

Policies of the Board of Trustees of the Unitarian Universalist Church, Rockford, IL
DRAFT May 23, 2012

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1. Governance

1a. Philosophy of Governance

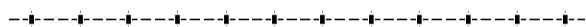
Valuing transparency in governance, the Board of Trustees will conduct all business of the church with respect for all opinions, with innovation, and with the future of the church clearly in mind.



1b. Board covenant

Our mission is to build a strong “legacy” for the future by honoring the past and nurturing a spring of positive energy within the Board and the congregation.

We covenant to build connections among board members and listen actively to the congregation. We will show up for meetings, worship and activities. We will be prepared, communicate clearly, challenge each other honestly, encourage and support one another and follow through. We will work constructively with the minister and staff and speak to the congregation with one voice. Each of us will be patient and responsive, nurturing our spirit, valuing our time, and accepting “no” as a valid response. We will enjoy our time together while being good stewards of our resources.



1c. Board self-government

1c.i. Agenda

The Board Agenda includes a time for check-in, an opening reading, the reading of the covenant, recognition of volunteers, reports from the treasurer, president, senior minister, and councils, old business, new business, and an update on annual goals if not otherwise covered in the agenda.

Information on policy changes will be published at least one week before Board action.
(02-27-79)

1c.ii. Board Committees

The Committees of the Board are those committees that do the work of the board on the board's behalf. They are described in the bylaws (Article VIII, Section 1) and include committees on finance, building and grounds, and denominational affairs. More information about these committees can be found in the charters, Appendix 1 of this document.

1.c.iii. Conflicts of interest

A conflict of interest arises whenever the personal or professional interests of a board or committee member are potentially at odds with the best interests of the church. Consistent with our commitment to transparency and to avoid loss of confidence in the governance of our Church, we have adopted the following policy:

The Unitarian Universalist Church of Rockford, and all Employees, Officers, Board members, Committee members, Panel members and others in a position to represent the Church, shall avoid any conflict between their respective personal, professional or business interests and the interests of the Church in any and all actions taken by them on behalf of the Church in their respective capacities.

If any Employee, Officer, Board Member, Committee or Panel Member of the Church has any direct or indirect interest in, or relationship with, any individual or organization that proposes to enter into any transaction with the Church, including but not limited to transactions involving:

- a. the sale, purchase, lease or rental of any property or other asset;
- b. employment, or rendition of services, personal or otherwise;
- c. the award of any grant, contract, or subcontract;
- d. any significant purchase (in excess of \$100)
- e. the investment or deposit of any funds of the Church

A person with a potential conflict shall give notice of such interest or relationship and shall thereafter refrain from discussing or voting on the particular transaction in which

he/she has an interest, or otherwise attempting to exert any influence on the Church, or the decision making committee or group to affect a decision to participate or not participate in such transaction.

Further, Employees, Officers, Board Members and Committee/Panel Members shall refrain from using privileged information gleaned from their participation in governance or management of the Church to further their personal, professional or business interests.

The Board will determine how to handle any conflicts that arise.

I have read and understand the Church’s Conflict of Interest Policy, and I agree to be bound by its terms.

_____ Date
Member’s signature

1c.iv. Discipline and removal of board members.

This is in article VII, Section 6 of the bylaws: “Regular attendance at Board meetings is expected. The case of any member who does not attend on a regular basis will be reviewed by the Executive Officers who will make a recommendation to the Board regarding retention on the Board. Any trustee who fails to attend more than two consecutive Board meetings without notice to the President, shall automatically be retired and the President shall declare such position vacant.”

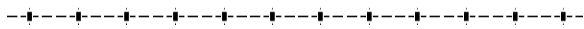
1d. Rules of Procedure for Congregational Meeting 10/17/07

1. The Chair will verify that a quorum has been reached, validating any actions taking at the meeting.
2. Only members may vote; friends may speak but not vote.
3. The Parliamentarian will advise the chair as necessary to enforce compliance with the church bylaws, the rules adopting to govern the meeting, and Robert’s Rules of Order.
4. Rulings on procedure will be made by the chair, may be appealed by seconded motion, and may be overturned by simple majority.
5. Speakers will speak only to the motion under consideration.
6. The first speaker will speak in favor of the motion, with subsequent speakers alternating between against and in favor of the motion. Each speaker will be limited to three minutes.
7. At any time, any member may call the question. At that time, the chair will inquire if there is any further discussion. If there is further discussion, it will precede.

8. At any time, any member may move the previous question, which is a motion to close debate. If two thirds of those present support the moving of the previous question, the motion under consideration will immediately be voted upon without further debate.

9. Voting will be done by voice vote. For some meetings, the Board may determine that the voting may be done by secret ballot. If a verification is requested, voting will be by showing of hands holding membership verification cards. If a member leaves the meeting before adjournment, the member must return the membership verification card to the membership committee table.

10. The meeting will be conducted in a civil manner.



1e. Affiliated Ministers _____ for may 2018__

Basis of the Relationship: Affiliated Ministers are persons who are engaged professionally in furthering the principles of the Unitarian Universalist Association outside the parish context or retired from full time ministry. They are neither employed nor paid by the church on a continuing basis. Affiliated Ministers will help the congregation understand its role in their ministry. The congregation will help to anchor Affiliated Ministers within a community of hope, justice and compassion, providing a spirit of support and nurturance in the Affiliated Ministers' work.

Requirements

- A person in Ministerial Fellowship with the Unitarian Universalist Association.
- An active participant at the Unitarian Universalist Church in Rockford.
- A member in good standing in the Unitarian Universalist Ministers Association and subject to its Guidelines for the Conduct of Ministry.
- A Community Minister must meet the standards of a professional group representing their area of specialization.
- The minister must be retired from full time ministry or engaged in work seen as congruent with the larger ministry of the church.

Call: A candidate shall become an Affiliated Minister upon call by 2/3 vote of the Congregation in response to a recommendation of the Senior Minister and the concurrence of the Board of Trustees. A Letter of Agreement signed by the President and the Affiliated Minister shall confirm the relationship. The relationship shall continue until terminated at any time by the Affiliated Minister, or by a majority vote of the Congregation at a duly called meeting. It shall be automatically terminated at such time as any of the requirements, above, are abrogated.

Responsibilities: An Affiliated Minister shall be responsible for one worship service for the congregation each year, with UUMA-standard compensation. An Affiliated Minister shall write an brief annual report on their activities for inclusion in the Church's Annual Report. An Affiliated Minister shall be welcome to submit occasional columns for inclusion in the church's newsletter. An Affiliated Minister shall meet annually with the Senior Minister and President for a review of their relationship with the church.

Benefits: An Affiliated Minister shall be identified as such on all staff lists on church stationery, newsletters, and Orders of Service, and shall be included in annual reports to the UUA. An Affiliated Minister may, at their own expense, represent the Church at the UUA Meetings as a Ministerial Delegate.

Collegial Relationship: The full-time settled Ministers have overall responsibility for ministerial leadership within the church. The shape and responsibilities of the collegial relationship between the settled and affiliated ministers will be established by a covenant letter between them and in light of the UUMA guidelines.

2. Discernment

2a. Mission

Guided by reason and sustained by love, we are a liberal religious community inspiring people to transform our world.

Proposed: We care for ourselves, each other, and our neighbors and risk acting for justice. Our connections create self-acceptance, empathy, and empowerment in this inclusive and diverse community.

2b. Vision

Many Windows, One Light.

Proposed: A loving congregation that connects.

2c. Core values.

In our religious lives, we celebrate, value and commit ourselves to

- The free search for life's truths in light of science, reason and our own life experience and conscience
- The wisdom of the world's religions in respectful conversation with, and as part of, our own beliefs and practices
- The power of hope and the inspiration of faith
- Beauty in the world, in art, in music and in nature
- Growing and stretching our minds and hearts by embracing change and practicing spiritual generosity
- Building a thriving church community where kindness, friendship, humor and diversity flourish in the spirit of kinship and love

- The worth of each individual and family, the celebration of diversity, and working for justice, inclusion and freedom for all
- Generous service to and participation in the wider community in which we live
- The interdependent web of life and our responsibility for the future of all

Proposed, Ends:

- Each person in the congregation is spiritually alive. We are inspired and equipped to extend radical love through our daily lives and authentic conversations.
- Our woven community celebrates differences, inspiring generosity of talent, time, and treasure, sustaining the congregation.
- Our networks of connections and focused acts for justice foster a world of understanding, equity, repair, and solidarity.

2d. Code of Ethics

05-17-98

Agreeing and disagreeing in love, making every effort to maintain the integrity of the church community in the bond of peace, we pledge that we shall:

IN THOUGHT

Accept conflict – Acknowledge together that conflict is a normal part of our life in the church.

Affirm hope – Affirm that we can work through our differences to growth.

Commit to a process – Admit our needs and commit to a process to achieve a mutually satisfactory solution.

IN ACTION

Go to the other – Go directly to those with whom we disagree; or work with a Conflict Management Panel representative.

In the spirit of humility – Go in gentleness, patience and humility, and own our own part in the conflict.

Be quick to listen – Listen carefully, summarize and check out what is heard before responding. Seek as much to understand as to be understood.

Be slow to judge – Be descriptive. Suspend judgment; avoid labeling, name-calling, and threats; and act in a non-defensive way.

Be willing to negotiate – Work through the disagreement constructively.

