Policies of the Board of Trustees of the Unitarian Universalist Church, Rockford, IL

As of November 2026

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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 2023-2024

As stewards and leaders, we embrace the mission of the church. We build

connections among board members and listen well to the congregation. We actively participate in worship, meetings, and activities to the best of our ability. We are prepared, communicate clearly, challenge each other honestly, encourage and support one another, acknowledge and correct our errors, and follow through. We work constructively with the Senior Minister (and through him, with the Assistant Minister and other staff). We speak to the congregation with one voice. We are patient and responsive, nurturing our spirit, valuing our time, and accepting "no'' as a valid response. We follow our bylaws and policies and are 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, approval of the consent agenda (which includes recognition of volunteers, reports from the treasurer, president, senior minister, and teams), 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.i.1: Staff Report Policy. 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.



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.

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 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**
Like the nature that surrounds us, we evolve as a habitat for spiritual development.

- Our deep roots connect us to a wealth of resources that nourish our growth as a beacon for justice, inclusion, and liberation, especially anti-racism and gender and sexuality justice.
- Our listening cultivates diverse and multicultural relationships that bridge divisions, strengthen our communities, heal hearts, and foster safety for all.
- Our awareness of our interdependence inspires us to protect the shared environment and natural world in which we live.

2b. **Vision**

A loving, spiritual congregation that lives our values through belonging, reason, and action.

2c. **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 of the Unitarian Universalist Church, Rockford12/7/22**

We, the members of the Unitarian Universalist Church in Rockford, Illinois, make every effort to maintain the integrity of the church community. As such, we shall:

1. Comply with Legal Requirements
   When practices are questioned, we must first consider legal obligations and requirements.
2. Avoid Conflicts-of-Interest
   As stewards of the church, we hold a sacred duty to hold the best interest of the church.
3. Honor Confidentiality
   We hold and protect private information; we respect the right to privacy of others.
4. Respect The Inherent Worth and Dignity of Every Person We
   treat all with dignity, respect, and care.
5. Practice Proactive Communication
   Open and continuous conversation is present, for proactiveness prevents conflict and distress.

For a free and responsible search of truth and meaning, disagreements may arise. As such, we shall:

PRINCIPLES

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.

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, ensuring that they are done in the spirit of these guidelines, and abiding by whatever decision is made.

PROCESS
Go directly to those with whom we disagree, or work with a Conflict Panel representative.
Go in the spirit of humility. Go in gentleness, patience, and humility, and admit our own part in the conflict.
Be quick to listen. Listen actively, confirm discussion, and act in a non defensive way.
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 just and reasonable 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).

Believe in and rely on the sacredness of the human spirit and strive toward peace, wholeness, health, and security.
If an agreement is not arranged or achieved after the above are addressed, a review via the conflict panel of the church may be arranged.

2e. Board Goal Areas

Board Goals 2022-2023

1. Revise safety and well-being policies (Strategic Plan) 2A3 a. Make a list of policies we need and commit to work 2-3 of them each month methodically and
   b. take time to collectively talk about it with one person on lead (Rev M bring Dan Hotchkiss list and Insurance list, eg and then divvy them up and research UUA/other sources)
2. ARAOM practices (Strategic Plan)-
   1. work with staff and team to grow its ARAOM capacity based on where they are.

1. Check-in with assigned teams 3 times in church year post-October.
2. Relay info back to assigned staff.

3. Board be supportive Annual campaign (perhaps a one-to-one generosity campaign) and/or whatever the finance committee and generosity team requests of the Board.

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3. Strategy

3a. Long Range Plan – See Appendix

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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 PROTECTION POLICY .....Revised: 02-22-23

We value safety and the dignity of all. The abuse or neglect of a child is unacceptable. This policy describes the principles and expectations to keep our children and youth safe.

Definitions:

- Child: A person under 18 years of age.
- Abuse: Abuse is physical, sexual, emotional, mental, economic or psychological actions or threats of actions that influence another person. This includes any behaviors, including words, that frighten, intimidate, terrorize, manipulate, hurt, humiliate, blame, injure, or wound someone. Abuse is not acceptable.

A) Annual Education and Awareness

1. The director of religious education will ensure that all volunteers who work with children will be reminded, each year, of this policy and trained on safety expectations. All staff and volunteers who volunteer more than 1x/month with Religious Education will attend a training (which can be a webinar) at least 1x/year on abuse prevention. The DRE will certify, in a manner of their choosing, that this has been done. Trainings required and offered by other organizations are acceptable.
2. This policy will be made available to all registered families and will be included in Path to Membership materials.

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

1. Volunteers must be at least 21 years of age if responsible for young people between the ages of 0 and 5th grade or at least 25 if volunteering with middle or high school students.
2. Volunteers must be an active congregant (member or friend) for at least 6 months or have references attesting to their qualifications for working with children or youth.
3. The Director of Religious Education will conduct a background check on all new volunteers, and every three years on returning volunteers. This shall be done, and the records maintained, according to recommended best practices.

C) Supervision Requirements: The Director of Religious Education will be

responsible for ensuring sufficient staffing for each classroom. It shall not be permissible to have one adult and one child alone in a classroom, vehicle, or other space. If insufficient volunteers and/or children are present to ensure this is met, groups will be combined or activities postponed. Classroom ratios shall be set by the DRE as appropriate given group dynamics, ages, and volunteer/staff experience.

D) Code of Conduct for Staff and Volunteers

1. Physical restraint and/or physical discipline (corporal punishment) may not be used under any circumstances.
2. Verbal abuse and/or the use of curse words are also inappropriate.
3. 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.
4. 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.”
5. 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: The Director of Religious Education will document any incidents that should be noted, including any concerns of abuse or neglect, injuries, or behavior that causes risk to others.

4c.i.B POLICY ON REGISTERED SEX OFFENDERS .....revised 02-22-23

Any registered sex offender who wishes to be a member of the church or who regularly attends church will fill out and sign a Limited Access Agreement with the Senior Minister and the President of the Board. The Senior Minister shall consult with the Covenant and Safety Team in the creation of any Limited Access Agreement. 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 CONFLICTS, VIOLATIONS OF COVENANT, AND DESTRUCTIVE BEHAVIOR.

JAN
25 2023

We are guided by our covenant, Code of Ethics, mission, and Unitarian Universalist values. Our covenant reminds us that “Love is the spirit of this church and reason is its guide” and that we covenant to “dwell together in peace.” Peace is not the absence of disagreement, but the presence of love and care. This policy addresses situations when love and peace are not practiced or experienced.

Core relevant values:

We value love: Love is the longing for mutual flourishing. This is expressed in empathy, caring words and actions, and respect for self and others. We want each person to grow and thrive.

We value peace: Violence, domination, manipulation, and harassment are not acceptable. People and communities flourish under conditions of safety.

We value healing: When possible, restorative practices should be used to heal relationships, individuals, and communities. This might include making amends, respecting boundaries, actions that repair, spiritual growth, and/or repentance. Restorative practices are our default, and the boundary-setting steps below are to be used when restorative practices are not able to bring healing and health.

We value anti-oppression and belonging: Systems and patterns of oppression, including but not limited to racism, sexism, ableism, homophobia, transphobia, classism, and ageism, must be noticed, challenged, and subverted. Those who have been pushed the margin should be centered in Beloved Community.

Definitions:

Conflict: Conflict is present when people are unable to "agree to disagree." When people are in tension over personality differences, a decision or direction, or a matter of opinion, they might be in conflict. Conflict is normal and healthy when addressed with spiritual maturity. We value a diversity of views and perspectives and affirm that "we do not need to think alike to love alike."

