegal and against policy. All Faiths adds gender identity and sexual orientation as classes that also deserve equal employment opportunity.

B. **Discrimination Concerns.** Employees/contractors who have questions about discrimination in the workplace, or who believe this policy has not been honored, should report their concerns immediately to the Minister or a member of the Board of Directors.

C. **No Retaliation.** Retaliation against individuals who make a claim of discrimination or participate in the investigation of such a claim is prohibited by this policy.

Policy # 116 Harassment

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to applicants who wish to be considered for employment or as a contractor or are currently employed at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. **Workplace Conduct.** All Faiths prohibits conduct that shows hostility or an aversion toward an individual because of his/her race, color, religion, gender, gender identity, sexual orientation, national origin, age, disability or any other protected class, and that has the purpose or effect of creating an intimidating, hostile, or offensive work environment; or has the purpose or effect of unreasonably interfering with an individual's work performance; or otherwise adversely affects an individual's employment opportunities.

B. *Examples of Harassment.* Some examples of conduct which may constitute harassment, depending on the circumstances, include, but are not limited to, the following: epithets, slurs, threatening or intimidating acts, or written or graphic material, oral or physical acts that purport to be jokes or pranks, repeated and unwelcomed gestures, unwelcomed physical proximity, physical contact that is sexual in nature or is sexually motivated, or use of sexual connotations.

C. *Reporting Harassment.* Every incident of harassment should be reported to and will be investigated by the Minister or Chair of the Board of Directors. Harassment by employee/contractors will not be tolerated and the employee/contractor may receive disciplinary action up to and including termination.

Policy # 117 Notice of Separation from Employment

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees, with exception of the Minister, and contractors employed by All Faiths Unitarian Congregation.

Policy/ Procedure:

A. *Resignation Notification.* Employees and contractors who resign are requested to give at least two weeks' notice in writing to enable the Congregation to find a suitable replacement.

B. *Implied Resignation.* Any employee/contractor who is absent for three consecutive workdays without notifying his/her supervisor will be deemed to have resigned.

Policy # 118 Confidentiality

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy guides the commitment to confidentiality of information about or pertaining to our staff/contractors, members, and friends at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. *Confidentiality Requirements.* Some employees/contractors have access to confidential information about the employer, members, friends, and other staff members. Such information must remain confidential and may not be released, removed from the premises, copied, transmitted, or in any other way used for any purpose by employees/contractors outside the scope of their employment.

B. *Requests for Employee Information.* All requests for information concerning past or present employees/contractors from other organizations or individuals should be directed to the Minister.

Policy #119 Conflict of Interest

Date Adopted: January 2025

Date Reviewed/Revised: February 2022

Reviewing Party: Board of Directors

Scope: This policy guides employees/contractors of All Faiths Unitarian Congregation related to conflict of interest.

Policy/ Procedure:

A. Conflict of Interest Situations. Employees/contractors are expected to avoid conflict of interest situations. Conflict of interest is defined as any situation where an employee might attain personal gain by disseminating information obtained through employment with All Faiths. A situation wherein the employee disseminates information which might be a detriment to All Faiths, either monetarily or to its public image, is also considered a conflict if the information or personal contact is not generally available except through employment with All Faiths.

B. Business/Financial Conflicts. Employees/contractors shall not engage in any business transaction and shall not have a financial or other personal interest which is incompatible with their employment duties or which would impair their judgment or actions in the performance of their duties for All Faiths. Employees/contractors who have questions about whether an activity violates this policy should discuss the matter with the Minister.

Policy # 120 Safety and Accidents

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees and independent contractors at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. Importance of Safety. The safety of employees/independent contractors, as well as members and visitors, is of paramount concern. All employees and independent contractors are expected to abide by accepted safety standards at all times. They should know the whereabouts of fire extinguishers, the Automatic External Defibrillator (AED) and the first aid kit.

B. Reporting Unsafe Situations. Any unsafe condition, equipment or practice observed by an employee/contractor should be reported immediately to the Minister or President of the Board of Directors. All on-the-job accidents or injuries to employees and contractors, no matter how minor, should likewise be reported immediately to the Minister or President of the Board of Directors. The employee/ contractor must complete the appropriate forms which are available from the Congregational Administrator. In the event of a fire or other emergency, first responders should be called immediately, and all staff/contractors and members/friends should be notified to evacuate.

C. Consequences of Failure to Comply. Failure to comply with health and safety standards will result in disciplinary action as outlined in these policies.

Policy #121 Personal Property

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees and contractors at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. Responsibility for Personal Property. All Faiths cannot be responsible for damage, theft, or loss of personal property, including loss or damage to vehicles or other property in or on the Congregation's property. Staff and contractors are responsible for their personal property and will not store their personal property on campus.

B. Reporting Losses. Employees/contractors should report any lost or stolen items to the Congregational Administrator so that the item can be returned if it is found.

C. Found Items. If an employee or contractor finds an item, it should be immediately turned in to the Congregational Administrator.

Policy # 122 Workplace Threats and Violence

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees and contractors at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. Zero Tolerance for Workplace Threats and Violence. Threats, threatening behavior, or acts of aggression or violence against persons by anyone on campus will not be tolerated. Any employee or contractor who verbally or physically threatens another, exhibits threatening behavior, or engages in violent acts may be removed and will remain off campus without pay pending the outcome of an investigation. If the Board of Directors determines that a violation of this policy has occurred, the Board may take disciplinary action up to and including termination and may take legal action as appropriate.

B. Reporting Threatening or Violent Behavior. All employees/contractors shall inform the Minister or the Chair of the Board of Directors of any behavior that they have witnessed or experienced, which they regard as threatening or violent, when that behavior is job related or is connected to employment.

Policy # 123 Inspection Rights

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees and contractors at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. Inspection of Storage Facilities. The Congregation has on its premises storage facilities such as desks, file cabinets, closets, and storage areas for the use by employees/independent contractors; however, the Board of Directors makes no representations that they are secure. The storage of any unauthorized alcohol, illegal drugs, or drug-related paraphernalia is prohibited on campus. The Board of Directors, and Minister as designee, reserves the right to open and inspect any desk, file cabinet, storage closet, or storage area at any time and without prior notice or consent.

B. Personal Locks Not Allowed. Employees and contractors may not use personal locks on any storage area, closet, cabinet or desks.

Policy # 124 Employment Authorization

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees and independent contractors at All Faiths Unitarian Congregation.

Policy/ Procedure:

A. Federal law requires that perspective employees/contractors must show proof of eligibility to work in the United States in the position for which they are applying. Employees/independent contractors must provide an original document or documents to the Board of Directors, or to the Congregational Administrator as the Board's designee, that establish identity and employment eligibility from the date employment begins.

B. Presenting false or misleading documentation will result in immediate termination.

Policy # 125 Credentials

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees and contractors at All Faiths Unitarian Congregation

Policy/ Procedure:

A. Proof of Eligibility to Work. Employees/contractors must provide documentation, specifically a resume, to the Board of Directors or to the Congregational Administrator as the Board's designee, that documents professional work experience, academic degrees, and certifications from the date employment begins.

B. False Documents. Presenting false or misleading documentation will result in immediate termination.

SECTION 200 BUILDING & GROUNDS USE POLICIES

Policy # 201 Building Use

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy relates to those (members, friends, community, herein referred to as Client) requesting to use All Faiths Building and Grounds and provides the process to do so.

Policy/Procedure: All Faiths facilities can be used by members, friends, and community groups if the activity is consistent with our mission and reflects our values.

A. Request to Use Facilities. Those requesting to use All Faiths Building and Grounds will be required to fill out a Facility Use Reservation Request form.

B. Member Use of Facilities for Events not Open to the Congregation.

If the following conditions are met, a Member (as defined by All Faiths' bylaws) may request to use All Faiths' space for events that are not open to the entire Congregation.

1. *Values/Mission.* The activity is within the values and mission of the Congregation and Unitarian Universalism.
2. *Availability.* The space requested is not already reserved for a Congregational function. The Congregation reserves the right to change the agreement and offer alternative space if the need arises to use the space for a Congregation-wide activity without change in fee.
3. *Inclusive Events.* If a Member is planning an activity that fits within our shared ministry and is open to the Congregation, they will not be responsible for a fee, but must complete a Facility Use Reservation Request form.

C. Standard Unavailable Dates. The facility is not available on Sundays, New Year's Day, Martin Luther King, Jr. Day, Fourth of July, Labor Day, Indigenous Peoples Day, Halloween, Thanksgiving and the day after Thanksgiving, or December 24 and 25.

D. Memorial Garden. The Memorial Garden may not be used for any purpose other than memorial service brick laying ceremonies.

E. Solicitation. Client is not permitted to solicit general population (passersby) to attend or participate in their event by handouts or personal contact during their reserved use of All Faiths.

F. Supervision by Client. It is understood that the Client is responsible for all persons attending the event.

G. Alcoholic Beverage Use: Use of alcoholic beverages is limited to beer, wine and/or champagne. Alcohol is not to be consumed by any participant under the age of 21.

