

Unitarian Universalist Church of Bloomington, Indiana

Seeking the Spirit, Building Community, Changing the World

Board Minutes

April 19, 2023



I. Call to Order and Chalice Lighting	2
II. Check-in	2
III. Approval of the Board Minutes	2
IV. Reports	2
A. Lead Minister Report	2
V. New Business	2
A. Budget	3
B. Stewardship Development Working Group Report	3
C. Stewardship Update	3
D. Search Committee Nomination Rollout	3
VI. Old Business	4
A. General Assembly Delegates	4
B. Personnel Policy Vote	4
C. Personnel Committee Member Suggestions	4
VII. Housekeeping	4
VIII. Topics for Future Consideration	4
A. By-Laws Committee Proposed Changes	4
IX. Executive Session	4
X. Adjournment	5

Board members attending: Linda Pickle, Mary Craig, Drew Schrader, Regina DiLamore, Abby Gitlitz, Jane McLeod, Rich Slabach

Board Members Attending via Zoom: None

Board members absent: None

Ministers attending: Rev Connie Grant, Rev Emily Leite

Guests attending: Barb Backler in person and Christine Banister and Harv Hegarty via Zoom

Submitted by: Regina DiLamore, Secretary

Attached Documents:

- A. Lead Minister's Report
- B. Stewardship Development Working Group Final Report
- C. Personnel Policy

I. Call to Order and Chalice Lighting

President Abby Gitlitz called the meeting to order at 7:02 pm, and the chalice was lit. A quorum was in attendance.

II. Check-in

III. Approval of the Board Minutes

Regina DiLavore moved to approve the March minutes. Linda Pickle seconded the motion. The motion was approved.

IV. Reports

A. Lead Minister Report

Rev. Grant provided updates to the Board. Stephanie Kimball is developing a family involvement support staffing plan for the Religious Education Coordinator and childcare staff positions. The April 2 service featuring worship associates was a success and will continue. In-person attendance has been approaching 150. Anabel Watson is recruiting a Welcoming Team to promote UUCB ownership, action and joy in hospitality and inspire a larger church community. The social justice task force is considering ways to be more visible.

A new church website is under development and the website focus group consists of Rev. Connie Grant, Mandy Skinner, Olaya Fernandez Gayol, Christine Banister and Barry Rubin.

The Celebration of Emily's service to UUCB will be after service on June 18, her last day in the pulpit.

The Lead Minister's report is provided in Attachment A.

V. New Business

A. Budget

The increase in next year's budget will be \$4,000. An additional \$5,950 was requested to upgrade Microsoft Office and to replace the projector. These funds would be spent in August. Currently, monthly contributions are being placed in the technology budget and technology spend is being forecast out.

Rich Slabach moved to approve moving \$5,950 from the SPF managed Operational Available fund to a Technology Reserve account. Linda Pickle seconded the motion and the motion carried.

The Board tabled the discussion of benefits.

B. Stewardship Development Working Group Report

The Board discussed the Stewardship Working Group Final Report. The Board liked the recommendations around staggered terms, co-chairs, and more messaging throughout the year.

The report recommended a change from a stewardship committee to a pledge committee format specifically for the purpose of raising money and pledging. The report also discussed providing monthly stewardship updates.

The search for a committee will be tabled until June and once established, will be ongoing and will be renewed every June.

A copy of the Stewardship Development Working Group Report is provided in Attachment B.

C. Stewardship Update

Drew is working with Mandy on the workflow of entering pledges into the database as there is currently a lot of manual updating.

Targeted follow-up emails will be sent out in two rounds:

- Previously pledged
- Never pledged

D. Search Committee Nomination Rollout

Drew discussed the nomination roll-out. Each member will receive an email on April 28 with a personalized link to the nomination. The email will explain the nomination process. Voting stations will be set up on two Sundays (April 30 and May 7) to assist members without email access. All those voting in person will sign a log to avoid unintended duplicate votes. During the week of May 8, the Board will make calls to encourage more nominations. The Board will meet at noon on May 14 to compile the nominee list and start contacting the nominees to ascertain their interest in serving on the committee. The final committee slate will be published on May 24.