- Identify issues, interests, and needs of both (rather than take positions).
- Generate a variety of options for meeting both parties' needs (rather than defending one's own way).
- Evaluate options by how they meet the needs and satisfy the interests of all sides (not one side's values).
- Collaborate in working out a joint solution (so both sides gain, both grow and win).
- Cooperate with the emerging agreement (accept the possible, not demand your ideal).
- Reward each other for each step forward toward agreement (celebrate mutuality).

IN LIFE

Be steadfast in love – Be firm in our commitment to seek a mutual solution.

Be open to mediation – Be open to accept skilled help. If we cannot reach agreement among ourselves, we will use those with gifts and training in mediation.

Trust the community – We will trust the community and if we cannot reach agreement or experience reconciliation, we will turn the decision over to others in the congregation.

- In one-to-one or small group disputes, this may mean allowing others to arbitrate.
- In congregational disputes, this may mean allowing others to arbitrate or implementing democratic decision-making processes, insuring that they are done in the spirit of these guidelines, and abiding by whatever decision is made.

Be committed to Shalom - Believe in and rely on the sacredness of the human spirit and strive toward peace, wholeness, health, and security.

2e. Board Goal Areas

3. Strategy

3a. Long Range Plan – See Appendix

4. Management

4a. Delegation to the staff.

From the Bylaws, Article IX, Section 2.

One Minister shall be designated as Senior Minister.

- A. The Senior Minister shall have administrative responsibility for the operation of the church, including the appointment and dismissal of all non-ministerial employees. Approval by the appropriate committees and the Board of Trustees shall be required prior to the appointment or dismissal of Program Staff.
- B. The Senior Minister shall be responsible for all services of worship in the church including those delegated to others.

4b. Delegation to others.

The board delegates to the Investment Panel responsibility for managing the congregation’s investments. See the charter for the Investment Panel in Appendix 1.

4c. Care for People

4c.i Health and Safety

4c.i.A. CHILD AND YOUTH PROTECTION POLICY.....Revised: 05-27-09

Definitions:

- Child: A person under 18 years of age.
- Abuse: An injury to a child that might not be intentional but is not accidental. It can be classified as physical abuse, emotional abuse, or sexual abuse. Harm caused by withholding life’s necessities—food, clothing, shelter, medical care—is called neglect.

A) Annual Education and Awareness

1. Church school and youth volunteers and Religious Growth & Learning Team members will be expected to review this policy and to sign an agreement to abide by it.
2. This policy will be distributed to all registered families – and subsequently to families enrolling in the program – and will be included in Path to Membership materials.

B) Screening and Selection of Paid and Volunteer Staff of Children and Youth Programs

1. All adult volunteer workers providing direct care or supervision of children or teenage youth will meet the following criteria:
 - a) At least 21 years of age—if responsible for young people between the ages of 0 and middle school-- or at least 25—if volunteering with senior high.
 - b) An active congregant (member or friend) for at least 6 months, and have participated regularly for at least 6 months, or have references attesting to their qualifications for working with children or youth.
2. All youth volunteers must:
 - a) Be at least 12 years of age.
 - b) Provide evidence of having complete a babysitting/childcare course or a church-sponsored-training.
3. All adult religious education employees and volunteers must complete the appropriate Application Form and consent to a background check. All religious education employees and year-long volunteers must undergo a background check at the beginning or renewal of their service, and before every third year of continuing service.
 - a) The Director of Religious Education will be responsible for the distribution, completion, and collection of volunteer screening materials.

- b) The Director of Religious Education will be responsible for coordination with the screening vendor, and for the security of screening materials.
 - c) Information will be shared with the Senior Minister, Religious Growth & Learning, Board of Trustees, and/or other lay leaders or staff members as appropriate.
 - d) Screening results will be kept in the Director of Religious Education's locked, confidential files.
- 4. Paid staff will supply at least two personal or professional references.
 - 5. Individuals convicted of, or under current indictment, or who self disclose any act of sexual misconduct involving a child or of child abuse are precluded from participation in any church programs involving children and/or youth. Additionally, they must sign a behavior covenant prior to participating in any church activity.

C. Supervision Requirements: All staff and volunteers are subject to the supervision and evaluation of the Director of Religious Education and operate under the authority of the Religious Growth & Learning Committee.

- 1. Whenever feasible, each group should have at least two paid or volunteer staff present at all times. The Director of Religious Education shall determine the appropriate level of supervision and may make exceptions to this rule on a case by case basis.
- 2. During Sunday morning programming, no adult will hold "class" with a single child or teen without notification of the religious educator and/or Floater (in the Director of Religious Education's absence); any approved one on one session will take place outside the classrooms or in the church library. (In the event only one student in a particular age group shows up, that student will be encouraged to participate with another age group for that day.)
- 3. The Director of Religious Education or designee will circulate around the classroom areas and monitor activities randomly during regular religious education hours.
- 4. Children in the Pre-K/K, or Pre-K – 1st grade room should be escorted to the bathroom at their request. The volunteer or staff person should first check to see that no one else is in the restroom and then stay outside, in the hall, entering only to offer necessary assistance at the child's request. Diaper changes and/or assisting of toileting of younger children should be done in the designated area of the classroom or, if in the adjoining bathroom, with the door open.
- 5. Children, 1st grade and younger, must be picked up by a parent or guardian, unless prior arrangements have been made with the religious educator or Floater (in the Director of Religious Education's absence).
- 6. Any one-on-one meeting with a child by an adult volunteer (i.e., to discuss problematic behavior) will be conducted with the door to the room open. The volunteer is responsible for notifying the religious educator prior to or immediately after the meeting.
- 7. A youth will participate one-on-one with an adult mentor or chaperone only with parental permission.

8. Volunteers between the ages of 12 and 20 will be directly supervised by an adult at least 21 years of age.
9. Recommended adult to child/youth ration (ratios in parentheses are the minimum):
 - a) Babies – 3-year olds: 1:3 (1:5)
 - b) 3 – 5-year-olds: 1:5 (1:8)
 - c) Elementary: 1:6 (1:10)
 - d) Middle School: 1:8 (1:10)
 - e) Senior High: 1:10 (1:10)
10. The following guidelines are to be used when providing transportation to church-sponsored programs:
 - a) Drivers must be at least 25 years of age, hold a valid driver's license, and provide proof of insurance;
 - b) The driver and each passenger must wear a seatbelt;
 - c) Drivers must not be mentally and/or physically impaired through the use of alcohol or other drugs.
 - d) A minimum of two adults must accompany a group going off site. A minimum of two children/youth must be assigned to each vehicle.
 - e) Parents must sign permission for their youngster(s) to leave the church.
 - f) Use of 16-passenger vans is prohibited.

D. Code of Conduct for Staff and Volunteers

1. All workers will sign the UU Rockford Code of Conduct.
2. Physical restraint and/or physical discipline (corporal punishment) may not be used under any circumstances.
- 3) Verbal abuse and/or the use of curse words are also inappropriate.
- 4) Physical expressions of affection such as hugs are acceptable, but it is best to allow the child to initiate the contact, and the adult must be sensitive not to allow them to become too frequent or prolonged.
- 5) It is never appropriate to engage in any manner of sexualized behavior with a child. This refers not only to explicitly sexual behavior but to sexually provocative, seductive, or erotic behavior or language, as well. Except for educational purposes in OWL class, it is inappropriate to tell jokes with sexual content, connotations, or "double entendres."
- 6) If a child discloses incidents of abuse or neglect, the worker or staff member should listen carefully but ask limited questions. Should the disclosure raise a suspicion that the child is in imminent danger, the worker should report it immediately to the Senior Minister or religious educator.

E) Incident Reports

- 1) If a person within the church community believes this policy has been violated, s/he should report the violation to the Director of Religious Education or the President of the Congregation.

- 2) If the reported violation is abuse by an religious education staff member or volunteer, that person will discontinue his/her work with children and/or youth until the matter is investigated and resolved.
- 3) Any “unusual occurrence” pertaining to the safety of children and youth should be documented by the volunteer or adult in charge who witnesses it. The reporting form, which should be filed with the Director of Religious Education, is attached to this policy and will be available in each classroom.

4c.i.B CONGREGATIONAL POLICY ON REGISTERED SEX OFFENDERS04-25-06

Any registered sex offender who wishes to be a member of the church or who regularly attends church will fill out and sign the Limited Access Agreement with the Senior Minister and the President of the Board. The Senior Minister will immediately notify the Board of the identity of any registered sex offenders who attend our church. The established conduct guidelines will be in writing and shared with the Board. The Board will be informed yearly by the Senior Minister of the status of any offenders who are attending church and their compliance with the established guidelines. The Sex Offender Registry will be reviewed annually by the Membership Team Chair or a person designated by the Senior Minister. Additionally, changes to the sex offender laws will be reviewed regularly. Members who teach Religious Education classes will read and sign the UUA guidelines for working with children. Any church member may confidentially ask the Senior Minister about the existence of any registered sex offenders who attend church.