H. Long Term Rental Approval. Long-term rentals must be approved by the Board of Directors.

I. Grounds/Landscaping. Any permanent changes to the property or landscaping must be approved by the Board of Directors, except for seasonal changes managed by the Building and

Grounds Committee. Gifts of plantings or outdoor displays shall become the property of the Congregation. These will be maintained at the discretion of the Board of Directors

Policy # 202 Keys

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy guides the dissemination of keys.

Policy/Procedure:

A. Control of Keys. The Congregational Administrator is the only person authorized to copy and issue keys.

B. Key Inventory. All keys issued will be maintained in a “Key Inventory” by the Congregational Administrator (see file named “Key Inventory.”)

Policy # 203 Schedule of Fees

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy offers a schedule of rental fees for use of All Faiths facilities by members, friends, non-members, and groups in the community (“Facility Use Reservation Form can be obtained from the Congregational Administrator).

Policy # 204 Art Displays

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy pertains to the display, gifting, and loan of members’ and Friends’ art.

Policy/ Procedure: members and friends who are artists may be asked or volunteer to share a piece or pieces of their work to enhance the beauty of our building or raise awareness of certain themes that support our mission. This policy sets forth the parameters of accepting and hanging art.

A. Gifts of Art. Gifts of art shall become the property of the Congregation. These may be accepted or hung at the discretion of the Board of Directors, stored for future display, reframed, or otherwise used in the best interest of the Congregation. Unless the donor specifically agrees, art cannot be sold to benefit the Congregation. If the giver requests, per IRS requirements, the Congregational Administrator will provide a letter noting the receipt of the art, the date of the donation and a reasonable description of the art. For donations valued at less than \$5,000, All Faiths will not value it, appraise it, nor sign a receipt suggesting its value. If the art is valued at more than \$5,000 and the donor has a certified appraisal for the art, we will complete IRS Form 8283 as required by the IRS to accompany the donor’s appraisal in support of a possible tax reduction.

B. Loans of Art. All loans of art are temporary. Art which is loaned to the Congregation will be hung for a time specified by the Board of Directors. This shall not exceed two months. One artist may hang several pieces of art for the specified time and may offer other work six months after their previous two-month display. The Congregation will take reasonable precautions to prevent loss or damage to work while being displayed but shall not be responsible for loss or damage while on display. The Congregation does not insure art belonging to someone else.

C. Art Display Locations.

1. *Community Room/Entry Hall.* Art may be hung in the community room or entry hall at the discretion of the board. on the two large spaces on the west wall either side of the Community Room pass through. More than one piece may be hung on each side if they are stacked, paired, and similar in size. Also, there is one space on the south wall of the Community Room where art may be hung. Consult the Congregational Administrator for acceptable methods for hanging.

2. *Sanctuary.* No art displays will be hung in the sanctuary.

D. Standards for Art. Art which is to be hung will not be judged or juried. All art must be appropriate and compatible and not in conflict with the Congregation's mission and beliefs.

Policy # 205 Use of Kitchen, Community Room and Bathrooms

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy applies to all who use the kitchen and the Community Room to guarantee those spaces are clean, organized, uncluttered and ready for use at all times. The intent is to clearly state that it is the responsibility of the group (persons) setting up to also clean the facility and ready it for future use.

Policy/ Procedure:

A. Responsibility for Cleaning. The kitchen, community room, and bathrooms will be cleaned by the group or individuals using it so that it may be returned to a clean and usable place for future use.

1. Groups wishing to use these spaces must first schedule the date with the Congregational Administrator.
2. Groups or individuals will be informed of the expectations for use and cleanup of the room. The user will be presented with a copy the following Rules for Usage:
 - a) All kitchen utensils, bowls, platters, cups, spoons etc. are to be collected at the end of use and cleaned. Those that fit in the dishwasher will be placed therein.
 - b) Return all utensils, bowls, platters, etc. that are not placed in dishwasher to their designated storage spaces for future use.
 - c) Any tablecloths removed from storage and used are to be laundered, folded and returned to their designated storage space. Tablecloths may be taken out of the All Faiths facility for laundering.

- d) All surfaces used to prepare food, serve food or tables that are used to eat on must be damp wiped clean.
- e) All waste must be deposited in the proper containers.

B. Containers Brought into the Facility. When persons who bring food to be served are leaving the facility, they must take any serving containers etc. they have brought with them to the facility.

SECTION 300 HEALTH AND SAFETY POLICIES

Policy # 301 Hurricane Preparedness

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: The Atlantic hurricane season is the period in a year when hurricanes and tropical storms form in the Atlantic Ocean. The season is currently defined as the time frame from June 1 through November 30, though in the past the season was defined as a shorter time frame. The implementation of this plan will prepare our members, buildings, and grounds for hurricanes.

Policy/Procedure:

The following steps will be taken to prepare All Faiths for the hurricane season.

A. Plan When the Season is Upon Us

1. *Building and Ground Committee Actions.* On or around June 1 of each year the Building and Grounds Committee will survey our building and grounds and develop a tropical storm action plan that addresses steps required to secure our building, secure objects outside our building, and identify any necessary pruning and grounds cleanup that must be completed to minimize post-storm cleanup.
2. *Newsletter Reminders.* Each year the June Newsletter will offer the Congregation hurricane preparedness tips and reminders as well as a brief description of the Hurricane Plan.
3. *Board of Directors Actions.* Each year in June the Board of Directors will review the Hurricane Plan during their scheduled meeting to review roles and responsibilities.

B. Plan When a Hurricane is Imminent.

1. *Contacting Members/Friends.* Each Member and Friend listed in the directory will be contacted to ensure preparedness and a plan for safety.
2. *Assistance Lists.* Those contacting members and friends will maintain a list of those offering lodging, supplies, and other assistance. Those needing assistance will be linked to those offering.
3. *Outside Items.* Building and Grounds and the Administrator will move items located outside the building to inside the building. Volunteers will be called upon to assist in implementing the plan when a storm is predicted to hit Fort Myers.
4. *Equipment.* Equipment owned by the Congregation such as computers, copying equipment, etc. will be disconnected and stored in a place that is likely to remain secure and dry. The Administrator will be responsible for securing those items.

5. *Notices to the Congregation.* The Administrator will create an outgoing phone message, a Facebook post, and email message canceling Sunday services, all Congregational meetings, and activities until further notice.

6. *Office Closure.* The office will be closed one to two days prior to the hurricane's anticipated arrival allowing the Minister and staff to personally prepare.

7. *Facility Use as Shelter.* Because the Congregation's building does not meet any of the tests for safety during a hurricane (building integrity, food supplies, medical assistance, etc.), it may not be used as a shelter for members during such a storm. members are urged to evacuate the area as early as possible. As a last resort, members should seek shelter in a designated public shelter that will provide food, medical care, and emergency aid. Local radio and television stations will announce which shelters are open.

8. *Emergency/Insurance Contact Information.* The Administrator will prepare a list of emergency numbers and contact information for the Congregation's insurance provider. That list will be distributed to the Board of Directors and Minister.

C. Plan for When a Hurricane Has Arrived.

1. *Follow-up Contacts.* Those contacting members and friends will attempt to make at least one contact via phone, text, etc. with those assigned to them.

2. *Office Closure.* The office will remain closed. Sunday services, all Congregational meetings, and activities are cancelled.

3. *Minister and Administrator Duties.* The Minister and Administrator will continue to conduct as much Congregational business as they can and will be compensated for all days out of the office.

D. Post-Hurricane Plan.

1. *Advisory Adherence.* All Faiths will adhere to advisories offered by local and state officials.

2. *Assessment of Facility/Grounds* When safe, Building and Grounds will assess the building and property for damage and will work with the Board and Administrator to create a plan to address any issues. The Building and Grounds Committee and the Administrator will create a plan for general clean-up of the interior and surrounding property. They will call upon volunteers for assistance.

3. *Office Closure.* The office will remain closed. All Congregational meetings and activities will be cancelled. The Minister and Administrator will continue to conduct as much Congregational business as they can and will be compensated for all days out of the office.

4. *Office Re-opening.* The office will open and the Minister and staff will return once electricity, water, and systems used to communicate are restored.

5. *Post-Hurricane Contacts.* As allowed by conditions, the Administrator will create an outgoing phone message, a Facebook post, and email message updating the Congregation. Those contacting members and friends will attempt to make at least one contact via phone, text, etc. with those assigned to them.

6. *Resumption of Services.* The Minister will decide when to resume Sunday services.

Policy # 302 Cooling and Heating
Date Adopted: February 2022
Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy applies to employees/contractors, members, friends, visitors, and renters of All Faiths Unitarian Congregation.

Policy/ Procedure: Temperature settings have been standardized to be economical and efficient while maintaining a comfortable environment in the building.

A. Authority to Program Cooling/Heating Systems. The Building and Grounds Chairperson, or his/her designee, are the authorized members to program the cooling/heating systems.

B. Temperature Control. It shall be the policy to operate the facilities at a comfortable temperature, thereby providing a welcoming place for members, staff, guests, and renters. At the same time, the Congregation recognizes the need to be a “green” facility and operate the air conditioning and heating only as required. Therefore, the temperature shall be maintained at approximately 75 degrees for cooling and 68 degrees for heating, but only for those times during which the sanctuary, community room, kitchen, offices, classrooms, or other rooms are scheduled for use.