Abuse: Abuse is physical, sexual, emotional, mental, economic or psychological actions or threats of actions that influence another person. This includes any behaviors, including words, that frighten, intimidate, terrorize, manipulate, hurt, humiliate, blame, injure, or wound someone. Abuse is not acceptable.

Bullying or Harassment: Bullying or Harassment is when abuse continues over time; especially when the person has been told to stop (though this is not required to constitute bullying or harassment). This is an intentional campaign to hurt, demean, or disempower another person.

Destructive Behavior: Destructive Behaviors are actions and words which cause harm to the church, as well as to people and relationships in the congregation. Bullying or Harassment is Destructive Behavior, but so are actions that attack leaders, violate our values, or present the church in ways that are counter to our mission. Generally, but not always, Destructive Behaviors are actions that continue after a request to stop, amend, or alter one's actions.

Staff

The personnel policy supersedes this policy. The abuse, harassment, or bullying of staff members by participants in the congregation is both a moral and legal violation and is not tolerated. The Senior Minister and/or the Board President or Vice President may immediately ban any person from physical or electronic participation or contact, until such time as the Covenant and Safety Team can review the matter, for violation of this provision. As per the personnel policy, the abuse or harassment of a participant by a staff member

is prohibited and grounds for employee discipline, including up to immediate termination.

Discernment

If a participant experiences conflict, abuse, harassment, or destructive behavior with another participant in the church, the following steps should be followed.

If all relevant parties agree that it is a situation of conflict, they should employ the principles of the Code of Ethics. That can include a request that the Covenant and Safety Team provide a mediator to seek resolution or acceptance, in accordance with the Code of Ethics process.

If a person isn't sure if an encounter is conflict, abuse, harassment, destructive behavior, or something else, a discernment conversation with one of the ministers, the religious educators, or a member of the Covenant and Safety Team is appropriate.

Reporting Destructive Behavior

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

- The minister(s)
- The Religious Educators or Music Director
- Any member of the Covenant and Safety Team

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. However, unfounded complaints brought forward with malicious intent are a violation of covenant and may require a pastoral and/or destructive behavior response.

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 concern. However, where a pattern of abusive behavior may be present, providing pastoral support, safety, and healing will sometimes require wider disclosure and conversations.

IMMEDIATE RESPONSE

The minister(s) and/or the leader of the group involved will undertake an immediate response to such destructive behavior. This may include asking the destructive person or persons to leave, or suspending the meeting or activity until such time as it can safely be resumed. Any time any of these actions is taken, the Senior Minister and a member of the Covenant and Safety Team must be notified. They, in turn, will then consult with the whole Covenant and Safety Team 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

Someone will refer the matter to the Covenant and Safety Team. This may be the group leader involved in the initial incident, the person harmed, the person engaging in destructive behavior, or any third party having knowledge of the incident. This will happen regardless of whether or not the situation required an immediate response. The Covenant and Safety Team will respond in terms of its own judgment, observing the following.

- The Covenant and Safety Team will respond to problems as they arise.
- There will be no attempt to define "acceptable' behavior in advance.
- Persons identified as destructive will be dealt with as individuals; the Covenant and Safety Team shall be expected to display wise cross cultural understandings and be attentive to the way that culture of origin, generation, race, ethnicity, gender, class, disability, and other factor shape behavior and conflict.

Any time that the church may have legal exposure, the Board must be informed.

The Covenant and Safety Team 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 current threat or perceived threat to persons or property?
- DESTRUCTIVE—how much damage to the church mission and identity is occurring?
- OFFENSIVE—how likely is it that prospective or existing members will

be driven away by the destructive behavior? The Team will be especially aware of the way that folks who have been marginalized might be further marginalized by the behavior.

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

• CAUSES—why is the behavior occurring?
• HISTORY—what is the frequency and degree of destructive behavior in the past? Have they been asked to stop, and failed to do so? • COMMITMENT TO REPAIR—has the person engaging in destructive behavior sought restoration and healing of the relationship? Are they eager to be back in covenant?

The Covenant and Safety Team will decide on the necessary response on a case-by-case basis. Sometimes, the Team will conclude that this is conflict, and not a matter of destructive behavior, and invite the parties into mediation and healing. When it is determined that destructive behavior is happening, however, the following levels of response will be followed:

LEVEL ONE—The Covenant and Safety Team will meet with the person or persons and other related parties to implement this policy. The Team will communicate their concern about the behavior. Whenever possible, restorative principles should be used here. The goal is to set appropriate boundaries, make amends, create healing and safety, and build community. If, however, 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 if the individual has been in significant resolutions before, in which case the Team will infer that repeated visits have not worked.

LEVEL TWO—It may be determined that the offending individual(s) actions need to be referred to the full Board of Trustees. In making this referral, the Covenant and Safety Team shall make a recommendation for action, which the Board may accept or amend. It may be determined that person who caused harm 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 person who caused harm may be removed from membership and, if appropriate, excluded from the church premises and some or 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 Board of Trustees, two members selected by the Covenant and Safety Team who are not members of the Covenant and Safety Team 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 Destructive 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 they were removed from membership and 2) an explanation in detail of how circumstances and conditions have changed, such that reinstatement would be justified. This should include a plan for repair and healing for those harmed. The request shall go to the Board of Trustees. The Board may consider the behavior of the former member in the intervening period. 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.

HEALING THOSE HARMED

In addition to providing pastoral support to those harmed by destructive

behavior, the persons most affected or targeted by this behavior shall be consulted and informed about any and all decisions about boundaries, participation, and appeal and reinstatement. A person who has experienced this kind of injury should never be surprised by the presence of the person who hurt them.

CHILDREN AND YOUTH

The harassment or abuse of children and youth is especially serious, and covered by the Child and Youth Protection policy.

Regional Staff as Resource

The ministers, Covenant and Safety Team, and Board of Trustees are welcome and encouraged to consult with UUA MidAmerica Staff, including our Primary Contact and/or the Safety point person, for best practices, resources, and, if necessary, to be an outside evaluator of this process.

The Covenant and Safety Team

The Covenant and Safety Team will be made up of three people, with one person elected at the annual meeting each year for a three-year term. They should be people with professional expertise in justice-making, restorative practices, mental health, or similar fields. The Nominating Panel shall nominate a person each year for this Team, and appoint persons to fill any vacancies. In addition to being responsive to concerns, the Covenant and Safety Team is charged with reminding and encouraging the congregation to keep the covenant, engage conflict in healthy ways, and practice restorative and healing justice in the church and in the world. Growing the congregation's capacity to handle both conflict and harm with spiritual maturity and healing skills is part of their charge. Existing members of the Conflict Management Panel and the Safe Congregation Response Team (both of which will be eliminated and their functions placed with the Covenant and Safety Team) will be polled to make up the new team, and appointed by the Board to respective 1, 2, and 3-year terms.

4c.i.D: Transportation Policy DEC 7 2022 The Unitarian Universalist Church,

Rockford, does not own a vehicle.

There will be times when a volunteer will transport a church member, youth, or child,

in their own private vehicle on official church business. This might include a pastoral need for transportation to a doctor's appointment or other need, a Religious Education field trip, or a similar activity. Giving someone a ride to church for worship is not considered "official church business" for the purposes of this policy unless arranged through the caring team.

If someone is going to transport others on official church business, they must be registered as a driver with the church. To be registered as a driver, they must 1. Submit a copy of their valid driver's license.