VI. Old Business

A. General Assembly Delegates

There are five confirmed early bird delegates:

- A. Madison Colquette
- B. Hans Kelson
- C. Sharon and Dan Wiseman
- D. Iris Kiesling (Virtual)

Renee Reed and Denise Breeden are also potential delegates. UUCB has slots for 10 delegates (5 are confirmed and two have applied). Stephanie Kimball would like to attend as well. Funding for the delegates was discussed by the Board. Drew suggested that travel expenses be covered in the future. The Board will also need to consider what the GA budget will be in the future. The Woman's Alliance has historically supported one person to attend GA. Two funded slots are still open and will be announced in the Friday update.

B. Personnel Policy Vote

Abby Gitlitz motioned to approve the official personnel policy with the current health insurance benefits. All approved and the motion passed.

The new personnel policy is provided in Attachment C.

C. Personnel Committee Member Suggestions

The Board discussed potential personnel committee members to join Jane McLeod on the committee and will revisit the topic in the near future.

VII. Housekeeping

Sunday Announcements (good through July 30)

Prologue articles (good through July 31)

VIII. Topics for Future Consideration

A. By-Laws Committee Proposed Changes

The Board discussed the timeline for announcing draft By-Law revisions. There will be a special congregational meeting to approve the By-Laws on October 22. The draft will be completed at least 30 days prior to the meeting.

IX. Executive Session

The Board entered executive session at 8:52 p.m.

X. Adjournment

President Abby Gitlitz adjourned the meeting at approximately 10:10 p.m.

Attachment A

Date: April 20, 2023
To: Board of Directors
From: Rev. Connie Grant, Interim Lead Minister
Subject: Monthly Report, April, 2023

1. Reporting against Ends

Seeking the Spirit

- a. Stephanie Kimball is developing a plan for family involvement support staffing to encompass Religious Education Coordinator and childcare staff positions, facilitating parent participation in programming while ensuring that children are well cared-for by trained caregivers, as well as supporting children's religious education teachers. Watch for details!
- b. Different-model multigenerational service on April 2 featuring Worship Associates was a success, and may become a recurring way of doing worship.
- c. April 23 worship service will celebrate Earth Day, led by Rev. Emily. (I'll be away.)
- d. Rev. Bill Breeden will preach on April 30. (I'll be there, supporting Rev. Bill.)
- e. In-person attendance on Sunday mornings has been approaching 150.
- f. Summary of Music Director's March report: I love this work more than anything. I told her it shows in the music.

Building Community

- a. Anabel Watson is recruiting a Welcoming Team, whose mission is to further a radically welcoming community by promoting ownership, action, and joy in hospitality at UUCB and further inspire the larger church community.
- b. Young adults have begun meeting regularly. A singles group is forming.
- c. As previously reported, involving congregants more deeply in the work of the church in meaningful (and visible) ways continues to be a major goal.

Changing the World

- a. Social Justice Task Forces continue to consider ways to be more visible and involve more congregants in the work they do, including a greater focus on related activities for the congregation in the months of their SJ moment.

2. Technology and communication

- a. As reported in today's Prologue,
New website in the works!

Our Tech Coordinator, Hans Kelson, has been hard at work building the bones for a new church website, with the goal of launching it this summer. The site url will remain the same, uubloomington.org, but with a new and improved design and content that is easier to find and engage with. We are working with a small focus group now as we develop a draft of the new site.

3. Other

- a. I'll be away from the evening of April 20 through April 28. I'll be in Phoenix, participating in the annual interim ministers' seminar, taking some vacation time to visit my son and grandsons, and also working remotely part of the time. I'll be reachable by the usual methods.
- b. I'm rethinking my planned July vacation time. I'll definitely be away from July 6 or so through July 18 or so for family vacation and will probably reschedule other time away later in the summer or early fall.

b.