4c.i.C POLICY REGARDING DISRUPTIVE BEHAVIOR.....Revised: 6/8/2008

The Unitarian Universalist Church, Rockford, IL (hereinafter called the church) is a place of safety and integrity for each person’s mind, body and spirit. We are a supportive and nurturing faith community, honoring and respecting the rich diversity of those gathered here. Recognizing that warmth, beauty, kindness, and passion will shape us as a congregation of goodwill, generosity, and presence, we covenant to affirm and promote:

- Honesty and authenticity in our relationships
- Words that are supportive and caring, not belittling or demeaning
- A welcoming and non-judgmental attitude
- Respect for each person’s boundaries of mind, body, and spirit
- Refraining from displays of temper
- Honoring the gifts and blessings of thought and deed

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

Disruptive behavior of an individual within the church building may lead to concerns about one or more of the following:

- Perceived threats to the safety of any adult or child.
- Disruption of church activities.
- Diminished appeal of the church to its potential and existing membership.

Therefore, the following shall be the policy of the church with regard to disruptive behavior by an individual or individuals.

REPORTING DISRUPTIVE BEHAVIOR

Any person who believes that they have witnessed or experienced disruptive behavior or who has had a disruptive behavior incident reported to them should report it to any of the following:

- The minister(s)
- Any member of the Board
- Any paid member of the church staff
- Any member of the Conflict Management Panel

If required by law, ordinance or similar regulation, the senior minister or a designated member of the church staff will immediately report the incident to the proper authorities.

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

While the church cannot guarantee absolute confidentiality, the church will make every reasonable effort to maintain confidentiality by disclosing the identity of the individuals involved only on a "need-to-know" basis and as necessary to investigate and resolve the complaint.

IMMEDIATE RESPONSE

The minister(s) and/or the leader of the group involved will undertake an immediate response to such behavior. This may include asking the offending person or persons to

leave, or suspending the meeting or activity until such time as it can safely be resumed. The police department may be called if further assistance is required. Any time any of these actions is taken, the minister(s) and the President and Vice-President of the congregation must be notified. They, in turn, will then consult with at least one additional representative from the Board of Trustees to determine what steps must be taken before the offending person or persons may be allowed to return to the activities involved. A letter detailing these steps will be sent to the offending party or parties.

MORE DELIBERATE RESPONSE

Both situations requiring or not requiring an immediate response will be referred to the Conflict Management Panel by the group leader involved in the initial incident, the victim, perpetrator or any third party having knowledge of the incident. The Conflict Management Panel will respond in terms of its own judgment, observing the following.

- The Conflict Management Panel will respond to problems as they arise.
- There will be no attempt to define “acceptable” behavior in advance.
- Persons identified as disruptive will be dealt with as individuals; stereotypes will be avoided.

The Conflict Management Panel will collect all necessary information. To aid in evaluating the problem, the following points will be considered:

- DANGEROUS—is the individual the source of a threat or perceived threat to persons or property?
- DISRUPTIVE—how much interference with church functions is occurring?
- OFFENSIVE—how likely is it that prospective or existing members will be driven away by the disruptive behavior?

To determine the necessary response, the following points will be considered:

- CAUSES—why is the disruption occurring? Is it a conflict between the individual and others in the church? Is it due to a professionally diagnosed condition or mental illness?
- HISTORY—what is the frequency and degree of disruption in the past?
- PROBABILITY OF CHANGE—how likely is it that the problem behavior will diminish in the future?

The Conflict Management Panel will decide on the necessary response on a case-by-case basis. However, the following levels of response will be followed:

LEVEL ONE—The Conflict Management Panel will meet with the person or persons and other related parties to implement the conflict management process as it is set out in the charter. The Panel will communicate their concern about the disruptive behavior. If the behavior cannot be resolved, it would proceed to level two and the full Board will intervene. Additionally the behavior will be referred directly to the Board:

1. If the individual has been in significant resolutions before, then the Panel will infer that repeated visits have not worked.
2. If the issue affects the larger congregation.

LEVEL TWO—It may be determined that the offending individual(s) actions need to be referred to the full Board of Trustees. If, after conflict management process consultation attempts to implement its normal process does not resolve the situation and the disruptive behavior continues, the full Board of Trustees will become involved. It may be determined that the offending individual(s) needs to be excluded from the church and/or specific church activities for a limited period of time, with the reasons for such action and the conditions of return made clear in a written notification.

LEVEL THREE— the Board of Trustees, after careful consideration, may determine that the offending individual(s) may be removed from membership and, if appropriate, excluded from the church premises and all church activities. Notification of such a decision will be made in writing, and will explain the individual's right and possible recourse.

Any action taken under Level Three may be appealed, in writing, to the Board of Trustees within thirty days of the letter of notification. An ad hoc appeal committee shall be formed by the Board of Trustees in the event that the action taken under level three is appealed. The appeal committee shall be composed of two members of the executive committee of the Board of Trustees, two members selected by the Conflict Management Panel who are not members of the Conflict Management Panel nor members of the board of trustees, and a fifth church member being an active member of the church, chosen by the removed person. In a case where the individual does not have a member to propose, the fifth member would be selected by the other four members of this appeal committee. The majority decision of the appeal committee shall be final and not subject to further appeal.

The removal of an individual from membership in the church will be announced in the church newsletter Kairos with the statement: In accordance with the Disruptive Behavior Policy a member has been removed from membership. Any church member who wishes to know the identity of the removed member may ask the minister or any member of the board of trustees. The individual will be listed in the annual report with any previous members who have been removed from church membership during the past church year.

POSSIBLE REINSTATEMENT OF REMOVED INDIVIDUAL

Any request for reinstatement must be made by the member who was removed from membership. The request must contain information concerning the rationale for the reinstatement: 1) a statement of understanding of the reasons for which s/he was removed from membership and 2) an explanation in detail how circumstances and conditions have changed, such that a reinstatement would be justified. The request shall go to the Board of Trustees. The Board will review the request and respond within

sixty days as to whether or not to reinstate the removed member. The decision of the board shall be final and not subject to further appeal. A reinstatement request may be made no sooner than one year following the removal. In the event that a reinstatement request is not granted, any subsequent reinstatement requests may be made no sooner than one year following the member being informed of a negative decision on the previous request.

4c.ii Non-discrimination

The Unitarian Universalist Church, Rockford, Illinois, welcomes all people into fellowship without regard to race, religion, sex, age, size, disability, income, military status, national origin, ethnicity, gender identity, gender expression, or affectional or sexual orientation. Keeping with its other policies and covenants, the church affirms and supports the full participation of all persons in all of its activities.

4d. Care for Staff.

See appendix 3.

4e. Care for Resources

4e.i. Financial controls

4e.i.A. General

From Article VII, Section 7 of the bylaws:

- A. Any unbudgeted expenditure exceeding 2% of the operating budget will be approved by a vote of the Society prior to authorization by the Board of Trustees.
- B. The Society must be informed of all budget changes.

4e.i.B PURCHASING POLICY04-18-01

The following procedures will apply to the one time purchase of goods and contractual services greater than \$1000 and will apply every three years to continuing contracts greater than \$1000 per year. Prices/bids shall be obtained from at least three (3) providers. Purchases/contracts will be awarded to the lowest responsible bidder, considering conformity with specifications, terms of delivery, quality and serviceability, with the following exceptions:

- Contracts for the services of individuals possessing a high degree of professional skill where the ability or fitness of the individual plays an important part;
- Contracts for the maintenance or servicing of, or provision of repair parts for, equipment which are made with the manufacturer or authorized service agent of that equipment where the provision of parts, maintenance, or servicing can best be performed by the manufacturer or authorized service agent;
- Contracts for goods or services which are economically procurable from only one source, such as for the purchase of books and periodicals, and for utility services such as water, light, heat, or telephone;
- Emergency procurement of goods or services where time constraints prevent application of the full bid process.

The following material should be included in any request for bids;

- (1) A description of the materials, supplies or work involved;
- (2) Completion or delivery date requirements;
- (3) Requirements for bid bonds or deposits, if any;
- (4) Requirements for performance and labor and material payment bonds, where applicable;
- (5) Place where bids are to be submitted and deadline for submission;
- (6) Any other useful information.

If specifications are available, the request for bids will include them or describe how they may be obtained. The bids will be reviewed by the Committee requesting the bids and acted on in accordance with Church Policies on Expenditures. If a Committee, Minister, or Board recommends a bidder other than the lowest bidder, it will provide the factual basis for the recommendation in writing. If the Committee of the Board accepts a bid from other than the lowest bidder, it will record the factual basis for its decision in the minutes.

Nothing in this policy is meant to override or replace any provision of Church Policies on Expenditures, covering committee expenditures.

4e.i.C MEMORIAL FUND EXPENDITURES..... 1-22-14

Whereas the Board of Trustees welcomes and encourages gifts from bequests and in memory and honor of others, and is grateful for such gifts, and

Whereas the Board of Trustees seeks to ensure that planned and memorial giving serves the long-term mission of the congregation, and

Whereas the Board of Trustees acknowledges that special considerations are present in the choice of expenditures from the Memorials Fund and the Special Gifts Fund, particularly the desires of the donors or survivors of a deceased member,

Also, whereas the Board is grateful for the sensitivity which the committee called upon to administer these funds is often required to exercise, both to the concerns of church members involved, and to the ongoing needs, priorities and commitments of the congregation,

It is therefore resolved to be the policy of the Board of Trustees of the Unitarian Universalist Church, Rockford:

1. All gifts given through wills, bequests, or estates, and all gifts given in honor or memory of a deceased member or friend of the congregation, will be received administratively by the Memorial and Special Gifts committee.

The chairperson of this committee will express, in writing, gratitude to the family of the deceased person, on behalf of the congregation as a whole.

Gifts of stock and real estate will be sold by the finance committee before being transferred to the Memorials and Special Gifts Committee.