C. Temperature Adjustments for Upcoming Use. It may be necessary to operate the heating or air conditioning systems well in advance of a meeting so that the meeting area will be at the proper temperature at the time of the meeting; this should not be construed as wasting power. Persons or groups desiring to use the Congregation’s facilities should contact office staff to schedule events in advance to assure that rooms will be comfortable at the scheduled times.

D. Limited Office Temperature Adjustments. The actual temperature in offices may be adjusted slightly, to improve the comfort level, by changing the temperature on the thermostats. This can be done by anyone. However, the air conditioning cannot be lowered below 72 degrees and the heat cannot be raised above 68 degrees.

F. Non-Use Settings. When not in use, the A/C temperature will be kept at 78 degrees.

Policy # 303 Food Storage
Date Adopted: February 2022
Date Reviewed/Revised: February 2022

Reviewing Party: Cong. Admin.

Scope: This policy applies to employees/contractors, members, friends, visitors, and renters of All Faiths Unitarian Congregation.

Policy/ Procedure:

To ensure health and safety, the following guidelines will be implemented when storing food.

A. Pantry/Cupboards.

1. General Guidelines. Conditions should be dry, cool and dark. Always store foods in the coolest cabinets away from the range, oven, water heater, dishwasher or any hot pipes.

Although many staples and pantry items have a long shelf life, store only what you expect to use within the recommended storage times.

2. *Storage Containers.* To prevent foods from deteriorating in the pantry, store them in metal, glass or plastic containers. Keep these containers, as well as commercially canned foods, clean and free of dust, which can drop into them when opened.

3. *Pest Control and Cleaning.* Treat storage areas for pests and clean the pantry periodically to remove food particles.

4. *Expired Items.* Check expiration dates on stored food. Discard items that are past their expiration date.

Policy # 304 Animals

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees/contractors, members, friends, visitors, and renters of All Faiths Unitarian Congregation.

Policy/ Procedure: In order to compassionately accommodate the needs of our Congregational families, there are times when members and friends of the Congregation should be allowed to bring their family pets on a limited basis to events at the church property. This falls in line with our priority of making our Congregation an inclusive space.

A. Guidelines. For the comfort of all attendees, some guidelines should be followed.

1. *Control.* Ensuring the animal would be under the control of the owner (e.g. leash, muzzle, cage, as appropriate).

2. *Cleanliness.* Preventing any pet soiling of the property.

3. *Noise Control.* If a pet disturbs an activity, the owner must step outside with the pet.

4. *Separation.* The owner must separate its pet in a manner to accommodate service participants with pet allergies or fears.

Policy # 305 Alcohol Use

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy governs the use and sale and of alcohol on campus and the purchase of alcohol using Congregational funds.

Policy/ Procedure: Per the Congregation's insurance policy, no alcohol will be sold on the property or at functions on the property. However, alcohol use is allowed at designated events or dinners as a matter of sharing with friends. The following guidelines apply:

A. No Donations or Charges for Alcohol. Donations will not be charged or accepted for alcoholic beverages by members, friends, or those renting our buildings and space. Donations may be made to the Congregation for items other than alcoholic beverages. No dollar amount shall be charged for alcoholic beverages.

B. Donated Money. Money that is collected as a donation or admission to an event are considered the Congregation's funds. These funds will not be used to purchase alcohol. members and friends may not requisition for funds and will not be reimbursed for the purchase of alcohol using Congregational or personal funds.

Policy # 306 Smoking

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees/contractors, members, friends, visitors, and renters of All Faiths Unitarian Congregation.

Policy/ Procedure: Smoking (cigarettes, cigars, pipes, use of vaporizers, etc.), is not allowed inside the building or on the grounds. This policy with reference to smoking outside the building can be relaxed when the building is being used by an outside group.

Policy # 307 Personal Safety

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy guides the process of ensuring personal safety while on campus.

Policy/ Procedure: Our building and grounds security relies heavily on the members who assume responsibility for such tasks as checking doors before and after events and making sure lights are off before leaving the premises. By defining security needs, this written security policy emphasizes that security is everyone's responsibility.

A. Locking the Building. The person in charge of an event is responsible for ensuring ALL doors are locked and lights are off after the event. If the person in charge cannot stay until the end of the event, they should arrange for a designated person to assume that responsibility. Tenants using our facilities must have a designated person responsible for checking the building. This must be addressed in their contract.

B. Leaving the Building at Night. Verify that no one is left alone in the building at night after an event, meeting, or program.

D. Addressing Requests for Assistance. Outside requests for assistance will be dealt with on an individual basis depending on the resources (informational or financial) available at the time of the request.

E. Other Safety Guidance. Other safety actions to be taken include:

1. Report any suspicious activity to the Police Department.
2. Do not leave the cash box unattended.

Policy # 308 Child Safety

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Scope: This policy relates to the safety of children and youth in the Congregation while on the property or participating in any All Faiths sponsored program.

Policy/ Procedure:

All children who come to the Congregation have the right to be and feel safe. The Congregation is committed to the safety and well-being of all children and young people who participate in our programs. The welfare and safety of those children is a priority. We aim to create an environment where children may have fun and feel safe. Our commitment reflects our Principles, most notably:

- the inherent worth and dignity of every person
- justice, equity and compassion in human relations
- acceptance of one another and encouragement to spiritual growth in our congregations

This policy has been developed in collaboration with the Congregation's employees, volunteers and the children who rely on our services as well as their families.

A. *Children's Rights to Safety and Participation.* Employees and volunteers encourage children to express their opinions and to make suggestions, especially on matters that directly affect them. We actively encourage children who rely on our services to have input about things that are important to them. We value diversity and do not tolerate any discriminatory practices. We teach children about what they can do if they feel unsafe. We act on the concerns children and parents raise with us.

B. *Recruitment of Employees and Volunteers.* The Congregation applies to best practice standards in the recruitment and screening of employees and volunteers. We interview and conduct reference checks of employees and volunteers and require criminal history reports for staff positions (see Policy 102 re: background checks).

C. *Reporting and Responding to Suspected Abuse and Neglect.* We will not tolerate incidents of child abuse.

1. Examples of Abuse or Neglect. Abuse and neglect include:

- *Physical abuse*: when a person purposefully injures or threatens a child or young person.
- *Emotional abuse*: an attack on a child or young person or that person's self-esteem as by bullying, name calling, threatening, ridiculing, intimidating or isolating the child.
- *Sexual abuse*: any sexual act or threat imposed on a child.
- *Neglect*: when a child is harmed by the failure to provide basic physical or emotional necessities.

2. *Notification of Suspected Child Mistreatment.* Employees and volunteers must notify the Minister or the Chair of the Congregation's Board of Directors as soon as practicable if they have a reasonable suspicion that a child has been abused or neglected. The Board of Directors is responsible for the overall welfare and well-being of children and youth participating in All Faiths activities conducted in our building or participating in All Faiths-sponsored activities conducted elsewhere.

The Minister, Staff, Contractors, Members, and Friends are considered to be mandated reporters.

D. Employees' and Volunteers' Responsibilities/ Appropriate Interactions with Children. In addition to being responsible for the welfare and well-being of children and youth participating in All Faiths programs, the Board of Directors is also responsible for the overall well-being of employees and volunteers working with our youth and children.

Employees and volunteers shall:

1. Establish and maintain a child safe environment, i.e. window blinds should be left open when children are present in the religious education room.
2. Treat children and young people with respect, listen to their ideas and opinions and protect their well-being.
3. Be professional in their actions through their use of language presentation, manner and punctuality.
4. Resolve conflicts between employees or volunteers and the children/youth in their care fairly and promptly. Report any breaches of these standards of behavior or violation of All Faiths policies regarding interactions of children/youth through established procedures.
5. Respect the privacy of children and their families and only disclose information to people who have a need to know.
6. Ensure that each child remains in the classroom until greeted by the appropriate parent or guardian.

E. Inappropriate Actions. Employees and Volunteers shall *not*:

1. Initiate unnecessary physical contact with children or do things of a personal nature that children can do for themselves.
2. Show favoritism through gifts or inappropriate attention.

F. Listening to and Reporting Child Abuse and Neglect. If a child or youth tells his/her story to a teacher, Minister, or Friend, some basic guidance to apply includes:

1. Listen carefully but do not ask investigative questions.
2. Provide an appropriate, private setting.
3. Believe the story and comfort the child/youth.
4. Be honest in your conversation with the child/youth. Don't make promises you cannot keep.

5. Write notes on what is said. Notes will enable you to make an accurate report.
6. Report the incident to the Minister or Board Chair as soon as possible.
7. Share the information with parents/guardian.
8. If the parent/guardian is the perpetrator, work with the Minister or the Board Chair and the local Florida Department of Children and Families to resolve the issue in a manner that protects the child.

G. Follow-up Reporting. As the adult hearing the child’s concern, you are not asked to decide whether a crime has been committed; however, the law states you are to report what a reasonable person would consider abuse or neglect. **The Minister, Staff, Contractors, and Members and Friends are considered to be mandated reporters.**

1. *Required Reporting.* The Minister or Board Chair will assist the Member in making a verbal report to authorities. A written report must be completed within 48 hours.
2. *Confidentiality.* All involved must respect confidentiality.
3. *Cooperation with Authorities.* All involved must cooperate with police/agencies.