Attachment B

STEWARDSHIP DEVELOPMENT WORKING GROUP REPORT

2023

Introduction

In December 2022, the Board of Directors of the Unitarian Universalist Church of Bloomington, IN (UUCB) convened the Stewardship Development Working Group to address these questions:

1. What is stewardship? Is it the annual pledge drive? The pledge drive, auction, and bazaar? One time giving asks such as for the solar panels and mortgage balloon payment? Planned giving? Is it occasional or year-round?
2. Should our various fundraising efforts be coordinated, or should disparate groups continue to do each one? Who decides this and coordinates it? How should the ministry, staff, lay leadership, and congregants be involved?
3. How can we use technology in stewardship?
4. How (and why) do different generations give, and how do we reach them? What are projected trends going forward and how do we lean into them?

Working group members were Joan Caulton, Corrin Clarkson, Libby DeVoe, Harlan Lewis, Rich Slabach (Board treasurer), Von Welch, Connie Grant (ex officio). The working group studied UUA materials and other stewardship publications, and attended UUA and community events to reach our recommendations, which follow, grouped by questions put to the working group.

Question 1

What is stewardship? Is it the annual pledge drive? The pledge drive, auction, and bazaar? One time giving asks such as for the solar panels and mortgage balloon payment? Planned giving? Is it occasional or year-round?

Stewardship is often defined as our contributions of time, talent, and treasure, and all of these are valuable contributions to UUCB. The working group decided to focus on the pledge drive as a matter of some urgency with the recent re-formation of a pledge drive committee by the UUCB Board. Since annual pledges fund over 80% of our operating budget, we made **our primary focus the annual pledge drive**. Other fundraisers, such as the bazaar, the Goods and Services Auction, and one-time giving for special projects, are also valuable to UUCB's

operations and appear to be successfully functioning, and hence were not subjects of our group's study.

Recommendations:

1. We recommend that UUCB continue the annual pledge drive as the primary fundraising vehicle. In our studies, pledging continues to be the dominant form of fundraising and while we identified some possible improvements, described later in these recommendations, no alternative to the annual pledge drive emerged as a possible replacement. Since stewardship encompasses much more than the annual pledge drive, we recommend that the committee be renamed "Pledge Drive Committee".
2. We recommend that UUCB explore the default renewal of pledges each year, perhaps with modest increases, in order to minimize effort by pledgers and the pledge drive committee. We note that process would help identify large decreases in pledging that warrant a conversation between UUCB leadership and the pledger.
3. UUCB has experimented in recent years with the ministers having primary responsibility for the annual pledge drive. We recommend that UUCB return primary responsibility for the pledge drive to lay leadership under the authority of the Board. Some specific details we recommend to the Board:
 - a. By early summer each year assure that there is in place a year-round pledge drive committee with staggered, overlapping terms, co-chairs, and enough members to share year-round work. Clarify who recruits members each year.
 - b. Provide the committee a clear job description, adequate budget, training, information about church finances, and guides to resources.
 - c. The Board should be a strong partner to the committee, ready to assist in outreach to the congregation.
 - d. Our recommendation is not meant to imply that ministers have no role to play in the pledge drive. The Board, pledge drive committee, and ministers should make best use of each minister's skills and leadership position to support the pledge drive.

4. UUCB members arrive at our congregation from diverse paths and hence may have very different understandings of financial support and their role in it. We recommend that during the membership journey UUCB provide clearly articulated expectations for financial commitment, as well as a basic understanding of UUCB finances.
5. We recommend that UUCB talk more openly, positively, and frequently about the impact of church expenditures on members' lives, the church's financial needs, and the important role of congregational support in order to increase congregational engagement in financial support. Charts showing the distribution of pledge levels, testimonials about the church's impact on its members, and updates about expenditures could be used.

Question 2

Should our various fundraising efforts be coordinated, or should disparate groups continue to do each one? Who decides this and coordinates it? How should the ministry, staff, lay leadership, and congregants be involved?

Operating independently of one another, our disparate fundraisers outside the annual pledge drive seem to be operating effectively. Calendar coordination is important to help prevent overlap in activities and fatigue from a constant stream of requests, but we are not ready to recommend an Integrated Stewardship Council or similar group to replace coordination by the ministers and staff for that purpose.