2. If the gift is under \$10,000, the chair of the Memorials and Special Gifts Committee will determine if any instructions for the use of the money have been given.

The Memorial and Special Gifts Committee, accounting for such instructions, will recommend a use for the gift.

3. The Memorial and Special Gifts Committee shall submit to the Board of Trustees for its approval, all proposed expenditures from Memorials or Special Gifts to implement projects that will involve the commitment of operating funds of the Church.

4. In all other cases, the Committee will recommend to the Board the proposed use of Memorial and Special Gifts Fund in excess of \$1,000. A majority vote of the Board is required to approve such expenditures.

5. If a gift is \$10,000 or more, it will be added to an endowment, unless otherwise specified by the donor. In these cases, the Senior Minister will also thank the family of the donor and inquire as to which endowment the gift should be added.

6. For gifts over \$10,000, the family may elect (and in absence of instructions, the finance committee may determine) to use the gift as a "multi-year

pre-paid pledge.” 10% of the gift, plus income, would be placed annually in the operating budget for the next 10 years.

7.If the gift is \$100,000 or more, the family may create a new named endowment fund for particular purpose, with the advice and consent of the Board.

8.The Board of Trustees, with the assistance of the Memorials and Special Gifts Committee, may create and support The Legacy Society of the Unitarian Universalist Church, Rockford. All members and friends who designate a portion of their estate to the congregation will be members of the society.

4e.i.D MEMBER & FRIEND COMPENSATION10-21-86

Members and Friends of the Unitarian Church shall not be paid for services to the church, except in those instances where prior approval is voted by the Board of Trustees.

4e.i.E COMMITTEE EXPENDITURES.....10/24/83; 12-15-83; Revised 08-01-09

Authority of committee chairpersons to make or authorize the making of expenditures or commitments to make expenditures: The chairpersons of official committees of the church for which budgets have been established are authorized by the Board of Trustees to spend or commit funds for the church provided that they abide by the following rules. Chairpersons or delegates who deliberately violate these guidelines may be held personally responsible for any excess expenditures or commitments.

1. Any individual expenditure or commitment in excess of \$500.00 must be approved by the Board of Trustees prior to its being made unless previously approved as a specific budget item by the congregation and/or the Board.
2. Committee chairpersons may spend or authorize the spending of funds or make or authorize the spending of funds or make or authorize the making of commitments up to the amount budgeted for their committee for the current year in support of the mission of their committee subject to the limitations in paragraph 1.
3. Committee chairpersons may not make or authorize expenditures or commitments which when combined with previously made expenditures or commitments exceed the annual budget for their committee.
4. As a means of increasing their commitment or spending authority, chairpersons may require deposits from participants for events prior to the date when expenditures or commitments need to be made.

- a. Spending and/or commitment authority is, in this case, the total cash or checks plus unused budget authority. (Promises to send check or cash cannot be counted.)
 - b. Deposits must be non-refundable until after the event and payment of all bills.
 - c. If an event results in a surplus after all bills are paid, deposits may be refunded in full or part until the surplus is exhausted.
 - d. Events must be canceled and all financial obligations eliminated if deposits when combined with unused budget authority do not equal or exceed planned expenditures or commitments.
 - e. Rule #1 applies regardless of deposits received.
5. Committee chairpersons may request increased spending and commitment authority from the Board for specific events for which it is impractical to obtain advance deposits and which would exceed authorized spending and commitment authority.
 6. Committee chairpersons are to receive monthly reports of expenses vs. budget, as well as be advised of the annual budget for their committee.
 7. Budget overages which occur as a result of error when every effort has been made to comply with policy will be considered the responsibility of the church.
 8. Questionable expenses will not be paid by the treasurer, and will be referred to the Board for disposition.
 9. Any expenditure made by a church member on behalf of a committee needs authorization from that committee's chairperson to qualify for reimbursement from church operating funds. The authorization is completed by:
 - a. The purchaser fills out a check request form indicating committee name, account to be charged, and dollar amount.
 - b. Itemized receipt is attached to the check request. Use federal tax ID letter so no tax is charged. Sales tax paid is non-reimbursable.
 - c. Committee chairperson approves purchase by signing check request or sending email authorization which is attached to check request.
 10. The senior minister has authority to spend monies throughout the administrative and congregational functions of the operating financials. The senior minister will make every effort to inform staff and committee chairs in advance when making purchases that affect their operating budgets.

4e.i.F STAFF EXPENDITURES.....08-01-09

We possess a credit card in the name of the Unitarian Universalist Church. To have such a card, the credit card company requires that an individual of the church must be an authorized signer of the card which carries the financial responsibility for the balances on the card. The senior minister is the signer of the current card. There are cards issued to the senior minister, the program director and the congregational administrator. Guidelines for use of the card are as follows:

1. Only use for church related expenses.
2. An itemized receipt is submitted for each purchase.
3. Finance chairperson reviews statement and approves for payment. Any items deemed inappropriate to church business or lacking receipt will be charged back to card holder that made the purchase with authorization from the Treasurer and senior minister.

4e.i.G Travel Policy08-01-09

This policy sets out the guidelines for travel by church professionals, staff, and members when traveling on church business, and on church expense. Travel by professionals should stay in the spirit of the following guidelines knowing that exceptions will occur.

1. Travel by professionals is at their own discretion within the scope of their professional expense budget. Travel by staff will be approved in advance by the Senior Minister, and within budgeted planning. Travel by members will be approved in advance by the Committee Chair responsible for the budget affected.
2. Travel expenses will be reimbursed based on submission of a completed Travel Expense Form. A church credit card may be used, if available. A completed expense form is still required.
3. The standard of travel for trips over 500 miles round trip will be coach class flights planned and reserved in advance. It is expected that a reasonable search for lowest fares will have been completed. The standard will be direct flights, or one stop flights. It is not necessary to minimize fare cost by scheduling 2 stop flights. Travel by car will be reimbursed up to the value of the lowest reasonable airfare.
4. Within 500 miles travel round trip by rental car will be the standard mode of out of town overnight travel. The standard will be rental category of "mid-size" or as required for the size of group traveling. The rental period will be for period of time directly involved in the business meeting. Use of a personal car is optional and will be reimbursed at the current IRS rates up to the comparable cost for a rental car. Employees using their own cars for church related business must be approved by, or at the direction of, the Senior Minister.
5. Overnight stay in hotel or motel will be reimbursed for the number of nights required for the meeting, or event attended, including direct travel. The expectation will be for utilizing a motel in a mid-range category (Holiday Inn Express, Hampton Inn). This expectation will be balanced by the location and the need for appropriate proximity and convenience to the event attended.
6. For overnight travel, meals will be reimbursed at a rate of \$40 per diem. The exception to this policy is when the senior minister buys a meal for a congregant or a group of them at a conference.

4e.i.H STOCK SALESreaffirmed 11-18-86

It is the policy of the Board of Trustees to promptly liquidate all gifts of stocks that are received in payment of pledges or as special or memorial gifts or bequests. The Treasurer is authorized to sell all stocks immediately upon receipt.

4e.i.I IN-OUT EXPENDITURES02-16-93

The Finance Committee shall, at the time of their creation or at the time of the adoption of this policy, assign a chairperson to each In/Out Account. That chairperson shall approve disbursements from that account. The Finance Committee may designate a staff member or a non-church member if appropriate for that particular fund. If a proposed expense places the In/Out account in a negative balance, it shall be denied unless authorized by the Treasurer. Unlike operating budget line-items, In/Out accounts shall carry over from one fiscal year to the next.

4e.i.J RETREATS, CONFERENCES, AND EVENTS04-25-18

Should the church or any group within the church plan to host a retreat, conference, or other event for which there is income and expenses greater than \$500, the following procedures should be observed. Failure to follow these procedures means that the individuals who sign contracts or purchase items are personally liable and the church will not reimburse expenses. No group or organization should use the church's name for planning of a retreat, event, or conference unless the procedures are followed.

1. Confirm availability of event's date(s) and time with the church office and secure the senior minister's approval of event, and the proposed dates, at least three months in advance. The senior minister may make exceptions for events which respond to a spontaneous need.
2. Submit an event proposal to the senior minister for approval. Proposal shall include name(s) of chairperson(s), event date(s) and time, anticipated attendance, purpose and description of event, and budget showing income and expenses.
3. All contracts or agreements for lodging, facilities, food or A/V usage shall be approved and signed by the office administrator.
4. All funds for the event, including income from registrations or other sources, shall be

processed through the church accounts. Registration and monies should be delivered directly to the church office, by postal mail, online, or in person, with checks made out to the church with the event name in the memo line to be deposited into an in/out account, or other relevant account. The event organizer will work with the office administrator to establish registration procedures that require advance payments, and have cancellation and refund policies which ensure all commitments and contracts will be fully funded from program payments.

5. All expenses of the event shall be paid by the church, in accordance with existing policies and procedures. All presenters must invoice the church directly. Expenses not authorized by the chair, or not included in the proposed budget shall not be paid, and shall be the responsibility of the person who initiated that expense. The senior minister may grant a waiver.

6. After the event, the church bookkeeper shall produce a full accounting of the event for review by the finance committee. Within 30 days after the event, the chairperson, shall prepare a report for the appropriate church committee chair and for the senior minister including number of attendees, the programming offered, the highlights, and the challenges.

4e.i.K FINANCIAL RESERVES POLICY.....9-27-17

Purpose: To establish a minimum amount of reserve funds.