2. Submit a copy of their car insurance.
3. Submit a copy of their vehicle registration.
4. Be at least 25 years of age, unless a waiver is granted by a minister of the church.
5. Have no recent history of driver-caused accidents or medical conditions that would impair their driving.
6. Sign a copy of this policy.

If a driver has any changes to their insurance, driver's license, registration, or driving history, they shall update their information with the church before driving for church purposes.

Drivers should obey all traffic laws, including the prohibition on using cell phones while driving and the requirement that all drivers and passengers wear seat belts.

Drivers should not lift or pick up any person, smoke in or around the vehicle, or accept payment (drivers may be reimbursed for mileage from the church).

If there is an accident or incident, report it to the church (any staff member) without delay, as well as contacting your insurance company.

I have reviewed this and agree to its requirements:

_____ _____
Name Date

Office use: ___ DL ____ Insurance _____ Registration

4c.i.E: Firearms Policy DEC 7 2022

Pursuant to Sections 430 ILCS 66/65 of Illinois Law, The Unitarian Universalist

Church, Rockford, prohibits persons from bringing firearms and other lethal weapons into the church or onto its grounds. Law enforcement officers shall be summoned to remove persons violating this policy from the premises.

This policy does not apply to law enforcement officers carrying firearms or other lethal weapons on church premises in the performance of their official duties.

4c.i.F Social Media Policy - Approved 3/15/23

1. The church uses social media platforms to connect with members, friends, visitors, and the public about our activities and values.
2. Posting will be done by ministers and staff only.
3. If any person, including any parent or guardian of a minor, requests that their image, name, or other information is not shared on social media (including in the newsletter), that request will be honored. New members will be asked if they want to opt out in any way.
4. Posts shall reflect our values, conform to legal requirements, including copyright and employment law, and respect confidentiality.
5. Commenting on posts is generally open, but the staff shall remove posts that defame, distract, attack, or belittle the church, its staff, and its leaders, or are otherwise inappropriate. A person may be banned or blocked from interacting with the church's posts on a platform if they continue to post comments that are inappropriate. They can be restored after a conversation about our expectations for interaction on these public platforms.

4c.i.G: IT Security Policy - Approved 3/15/23

1. Staff will keep their computers updated regularly with the latest software. They will also ensure that any personal devices on which they might do church work are regularly updated.
2. All staff devices should be password protected and "time-out" at 5 minutes or less when not in use.
3. Multiple times per year, the staff will remind the congregation to be aware of phishing scams, and how to report them.
4. At least twice per year, our outside tech support will check all work computers for anti-virus protection.
5. All data is and will be stored on backed-up and protected third-party sites and servers, including document storage, database, and financial information.

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.

4.e.i.B. PURCHASING POLICY (Revised July 2026)

The Board of Trustees of Unitarian Universalist Church of Rockford will be responsible_stewards of church resources and_will manage Church funds in a fiscally responsible manner. This sense of responsibility will guide all purchases made by the church.

The procedures discussed below will apply 1) to one-time purchases of goods and/or services greater than $2,000*, and 2) every three years, to continuing contracts greater than $2,000 per year :

- Prices/bids will be obtained from at least three (3) providers with exceptions permitted if there is compelling justification for waiving the bid process. (See *Exceptions* below.)
- Purchases/contracts will be awarded to the lowest responsible bidder that meets the bid specifications, including terms of delivery, quality and

serviceability. Justified exceptions will be permitted. (See *Exceptions* below.)

The church committee/staff member submitting the project/purchase request shall:

1. Provide a detailed description of the work to be performed or item to be purchased, the justification for the expense, the cost, and provider selected.

   If a written request for bids that outlines the scope of work and submission guidelines is issued, bidders will be requested to:
   a. submit a description of how they will complete the work to be performed.
   b. describe how they will obtain the needed project materials.
   c. outline their work progress/completion schedule.
   d. present their qualifications to deliver services, etc.
   d. present a detailed breakdown of costs.

All material must be presented in a way that bids can be easily compared.

2. Assure that the bidder selected has legal or financial protections for the church appropriate for the nature of the project. These protections may include some of the following:

a. Liability and Workers' Compensation Insurance. (The bidder must document liability insurance and workers' compensation insurance coverage equivalent to requirements in the church policy. If awarded a contract, the bidder must assure that they will add the church as a "named insured" on their insurance.)

b. Lien Waivers. (Lien waivers are especially important if the bidder will be purchasing significant materials for the project.)

c. Payment schedules. (Payment schedules will be related to costs incurred, as appropriate.)

d. Performance Bond. (The church Board will assess if the project needs a Performance Bond.)

e. Written and signed contractual agreements. (Required.)

f. Legal consultation. (The church Board will decide if legal consultation is needed.)

<u>Exceptions</u>

There are recognized exceptions to the requirement for three bids and/or the selection of the lowest bidder:

1. Contracts for the services of providers possessing a high degree of professional skill a) where the ability or fitness of the provider plays an important part; and/or b) where a provider understands the operations of the church or the building in a way that makes them uniquely qualified to provide the necessary goods and/or services.

2. Contracts for the maintenance, servicing or provision of repair parts--contracts that are made with the manufacturer of the product or the service agent of that product where the provision of parts, maintenance, or servicing can best be performed by the manufacturer or authorized service agent of the product.

3. Contracts for goods and/or services that are economically procurable from only one source, or where the availability of responsible providers in the community may be limited by nature of the goods and/or services specified, thus making soliciting multiple bids impractical.

4. Emergency procurement of goods or services where time or seasonal constraints limit application of the bid process.

5. Persuasive reasons exist to believe that that lowest bidder would not be able to provide the goods and/or services in an acceptable fashion or has conducted business in a manner that does not align with UU values.

The church committee or staff member submitting the request will be responsible for documenting the bidder selection reasoning, especially if there are limited (or single) bids evaluated, or if selected, the bid is not the lower bid.

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 COMPENSATION 10-21-86

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 Expenditure Authorities.....09-2026

Expenditure Authorities

The Board of Trustees is authorized by the Congregation to govern and administer the church funds and church operations. The board will create committees or authorize non-ministerial staffing to administer the various activities.

Board of Trustees expenditure Authorities

- The congregation By-Laws specify the expenditure authority of the Board.
- Any unbudgeted expenditure exceeding 2% of operating budget will be approved by the Society.
- The Society must be informed of all budget changes.

Program Committees and Staff Expenditure Authorities

- Standing committees, ad-hoc teams and committees, and program staff have budgets for their associated activities.
- Committee chairpersons, or staff have the authority to make commitments or expenditures up to the limits of the current year program area budget.
- Individual expenditures or commitments in excess of $500 will need Board approval.
- A committee may plan an event with costs that exceed their designated budget by planning to ask for donations, or sell tickets. It is expected that the committee will have a documented plan for expecting to stay within the annual budget.
- Committee chairpersons or staff will periodically receive budget reports to assist them
- The senior minister has the authority to make expenditures that may be categorized into, and thus impact a program area budget. Preferably in advance, the senior minister will inform staff, teams, or committees when these expenditures impacts their budget.
- The principles itemized in the Purchasing Policy will apply.
- Any expenditure is initiated by the committee chair filling out a “Check Request Form”, and submitting it to the Office Manager. The request form will include the committee, or team name, the budget account, the dollar amount, and documentation in the form of a quote, or a price list, or such. In the case of a request for re-imbursement, itemized receipts must be included.