Policy # 309 Supervision of Children and Youth

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Scope: This policy guides those providing supervision of children of the Congregation.

Policy/Procedure: No person with a known child-related offense record may serve on a committee determining standards or programs involving children or youth. If he or she is serving a committee that takes up business directly related to children or youth, the person may not participate in the discussion or decision making.

A. Dissemination of Child/Youth Related Policies. To ensure that children and youth are supervised appropriately, All Faiths will educate all members and friends about policy and guidelines.

B. General Guidelines. The following general guidelines apply:

1. *Open Door Classrooms.* At all times doors for rooms used as religious education classrooms will be open when children/youth classes are on-going.
2. *Parental/Guardian Permission.* Adults supervising children and youth must seek parent/guardian permission to participate in All Faiths programs and activities.
3. *Emergency Contact Information.* The parent(s) or guardian of children/youths participating in an All Faiths class/program must provide emergency contact information for his/her child or youth who is participating in the class. That information must be readily available to the supervising adult.
4. *Special Needs.* Parents/guardians must provide information about any special needs of their children and/or youths participating in the class. That information must be made available to the supervising adult.

5. *Reporting Suspected Abuse or Neglect.* All Faiths' policy on child safety (Policy #308 in this manual) applies including the reporting of suspected abuse or neglect.

C. Off-site Activities. If an All Faiths child/youth activity requires travel off-site, the following guidelines must be met:

1. *Permission.* Prior parent/guardian written permission is required.
2. *Approval of Driver(s).* Specific drivers must be approved by the Board of Directors before the transport of children/youth off-site occurs.
3. *Seatbelt Safety.* Every person transported must wear a seatbelt.
4. *Emergency Contact Information.* The drivers and/or supervising adults must carry emergency contact information about each passenger with them in the vehicle.
5. *State Required Automobile Documents.* Before leaving the All Faiths premises, each driver must provide proof of license, insurance, and registration to the lead organizer of the trip.

D. On-Site Activities. On-site children/youth programs must meet the following criteria.

1. *Only All Faiths-Sponsored Programs.* Children and youth will only meet with adults for programs/activities sponsored by the Congregation.
2. *Building Access.* The building will not be accessed by children and youth until two adults are present.
3. *Open Classroom Doors.* Classroom doors are to remain unlocked and open any time a youth or children class is being conducted.

SECTION 400 COMMUNICATION/SOCIAL MEDIA/PRESS

Policy # 401 Email Database

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy guides the collection of information for the Congregation's database and how it is used.

Policy/ Procedure: The Congregation shall maintain a database of its members, friends, visitors and community partners.

A. Database Purposes. The purposes of maintaining the Congregation's database are to:

1. Facilitate communication and service to the Congregation members and friends;
2. Serve as a resource to match individuals and groups to church programs; and
3. Facilitate the administrative functions of the Congregation.

B. Submission and Sharing of Information. Submission of information to the database is voluntary. The information in the database will not be shared with outside organizations. Information provided by members and friends will not be published or shared within church publications without consent.

C. Access to the Database. The members of the Board of Directors, the Minister, the Congregational Administrator, and the Finance Chair shall have access to the database. Other Congregational leaders (committee chairs, project leaders, etc.) will work with the Congregational Administrator to obtain relevant access or information from the database. If there are any issues related to the confidentiality of any database information and whether it should be provided to a Congregational leader at her/his request, the issue should first be addressed to the Minister. If the leader requesting the information is not satisfied by the Minister's decision on disclosure, or the Minister recuses him/herself, the issue shall then be resolved by the Executive Committee of the Board of Directors. Nothing in this policy shall be construed to require the Minister to divulge any information given to him/her in confidence by a Member, Friend, visitor or any other individual.

D. Access to the All Faiths Email List. No one will be granted access to the e-mail list database maintained by the Congregation to send messages, announcements, or share concerns. This email database is not for the use of members.

E. Database Updates. The Congregational Administrator will collect updates and new information.

Policy # 402 Email Directed from the Office

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Cong. Admin.

Scope: This policy governs the process of sending e-mails from the office to the membership.

Policy/ Procedure: Responding to the needs of our Congregation, which has indicated a limited number of emails is preferred, this policy has been developed to reduce the number of e-mail communications sent from the office to our members and friends.

A. Dissemination of Emails. All emails from All Faiths' office sent to our members and friends are sent by our Administrator from the Congregation's address. Others responsible for communications from a committee or an All Faiths program or project who would like to address members and friends via email must coordinate with the Administrator who will send the email.

B. Weekly Announcements. Each week the Administrator will send one email advertising the service and music for the coming Sunday. In addition, the Administrator will add any announcements that may be of interest to the Congregation or pastoral care needs (death, illness, celebration, congratulations, and other needs) to this email. If an event or program, whether it be Congregational or community, is happening within the next 7 days after the weekly email is sent a separate email will be sent by the Administrator. If an announcement, event, program or notice, whether it be Congregational or community, is happening after the next newsletter cycle, a separate email will not be sent; that information will be included in the next newsletter published by the Administrator.

1. Dissemination of UU/All Faiths Information. Official messages from the UUA, UUSC, the Board of Directors and the Minister are forwarded to the Congregation through the weekly

announcements or monthly newsletter. Ongoing Congregational activities will also routinely be forwarded through the weekly announcements.

2. *Information Never Forwarded.* Messages from political parties or from for-profit organizations should never be forwarded.

C. Care and Support. It is right to notify our members and friends about care and support needs of fellow congregants. This is a way we minister to one another. Care and support needs almost always require immediate attention. Once a care and support need is identified by anyone in the Congregation, contact the Care and Support Coordinator or Administrator who will communicate with our members and friends via a timely email from the office.

Policy # 403 Social Media

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Minister/Cong. Admin

Scope: This policy governs the administration of the Congregation's social media.

Policy/Procedure: All social media postings shall be consistent with the values held by the All Faiths Congregation.

A. Social Media Content. Most of the Facebook/Website content will promote activities occurring at All Faiths, activities in which members of All Faiths are participating, and events in the Southern Region that are sponsored by Unitarian Universalist churches or UUA affiliated organizations. Other types of content will include personal comments, photos, etc. from the Page Administrators, and people who have "liked" the page. Personal comments and photos must relate to All Faiths activities, members of our Congregation, etc.

B. Page Presentation/Required Content. The All Faiths logo, colors and typefaces should be consistent with graphic guidelines and resemble our other media "branding" styles. The All Faiths statement of identity (our logo) should be prominently displayed.

1. *Minister Information.* The name of the Minister should be easily accessible as well as his/her photo; however, each post should clearly state that Administrator posts are not from the Minister.

2. *All Faiths Contact Information/Links.* All Faiths' contact information should be prominently displayed; links to the All Faiths website, Facebook site, etc. should also be easily accessible.

3. *Members-Only Content.* Content designated as members-only should be password protected and accessible only to members and friends of All Faiths. All Faiths recognizes friends as people who are not official members, but participate, volunteer, and/or make financial contributions on a regular basis. The same guidelines for content intended for the general public shall apply to members and friends as well.

4. *Photos of Children.* Permission must be obtained from the parent/guardian before photos of children are posted.

B. Monitoring Facebook Content. Administrators should monitor the Facebook page and remove any content that does not comply with the guidelines contained herein; habitual offenders may be banned from further contributions to the page.

1. *Daily monitoring.* Postings should be checked for inappropriate content on a daily basis.

2. *Weekly updates.* New content should be added by an administrator at least once per week.

C. Administrators. In addition to the All Faiths Administrator for Communications, one or more representatives of the Communications Committee will be designated as a Facebook administrator and share responsibility for monitoring the content that is presented on Facebook.

D. Administrator(s) Authority. These persons shall have full authority to create, delete and maintain the content, provided that the content:

1. Is maintained within the bounds of these Policies.
2. Is consistent with the Seven Principles of Unitarian Universalism.
3. Avoids slander, libel, violations of copyright, profanity, off-color humor, and advocacy of political candidates not allowed given our tax status.
4. Does not reveal private personal information.
5. Does not advertise commercial businesses.
6. Presents information that is accurate and relevant.
7. When making announcements, concisely sets out the “Who, What, When, Where, Why, How, and How Much” of all items.
8. Is written in clear and grammatically correct prose.
9. Is updated on a timely basis.

E. Administrator Reporting. The person or persons maintaining the All Faiths Facebook page shall report to the Communications Committee, which in turn shall report to the Board of Directors.

Policy # 404 Petitions and Individual Support Requests

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Board of Directors

Scope: This policy applies to employees, contractors, members and friends of the Congregation and guides the process for approval of presenting petitions to the Congregation and requesting political and financial support from the Congregation.

Policy/ Procedure:

A. Petition. Our desire for justice and equity occasionally calls us to organize in numbers. One way to achieve this is to offer signed petitions to legislators and others. All are welcome to request signatures for petitions if the petition is related to an issue in sympathy with Unitarian Universalist values and the ministry of All Faiths. Those wishing to present petitions must coordinate the announcement of the petition and the time and space for signing the petition with the Congregational Administrator. Petitions related to the election of any candidate are not allowed.