Whereas the Board of Trustees recognizes the need to be financially responsible and prepared for the unexpected, it is hereby resolved to be the policy of the Unitarian Universalist Church, Rockford, IL to maintain a Reserve Fund with an approximate minimum value of 5% of the annual pledge income. Should a fiscal year end with a positive balance, this balance shall be added to the Reserve Fund. Late pledges from the previous year shall be added to the Reserve Fund and not included in the current year's income.

4e.i.L SPECIAL FUNDRAISING SUNDAYS11-18-98

No special fundraising efforts will be scheduled as part of Sunday Services without the permission of the Board of Trustees. It is the position of the Board that any requests for special fund-raising Sundays should be screened by the Executive Committee and only brought to the Board if the Executive Committee feels that the appeal has extraordinary merit. Requests may be referred to appropriate committees for alternative action.

4e.i.M FUNDRAISING AND SOLICITING POLICY

PURPOSE: To provide a policy regarding fundraising and soliciting activities at church to regulate their frequency.

DEFINITIONS:

- Fundraising: Requesting monetary contributions or offering for sale items for the purpose of raising funds, e. g. tickets, tangible items.
- Soliciting: Requesting the contribution of items for a cause.
- Church related entities: Church Board of Trustees, committees, task forces, panels, organizations, covenant groups, denominational groups, an entity of which the church is a member or with whom the church has a relationship, or any entity recognized by the Board of Trustees.
- Non-church related entities: Any entity lacking formal ties to the church.

CHURCH RELATED FUNDRAISING/SOLICITING:

1. All fundraising requires approval of the Finance Committee before activity begins with the following exceptions: fundraising items in the approved church operating budget, Boston Group, NPR advertising, UU Service Committee appeals, designated "Share the Plate" recipients and emergency appeals at the discretion of the Senior Minister.
2. Soliciting non-monetary donations for a special project does not require approval.
3. Information re: approved fundraising or soliciting must be published in the church newsletter prior to any Sunday morning announcements or collections.
4. Information may be posted in designated areas in the church.

NON-CHURCH RELATED FUNDRAISING/SOLICITING:

1. Non-church related fundraising and soliciting is limited to publishing information in the church newsletter and/or person to person contact outside of the scheduled church service, such as coffee hour. Requests for support cannot be made from the pulpit.
2. Information may be posted in designated areas in the church.

4e.i.N - PROFESSIONAL EXPENSES (12/7/2016)

1. Staff members who are allocated professional expenses are entitled to use those expenses to further their professional development, for pastoral care, volunteer support, professional supplies, and similar items. Professional expenses should be reasonable and restrained, and in fulfillment of the congregation's mission.

Computer expenses, curriculum, sheet music, and similar items should come from the budgets for those items. For more, see <http://www.uua.org/careers/compensation/fair/179011.shtml>

2. Staff members may use their professional expenses in one of two ways.
 - A. They may purchase the item with their own funds, and be reimbursed under the normal reimbursement procedure.
 - B. They may use a church-issued credit card for these expenses, and submit the receipt to the bookkeeper.
3. Staff members are expected to use a church credit card, and our tax-exempt status, for any purchases when convenient to do so. Generally speaking, airfare and hotel taxes cannot be waived; professional conferences usually have no taxes.
4. Staff should not exceed the yearly budget for expenses. If they do so, they must reimburse the congregation, unless the finance committee should approve otherwise.
5. Professional expenses do not roll over into the next year's budget.
6. Items purchased with professional expenses belong to the congregation, and not to the employee. When an employee departs, they may purchase the items at their depreciated cost from the church with the agreement of the finance committee.

4e.ii Security Camera Policy

Access:

1. All church staff will have the ability to view cameras on the monitor or remotely in real time only and are not permitted to share that information with others or record.
2. Congregants who have been approved by at least 3 of the 5 administrators will have the ability to have real time remote access and are not permitted to share that information with others or record.
3. Any church member is able to view real time operation at the monitor located in the office.
4. The following list of people (administrators) will have full access to the system
 - a. Building and Grounds Chairperson
 - b. Senior Minister or his appointee in absence
 - c. Board President
 - d. Board Vice President
 - e. One member of the Conflict Resolution Panel
 - f. Security Camera administrator
 - i. Does not have the responsibility of approving the release of video content
 - ii. Controls access according to stated policy
 - iii. Responsible for the upkeep to the video surveillance system

Video Content Storage: Daily video content that is captured by the system will be stored for one week and then purged by the automated system or the Security Camera Administrator

Video Content Preservation: When notified of an incident that may have been captured. The pertinent video content can be permanently saved to the system or an alternative storage device approved by the administrators.

Release of video: Release of any video content can only be done with the approval of a minimum of 3 of the 5 administrators.

All of the above listed administrators must be notified of any release of video content via Email. Local, State, or Federal Law Enforcement agencies, Legal Counsel, or Insurance Companies, representing any person, or persons, involved in any incident captured on the video surveillance must be preceded by a Court Order, Subpoena, or other official stationery of the requestor clearly identifying the identity of the Requestor, the nature of the request, the specific need for the request, and the specific time frame (duration) of the video recording. All such requests will be reviewed by the Church's legal counsel prior to any agreement to the release of the requested video recording.

5. Oversight

5a. Monitoring

5a.i. Financial Reports

We get a regular report, but don't have a policy requiring it

5a.ii Staff reports

In advance of the Board of Trustees' regular monthly meeting, the senior minister shall provide a written report to the Board members. This report shall include progress and time spent in the fulfillment of each of the senior minister's goals for the year, as well as any notes the minister would like to add. As part of this report, the senior minister shall append brief written reports from senior staff members; these brief reports shall include relevant data and a brief listing of major areas of focus.

The board may ask the senior minister for additional reports on particular topics, including more detailed information from other staff about their work.

5.a.iii Board inquiries

As indicated in the bylaws, the Board may “creat[e] such additional committees, teams, task forces or working groups as it may deem necessary.”

5.a.iv. Financial Review Policy

4-25-18

1) External Financial Review

a) It will be the goal of the church to budget a yearly expense that will build sufficiently to fund an externally performed compilation every 5 years.

2) Annual Internal Audit

a) The Board shall appoint a three member Internal Audit Committee. The members should all have professional experience in accounting. Members should include one member of the Finance Committee and one previous Church Treasurer, but should exclude the current sitting Treasurer. The Audit Committee should include no more than two active members of the Finance Committee and Investment Panel.

b) It is expected that the Internal Audit Committee will perform a review each year. The committee may reference the document “Internal Financial Review for UU Congregations” available on the UUA website. It is not expected that the committee perform all activities on the UUA list every year. They should use their professional judgment to make a responsible review.

c) At the very least, every year, the Review should

- i) Reconcile external bank statements and investment account statements to the internal General Ledger to the Balance Sheet.
- ii) Sample a payroll. Assure the calculations are correct and match the annual budget. Verify tax, FICA, and other payments are made by check, or ACH.
- iii) Sample some credit card spending. Sample some authorized check spending.
- iv) Perform other reviews as the committee determines to be pertinent.

5.b Evaluation

5b.i Program evaluation

we don't have a policy or process



5b.ii. Board, Senior Minister, Staff Evaluation

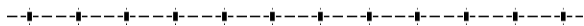
1. Near the end of each fiscal year, the Board will review and revise the Long Range Plan. About every 3-5 years, the Board shall appoint a new Long Range Planning Team to lead the congregation in the creation of a new plan for the coming years.

2. Each year, the Senior Minister shall evaluate the performance of each staff member that they supervise. This evaluation shall assess how each employee is doing at completing the essential functions, demonstrating the core competencies, and advancing their yearly goals. The employee, in consultation with the Senior Minister, will use this evaluation and the Long Range Plan to create new goals for the coming year. The Senior Minister will share a summary of these evaluations and the yearly goals with the personnel committee and/or board of trustees. Employees who are supervised by a staff member other than the Senior Minister will be evaluated by their supervisor, who will share the results with the senior minister.

3. In a similar fashion, the Senior Minister and/or the Committee on Ministry will assess, annually, how the senior minister is doing at completing the essential functions, demonstrating the core competencies, and advancing their yearly goals. The Senior Minister will develop and present to the Board of Trustees and/or Committee on Ministry a continuing education and development plan based on these conversations. The senior minister will produce a summary of these evaluations for the Board of Trustees.

4. At least every 4 years, the Committee on Ministry and/or Board of Trustees shall review the Essential Functions, Core Competencies, and Letter of Agreement with the senior minister. This review will include consideration of areas of responsibility and shared ministry between the senior minister and lay leaders. They shall recommend changes as necessary to the Board.

5. Board Self-Eval - tba



APPENDIX - PERSONNEL POLICIES

The Unitarian Universalist Church of Rockford

Employee Policies Manual



4848 Turner St.
Rockford, IL 61107-5099
(815) 398-6322

THE MISSION

Guided by reason and sustained by love, we are a liberal religious community inspiring people to transform our world.

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THIS HANDBOOK

This handbook is intended as a guide to employees of the Unitarian Universalist Church of Rockford regarding the terms and conditions of employment. This handbook supersedes and nullifies all prior handbooks, policy statements, memoranda or representations, whether verbal or written, and is the sole source of personnel policies for all employees of The Unitarian Universalist Church of Rockford except for those with written contracts of employment authorized and approved by the Board of Directors of The Unitarian Universalist Church of Rockford. Only the Board of Directors or the Senior Minister are authorized to change any of the terms of this handbook and then, only in writing.