Facilities Committees and Office Staff

- Generally speaking, there are groups that operate or maintain the building and manage the office operations. These are the Building and Grounds Committee, the Church Minister, the Office Administration Staff, the Memorials Committee.
- Budgeted, or not, expenditures, commitments, or contracts of more than $5,000 will need Board approval.
- While these expenditures, contracts, and commitments are often interwoven, it is assumed that the minister and staff have the lead responsibility for office and business operations, and the budget thereof. It is assumed that the Buildings and Grounds Committee will have the lead responsibility for building related expenditures, and the budget thereof. It is assumed that the Memorials Committee will have lead responsibility for the use of the Memorials and Special Gifts Fund.
- The principles itemized in the Purchasing Policy will apply.
- Any expenditure is initiated by filling out a “Check Request Form”, and submitting it to the Office Manager. The request form will include the requestor name, the budget account, the dollar amount, and documentation in the form of a quote, or a price list, or such. In the case of a request for re-imbursement, itemized receipts must be included.
- Church credit card expenditures must be documented with receipts and budget account information.

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 Policy 08- 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 SALES .....reaffirmed 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 EXPENDITURES 02-16-93

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.iJ RETREATS, CONFERENCES, AND EVENTS 04-25-18

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 SUNDAYS 11-18-98

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 stationary 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

Personnel Policy Manual

For

The Unitarian Universalist Church, Rockford, IL

Date Adopted: _____April 29th, 2020_____

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Adapted from the UUA Template by Linda Sandquist, Matt Menze, Sarah Dorner,

and Senior Minister.

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WELCOME

Welcome to The Unitarian Universalist Church, Rockford. We are glad to have you as a member of our staff and hope you will enjoy working for the congregation and contributing to our liberal religious community.

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

This Manual is not a contract and can be modified or changed at any time.

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

Again, welcome!

CONGREGATION MISSION

VISION: A LOVING CONGREGATION THAT CONNECTS.

MISSION: WE CARE FOR OURSELVES, EACH OTHER, AND OUR NEIGHBORS ADND RISK ACTING FOR JUSTICE. OUR CONNECTIONS CREATE SELF-ACCEPTENCE, EMPAHTY, AND EMPOWERMENT IN THIS INCLUSIVE AND DIVERSE COMMUNITY.

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ABOUT THIS MANUAL

This Manual has been prepared to help you understand some of the policies and procedures of The Unitarian Universalist Church, Rockford (referred to herein as "Employer" or “Congregation”). You should familiarize yourself with the content of this Manual as it provides basic information about our expectations, policies, procedures and benefits. Nothing in this Manual is intended to create or creates an employment

agreement, express or implied, or a contract that employment or any benefit will be continued for any period of time.

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

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

As a progressive and evolving organization which must respond to operating needs and other circumstances, changes and modifications in policies, procedures, and benefits will be made from time to time. This Manual replaces all previous personnel policy manuals or handbooks and any inconsistent policies.

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

DIVERSITY AND INCLUSION

EQUAL EMPLOYMENT OPPORTUNITY

Unitarian Universalist principles affirm the inherent worth of each human being, and commit to working towards justice, equity and compassion in human relations. The Congregation believes that policies advancing diversity, equity and inclusion are essential in creating social change which responds to historical and current practices of discrimination. Additionally, we believe that significant diversity among our staff makes for a richer, more dynamic organization. Our Congregation is committed to addressing the systemic prejudices and biases found within all parts of society by, among other things, working to ensure that all staff are trained to understand, welcome, and better serve a multiracial, multiethnic, increasingly diverse community and enhance the ability of each individual to live our values of justice, equity, and interdependence.

The Congregation affirms its commitment to inclusion and equal

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

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

Employees who have questions about discrimination, harassment or retaliation in the workplace, or who believe this policy has been violated,

should report their concerns immediately to the Senior Minister, or the Board President or Vice-President.

HARASSMENT

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

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

Conduct prohibited by these policies is unacceptable in the workplace, and in any work-related setting or event outside the workplace, such as congregation meetings, social events, and any other Congregation related activity. Any employee who believes that they have been harassed by another employee, Supervisor/Minister, a congregant, or any other person who the employee encounters in the course of employment should report that conduct immediately to the Senior Minister, or the Board President or Vice-President. If the report or complaint involves the Minister, or if the Minister is unavailable, the individual making the complaint or the individual receiving the report or complaint should immediately report the complaint to the President or Vice-President of the Board. The UUA Ministries and Faith Development Staff Group is available to assist with complaints involving ministers.

SEXUAL HARASSMENT

While all types of harassment are prohibited, sexual harassment requires particular attention.
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Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when:

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

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

- Unwelcome sexual advances, whether or not it involves physical touching; sexual assault, or coerced sexual acts;
- Requests for sexual favors in exchange for actual or promised benefits such as a favorable review, salary increases, promotions, or other benefits;
- Unwelcome suggestions regarding, or invitations to, social engagements or social events;
- Any indication, expressed or implied, that any aspect of employment conditions, depends or may depend on the granting of sexual favors or on a willingness to accept or tolerate conduct or communication of a sexual nature;
- Unwelcome or coerced physical proximity or physical contact which is of a sexual nature or sexually motivated;
- Use of offensive or demeaning terms which have a sexual connotation;
- Inappropriate remarks of a sexual nature;
- Sexual gestures, suggestive comments, sexually insulting comments, epithets, jokes or name-calling; written or verbal references about sexual conduct;
- Communication or displaying sexually suggestive objects, pictures, cartoons or computer Web sites in writing, electronically or verbally;
- Sex stereotyping, such as when the conduct or traits are considered inappropriate simply because they may not conform to other people's ideas or perceptions about how individuals of a particular sex should act or look; or

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- Hostile actions taken against an individual because of that individual's sex, sexual orientation, or gender identity, such as interfering with an individual's work area, equipment, or ability to do their job, name-calling, etc.

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

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

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

PROCEDURE/RESOLUTION OF EMPLOYEE COMPLAINTS

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

- The employee should communicate immediately with their Minister. If the report or complaint involves your Minister, the individual receiving the report or complaint should immediately report it to the President or Vice-President of the Board. You may be asked to put your complaint in writing.

- The Congregation may ask the Safe Congregation Response Team and/or the Conflict Resolution Panel to take the lead.

- An investigation will then be initiated and evidence will be gathered. The investigation will normally include an interview of the employee, the accused, and any relevant witnesses.

- The Minister or Congregation Board's President shall then take appropriate action. The complainant should be notified that appropriate action has been taken.

- If either the complainant or the alleged harasser objects to the resolution, they may seek a review by the Congregation's Board. The resolution recommended by the Board will be binding upon

the Congregation and the employee.

ACCOMMODATIONS OF DISABILITY

The Congregation provides reasonable accommodations to enable an individual with a disability to perform the essential functions of their job in compliance with state and federal law. If an employee is unable, or finds it difficult, to perform all the functions of their job due to a disability, they should inform their Supervisor/Minister about the disability and discuss the type and nature of any assistance or adjustment that would enable the employee to perform the essential functions of the job.

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

CATEGORIES OF EMPLOYMENT

Full-Time: An employee who regularly works the Congregational year or 12 months of continuous full-time service at 40 hours or more per week is considered a full-time employee.
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Part-Time: An employee who regularly works for the Congregational year or 12 months is considered a part-time employee. Part-time employees scheduled to work at least 10 hours but less than 40 hours per week are eligible for benefits according to the benefit plan descriptions in this Manual.