B. Individual Support Requests

The Johnson Amendment, which reads (in part) as follows, prohibits individual support requests.

(3) Corporations, and any community chest, fund, or foundation, organized and operated exclusively for religious, charitable, scientific, testing for public safety, literary,

or educational purposes, or to foster national or international amateur sports competition (but only if no part of its activities involve the provision of athletic facilities or equipment), or for the prevention of cruelty to children or animals, no part of the net earnings of which inures to the benefit of any private shareholder or individual, no substantial part of the activities of which is carrying on propaganda, or otherwise attempting, to influence legislation (except as otherwise provided in subsection (h), and which does not participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office.

- 1. Employees and Contractors.** In the event that an employee or contractor would like to become a candidate or is a candidate for local, county, state, or national public office they will not solicit financial support nor use the congregation's database to solicit support.
- 2. Members and Friends.** In the event that a member or friend would like to become a candidate or is a candidate for local, county, state, or national public office they will not solicit financial support nor use the congregation's database to solicit support.

SECTION 500 SANCTUARY/WORSHIP/SERVICES POLICIES/SOCIAL JUSTICE

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Scope: This policy applies to the Minister and Worship Associates who will provide to the congregation high quality and inspirational services.

Policy # 501 Sanctuary and Social Hall

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Scope: The congregation includes in its facility a Sanctuary and Social Hall reserved for its members to participate in Worship Service, Life Celebrations and Celebrations of Life, Concerts, Plays and other activities deemed relevant to meet the needs of the congregation.

Policy #502 Worship Services

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Are held in person at least one time weekly preferably on Sunday, which includes, Welcoming, Announcements, Prayers, Readings, Chalice lighting and extinguishing and Ministerial message. The length of the services may at times vary.

Annual Service are held in person for Founders Day (Feb.), Water Communion (Homecoming-Sept.), Flower Communion (June)

Policy # 503 Life Celebrations (Weddings, Dedications etc.)

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Are held in the Sanctuary or Social Hall when requested and space is available for the event.

These events may also include a gathering for a meal and socializing after the ceremony.

Wedding and Commitment Ceremonies performed by the Minister will require at least one meeting with the minister prior to the ceremony.

Policy # 504 Celebrations of Life (Memorials, Funerals, Internments)

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Are held in the Sanctuary and or Social Hall when requested and space is available for the event. These events may also include a gathering for a meal and socializing after the ceremony (repast).

Memorial Brick and Candle -The congregation includes on its property a Memorial Garden, where a Memorial Brick is laid by request in memory of those who have transitioned. A short ceremony is offered when requested.

Memorial Candle Lighting Ceremony - is offered during the service to grieving families and given as a gift from the congregation

Internment: - when a burial is off site the Minister will provide self transportation to the site, and offer Internment Services at the site.

Policy # 505 Baby Naming and Dedication Services

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

The Minister will offer Baby Naming and Dedications ceremonies outside of Sunday Services in the Sanctuary and or Social Hall. When requested and space is available for the event. These events may also include a gathering for a meal and socializing after the ceremony.

Policy # 506 Coming of Age (Bridging) and Crone (Sr. Women)

Date Adopted: February 2025

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

As our Children and Youth mature and are ready to join the adults and leave youth service the Minister will offer a Bridging ceremony to honor the transition. The Bridging Ceremony may include a celebratory meal in the Social Hall.

Crone ceremony is offered when our Sr. Women are ready and request the ceremony to honor the transition from maiden, and mother to crone (woman of wisdom). The minister will provide this service outside of Sunday Service. These ceremonies may include a celebratory meal in the Social Hall.

SECTION 600 RIGHT RELATIONS

Policy # 601 Safe Congregations

Date Adopted: February 2022

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Scope: This policy applies to all at All Faiths Unitarian Congregation.

Policy/ Procedure:

All Faiths is committed to promoting a safe and welcoming environment supportive of personal and spiritual growth. All Faiths recognizes the right of its Ministers, employees/ vendors, members, and guests to have an environment free of interpersonal violence such as harassment, abuse and disruption. Violations would include abuse or harassment of a physical, psychological, or sexual nature. This Safe Congregation Policy Statement and the Safe Congregation Procedures are also considered to include prohibitions against all criminal behaviors.

A. Victim Support. Any Youth, Member of the Congregation, staff member or guest is invited to report unacceptable behavior which may be a violation of this Policy, either verbally or in writing, to the Minister or Board of Directors. We believe that harassment, abuse and disruption are not the fault of the victim. A person who has been harassed, abused or disrupted needs support, empowerment, and a structure which provides an effective, safe, and prompt response to his or her complaint.

B. Accused Individual's Rights. We recognize the right of an individual who is accused of inappropriate behavior to respond to the allegations, unless informing that individual of the allegations is unnecessary, unhelpful, or unsafe.

C. Potential Resolution Tactics. We understand that harassment, abuse and disruption may at times not be intentional, but may in fact arise through miscommunication or lack of awareness. When uncomfortable and/or unacceptable behaviors occur, individuals can sometimes resolve the situation themselves through direct discussion with the responsible party. Since this direct approach is not always appropriate, the Minister and Board of Directors provide the support of safely and effectively resolving such situations.

D. Handling Complaints. Complaints will be handled according to the following guidelines:

1. All complaints shall be given prompt and fair consideration.
2. Persons presenting complaints shall be free of coercion, restraints, interference, discrimination, or reprisal.
3. Sensitivity, objectivity, and fairness will be used in handling these complaints.
4. A complaint can be made verbally or in writing and except under extenuating circumstances, a meeting shall be held within ten days of the complaint being made and a decision within ten days of that meeting.
5. If it is determined that there has, in fact, been an offense, a recommendation will be made by the Minister to the Board of Directors. If no disciplinary action is involved, that decision can close the complaint process.

6. All complaints shall be handled in confidence and, if received in writing, conspicuously marked 'Confidential'. A written record conspicuously marked Confidential shall be kept by the Minister. Unless otherwise required, this confidential record shall only be accessible to the Board of Directors and the Minister. Access shall be further limited if the complaint involves any of these parties or family members of the same.

7. If a complaint is resolved informally or dropped at the request of the complainant, there is no requirement to keep a written record. Under such circumstances, the Minister or Board Chair shall not *be* required to contact the individual the complaint was against. However, should a complaint be dropped but available evidence indicates a definite possibility that harassment or abuse has occurred, or may occur in the future, the Minister or Board Chair shall, nevertheless, call a meeting.

E. Safe Congregation Deliberation and Recommendation/Action. To aid in evaluating the problem, the following points, among others, will be considered:

1. *Dangerousness.* Is the individual the source of an existing, continuing, or possible future threat or perceived threat to persons or property?
2. *Disruptiveness.* How much interference with church functions is going on?
3. *Offensiveness.* How likely is it that prospective or existing members will be driven away?

F. Determining Necessary Response. To aid in determining the recommendation and necessary response, the following points, among others, will be considered:

1. *Harm.* Has any Member, Guest or Employee been physically, psychologically or sexually harmed? Is there continuing harm? Is there a potential for future harm?
2. *Causes.* Why is the offensive conduct occurring? Is it a conflict between the individual and others in the Congregation? Is it due to a professionally diagnosed condition of mental illness?
3. *History.* What is the frequency and degree of offensive conduct caused in the past?
4. *Probability of Change.* How likely is it that the problem behavior will diminish in the future?

G. Recommendation and Action

1. *Action in the Case of Harassment or Abuse.* In the event it is concluded that a Member, Guest or Employee has been physically, psychologically or sexually harmed, immediate action is warranted. The Minister or Chair will communicate to the alleged offender that he or she is barred, until further notice, from all Church property and all Congregational activities. The alleged offender shall have a right of appeal, first to the Board of Directors, which can lift the bar by a unanimous vote. Should the bar not be lifted, the alleged offender can appeal to the membership; their vote shall be conducted consistent with the All Faiths bylaws. This bar shall not constitute a revocation of membership and the Minister shall in no manner be prohibited from ministering to the alleged offender and shall provide such services as he or she deems appropriate under the circumstances.

2. *Action in the Case of Disruption.* In the event a Member, Guest, or Employee has been disruptive, the person witnessing the behavior may, in his/her discretion, take the following immediate actions without need to make a recommendation to the Board of Directors.

- a) Clearly and directly tell the person what action is disruptive and/or offensive;
- b) State that you expect the person to stop this behavior; and

- c) Firmly tell the person that if his or her actions persist, a recommendation will be made to the Board of Directors for more serious discipline.

H. Definitions of Harassment, Abuse and Disruption. Three principal forms of unacceptable behavior are harassment, abuse, and disruption; each is defined below. If an individual feels his or her personal safety has been violated in this Congregation by a behavior or form of misconduct that is not specified here, she or he may still file a complaint with the Minister or Board Chair.