All employees of The Unitarian Universalist Church of Rockford are “at will.” This means that any employee may be terminated at any time, with or without cause and with or without notice. Similarly, employees may quit at any time, with or without cause and with or without notice. Nothing in this handbook should be construed as a contract or promise of continued employment or as abrogation of the at will status of every employee.

The terms of this handbook are subject to change at the discretion of the Board of Directors or the Senior Minister, with or without prior notice. In those instances where changes are made, employees will be provided with written notification of those changes. It is every employee’s responsibility to be aware of the terms of this handbook and to stay abreast of changes. If an employee has any questions regarding this handbook, those questions should be addressed first to the employee’s immediate supervisor and then to the Senior Minister.

EQUAL OPPORTUNITY

The Unitarian Universalist Church of Rockford will not discriminate in hiring, promotion, compensation or discipline on the basis of one's race, sex, national origin, religion, ethnicity, age, disability, status of discharge from the U.S. armed forces, gender identity, marital status or sexual orientation.

The Unitarian Universalist Church of Rockford will endeavor to provide accommodation to those applicants and employees with disabilities in order to enable them to perform the essential functions of the jobs which they are seeking or for which they have been hired. In those cases, however, where a disability is not apparent, it is up to the applicant or employee to request accommodation. Once requested, The Unitarian Universalist Church of Rockford will engage in an interactive process with the employee or applicant in order to determine what if any reasonable accommodation can be provided.

WORKPLACE EXPECTATIONS

It is impossible for any employee handbook to address all possible questions and situations that might arise. The policies set forth in this section are intended to provide general guidelines for appropriate and expected workplace decorum and behavior. Any behavior that is inconsistent with the mission of The Unitarian Universalist Church of Rockford will result in disciplinary action, up to and including termination, whether that behavior is specifically discussed in this handbook.

Confidentiality

No employee should disclose any information about any member of the congregation or visitor to the congregation to any third party or to any individual who does not have a need to know where the information was obtained in the course of the provision of or related to the provision of educational or ministerial services consistent with the mission of The Unitarian Universalist Church of Rockford. Employees should not discuss information relating to members and visitors in casual conversation with other employees or in public places where inadvertent disclosure of confidential information might occur. Improper disclosure of confidential information is a very serious breach of trust, and will result in disciplinary action up to and including termination.

Harassment

The Unitarian Universalist Church of Rockford will not tolerate a hostile or abusive working environment for any of its employees. No employee should be subjected to offensive or hostile behavior directed against him or her because of his or her age, gender, ethnicity, race, national origin, religion, marital status, gender identity, sexual orientation, or status of discharge from the armed services.

Although no workplace harassment will be tolerated, sexual harassment tends to be the most common form of improper workplace behavior. Although not exhaustive, examples of sexual harassment include:

The making of unwelcome sexual advances, requests for sexual favors or other verbal or physical conduct of a sexual nature;

The promise of differential treatment (a raise, less desirable job assignments, promotion, etc.) in exchange for submission to requests for sexual favors;

The making of sexually offensive jokes, gestures or remarks, displaying sexually offensive materials or making sexually oriented advances or comments to or in the presence of others.

Employees engaging in any sort of harassing behavior because of another's age, gender, ethnicity, race, national origin, religion, marital status, gender identity, sexual orientation, or status of discharge from the armed services will be disciplined up to and including termination.

Employees who feel that they are the victims of discriminatory harassment may and should immediately report this to their supervisors, or any board member, or the Senior Minister. Employees should feel free to take complaints of harassment to any supervisory employee or board member with whom they are most comfortable. Once notified of allegations of improper behavior, the Senior Minister (or if the Senior Minister is involved as a witness, a person designated by the Senior Minister) will conduct an investigation into the allegations, interviewing any employees who may have knowledge of the incident or related problems. To the extent possible such investigations shall be conducted discreetly. If appropriate, disciplinary action will be taken against the offending employee. No employee will be subject to any form of retaliation or discipline as a result of filing a harassment complaint.

While it is hoped that harassment complaints and incidents can be resolved within The Unitarian Universalist Church of Rockford, all employees have the right to contact the Illinois Department of Human Rights (IDHR) or the Equal Opportunity Commission (EEOC) about filing a formal charge. Generally, a charge of discrimination filed with the IDHR complaint must be filed within 180 days of the last alleged incident(s), while charges filed in the federal EEOC must be filed within 300 days following the last alleged incident of discrimination.

Administrative Contacts:

Illinois Department of Human Rights
217-785-5100 Springfield
217-785-5119 TDD Springfield
312-814-6200 Chicago
312-263-1579 TDD Chicago

Equal Employment Opportunity Commission
312-353-2713 Chicago
800-669-3362
800-800-3302 TDD

Employees filing charges of discrimination with either the IDHR or the EEOC are protected from retaliation by the Illinois Human Rights Act and federal anti-discrimination laws. However, the filing of false or frivolous complaints or charges may result in disciplinary action up to and including termination of employment.

Electronic Communications

Computers, software and telephones provided for use of employees and members of The Unitarian Universalist Church of Rockford are the property of the Church and are intended for business use. Personal use of computers, e-mail, the internet, and telephones should be kept to a minimum. Under no circumstances should any employee download or upload any software, use a password, access a file, or retrieve any stored communication without authorization from his or her supervisor. Opening, reading or downloading any e-mail received from an unknown source without the authorization and knowledge of the network administrator is prohibited as such e-mails often include viruses which may damage or destroy the network. Access to the local area network should be limited to protect the confidentiality of information stored within the network and its integrity.

The Unitarian Universalist Church of Rockford strives to maintain a workplace free of harassment and sensitive to the diversity of its employees. The downloading, uploading, or viewing of any materials that are disruptive or offensive is strictly prohibited. This includes the display or transmission of sexually-explicit images, messages and cartoons, ethnic or racially offensive slurs and comments, off-color jokes, or anything that may be construed as harassment or showing disrespect for others.

E-mail may not be used to solicit others for commercial ventures or for partisan political purposes.

The Unitarian Universalist Church of Rockford purchases and licenses the use of various computer software for business purposes and does not own the copyright to this software or its related documentation. Unless authorized by the software developer, The Unitarian Universalist Church of Rockford does not have the right to reproduce such software for use on more than one computer. Employees may only use software on local area networks or on multiple machines according to the software license agreement and duplication of software and its related documentation inconsistent with the applicable license agreement is strictly prohibited.

Computers and telephones provided by The Unitarian Universalist Church of Rockford are the property of the Church and it reserves the right to monitor their use in order to assure compliance with this policy. Employees should be aware that browsing histories and e-mail traffic, even if deleted at the user's terminal, remain in the network server and may not be erased except by the network administrator.

Drug and Alcohol Use

Consistent with its mission, The Unitarian Universalist Church of Rockford will provide a working environment free of drugs and alcohol. The use, consumption, sale, possession, or being under the influence of alcohol or any controlled substance during normal working conditions (unless being taken in accordance with the instruction of a DEA licensed physician) is strictly prohibited and will result in the immediate termination of employment. Employees attending official functions which include alcohol may consume only in moderation.

Any employee who has been prescribed any medication which may impair his or her ability to perform should notify his or her supervisor. Employees in this situation may be asked to provide information from the prescribing physician regarding his or her ability to safely and effectively perform the essential functions of his or her job while taking medication. Any use of prescribed medication inconsistent with the instruction and direction of the prescribing physician shall be considered a violation of this policy.

No employee seeking treatment for substance abuse will be discriminated against in the terms and conditions of employment for coming forward, so long as leave for treatment or other accommodation is requested prior to The Unitarian Universalist Church of Rockford becoming aware of a violation of this policy.

Persons who successfully complete an in-patient or out-patient substance abuse treatment program are encouraged to engage in after care such as participation in Alcoholics Anonymous or Narcotics Anonymous or addictions and alcoholism support groups affiliated with The Unitarian Universalist Church of Rockford. Persons returning to work following treatment for substance abuse will be subject to immediate termination for violation of this policy, as with any other employee.

Attendance

Regular attendance and punctuality are essential for all employees. It is necessary in order to be able to provide ministerial services to members and stands as an example. Excessive tardiness or absenteeism will not be tolerated and will result in disciplinary action up to and including termination.

In order that The Unitarian Universalist Church of Rockford may effectively and efficiently fulfill its mission, it is requested that employees provide as much advance notice of an absence or tardiness as is possible. As soon as the employee is aware that he or she will be late or absent, he or she should contact his or her supervisor. In the absence of extenuating circumstances, the failure to notify a supervisor of the reason for an absence, before the absence, will be treated as a "no call/no show." Any absence of three consecutive days when the employee is expected to be in attendance without contact will be treated as a voluntary resignation of employment by the employee.

Smoke Free Premises

Consistent with the mission of The Unitarian Universalist Church of Rockford and Illinois law, the use of tobacco products anywhere on the premises of The Unitarian Universalist Church of Rockford is strictly prohibited.

Timekeeping and Overtime

Depending upon their duties, employees of The Unitarian Universalist Church of Rockford may be covered by the federal Fair Labor Standards Act and the Illinois Minimum Wage and Overtime Law (non-exempt). Generally, ministers and administrators whose duties include discretionary supervisory responsibilities for other employees are exempt from the overtime laws. Regardless, The Unitarian Universalist Church of Rockford expects all employees to work as scheduled and to keep track of hours worked.