Casual/Temporary Employee: An employee who works full or part-time for a specific time period, including during peak or seasonal periods, for specific projects, to fill in for an absent regular employee, or for other reasons for a limited period of time is

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

FLSA DEFINITIONS

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

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

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

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

WORK SCHEDULES AND PAY

ORIENTATION

Your Supervisor/Minister or a designated congregational leader will introduce you to your co-workers and orient you to your work area and job responsibilities. In some cases, a written job description has been prepared that contains a summary of duties and responsibilities. Of course, it is impossible to list or to describe all of the duties of a particular job. Moreover, from time to time, changes in jobs will occur to reflect

temporary or long-term changes in staffing or operational needs. Please keep in mind that your Supervisor/Minister has the authority to assign duties, responsibilities, or functions to you even though the duties have not been yours in the past or are not specifically mentioned in your job description.

EMPLOYMENT AUTHORIZATION

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

HOURS OF WORK

Your Supervisor/Minister will establish individual work schedules, which may change from time to time based on the needs of the Congregation and at the discretion of the Minister. Attendance at meetings outside of established work schedules at the request of the employee's Supervisor/Minister will be considered time worked. Employees may occasionally be required to attend staff retreats or off-site events which are relevant to their positions. Employees should not work more than the hours they are authorized.

Your Supervisor/Minister, at their discretion, may authorize work-at-home for minor illnesses for you or your dependents, forgive short-term sick absences less than 4 hours, and approve short-term schedule
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adjustments. Employees' daily schedules are at their discretion, as approved by the minister. Employees working from home should be reasonably available by phone and email, and should be doing church work.

MEAL AND BREAK PERIODS

Employees should take breaks.

TIMEKEEPING AND OVERTIME

Non-exempt employees must submit a written record of their time

worked on a weekly basis, consistent with the recordkeeping provisions of the Fair Labor Standards Act ("FLSA") and state law.

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

PAY AND PAYROLL DEDUCTIONS

The Congregation strives to offer its employees equitable and competitive wages and salaries commensurate with its ability, resources, and sound policy. Pay adjustments generally will be considered for all employees once a year, with any adjustments effective at the beginning of the fiscal year. There is no guarantee of an annual pay adjustment. Pay adjustments are usually based upon such factors as individual performance, job responsibilities, and other appropriate factors, such as increases in the cost-of-living as well as changes to UUA salary recommendations.

Deductions made from employees' wages are reflected on a pay stub. Federal law requires deductions from pay for income tax, Social Security, and Medicare. Other deductions may include state and/or local taxes or wage garnishments. Some deductions, such as voluntary retirement contributions, or medical or other benefit cost-sharing, are optional and are made only if the employee has authorized the deduction. Paychecks

and pay stubs should be reviewed when they are received. If an employee believes a mistake has occurred, or if there are any questions, the employee's Supervisor/Minister should be contacted immediately.

Employees are paid monthly on the 20th of each month. Your pay will be paid by direct deposit, unless you opt out and request a mailed check.

CORRECTIONS OF ERRORS IN PAY

It is the Congregation's policy to comply with federal and state laws

governing payment of wages, and the Congregation makes every effort to ensure employees are paid correctly. Occasionally, however, mistakes may happen. When mistakes occur, employees should call them to the Congregation's attention immediately. The Congregation will promptly investigate the issue and make any corrections necessary.

PERSONNEL INFORMATION AND FILES

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

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

The Congregation maintains a personnel file for each employee that contains new hire paperwork, performance reviews, and other documents related to the Employee's employment. An employee is allowed to write their response to any document added to the file. Employees may review the contents of their file upon request.
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POLICIES APPLICABLE TO EMPLOYMENT

ABSENTEEISM AND TARDINESS

Each employee is expected to maintain good attendance and to report to work on time. Absence and lateness hinder the effectiveness of our work and must be kept to a minimum. Excessive absenteeism or repeated tardiness may result in discipline up to and including termination of employment.

Employees should keep their scheduled hours. When an employee cannot keep their regular hours, they should inform the Senior Minister, and other

employees scheduled to work that day, as soon as possible. The notification and approval of a particular absence by a Supervisor/Minister does not insulate an employee from a review of the total number of absences or late arrivals in any given period of time.

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

PROFESSIONAL ATTIRE AND CONDUCT

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

ALCOHOL AND ILLEGAL DRUGS

The Congregation maintains a drug-free workplace. The use, possession or distribution of any illegal drug (or prescription drugs not being taken or possessed according to medical direction) on Congregation premises or property is prohibited. Under no circumstances may an employee appear at work while intoxicated or under the influence of illegal non prescription drugs, marijuana, or alcohol or smelling of alcohol or marijuana. Improper use of prescription drugs is also prohibited. A violation of this policy may be grounds for immediate disciplinary action up to and including termination.

The Congregation recognizes that responsible consumption of alcohol might be acceptable at occasional functions, but generally, the workplace

is alcohol-free. On such an occasion, all employees are expected to uphold an atmosphere of professionalism and respect for those who choose not to participate. Any staff function at which alcohol is served must first be cleared with the Supervisor/Minister. It is expected that employees consuming alcohol on the premises do so in moderation and in the spirit of maintaining a safe and comfortable environment for all.

SMOKING

The Congregation is a smoke-free workplace. Smoking and vaping of

tobacco, marijuana, or any substance is not allowed anywhere on Congregation property, both inside or outside the Congregation building.

CONFIDENTIALITY

Employees may have access to confidential information about the Congregation, including but not limited to information about members, friends, or other staff members. Such information must remain confidential and may not be released, removed from the Congregation's premises, copied, transmitted or in any other way used for any purpose by employees outside the scope of their employment. Employees have the right to use and share information about their personal wages and benefits. All requests for information concerning past or present employees received from organizations or individuals should be directed to the Supervisor/Minister.

COMPUTERS, INTERNET, EMAIL AND OTHER RESOURCES

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

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

- transmitting obscene, harassing, offensive or unprofessional messages;

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

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

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

Any software or other material downloaded onto the Congregation's computers may be used only in ways consistent with the licenses and copyrights of the vendors, authors or owners of the material.

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

With prior authorization, employees may use their own personal electronic devices (computers, tablets, phones, etc.) for work related purposes provided the devices have appropriate security software and the employee agrees to follow appropriate data protection and back up practices. Any files or software belonging to the Congregation may only be downloaded and used for Congregation related work provided the employee is given express written permission from the Congregation, and proper documentation is maintained regarding the files downloaded in the event that future retrieval is required. In addition, upon employment termination for any reason, the employee agrees to give the Congregation

access to any personal electronic devices and passwords, to allow the Congregation to retrieve and/or delete all Congregation files and documents from them. In the event that the Congregation does not request such access, then the employee agrees promptly to return, to the extent practicable, and to delete any and all Congregation related documents and copies thereof from any such devices or back ups.

The employee is responsible for any maintenance, repair, or replacement of a personal device required or used, irrespective of the amount of work

usage or the cause of the damage unless agreed to in writing by the Congregation. However, the employee must provide the Congregation with immediate notice should a personal device containing Congregation software or files be lost or stolen.

CONFLICT OF INTEREST/OUTSIDE EMPLOYMENT

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

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

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

INCLIMENT WEATHER

If Rockford Public Schools is closed, the church office is closed.
Employees may work from home, but are not expected to come in.

EMPLOYMENT OF RELATIVES AND MEMBERS

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

The congregation's bylaws prohibit compensation to members of the church without approval from the Board. In general, the congregation

does not employ members, and staff members should remember that they serve the congregation, and are not members of it.