We discussed an annual meeting of the various fund-raising groups to share best practices for publicity, finances, and overall stewardship. The Board may wish to consider this.

One form of coordination we witnessed at other congregations that we recommend that UUCB explore, is for electronic or paper pledge forms to include more than one fundraising effort. For example, many pledge forms also asked if the pledger had included the congregation in their planned giving.

Question 3

How can we use technology in stewardship?

In our research of other congregations, we discerned nothing unusual about how UUCB is using technology. However, it is important to budget for regular updates to online donation software, as it evolves rapidly.

Question 4

How (and why) do different generations give, and how do we reach them? What are projected trends going forward and how do we lean into them?

Before discussing differences, we note traits that are common to all generations:

- They give to mission, trusted leaders, and trusted financial management.
- They want their gifts to make a difference, change lives.
- They need to hear about change wrought by gifts.
- They want thanks and acknowledgement from leaders.

One key difference we identified is that trust in institutions is decaying. Older generations, with more trust in institutions, will respond to a sense of duty. Younger generations trust institutions less and require more data and persuasion. They identify with causes or issues that matter to them and select charities for impact. Multigenerational stewardship messaging should include:

- Multigenerational ownership and responsibility for the future
- Our values in action
- Values we hold in common
- Community is available for all
- Year-round gratitude
- Visible, multi-generational spokespeople
- Social media ambassadors

Appendix: Stewardship Resources used by the Working Group

<https://www.uua.org/finance/fundraising/forth>

<https://stewardshipforus.com/>

<https://www.uua.org/finance/fundraising>

Not Your Parents' Offering Plate, J. Clif Christopher (especially valuable in explaining generational differences)

Attachment C

Personnel Policy Manual

For

Unitarian Universalist Church of Bloomington

2120 N Fee Lane
Bloomington, IN 47408

Date Adopted: April 19, 2023

TABLE OF CONTENTS

- Welcome
- Congregation Mission and History
- About this Manual
- Diversity and Inclusion
 - Equal Employment Opportunity
 - Harassment
 - Sexual Harassment
 - Procedures/Resolution of Employee Complaints
 - Accommodations of Disability
- Categories of Employment
 - FLSA Definitions
- Work Schedules and Pay
 - Orientation
 - Employment Authorization
 - Hours of Work
 - Meal and Break Periods
 - Timekeeping and Overtime
 - Pay and Payroll Deductions
 - Corrections of Errors in Pay
 - Personnel Information and Files
- Policies Applicable to Employment
 - Absenteeism and Tardiness
 - Professional Attire and Conduct
 - Alcohol and Illegal Drugs
 - Smoking
 - Confidentiality
 - Computers, Internet, Email, and Other Resources
 - Conflict of Interest/Outside Employment
 - Employment of Relatives and Members
 - Medical Documentation
 - Vehicle Usage and Expense Reimbursement
 - Safety and Accidents
 - Personal Property
 - Workplace Threats and Violence
 - Inspection Rights
 - Media Inquiries
- Performance and Conduct Expectations
 - Supervision and Performance Reviews
 - Difficulties on the Job
 - Standards of Conduct
 - Work and Disciplinary Guidelines
 - Separation Pay
 - Resignation/Retirement
- Benefits

Time Off Policies

Holidays

Vacation

Sick Leave

Personal Days

Funeral or Bereavement Leave

Jury Duty

Leaves of Absence

Family and Medical Leave

Parental Leave

Extended Medical Leave

Military Leave

Sabbatical Leave

Insurance and Employee Benefits

Health Insurance Benefits

Group Dental, Term Life, and Long-Term Disability Insurance

Workers' Compensation Insurance

Retirement Benefits

Personnel Manual Acknowledgement

WELCOME

Welcome to the Unitarian Universalist Church of Bloomington. 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.

At UUCB, the Lead Minister is responsible for overseeing and managing staff, working in collaboration and consultation with staff supervisors and the Personnel Advisory Committee. The charge and composition of the Personnel Advisory Committee are given in Appendix A. If you have any questions or suggestions concerning information in this Manual, please feel free to contact the Lead Minister or the Chair of the Personnel Advisory Committee.