1. *Harassment.* Harassment includes unsolicited and unwelcome conduct that, in the case of sexual harassment, has sexual overtones. All forms of harassment can feel intrusive, intimidating, hostile, offensive and/or humiliating to the victim. This includes physical, psychological, and sexual harassment. Stalking is also a type of harassment. We consider the following three areas to overlap, but whether the harassment is primarily physical, psychological or sexual will be determined by the focus of the complaint. Unwelcome physical touching with sexual overtones is considered sexual harassment.

a) *Physical.* Pertaining to unwanted touching, contact, or other physical intrusions on another's space.

b) *Psychological.* Pertaining to emotional and mental levels of pestering, intruding, stalking, etc.

c) *Sexual.* Pertaining to unwanted sexualized behaviors, which may be in the form of:

i. Physical conduct. Touching, pinching, brushing against, impeding or blocking movement, assault, coercing sexual contact, etc.;

ii. Verbal conduct. Sexually suggestive or obscene comments, sexual propositions, threats (including threat of job loss or other punishment unless the victim engages in sexual relations), jokes about gender-specific traits or sexual orientation, etc.; and/or

iii. Written conduct. Sexually suggestive or obscene written material.

2. *Abuse.* Abuse is a pattern of behavior that is used to control and/or dominate another person. Abuse can be physical, psychological, and/or sexual.

a) *Physical.* Includes actual or threatened harm, such as hitting, shoving, kicking, or throwing things. The harm or threat thereof may also be against family members, pets, or treasured belongings.

b) *Psychological.* Includes being mistreated mentally and emotionally, such as being insulted, ridiculed, or threatened verbally.

c) *Sexual.* Includes any of the behaviors above. Three major areas of concern are:

i. Sexual relating or contact between an adult and a minor;

ii. Sexual relating or contact between minors that violates one of them because of the other's role or position of power; and

iii. Sexual relating or contact between adults that violates one of them because of the other's role or position of power.

3. *Disruption.* Disruption is behavior which does not rise to the level of harassment or abuse but which, when viewed by a reasonable Member of the Congregation, interferes with the free, safe, and comfortable use and enjoyment of worship, the facilities or activities. Examples include veiled threats to the safety of any adult or child; the disruption of Congregational activities; and manipulation, exploitation, or uninvited pressure in relationships.

I. Standards and Additional Procedures Regarding Behavior of Minister

1. The Minister will recognize the power the ministry gives her or him and refrain from harassment, abuse, disruption and other practices which are harmful to others and which endanger her or his integrity or professional effectiveness. Such practices include, but are not limited to, sexual activity with a child, with an adult in the Congregation who is not her or his spouse or partner, with a counselee, with the spouse or partner of a person in the Congregation, with an intern, with an employee/staff member, or with anyone else whose relationship with the Minister would be exploited by a sexual involvement. If the Minister is single, before becoming sexually involved with a person in the Congregation, the Minister will take special care to examine his or her commitment, motives, intentionality, and the nature of such activity and its consequences for the Minister, the other person, and the Congregation.

2. The Minister will not invade the private and intimate bonds of others' lives, nor trespass on those bonds for the Minister's own advantage or need. In any relationship of intimate confidentiality, the Minister will not exploit the needs of another person. Sexual misconduct is a violation of the ministerial relationship in which a person in a position of religious leadership takes advantage of a vulnerable person instead of protecting him or her. It covers a wide range of activity, and the harm caused by this misconduct is related to the degree of seriousness. The range which follows is from the least degree of seriousness to the greatest degree of seriousness:

- a) sexual innuendoes;
- b) inappropriate touching;
- c) unwelcome advances or requests for sexual favors;
- d) sexual relations with an adult under inappropriate circumstances; and
- e) sexual relations with a minor under any circumstances.

J. Standard and Procedure Regarding Sexual Harassment of Employees

1. Standards Regarding Sexual Harassment of Employees (Under Title VII of The Civil Rights Act)

- a) All employees and persons who have been contracted with for their labor have the right to an environment free from sexual harassment. Sexual harassment is illegal under Title VII of the Civil Rights Act of 1991. When a person is sexually harassed, she or he is afforded the same protection and redress as a victim of any other form of discrimination.
- b) Sexual harassment is defined by the U.S. Equal Employment Opportunity Commission (EEOC) as the use of one's authority or power, either explicitly or implicitly, to coerce

another into unwanted sexual relations or to punish another for his or her refusal of same; or the creation of an intimidating, hostile or offensive working environment through verbal or physical conduct of a sexual nature.

- c) It prohibits unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:
- i. Submission to such conduct is made either explicitly or implicitly a term or condition of employment; and/or
 - ii. Submission to or rejection of the conduct is used as the basis for a decision or decisions affecting such individual; and/or
 - iii. Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance; and/or
 - iv. Such conduct has the effect of creating an intimidating, hostile, or offensive working environment, and the supervisor knows or should know of the existence of the harassment and fails to take timely and appropriate action.
2. *Supervisors' Responsibilities.* All individuals in positions of supervision are responsible for their own conduct and for the conduct of individuals they supervise, and will take affirmative steps to stop sexual harassment by subordinates when it is brought to their attention, including warning or disciplining the offending individual. Such disciplining may include any legally acceptable means, to be decided with the assistance of the Minister or Board Chair and if deemed advisable, the Board of Directors.
3. *Additional Procedure When Handling Complaint of Employee.* When an employee has an unresolved complaint about another employee or anyone she or he encounters in the context of the Congregational work environment, the employee shall first discuss the complaint with the Minister or the Chair.

K. Standard and Procedure Regarding Behavior of Member or Guest

1. *Member or Guest Misconduct.* We believe our Congregation needs to have clearly communicated standards. Misconduct on the part of a Member or guest can have harmful effects on any individual as well as on the rest of the Congregation. A central Congregational mission is to protect the welfare of all individuals, including the Congregation's staff and Minister. Gradations of seriousness can apply to all forms of harassment, abuse and disruption. For example, the following list applies to sexual misconduct, listed from the least serious to the most serious:

- a) Unwelcome sexual innuendoes;
 - b) Inappropriate touching;
 - c) Unwelcome advances or requests for sexual favors;
 - d) Sexual relations with an adult under inappropriate circumstances; and/or
 - e) Sexual relations with a minor under any circumstances.
2. *Correcting Misbehavior.* Appropriate steps will be taken when the behavior of a Member or guest has the effect of interfering with another person's personal safety and/or spiritual growth.

3. *Additional Procedures When Handling Complaint Against Member or Guest.* The Minister, staff, and board officers all have the right to exclude or remove from the premises, by any lawful means, any person whose present conduct is so disruptive and/or offensive as to impair the functioning of the Congregation. This conduct may come to their attention by direct observation or by verbal or written complaint of another Member or guest. The objectionable conduct may be in person, by mail, by telephone, or by other means.

If the complainant and/or Congregational official (such as Minister, staff member, etc.) believes the person committing the objectionable behavior is not aware that his or her actions are disruptive or offensive, the complainant and/or church official can attempt to resolve the situation by approaching the person in this way:

- a) Clearly and directly tell the person what action is disruptive and/or offensive.
- b) State that you expect the person to stop this behavior.
- c) Firmly tell the person that if his or her actions persist, you will make a recommendation for further action to be taken.

If this effort is ineffective or such an approach is deemed unacceptable or inadvisable, the complainant can make a confidential request for action, verbally or in writing, to any Officer of the Board of Directors.

4. *Immediate Action.* In some situations, immediate action is warranted and should be taken. It is appropriate, for example, to immediately call the police to remove any person exhibiting violent behavior.

5. *Member and Guest Rights.* Individuals who feel threatened by behavior of other individuals are in no manner prevented by this Policy and Procedure, or by any other Congregational governing document, from contacting the police if he or she feels threatened or is, or has been, harmed or if they are aware of another individual who has been threatened or is being, or has been, harmed.

SECTION 700 FINANCE POLICIES

Policy # 701 Income

Date Adopted: February 2015

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: The financial operations of the Congregation are established to ensure sound accounting practices and to abide by provisions in our bylaws.

Policy/Procedure:

A. Recording and Depositing Funds. All contributions of any kind should be recorded and entered using current accounting software. Contributions by check, cash (if the donor is identified), or Paypal will be recorded by donor name and letters will be sent to donors (whose donations exceed \$250) each January to confirm the donations they have made in the prior year. Contributions for operating fund, special collections, special events, programs, etc. will be credited to the appropriate line item. All contributions or income should first be deposited into

the current designated bank general fund, and then transferred to other accounts if needed (e.g. Legacy Fund, Minister's Discretionary Fund, Operating Reserve, or Capital Reserve Fund). Capital Reserve Fund contributions should be deposited directly into the Capital Reserve Account whenever possible.

B. *Sunday Collections at Services.* Offertory and special collections will be made at Sunday services. Collections shall be counted by two people and recorded on the appropriate forms, and the forms shall be signed by each person. Copies of contribution checks will be made, and cash counts will be confirmed. All contributions shall be deposited as soon as possible into the current designated bank General Fund checking account.

C. *Special Events.* Special events are conducted to raise funds for the Congregation; such funds are to be placed in the Operating Fund. Monies collected for these events are to be counted by two people. Cash and checks are recorded on a tally form that states the name of the event. Any checks that are collected are to be copied. These funds are to be recorded in the appropriate account in the current accounting software.

D. *Special Collections.* Special collections usually are taken for annual Employee bonuses and the Minister's Discretionary Fund. Contributions for the Minister's Discretionary Fund will be deposited into the separate checking account maintained for that purpose. Requests for additional special collections shall be submitted to the Finance Committee for its consideration; that committee will then make recommendations to the Board of Directors Executive Committee regarding approval before such collections may be announced and collected.