Non-exempt employees will be compensated at a rate equal to one and one half times their regular rate of pay for any hours worked in excess of forty in any given work week. A work week at The Unitarian Universalist Church of Rockford is from Sunday through Saturday. Paid time off, such as holiday pay or vacation, will not be included in the calculation of hours worked for the purpose of overtime.

Non-exempt employees' time will be tracked in 15 minute increments, rounding to the nearest quarter-hour. For example, if an employee clocks in at 8:06 a.m., her time will be rounded up to an 8:00 a.m. start time. If the same employee clocks in the next day at 8:08 a.m., her start time will be rounded down to 8:15 a.m. Employees should not clock in early.

Non-exempt employees are prohibited from working voluntary overtime. Overtime hours may only be worked with prior approval of a supervisor when authorized and necessary. Employees who work unauthorized overtime will be subject to discipline up to and including termination.

Non-exempt employees will not be allowed compensatory time off unless taken in the same work week. For example, if an employee works for 10 hours on Monday, he may be granted two hours of compensatory time off so that his hours worked in that work week do not exceed 40. The two hours of compensatory time off must be used in the same work week in which they are granted. Compensatory time off may not be carried over from one work week to another.

Annual Performance Reviews

All employees may expect to receive written performance reviews at least once per year. Employees in the first year of employment may receive a first review at or near the anniversaries of their sixth month and first year of employment and annually thereafter. Performance reviews may be completed more frequently at the discretion of the Senior Minister when deemed necessary due to special circumstances such as marginal performance. A copy of a final review will be placed in the employee's personnel record after it is reviewed with and signed by the person preparing the review and the employee being reviewed. Signing the review does not indicate agreement with the substance of the review, only that it has been seen.

Personnel Files

The Unitarian Universalist Church of Rockford will maintain personnel files for every employee. Personnel files will be accessible only to the Senior Minister and to administrative staff as necessary or to an employee wishing to review his or her own file. In addition to annual reviews, personnel files will contain any and all documents used by the Unitarian Universalist Church of Rockford in evaluating the terms and conditions of employment including hiring, termination, promotion, demotion, discipline and pay increases or decreases. Personnel files will not contain any medical or medically related information about any employee. Such information will be separately maintained in a confidential medical file and not disclosed to anyone without a need to know.

Employees may be shown and asked to sign and date documents, such as disciplinary memoranda, to be placed in their personnel files. The signature of such a document is not intended to indicate agreement with the substance of the document, only that it has been seen. Employees may submit written responses to any such documents for inclusion in their personnel files.

Employees may request the opportunity to review the contents of their personnel files. Such requests should be directed to the administrative offices, in writing, and a time will be arranged for the requesting employee to come in. Employees may also request, in writing, photocopies of all or part of their files. Such requests will usually be fulfilled within seven working days. Employees may be charged a reasonable fee for the costs associated with administrative time and copying. For purposes of this policy, an "employee" means any current employee or any employee who has been separated from The Unitarian Universalist Church of Rockford for one year or less.

Discipline

The Unitarian Universalist Church of Rockford recognizes the value of its employees and generally will attempt to use a system of progressive discipline to correct performance deficits. The Unitarian Universalist Church of Rockford, however, reserves the right to use any or none of the steps outlined below depending on the nature and severity of the situation presented.

Again, it is virtually impossible to anticipate all of the possible situations that may arise and while it is not intended to be exhaustive, the following behaviors, will result in immediate termination of employment without resort to progressive discipline:

- 1) The inappropriate touching (battery) or the threat of inappropriate touching (assault) of any employee, member of or visitor to the Church at any time;
- 2) Harassment of any employee, member of or visitor to the Church based on that student's sex, race, religion, national origin, ethnicity, sexual orientation or disability;
- 3) The downloading, uploading, display or viewing of any pornographic or sexually oriented materials while on Church premises;
- 4) The solicitation of any member or visitor to the Church for personal or commercial reasons at any time;
- 5) Loaning money to or borrowing money from any member or visitor to the Church except in the normal course of business and on the same terms as any other person where the member or visitor may be in the business of making loans;
- 6) The use of corporal punishment or physical or verbal violence toward any minor;
- 7) Falsification of information in an application for employment;
- 8) Theft;
- 9) The conviction of any felony or crime involving dishonesty;
- 10) The use, possession or sale of controlled substances or alcohol (on Church grounds), unless part of a church event where alcohol is served;
- 11) The possession or display of pornographic or sexually oriented materials (on Church grounds or while engaged in Church related activities or work but off of the premises); and
- 12) The use or threat of use or possession of firearms (on Church grounds or while engaged in Church related activities or work but off of the premises).

Where appropriate, the Unitarian Universalist Church of Rockford will employ the following steps in an effort to correct or modify performance problems:

- 1) A verbal warning will be given by the supervisor and the discussion will be documented in the personnel file;

- 2) A written warning will be issued in the presence of the supervisor and one other administrative employee and a copy of the written warning will be placed in the personnel file;
- 3) A second written warning will be issued in the presence of the supervisor and one other administrative employee and punishment such as an unpaid disciplinary suspension not to exceed 30 days in duration may be issued and a copy of the second written warning will be placed in the personnel file; and
- 4) Involuntary termination of employment.

Records of discipline will remain in the affected employee's personnel file indefinitely. The behavior does not need to have been of the same time to merit moving from one disciplinary step to another. For example, an employee verbally counseled for excessive absenteeism may be issued a written warning for not completing an assigned task. At the discretion of the supervisor issuing the discipline or the Senior Minister, steps may be repeated or skipped depending on the nature and severity of the problem.

Nothing in this discipline policy is intended to modify or alter any employee's status as an at-will employee. This is not a promise or contract of continued employment.

Conflict Resolution Procedure

Any employee of The Unitarian Universalist Church of Rockford with concerns about any change in the terms and conditions of his or her employment, such as a raise or failure to grant a raise, or with any disciplinary action taken against him or her, including termination, shall have the right to seek review of the action taken.

Where an employee wishes to seek reconsideration of an employment related decision regarding his or her employment, only, he or she may file a written request with the Senior Minister. The request submitted under this policy must be in writing and must succinctly set forth the decision being reviewed and the bases for requesting modification or reversal of that decision. Employees may not submit requests for reconsideration or review on behalf of others and may not have legal representation during this process. The written grievance must be presented to the Senior Minister within 14 days of the decision being reviewed.

The Senior Minister shall review the request and, at his or her sole discretion, determine whether further action or review is warranted. This will include review of requests for review of decisions of the Senior Minister. Within 14 days of receipt of a grievance, the Senior Minister shall respond to the grieving employee, in writing, in one of the following manners:

- 1) That the decision is sustained and final;

- 2) That review of the decision warrants further investigation by the Senior Minister; or
- 3) That the decision being reviewed will be referred by the Senior Minister to the Board of Trustees of The Unitarian Universalist Church of Rockford for consideration at its next regularly scheduled meeting.

In the event the Senior Minister opts to conduct further investigation, he or she may do so in the manner he or she deems appropriate but will provide a written final decision to the grieving employee within 30 days following the issuance of the written notice that further investigation would be conducted.

In the event the Senior Minister opts to refer the matter to the Board of Trustees, the Board may conduct such investigation or hearing as it deems appropriate. Nothing in this policy is intended to create any right of any employee to be heard before or by the Board of Trustees of The Unitarian Universalist Church of Rockford. However, the Board of Trustees may, at its discretion, offer the opportunity to an employee to present his or her grievance to it on his or her own behalf in such manner as it deems appropriate. The Senior Minister shall notify the grieving employee in writing of any action taken by the Board of Trustees within 14 days following any meeting at which action is taken. In the event the Board of Trustees provides an opportunity to be heard, the Senior Minister shall notify the grieving employee in writing of the date, time and place and of any limitations on time and manner of presentation at least 7 days prior to any such hearing.

Copies of all documents and notices provided under this policy will be placed in the affected employee's personnel file. The notification by the Senior Minister that a grievance has been received, reviewed in accordance with this policy, and is final, will serve to terminate any right to further review under this policy.

Resignation

In those cases where The Unitarian Universalist Church of Rockford is forced to terminate employment for reasons unrelated to poor performance, it will endeavor to provide the affected employees with as much notice as is practicable under the circumstances. Similarly, it is requested that employees choosing to voluntarily resign their employment provide the Church with notice of at least two weeks.

In all cases, The Unitarian Universalist Church of Rockford reserves the right to end employment prior to the tendered notice period but will continue to compensate employees who have given notice at least until such time as they actually stop working. In all cases where an employee resigns, the Church would appreciate the employee's voluntary participation in a candid exit interview in which the employee shares his or her reasons for leaving.

BENEFITS

Benefits Plans

The Unitarian Universalist Church of Rockford currently provides eligible employees with the opportunity to participate in available IRS qualified benefits plans including:

Group Health Care Plan (family & single)	Minimum 750 Hours yearly
Life Insurance	Minimum 750 Hours yearly
Disability Insurance	Minimum 750 Hours yearly
403(b) Retirement Savings Plan	Minimum 1000 Hours yearly

Details and eligibility requirements of the currently available plans are in the summary plan documents for each, copies of which may be obtained from The Unitarian Universalist Church of Rockford administrative offices. The plan documents and not this handbook are determinative of eligibility for each. Questions about the currently available benefits should be directed to the Senior Minister. The Board of Trustees of The Unitarian Universalist Church of Rockford reserves the right to revoke, modify or amend these benefits plans at any time, with or without prior notice.