MEDICAL DOCUMENTATION

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

VEHICLE USAGE AND EXPENSE REIMBURSEMENT

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

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

SAFETY AND ACCIDENTS

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

Any unsafe condition, equipment or practice observed by an employee should be reported immediately to the Supervisor/Minister. All on-the job accidents or injuries to employees, no matter how minor, should be reported immediately to the Supervisor/Minister and workers

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

PERSONAL PROPERTY

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

WORKPLACE THREATS AND VIOLENCE

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

Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts on congregation property may be removed and must remain off congregation property pending the outcome of an investigation. If the Congregation determines that a staff member has violated this policy, the Congregation may take appropriate disciplinary action that may include, but is not limited to, suspension and/or termination of employment, and/or legal action as appropriate.

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

INSPECTION RIGHTS
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Congregations, like other organizations, are sometimes the victims of theft. The congregation has on its premises storage facilities such as desks, file cabinets, closets and storage areas for the use of employees. The storage of any unauthorized alcohol, weapons, explosives, or illegal drugs or drug-related paraphernalia is prohibited on congregation premises. Therefore, the Congregation reserves the right to open and inspect any desk, file cabinet, storage closet, or storage area at any time

and without prior notice or consent. Employees may not use personal locks on congregation owned desks, cabinets, closets or storage areas.

MEDIA INQUIRIES

All requests for information on behalf of or regarding the Congregation from newspapers, television and radio media should be directed to the Minister. An appropriate response to a media inquiry would be, “I’m not the best person to answer that question. May I contact the appropriate person and have that individual get back to you?”

PERFORMANCE AND CONDUCT EXPECTATIONS

SUPERVISION AND PERFORMANCE REVIEWS

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

DIFFICULTIES ON THE JOB

In every organization, there are situations where an employee's performance does not measure up to the standards of the job established by the Church, or where they do not conform to work or conduct expectations. In such cases, the Congregation will strive to help employees succeed in their work. However, continued employment depends on the Congregation’s needs and the employee’s ability to satisfy performance and conduct standards.
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We hope problems will be resolved at an early stage with open communication between the employee and the Supervisor/Minister. When improvements are necessary in the conduct or performance of an employee, the Congregation will attempt to give the employee written advance notice of the problem and that their job is in jeopardy if satisfactory improvement is not made. However, because of the

circumstances or the nature and seriousness of the conduct or performance deficiencies involved, the Minister or Board Chair/President may immediately terminate an employee's employment without prior notice.

STANDARDS OF CONDUCT

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

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

Conduct that does not meet the Congregation's standards, such as violations of Congregation policies, a lack of respect or courtesy to a fellow employee or member, disruptive or disorderly conduct, etc., will not be tolerated and will be grounds for immediate disciplinary action and may result in termination of employment. In addition, any breach of trust or conduct which shows a serious lack of dependability or good judgment, such as theft, falsification of Congregation records, destruction of Congregation property, conflict of interest, insubordination, etc., may be grounds for immediate discipline, up to and including termination from employment.
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SEPARATION PAY

If an employee's position is terminated for reasons unrelated to work performance or employee conduct, the employee is eligible for 2 weeks of severance pay, calculated as the regularly scheduled hours x the hourly

pay rate for non-exempt hourly employees, for each year of employment up to a maximum of 16 weeks.

If employment is ended for poor performance before the second anniversary, the employee will be paid 2 week's severance pay, calculated in the same manner. If the employee has completed two years or more then they shall receive one additional week of severance for each year of service up to 6 weeks. If an employee is dismissed for serious misconduct, no severance is paid and all benefits cease at the time of dismissal. Accrued, unused vacation will be paid.

If a position must be eliminated, or hours reduced, the Congregation will give the maximum notice possible. When possible, an employee may be offered a new position at the church at a later date, with seniority restored.

RESIGNATION/RETIREMENT

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

BENEFITS

TIME OFF POLICIES

HOLIDAYS

The following are holidays for which an employee is paid:
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New Year's Day
Martin Luther King Jr. Day
Memorial Day
Fourth of July
Labor Day

Thanksgiving Day
The day after Thanksgiving
Christmas Day
New Year's Eve

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

In addition, each employee has two floating holidays to use at their discretion, with notice given to the Supervisor/Minister. These days must be taken as one full day – they cannot be spread out over multiple days.

Employees regularly scheduled to work at least 20 hours or more per week are eligible for holiday pay if they would normally be scheduled to work that day. If eligible employees are required to work on a holiday, they generally will be granted another day off. Eligible part-time employees only receive holiday pay if they are scheduled to work on a holiday and are paid for the number of hours they are normally scheduled to work that day.

VACATION

The Congregation grants paid vacation to regular employees scheduled to work at least 10 hours per week at their regular rate of pay based on their length of service with the Congregation according to the schedule below.

Length of Service	Annual Amount of Vacation
0-4 years	2 x employee's regularly scheduled weekly hours
5-9 years	3 x employee's regularly scheduled weekly hours
10 + years	4 x employee's regularly scheduled weekly hours

Vacation credits each pay period and employees may not use more than the amount credited without approval of the Supervisor/Minister. Increases in vacation accrual rate will be made on the first day of the fiscal year following the anniversary date of the year in which an employee completes their 5th or 10th year of employment.

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

Vacation time does not carry over from year to year.

SICK LEAVE

All employees are eligible for Sick Leave. Sick leave is earned upon hire. Each employee has up to 10 paid sick days per fiscal year. Sick days do not carry over from year to year. When possible, especially for part-time employees, employees should substitute days to make up time.

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

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

FUNERAL OR BEREAVEMENT LEAVE

Empolyees will be granted bereveavement leave by the Senior Minister on a reasonable basis.

JURY DUTY

Time off for Jury Duty will be accorded in line with IL law.
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LEAVES OF ABSENCE

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

FAMILY AND MEDICAL LEAVE

Consistent with UU Values, the Congregation voluntarily provides certain aspects of the Family Medical Leave Act ("FMLA"), which allows an employee after 12 months of employment to take up to 12 weeks of unpaid leave due to the employee's own serious health condition, for the birth, adoption or placement for foster care of a child or to care for a family member (child, spouse, or parent) with a serious health condition. Up to the conclusion of this leave period, an employee generally has the right to return to the same position. This leave may be taken all at once or intermittently, depending on the circumstances. Medical certification is required.

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

PARENTAL LEAVE

PAID LEAVE: After 12 months, employees who become natural or adoptive parents are eligible for up to 12 weeks of paid parental leave. Parental leave must begin within six weeks of the birth or adoption. The rate of

pay for weeks of paid parental leave is based on wages for the employee's regularly-scheduled workweek. Rather than taking twelve consecutive weeks of leave, the equivalent number of days may be spread out over up to a year, at the discretion of the Supervisor/Minister. Such intermittent parental leave must be used within one year of birth, placement, or whenever the leave begins, whichever is first. Parental Leave benefits apply only to adoptions in which the child is new to the parent(s).

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

EXTENDED MEDICAL LEAVE

Employees, who work a minimum of 10 hours per week, have been diagnosed with a serious illness or disabling condition by a physician and have exhausted their vacation, sick and personal leave benefits, may be paid extended sick benefits at 75 percent of their regular pay until the earlier of release to return to work by the physician, approval for long term disability payments, or 90 days whichever occurs first.. Vacation and other time off with pay benefits do not accrue during this period. Extended medical leave goes into effect after all other leave (sick and vacation) has been used.

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

MILITARY LEAVE

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

verification of the duty call from military authority, the date the leave is

to commence, and the expected date of return.

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

SABBATICAL LEAVE

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

To be eligible to apply for a sabbatical leave, the employee must work half-time or more hours per week, demonstrated a good work record of at least 5 years of continuous employment, and currently be in good standing with the Congregation. Normally, sabbaticals may not exceed 12 weeks. Other requirements may also apply. Information about sabbatical leaves may be obtained from the Minister or Chair/President of the Board.