E. *Designated Special Funds.* As part of our mission, the Congregation supports local community organizations by collecting funds designated specifically for those organizations. Community organizations can only be added to our special collection list by Board approval. The organization that will be benefiting on its designated month will be announced in the newsletter and from the pulpit. All such funds should pass through the General Fund and accounting software, but should be accounted for separately from the Operating Fund. Disbursement of funds shall be only for the designated purpose and only when sufficient funds have been raised to cover the expenditure as approved by the Social Action and Outreach Committee or Team. (See Policy 710).

F. *Other Collections.* Written reports will be prepared, signed by two people, and submitted along with the checks and cash to the Congregational Administrator and/or Treasurer for all other collections. Examples include money and checks given for concerts, programs, lunches, movie nights, dinners, special events, yard sales, bazaars, and other fundraisers. No cash collections should be left unattended.

G. *Credit for In-Kind Donations.* Members who provide necessary supplies may be given credit for their donations by providing relevant detailed receipts. Such supplies would include cleaning supplies, paper supplies, coffee, cookies, food, service supplies etc. Members will receive a year end letter stating the approximate value of donated supplies.

H. Reconciliation. Monthly reconciliation should be made with bank statements by the Congregational Administrator and/or Treasurer, and monthly reports on account assets and income shall be provided to the Finance Committee and Board.

Policy # 702 Expenses

Date Adopted: February 2015

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: The financial operations of the Congregation are established to ensure sound accounting practices and to abide by provisions in our bylaws.

Policy/Procedure: Expenses shall be in accordance with the established budget and appropriate records of expenses shall be maintained.

A. Expenditures. All expenditures should be maintained within Budget. The Congregational Administrator, without any further approval, subject to cash-flow limitations, should pay routine expenses already included in the budget. The Congregational Administrator should use his or her judgment in paying routine expenses that are over budget if projections show that on average over the course of the year the monthly budget can be met.

B. Recording and Files. All expenditures shall be recorded in the appropriate line item in the current accounting system used and reflected in the Profit and Loss statements. The Congregational Administrator and Treasurer shall monitor and keep detailed records of all expenditures except those made through the Minister's Discretionary Fund. Files shall be kept of relevant bills, invoices or receipts.

C. One-time or Unbudgeted Expenses or Capital Expenditures. All one-time or unbudgeted expenses or capital expenditures must be approved in advance. No one can commit the Congregation to such expenditures without prior approval. The Treasurer should use his or her judgment and seek advice of the Finance Committee and/or the Board as circumstances warrant. Except for emergencies, extra funding should be obtained before making such unbudgeted or capital expenditures.

D. Payment by Check Procedures and Automatic Payments. The Congregational Administrator prepares the checks after reviewing bills for accuracy and compliance with the budget.

1. Authorized Signers: Authorized signers are designated by Resolution of the Board following the annual meeting in March each year. Authorized signers are generally Board Chairperson, Vice-Chairperson, Secretary, Treasurer and Finance Chairperson.

2. Required Signatures. Required signatures vary depending on the amount of the check.

a) Checks up to \$500 may be signed by one authorized signer.

b) Checks over \$500 must be signed by two authorized signers.

3. Automatic Payments: Automatic payments made through the checking account for vendor expenditures, mortgage and payroll deductions should be scrutinized by the Congregational Administrator and Treasurer for accuracy.

E. Debit Card Payments. The Congregational Administrator maintains control of the All Faiths debit card, which is associated with our bank checking account. It may be used for purchase of small budgeted items upon written request. Examples would be for mulch or fertilizer for the yard, snacks for programs, office supplies or service supplies. The card is to be returned promptly, along with the relevant purchases, and written receipt for proper recording using the Debit Card Purchase Request form.

F. Member Reimbursements – Member reimbursement for approved purchases made on behalf of the Congregation shall be made by check when an approved Member Purchase Reimbursement form is submitted together with necessary receipts.

Policy # 703 Specific Expenses

Date Adopted: February 2015

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: The financial operations of the Congregation are established to ensure sound accounting practices and to abide by provisions in our bylaws.

Policy/Procedure: All expenditures should be kept within approved Budget.

A. Payroll. Regular employees presently include the Minister, Congregational Administrator, Music Director, Child and Youth Program Director, and Sexton. Regular employees are paid at the end of the month. Payroll includes salary, FICA, and other employee benefits (health and dental, disability, etc.). The Congregational Administrator submits the necessary information to the payroll processing firm, which makes automatic payments through our General Fund checking account. Their monthly report shall be reviewed by the Congregational Administrator and/or Treasurer and kept on file for audit.

B. Employee Bonuses. Disbursement of employee bonuses from special collections may be made by cash or check from the General Operating Fund, with all tax deductions processed through the payroll company.

C. Outside Labor. Visiting singers, musicians, guest speakers, repairmen, groundskeepers, and extra casual labor of any kind are paid by check. Total payments to independent contractors exceeding \$600 in any given year shall be reported to them and the IRS on form 1099-Misc.

D. Mortgage/Loan. If there is a mortgage/loan, the monthly mortgage/loan payment to the bank is made automatically from the General Fund checking account.

E. Insurance. Liability, property and flood insurance premiums are paid by check and/or Electronic Fund Transfer (EFT).

F. Utilities. Phone and internet service, electric, water and sewer bills are checked for accuracy by the Congregational Administrator, then paid by Electronic Fund Transfer (EFT) through our General Fund checking account.

G. Advertising. Advertising services are paid by check and/or debit card.

H. Printing. The current printing service provider is paid by check and/or Electronic Fund Transfer (EFT). Printing services include newsletters, Orders of Service, office stationery, cards and other miscellaneous printing.

I. Postage. US Postal Service expenses are paid by check and/or debit card.

J. Website. Annual website and domain fees are paid by check and/or debit card.

K. Office Supplies. Routine office supplies are purchased by the Congregational Administrator, via check and/or debit card, and an appropriate receipt is submitted for the record.

L. Other Supplies or Equipment. Other supply/equipment invoices are paid by check and/or debit card.

M. Service Supplies and Religious Education Supplies. Service and religious education supplies are paid to the supplier by check and/or debit card. If purchased by the Congregational Administrator, member or teacher, the purchaser can be reimbursed by check if the purchase was approved and an invoice was submitted for the record.

N. Program Supplies. Invoices for program supplies are paid by check to the supplier. If the items were purchased by the Congregational Administrator or committee members, reimbursement may be made by check if the purchase had prior approval and the associated invoice is submitted. If paid using the debit card, an appropriate receipt must be submitted for the record. Costs for most program supplies should be covered by contributions made at the programs.

O. Maintenance Supplies. Invoices for maintenance supplies purchased for interior or exterior use may be paid by a check issued to the supplier. If the Congregational Administrator or Member purchases the supplies, the cost will be reimbursed if a request for reimbursement is submitted with the invoice. Such supplies may also be purchased by debit card with an appropriate receipt submitted for the record.

P. Maintenance and Repairs. The need for maintenance or repairs should be reviewed by the appropriate committee or Executive Committee prior to such expenditure being made. If the expenditure amount is significant, estimates must be obtained. Expenditures will be paid by check and/or debit card after completion of the work and receipt of the bill.

Q. Mileage. Mileage is reimbursed at the current year IRS mileage rate for approved driving. The request for reimbursement must be substantiated by detailed information about the number of miles driven, origin point and end point (from-to) and purpose of the trip. Examples of approved mileage reimbursement includes trips to/from the post office, printer, or suppliers if necessary. Daily mileage to and from the office will not be reimbursed.

R. Special Events. Special Events include Congregational celebrations, concerts, special educational events, special fundraisers, yard sales, bazaars, etc. These must be approved in advance by the Board after reviewing an estimate of anticipated revenue and expenses. Those estimates should be submitted through the Finance Committee for review prior to submittal to the Board. The proposal should include itemized lists of anticipated income and expense items. The budget does not provide for expenses that exceed the proceeds garnered from the event. Special event income and expenses are line items in All Faiths Operating Accounts.

S. Standing Committee Funding. Standing committees should provide an estimate of their income and expenses to the Finance Committee by November 1 each year, to be reviewed and, if appropriate, incorporated into the Annual Budget that is approved at the Annual Congregational Meeting. They may also submit proposals to the Finance Committee and Board from time to

time if needed, provided that such proposals do not represent requests for expenditures not provided for in the budget that would not be covered by income generated by the activity. **T. Other Expenses.** Before any other expenses are incurred, the expense should have prior approval by the Executive Committee. Payments are to be made by check and/or debit card.

Policy # 704 Transfers

Date Adopted: February 2015

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: The financial operations of the Congregation are established to ensure sound accounting practices.

Policy/Procedure: All Faiths funds shall be maintained in various designated accounts.

Transfers to Other Accounts. All Faiths maintains separate bank accounts for the Minister’s Discretionary Fund, Operating Reserve, Legacy Fund, and Capital Reserves Fund. The Operating Reserve was established to provide a backup for paying bills in months when expenses exceed income. It is our policy to deposit to that reserve whenever the balance in the checking account is sufficient to make it possible. All donations for these funds are deposited first into the General Fund, and then transferred by check or bank transfer to the designated accounts.