Vacation

Full time employees (those regularly scheduled to work 30 hours or more per week and 1000 hours per year, or more), are entitled to and encouraged to use paid vacation. Part time employees, who are scheduled to work less than 30 hours per week, will negotiate their vacation time with their supervisor at the time of their employment. Vacation time is earned on an accrual basis but no vacation will accrue or be taken during the first year of employment. Vacation pay will be paid based on the average daily compensation for salaried employees or based on the average number of hours worked per day for employees paid on an hourly basis. Vacation time will not be included in the calculation of hours worked for purposes of overtime.

Vacation should be scheduled as far ahead as is practicable and must be requested in writing to the Senior Minister. Employee requests for specific times for vacation will be granted on a first-come-first-serve basis and in accordance with the administrative and operational needs of The Unitarian Universalist Church of Rockford. Accrued but unused vacation time may not be “banked” or carried over from year to year. Paid vacation time will accrue, based on the anniversary date of hire, on a pro rated basis in accordance with the following schedule:

- 1 – 7 years of service 10 days (2 weeks)
- More than 7 – 15 years of service 15 days (3 weeks)
- More than 15 years of service 20 days (4 weeks)

Paid Holidays

Full time employees (those regularly scheduled to work 30 hours or more per week and 1000 hours per year, or more) will be allowed observed holidays off with pay. Paid time off under this policy will not be included in the calculation of hours worked for purposes of overtime or averaging of regular rates. Holiday pay will be paid based on the average daily compensation for salaried employees or based on the average number of hours worked per day for employees paid on an hourly basis. If a paid holiday falls on a Saturday or Sunday, the immediately following Monday will be taken as the day off. Paid holidays will include:

- New Year's Day
- Martin Luther King's Birthday,
- Memorial Day,
- Independence Day,
- Labor Day,
- Thanksgiving Day and the Friday after,
- Christmas Day,

Non-exempt employees who work on observed or paid holidays will be compensated at their regular rates in addition to receiving holiday pay. The holiday pay will not be included in the calculation of hours worked for purposes of overtime.

Paid Time Off

The Unitarian Universalist Church of Rockford will provide paid time off to full time employees (those regularly scheduled to work 30 hours or more per week and 1000 hours per year, or more). Paid time off will be of two types; sick time and personal time. Employees seeking to use paid time off are asked to provide the Senior Minister with as much advance notice as is possible or practical. In accordance with the attendance policies, those employees not reporting to work due to illness must notify the Senior Minister or immediate supervisors. No paid time off under this policy will be counted as hours worked for purposes of calculation of overtime.

Sick Time

Eligible employees will be allowed a total of ten (10) paid sick days off per year, to be paid at a daily rate equivalent to the average daily compensation of the employee making the request, exclusive of overtime.

Paid sick time is intended to be used as time off for an illness or to care for a family member who is seriously ill. Family members are spouses, domestic partners,

parents, dependent minor children or those children with whom the employee is in loco parentis. If an employee requests time off due to illness, the Church may request verification of the reason and need for absence from a health care professional. In any event, for any absence of three consecutive days' duration or more, written verification of the medical need for absence will be required and the Church may request verification of fitness for return to work.

Employees may not carry over or bank unused sick days from year-to-year. No accumulated and unused sick time off will be paid to terminating employees regardless of whether termination is voluntary or involuntary. Employees abusing the sick time will be subject to discipline up to and including termination.

Personal Time

Additionally, eligible employees will be provided with one paid personal day per year to be used at the employee's discretion. Personal time off will be paid at a daily rate equivalent to the average daily compensation of the employee making the request, exclusive of overtime, and must be used in full day increments. Paid personal time will not be carried over from year-to-year and may not be banked.

Mileage Reimbursement

Where employees have been authorized by a supervisor or the Senior Minister, to utilize a privately owned vehicle for a Church purpose, reimbursement may be requested at the current IRS approved mileage rate.

If directed to attend a Church related function which requires travel, reimbursement will be made for those expenses necessarily incurred including lodging but not meals. Employees attending approved conferences or events for professional development are entitled to be reimbursed for their meals, lodging, and other reasonable expenses. Employees seeking reimbursement under this policy should provide verification of expenses such as receipts. Only commercially reasonable expenses will be reimbursed. If an employee has a question, approval for a travel expenditure should be sought from the administrative offices prior to making the expenditure.

LEAVES OF ABSENCE

Discretionary Leaves of Absence

Employees of The Unitarian Universalist Church of Rockford may make a written request to the Senior Minister for a discretionary leave of absence. The employee making the request should outline the reason for and expected duration of the leave. The Senior Minister may consult with the Board of Trustees for purposes of obtaining recommendations on whether a request can or should be met. The Senior Minister, however, shall have sole discretion in determining whether a request under this policy should be granted. The Senior Minister may request documentation or verification of the reason for any request under this leave. The failure to provide verifiable documentation or verification under this policy may result in the request being denied. Information provided to the Senior Minister under this policy shall be maintained confidentially.

Unpaid discretionary leaves of absence will not be granted unless and until all accrued and unused paid time off and vacation time has been used. During a period of unpaid leave under this policy, no benefits will accrue. Group health plan benefits will be continued on the same terms and conditions as existed at the beginning of the leave period as noted in the health insurance section below.

In considering requests under this policy, the Senior Minister will consider such factors as the requesting employee's tenure and work record, the nature of the position held as well as the administrative, personnel and operational needs of The Unitarian Universalist Church of Rockford. No leave granted under this policy will be greater than 30 days in duration. At the expiration of a leave granted under this policy, if an employee does not return, he or she will be deemed to have voluntarily resigned. An employee returning to work from a discretionary leave taken for medical reasons must provide a written verification from a health care provider of his or her fitness for work, restrictions and accommodations requested.

Although it will endeavor to return an employee to the position held at the time leave commenced under this policy, The Unitarian Universalist Church of Rockford does not and cannot guarantee that an employee granted leave pursuant to this policy will be returned to the same position or a substantially similar position. If an employee is returned to a different position than that held when the leave commenced, it will be at a commensurate level of pay and benefits.

Uniformed Services Employment and Re-employment Rights Act

Any employee of The Unitarian Universalist Church of Rockford who is called to active duty in any component of the U.S. Armed Forces, Armed Forces Reserve or National Guard shall be granted an unpaid leave of absence not to exceed five years and shall be eligible for reinstatement to the same position held, or a substantially

similar position, with the same pay, benefits, prestige and privileges as existed when the period of active duty began. For employees called to service for a period of 91 days, or less, all benefits will be continued, including accrual of vacation and all qualified group plan benefits in existence at the time military leave began, except that holiday pay shall not be paid. Upon return from a period of active duty leave of 91 days, or less, employees shall be returned to the same position held when leave began. Employees whose period of military leave exceeds 91 days shall not receive or accrue benefits but shall be offered COBRA continuation. Upon return to employment from a period of active duty of more than 91 days, employees shall be returned to the same or a substantially similar position as that held when the period of leave began. In any event, an employee returning to employment following a period of active duty of 91 days or more shall be treated by The Unitarian Universalist Church of Rockford as though he or she had been continuously employed in terms of seniority, pay, benefits, promotions, etc. Employees are expected, to the extent possible, to provide The Unitarian Universalist Church of Rockford with a copy of orders or other notice of a period of active duty. Additionally, employees must notify The Unitarian Universalist Church of Rockford of intent to return to work within 90 days of the end of a period of active duty or will be considered to have voluntarily resigned their positions.

Victims Economic Security and Safety Act

Employees of The Unitarian Universalist Church of Rockford who are victims of domestic abuse or who have children that are victims of domestic abuse may request unpaid time off in order to attend to matters such as obtaining domestic orders of protection or recovery from injuries received as the result of domestic abuse. Additionally, The Unitarian Universalist Church of Rockford will act to reasonably accommodate employees under this policy where requested. Leave granted under this policy shall not exceed twelve (12) weeks in any year based on a rolling leave period which begins with the first day of leave. The 12 weeks granted under this policy does not expand nor is it in addition to leave provided under the federal Family and Medical Leave Act. Employees taking leave under this policy will be required to concurrently use accrued and unused paid time off and vacation.

Jury Duty

The Unitarian Universalist Church of Rockford will not aid or assist any employee in avoiding jury duty. If the administrative or personnel needs of The Unitarian Universalist Church of Rockford so require, it may assist an employee who receives a summons for jury duty in delaying service. The Unitarian Universalist Church of Rockford will not compensate employees on jury duty but any compensation received by the employee from the state or federal government may be retained. Additionally, employees may, at their election, use accrued and unused vacation or paid personal time concurrently with jury service.

**The Unitarian Universalist Church of Rockford
Acknowledgement of Receipt of Employee Policies Manual**

I, _____, acknowledge receipt of a copy of
(printed name of employee)

The Unitarian Universalist Church of Rockford Employee Policies Manual. I have been told that this manual supersedes all prior documents or verbal representations made to me and that my employment with The Unitarian Universalist Church of Rockford is at-will. I have been given the opportunity to read the handbook and ask questions regarding its terms and meaning to my satisfaction. I further understand that the signed original of this acknowledgement will be placed in my personnel file.

Dated _____

(signature of employee)