Again, welcome!

CONGREGATION MISSION AND HISTORY

In 1948, a half dozen Indiana University faculty, students, and staff, who had been active in Unitarian activities elsewhere, started to meet together in Bloomington. Meetings were lay-led and held in each other's homes about once a month.

On January 5, 1949, they applied to the American Unitarian Association (AUA) for Fellowship status and were recognized as an affiliate. They shifted their meetings to twice a month and met at the IU campus club on 7th Street. After the meeting, they would socialize at a member's home. In October 1949, the Fellowship shifted its meeting place to the IU Memorial Union, which had a larger meeting room. The congregation at the end of 1949 had grown to 30 adults.

In the ten years of its existence, the Fellowship promoted integration, civil rights, free speech, and fostered a liberal religious education for its children.

The Fellowship developed an outreach to the University students on campus and supported efforts by the City of Bloomington and Monroe County to make the area respectful of religious, cultural, and racial diversity.

The Fellowship became a church with a minister in 1958 and moved to North Fee Lane, its present location, on the edge of the Indiana University campus in 1962, originally holding its services in the farmhouse located on the property.

The present building has expanded since it was started in 1965. The present meeting room or sanctuary where Sunday services are held was constructed as an addition and dedicated in 1999. This addition nearly doubled the size of the building.

In 2011, the Green Spaces project encouraged the installation of more efficient windows, lighting, and solar panels for generating electricity. Church membership is over 500. The staff includes professionals in charge of church administration, religious education, membership, and music.

ABOUT THIS MANUAL

This Manual has been prepared to help you understand some of the policies and procedures of the Unitarian Universalist Church of Bloomington (referred to herein as "Employer" or "Church"). 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 Employer 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 Lead Minister as Head of Staff. This means that the employee may terminate the employment relationship at any time, for any reason, with or without notice, and the Employer 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, adopted in February 2023, 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 Head of Staff or the Chair of the Personnel Advisory Committee. 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 Church as an institution 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 or expression, national origin, age, disability, veteran status, genetic information, or any other classification protected by law. As a church, the Employer may consider religion in the hiring and terms and conditions of employment of certain positions. Any discrimination in the workplace based upon any protected status/classification is illegal and against policy.

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

Employees who have questions about discrimination, harassment, or retaliation in the workplace, or who believe this policy has been violated, should report their concerns immediately to the Lead Minister as Head of Staff, or the Chair of the Personnel Advisory Committee.

HARASSMENT

Harassment of any kind has no place in the workplace. The Church is committed to promoting an environment that is professional and respectful. Any harassment regarding race, color, religion, age, sex, sexual orientation, social class, gender identity or expression, national origin, disability, or any other protected status will not be tolerated. Our Church 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 Church. 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. It can occur in interpersonal interactions and also via email or social media.

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 Church-related activity. Any employee who believes that they have been harassed by another employee, by any minister, a congregant, or any other person who the employee encounters in the course of employment should report that conduct immediately to the Lead Minister as Head of Staff. If the report or complaint involves the Lead Minister, or if the Lead Minister is unavailable, the individual making the complaint or the individual receiving the report or complaint should immediately report the complaint to the Chair of the Personnel Advisory Committee. The UUA Ministries and Faith Development Staff Group is available to assist with complaints involving ministers.

SEXUAL HARASSMENT

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

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

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

- Unwelcome sexual advances, whether or not they involve 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
- 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 including their supervisor, any minister, or any other person encountered in the course of employment, including a congregant, should report that conduct immediately to their Head of Staff. If the report or complaint involves the Lead Minister, or if the Lead Minister is unavailable, the individual receiving the report or complaint should immediately report it to the Chair of the Personnel Advisory Committee.

Every complaint or report of sexual harassment will be promptly investigated according to the procedures outlined in Appendix B. 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.