Policy # 705 Non-Operating Accounts

Date Adopted: February 2015

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: The financial operations of the Congregation are established to ensure sound accounting practices.

Policy/Procedure: All Faiths non-operating funds shall be placed in specified accounts.

A. Legacy Fund. Contributions made to the Legacy Fund will first be deposited into the General Fund, and then transferred by check to the separate Legacy Fund account. There is a separate policy for the Legacy Fund. (Note: This account may also be used for receipt, sale and conversion of stock donations made to our general Operating Fund.) These funds can only be used for capital expenditures which require Board approval. All “In Memory of…” donations are deposited into the Legacy Fund.

B. Minister’s Discretionary Fund. There is a separate checking account maintained at the bank for the Minister’s Discretionary Fund (MDF). Money donated for the MDF will be recorded in the accounting software, deposited into our General Fund, and then transferred to the MDF account. These funds are for the Minister’s discretionary use to provide aid and assistance to those in need (see Section 711).

C. Capital Reserves Fund. Effective April 1, 2022, a Capital Reserves Fund was created as the result of a Capital Reserve Study conducted in the summer of 2021. The Board authorized a transfer of \$20,000 from the Legacy Fund to open the account, which will be funded on a monthly basis as part of the operating budget through the General Fund.

Policy # 706 Financial Review

Date Adopted: February 2015

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: This policy guides the process for an annual audit and review.

Policy/ Procedure: In accordance with our bylaws, the Board shall appoint a Financial Review Committee each year to review the annual accounts of the Congregation. The committee shall review the income and expenses, the reports, and files containing bills and receipts, and other supporting documents. The Financial Review Committee shall submit their report, along with their recommendations, to the Finance Committee, the Board, and to the Congregation at the Annual Congregational Meeting in March.

Policy # 707 Funding Delegates to General Assembly

Date Adopted: November 2020

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: This policy guides the process of selecting and funding All Faiths' delegates to the annual UUA General Assembly (GA).

Policy/Procedure: Delegates shall be funded in accordance with the conditions below.

A. Recognition of Importance of GA. The Congregation considers attendance at GA to be a broadening and desirable leadership training experience. Our members recognize the value of infusion of new ideas gained at GA into our Congregational life as well as the enthusiasm for leadership and for our religion that is fostered by attendance. The Congregation also recognizes the importance of All Faiths delegates being able to vote on resolutions decided at GA. Therefore, All Faiths supports sending as many of our allotted number (three) of delegates to GA each year as possible.

B. Funding Delegates. Furthermore, the Congregation believes that the ability to pay for attending GA should not be a factor in the decision of how delegates are chosen. Therefore, in years when the Congregational budget can support the required expense outlay, All Faiths will financially support some of the costs associated with attendance.

1. Eligibility. The Board desires to offer financial support systematically and equitably first to the Officers of the Board; secondly, to Directors; and thirdly, to Committee Chairs of major committees. If, in a given year, all but one Board Member declines to accept this stipend, then consideration may be given to paying an amount to cover registration, travel, room for that one Board Member who is willing to go.

2. Scholarships. Scholarships which may be granted to eligible participants may not exceed the amount included in the Budget.

3. Limits of Financial Support. No one Congregant shall receive scholarships to attend GA more than once. Furthermore, funding will not be provided for a spouse's or a partner's registration, room, or travel costs in the same year.

4. *Remote Participation.* Electronic participation is a less expensive option which would allow our Congregation to participate in voting at our national conference.

Policy # 708 Compensation of Guest Musicians and Speakers

Date Adopted: April 2016

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: This policy guides the Minister and Committees who wish to compensate a guest speaker or musician.

Policy/ Procedure: A consistent approach will be maintained when compensating speakers and/or guest musicians.

A. Compensation Categories. Compensation may be made for ordained and non-ordained guest speakers; summer guest speakers; and guest musicians and/or singers.

B. Setting/Changing Rates of Compensation. When preparing the proposed budget for the next fiscal year, the Board of Directors, after considering recommendations made by the Finance Committee, will adjust and approve rates of compensation for guest services. The Board has the ability to change the rates of compensation at any time; any changes will appear in the minutes of the Board meeting when such changes are made.

C. Notification of Rates. These rates will be communicated to committee chairs, the Treasurer, the Minister, and the Music Director so they may invite and compensate guests accordingly.

Policy # 709 Paying Members and Friends for Services

Date Adopted: February 2022

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: This policy guides decisions regarding when, if ever, All Faiths will pay members and friends for their professional services if such services are appropriate.

Policy/Procedure: Payment to members for services must conform with the conditions stipulated below.

A. Appropriate Circumstances for Paying Members or Friends. Sometimes paying for a Member's or Friend's talents is appropriate and fair. Two examples of circumstances in which a Member or Friend might be paid are as follows:

1. *Lack of Volunteer Services.* When a "Board-approved" project or activity is proposed and/or identified as a need and volunteer Member or Friend services are not available, offered or desirable (for example, a construction project or a meal service).
2. *Member Requested Class.* When at least 10 of our members request a specific class or activity to be led by a person with special training, and no Congregant with those qualifications volunteers his or her services, and when that activity is determined by an

appropriate committee to be within the values of Unitarian Universalism and our Congregation.

B. Determining Appropriate Fee. Under the circumstances above, a written agreement shall be developed between the individual being asked to provide the service and the Finance Committee. That agreement will contain appropriate details such as length of time, location for the class/service, and fees. The fee may be partially paid to the Member/Friend by All Faiths and a portion of the fees may be collected from the participants of the proposed class or activity. In that circumstance, the agreement should specify the agreed-upon split of payment. Since these are Congregant-supplied services and therefore under the umbrella of our Shared Ministry, we would expect the fees to be lower than those charged for the general public.

Policy # 710 Collecting and Sharing Share the Plate Donations

Date Adopted: September 20219

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: This policy directs funds collected through Share the Plate to community based organizations.

Policy/Procedure:

A. Collection

The Finance Committee and the Social Action and Outreach teams collaborate to name and schedule community based organizations to be designated to receive “share-the-plate” donations on certain designated months. Donations may be received via separate check or designated amount indicated on the memo line. The monthly schedule will be offered to the Board of Directors for approval through the Finance Committee.

B. Choosing Organizations to Receive Funds

Though the Finance Committee and Social Action teams collaborate to choose community based organizations to receive funds, the Board of Directors have final approval. If there is a change it must be proposed and approved by the Board of Directors.

C. Organizations Connected to Members and Friends

Community organizations that have a connection to a member or friend from the congregation will not be considered to receive funds. This is considered a conflict of interest. The one exception is a ministry of the congregation and is Operation Joy.

Policy # 711 Minister’s Discretionary Fund

Date Adopted: September 2020

Date Reviewed/Revised: May 2024

Reviewing Party: Finance Committee

Scope: This policy provides for the collection of funds for the Minister’s Discretionary Fund

(MDF) and describes for whom and how the funds are to be distributed by the minister. The policy also provides a mechanism for quarterly reporting of income and expenditures.

Policy/Procedure:

The congregation schedules collections of funds from its members and friends to benefit the Minister's Discretionary Fund. The fund is not an asset of the congregation, but a fund administered at the discretion of the Minister to benefit those in need. Confidentiality and privacy are of the upmost importance as funds are disbursed. The Minister will be the only person who knows the identity of those receiving funds and reviewing statements of this account.

To allow contributions to be tax-deductible, no contribution may be designated for the benefit of any person.

As a measure of accountability, the Minister provides the Chair of the Board of Directors and the Treasurer a quarterly report detailing how the fund was used. The report will include amounts disbursed and the reason funds were given. The report will use general categories to identify the reasons. Those categories are: Housing, Basic Needs, Medical, and Other. The report will use initials to identify the recipient.

If the Minister is unavailable or incapacitated the Board Chair will be a Signer of the Account Agreement and will have the ability to disburse funds.

An employee is considered eligible to benefit from the fund. Any disbursements made to employees will not be considered payroll income and will not be documented using payroll. Rather, the disbursement will be considered an offering to the employee. The Minister and the Minister's family members are not eligible to receive funds.

If cash or gift cards are disbursed, there will be a specific record maintained that includes the date and amount of the disbursement and its use.

Statements, Reports, and blank checks are organized in one file locked in the Minister's office.

SECTION 800 ADMINISTRATIVE FUNCTIONS POLICIES

(to be developed)

SECTION 900 RELIGIOUS EDUCATION AND ADULT PROGRAMS

Date Adopted: February 2024

Date Reviewed/Revised: January 2025

Reviewing Party: Minister

Scope: This policy applies to the Minister and Religious Educator who will provide and promote educational programs for the Congregation.

MISSION: To schedule, coordinate, and promote educational programs for children, youth, and adults of the Congregation.

FUNCTIONS:

- Schedule workshops, forums, child/youth programs, guest speakers, events and other learning opportunities for the Congregation.
- Prepare information for monthly newsletter.
- When requested, submit an annual budget request to the Finance Committee suitable for meeting the Lifespan Education Committee's mission for the coming year.
- When appropriate, prepare an Annual Report for the Annual Meeting.