INSURANCE AND RETIREMENT EMPLOYEE BENEFITS

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

HEALTH INSURANCE BENEFITS

Employees who are expected to work at least 750 hours per year may enroll in the group health insurance plan sponsored by the congregation.

The Congregation currently pays 80% of the premium for full-time employees for the standard PPO plan offered by the UUA. Part-time staff working 750 hours or more receive a pro-rated payment of the premium toward coverage of health insurance benefits. Eligible employee dependents may also be enrolled and the Employer pays 50% of the additional premium for dependents, again pro-rated for part-time staff according to the following schedule:

1820 hours per year (35 per week) or more	80% of employee/50% of dependent premium
1560 - 1819 hours per year (30 - 34 per week)	65% of employee/40% of dependent premium
1040 - 1559 hours per year (20 - 29 per week)	50% of employee/30% of dependent premium
750 - 1039 hours per year (14 - 19 per week)	40% of employee/25% of dependent premium

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

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

GROUP DENTAL, TERM LIFE, AND LONG TERM DISABILITY INSURANCE

Employees who are expected to work 750 hours per year are enrolled in term life insurance and long-term disability insurance through the group plan sponsored by the UUA. The congregation pays 100% of the cost of Long-term Disability insurance and term life insurance. The cost of Long Term Disability Insurance is imputed as income, so that if this insurance is used, the benefit is non-taxable. Employees who work 750 hours per year may also enroll in group dental insurance. The congregation pays the premium cost for dental coverage according to the same schedule as health insurance (see A.1. above). Employees will be required to make their required contribution Further information concerning these policies is available from the Supervisor/Minister or by going to https://www.uua.org/finance/compensation/uua-insurance-plans

WORKERS' COMPENSATION INSURANCE

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

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

RETIREMENT BENEFITS

Our Congregation has adopted the Unitarian Universalist Organizations Retirement Plan (UUORP). The plan is an IRS qualified, defined contribution, 401(a)/(k) multiple employer, Church retirement plan designed to help ensure employees of UUA-related organizations have an opportunity to accumulate savings for their retirement years. Every employee has the option to enroll and authorize Elective contributions (pre-tax salary reduction contributions) immediately upon employment, irrespective of hours worked or scheduled.

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

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

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

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

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

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

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

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

Date	Print Name	Signature

I. Staff Response

The basic premise of an emergency response is that at any emergency incident ***one*** member of the UU Church staff will be present at the site of the emergency and will be in charge of the response to the situation. Whoever is the first person on the scene is in charge until someone from the Chain of Command arrives, and simultaneously is calling for appropriate emergency aid.

Chain of Command

Each individual participating in the operation reports to only one person. This eliminates the potential for individuals to receive conflicting orders from a variety of sources, thus increasing accountability, preventing freelancing, improving the flow of information, helping with the coordination of operational efforts, and enhancing operational safety.

This is necessary so that an efficient, timely, and appropriate response is made. The Incident Command System model is the basis for this plan. Roles/responsibilities are described, will be understood, practiced and adhered to.

The Lead Staff (LS) will direct other staff, volunteers and church attendees in dealing with the emergency. Chain of Command to determine who will be in charge works in the following way. The highest ranked person on the list is in charge unless they are not on the site or unable to serve in this position, which would then move leadership to the next person on the list, and so on:

Chain of Command (This list will change with any change in personnel.)

1. Senior Minister
2. Building and Grounds Chair
3. The staff person first on the scene of the situation.
4. The Board Member first on the scene of the situation.

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All staff members will be trained in this Emergency Action Plan, additional trainings as necessary and emergency plan exercises. These staff will have the authority to direct all activities related to the emergency and assign other staff to specific duties that may be outside of job descriptions. All staff and volunteers are expected to exercise situational awarenessand report concerns to LS as they arise. Ministers and other worship leaders are not assigned operational duties within this plan, with the exception of #1 and 3 above and/or implementing the response as directed by the Lead Staff. Their primary role will be to provide emotional and spiritual care to persons in the emergency and to calm others who are standing by or attending an event at the church when the emergency occurs.

Ministers, and in their absence other Board members, will act in coordination with the Lead Staff as information source to media requests.

II. Medical Emergency

Medical emergencies include persons on the church property who have dizzy spells, disorientation, pass out, have sharp chest pains and/or other pains, falls, cuts, difficulty in breathing, severe vomiting and other medical or life threatening emergencies. The lead staff person (as defined above) will do the following:

a. Determine if 911 should be called (to 4848 Turner) and assign a person to make the call and meet the responders at the 4848 Turner entry.
b. Determine if AED should be used and assign a person to bring it to

the scene.

c. Determine if CPR should be initiated and assign persons to begin compression-only CPR.

d. Determine if the victim is under 18, assign a person to locate parents.

e. Determine if injury requires limited movement.

f. Determine if first aid kit is needed and assign person to bring it to the scene.

g. Determine if person is or has recently vomited and turn person on their side.

h. Determine if person needs warmth and comfort and assign persons to find appropriate materials.

i. Turn the direction of the emergency over to 911 staff when they arrive.

j. Determine if help is needed to calm persons at the scene and assign persons to intervene and move persons away from the scene.

Church-Owned wheelchairs are in the office lobby, above the

stairs.

Defibrillators are located:

• Main level – in the hallway near the library.

First Aid Kits are located:

- Lower level - in the nursery
- Main level – in the Kitchen by the door
- In the offices next to the copier.

III. Public Health / Pandemic Response

Public Health concerns, such as community spread disease or foodborne illness, have the potential to be significant safety issues. As we have learned with Covid-19, some community spread illnesses can quickly and profoundly impact: the health and wellbeing of congregants, particularly the most vulnerable, staffing, and the essential functions of the church. In instances of emerging health concerns we look at our stated sources of authority to determine the most immediate and ongoing responses.

Sources of Authority:

For local public health concerns The Illinois Department of Health (IDH) is our primary source of authority. IDH provides specific recommendations for community and faith-based organizations. For larger scale community spread diseases and pandemic responses the Center for Disease Control (CDC) provides authority and guidance. For responses to community spread diseases that specifically impact our children's educational settings, the Rockford School District provides an additional source of guidance.

The Board is the source of authority that determines policy, safety protocols and decisions that impact functions of the church in response to both emerging and ongoing public health concerns.

Response Policies and Protocols:

The Board and staff, using the most up-to-date recommendations from public health authorities, will create policies and safety protocols that are tailored to the emerging public health concern. They will monitor the situation and adjust protocols over time in response to the emerging or ongoing public health concern. Responses may include but are not limited to: safety protocols for staff and congregants to enter the building or gather in person; increased or revised cleaning and sanitization; or reporting to IDH, and, in extreme case of public safety concern, cancellation of programming or building closure. **Reporting a Foodborne or Waterborne Illness:**

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Reports of suspected foodborne illness should be reported to the Office Manager or follow the chain of command. That person will make a report to one of the following:

- **Call 1-800-222-1222, the Illinois Poison Control Center.**

IV. Emergency Evacuation due to fire, gas, chemical, or water break

Always call 911 first! If there's a suspected gas leak, leave the building before you call!

The building will be evacuated in the case of fire, gas leak or other event deemed necessary by the LS. All persons in the building will be evacuated. The staff will advise people to leave immediately with no stops for personal belongings and will help those in need of assistance. Children will be accompanied out of the building by teachers and helpers in the rooms. The nursery personnel, along with additional resources as may be assigned, will carry the children out of the building as needed. **The elevator will not be used. Exit signs are in each hallway directing the way out.**

Everyone must be at least 100 feet away from the building in case of a fire. **The gathering place is at the far east end of the parking lot, near the dumpsters. Families will be reunited there.**

See the embedded map for building exits, fire pulls and fire extinguishers.

Fire doors will automatically close with a fire alarm.

In the event of a **gas leak**,

- Do not pull the fire alarm; alert occupants by word of mouth •
- Do not turn on or off electrical switches

- Avoid using electrical device or telephone of any type • Do not start up or shut down motor vehicles or any other electrical equipment
- Do not strike a match. Avoid open flames or other ignition sources.
- Move to a location a safe distance away.
- Call Nicor Gas (from outside) at **888.642.6748** or **911** in an emergency. • Stay away until Nicor Gas or the emergency responders have told you it's safe to return.

V. Weather Emergency

In the case of a storm emergency such as tornado, the person monitoring the situation will direct appropriate staff to **inform all persons currently in the building to seek shelter in the lower level of the building.**

The goal is for all persons to be in rooms with NO windows and NO exterior walls. If the numbers of people exceed what is deemed to be safe, the staff in charge will unlock other rooms in the area such as the mechanical room and other storage rooms. The end of the emergency will be determined

by the Lead Staff member.

a. What prompts a weather emergency? Sirens or weather alerts on radios and phones.
b. Who calls it? The Lead Staff.
c. Everyone needs to get inside.

All persons will seek shelter in hallways and protected spaces. As many as possible will go downstairs. The safest areas are maked in yellow.

- The “Spectrum Hallway”, into the commons, and the church RE library are the most protected places and should be used by all people who can do stairs.
- People who cannot do stairs should go to the bathrooms or to the choir and conferene rooms, away from the small windows.

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VI. Loss of Power

If in the elevator during a loss of power, call 911 from cell phone or elevator phone. The fire department has a team that responds to these situations. Decisions about staff and programming will be made based on the estimated length of outage, the time of day regarding sunlight and what is happening in the building at the time.
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VII. Persons showing inappropriate behavior

The UU Church, Rockford, through active outreach, community partnerships, and signage, has chosen to take explicit actions on political and social issues. It is incumbent on our congregation to be

prepared for negative reactions from those that don't share the church's views. To that end the following policies and processes will be put into place.

Inappropriate Behavior

Recognizing there is a spectrum of inappropriate behavior that ranges from mild annoyance to active shooter it is important that all "Initial Contact/Front Line" volunteers and staff be trained in how to recognize and react correctly to inappropriate behavior in and around the UU Church.

Much of what may be considered unsuitable behavior by groups today is organized and conducted thru social media. We are regularly alerted by other progressive activists about "negative chatter" so we can anticipate issues.

Acknowledgment of the role of initial contact

There must be recognition that not everyone may be emotionally or substantially able to take on the task of making the initial judgment and reacting to inappropriate individuals.

Staff assigned and people volunteering for these positions should be candidly evaluated as to their ability to function in what, on occasion could quickly escalate into an uncomfortable or dangerous situation. Individuals not willing or able to respond properly should not be in these first contact situations.

Planning not profiling

Sometimes a situation calls for having mental scripts, or slides in your memory banks to allow for a rapid assessment of the situation and formulation of a plan. These may be mental short hand in the sense that "I've seen this behavior before and it led to this kind of reaction". What we need to do is quickly understand the totality of the situation and behavior – not who is or isn't exhibiting that behavior. It is critical to pay attention to and note details that describe the person, e.g., clothing, facial features, hair, height, weight, race, apparent gender expression, age, etc.

Spectrum of potential Inappropriate Behaviors

There is no hard and fast definition of inappropriate behavior in relation to The UU Church. Behaviors could range from simply disruptive to an

active shooter. There is no model of Inappropriate Behavior and it is usually situational, therefore there is not an all purpose response. The key message is that Initial Contact or Front Line situations will need to have people who are trained and able emotionally and physically to react to inappropriate behavior with appropriate behavior. Examples of

the spectrum of behaviors:

- Passive aggressive
- Intoxication
- Mental illness
- Political demonstrations
- Theft and vandalism
- Active threat
- Active shooter
- Domestic terrorism

Risk Frequency Analysis

Over reaction may be as harmful as under reaction. Most of the time dealing with inappropriate behavior at the UU Church will be in the low risk/low frequency quadrant.

Recognizing Violent or Threatening Behavior

Engage! “Welcome to Unity. What brings you here today?”

Violent behavior includes, but is not limited to:

- Any physical assault, with or without weapons.
- Behavior that a reasonable person would interpret as being potentially violent, such as throwing things, pounding on a desk or door, or destroying property.
- Specific threats to inflict harm, such as a threat to shoot a named individual.
- Use of any object to intimidate and/or attack another person.

Threatening behavior includes, but is not limited to:

- Physical actions short of actual physical contact and/or injury, such as moving closer aggressively, waving arms or fists, yelling in an aggressive or threatening manner.
- General oral or written threats (in any medium, including email and social media) to people or property, such as, “You better watch your back” or “I’ll get you” or “I’ll ruin your car.”
- Threats made in a “joking” manner.
- Stalking behavior.

- Implicit threats, such as, “You’ll be sorry” or “This isn’t over yet.”

Reporting Violent or Threatening Behavior

If you are aware of a situation that has indicators of concern like the ones listed above, please share what you know with a member of the staff, so that others may be notified as appropriate.

VIII. Demonstrations

People have a right to protest or demonstrate off church grounds, but they do not have a right to block our entrance or to be on our grounds.

Before the storm: Risk Management

Understand the risk fully. Often, but not always, demonstrations outside the church may be predicted by the ongoing monitoring of the Internet and social media by staff.

The staff needs to think through all the risks that might be involved in any event, including a mental walkthrough of possibilities and appropriate responses. “What if?” Then based on findings, develop a plan making sure there is an emergency policy that everyone knows. It should be a known part of the culture that is reviewed frequently. Lead staff informs other staff and volunteers who are likely to be onsite at the time.

During the storm: Crisis Management

The Lead Staff will either interact with the demonstrators, or will delegate this to another staff person, explaining what is public and what is not.

Signs and other objects of disruption may not be brought into the church, and while all are welcome to enter, any disturbance of the sanctioned activity will not be tolerated. If needed, the police will be called to intervene.

Individuals in the congregation need to be informed of what is going on and what appropriate behavior is expected.

After the storm: Debrief

A debrief should be carried out as soon as appropriate. Three questions need to be addressed: What was planned? What actually happened? What do we need to do differently next time?

IX. Suspicious Package / Bomb Threat

A. Suspicious Package

Letter and Parcel Bomb Recognition Checklist, What to Look For

- Foreign mail, air mail, and special deliveries.
- Restrictive markings such as “CONFIDENTIAL” or “PERSONAL”.
- Excessive postage.
- Handwritten or poorly typed address.
- Incorrect titles.
- Misspellings of common words.
- Oily stains or discoloration on package.
- Strange odor.
- Strange sounds.
- Excessive weight.
- Rigid, lopsided, or uneven envelopes.
- Excessive tape or string.
- Visual distractions.
- No return address.

Handling Suspicious Packages – **DON’T!**

- DO NOT open or shake it.
- DO NOT carry or show to others.
- DO NOT bring to the Police Department.
- DO NOT sniff, touch or taste.

Handling Suspicious Packages – **DO!**

If a suspicious package is left outside of the door, leave it there

and call 911.

If the package is delivered to the inside of the building, put on gloves and move it to the the vestibule closest to the door of delivery and lock the door to confine the area.