PROCEDURES/RESOLUTION OF EMPLOYEE COMPLAINTS

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

- The employee should communicate immediately with their Head of Staff. If the report or complaint involves the Lead Minister, the individual receiving the report or complaint should immediately report it to the chair of the Personnel Advisory Committee. You may be asked to put your complaint in writing.
- An investigation will then be initiated and a finding issued according to the procedures outlined in Appendix B.
- The Head of Staff 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 appeal the decision according to the procedures outlined in Appendix B. The final

resolution recommended by the Board will be binding upon the Congregation and the employee.

ACCOMMODATIONS OF DISABILITY

The Employer 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 Head of Staff 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 Employer will need medical documentation of the disability and of possible accommodations. The Employer 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 Employer may also ask to speak to the employee's physician or health care provider to help the Employer 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 Employer may also ask the employee to submit to an independent medical or other appropriate examination, at the Employer's expense.

CATEGORIES OF EMPLOYMENT

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

Part-Time: An employee who regularly works less than 40 hours per week and/or less than 12 months per year 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.

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 temporary employee. Regardless of whether an employee is scheduled to work for a limited period of time the employee will be considered "at-will." 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.

The current exempt positions at UUCB are: Lead Minister, Minister of Story and Ritual, Director of Administration, and Director of Religious Education. All other positions are non-exempt.

WORK SCHEDULES AND PAY

ORIENTATION

Your immediate supervisor or Head of Staff 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 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 Head of Staff 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 Employer that establishes identity and employment eligibility from the date employment begins.

HOURS OF WORK

Current office hours are Monday through Friday from 9 a.m. to 3 p.m. The office is also open on Sunday from 10 a.m. to 1 p.m. and some employees may be scheduled for work on weekends and evenings.

Your immediate supervisor and/or Head of Staff will establish individual work schedules, which may change from time to time based on the needs of the Church and at the discretion of the supervisor/Minister. Attendance at meetings outside of established work schedules at the request of the employee's supervisor or Lead 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. Some employees may be eligible for partial remote work arrangements, with advance permission of the Head of Staff. In general, employees are expected to work at least half of their hours onsite.

MEAL AND BREAK PERIODS

The time of meal and break periods will be at the discretion of the employee's immediate supervisor. Generally, there will be one paid 15-minute break period for each four-hour work period.

Employees working 6 hours or longer usually receive a one-hour unpaid meal period. Non-exempt employees should not perform any work during their meal period, except as otherwise directed by their supervisor. Break periods may not be accumulated, nor may they be substituted for tardiness or longer meal periods.

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. Work by a non-exempt employee in excess of 40 hours in a workweek will be compensated as comp time or overtime. Any overtime pay must be approved in advance. Whenever possible, comp time should be taken during the current pay period. Paid holidays, sick days, vacation days, or any other paid time off do 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

UUCB strives to live its values by compensating staff appropriately and providing access to high quality benefits. Specifically, we strive to offer employees equitable and competitive wages and salaries commensurate with our 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 Director of Administration or Head of Staff should be contacted immediately.

Employees have the choice of being paid at the end of each month or on the 15th and the last day of the month. Employee pay will be electronically deposited into their checking account each pay period.

CORRECTIONS OF ERRORS IN PAY

It is the Employer's policy to comply with federal and state laws governing payment of wages, and the Employer makes every effort to ensure employees are paid correctly. Occasionally, however, mistakes may happen. When mistakes occur, employees should call them to the Employer's attention immediately. The Employer 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 Employer at the time of hire and as requested from time to time. This information is essential for many purposes, including benefits administration, mailing information to the employee's home, and contacting friends or family in case of emergency. Please notify the Director of Administration promptly of any changes in:

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

The Employer 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 in the presence of a Church representative at a mutually agreed upon time.

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.

Personal appointments should be scheduled before or after work hours, if possible. All scheduled absences must be approved in advance by the supervisor or Head of Staff. Employees who are unable to report to work at their scheduled time must call their supervisor or Head of Staff as soon as possible to report the absence and the expected time of return to work. Employees must call in each day they are absent, unless otherwise authorized by their supervisor or Head of Staff. The supervisor or Head of Staff must approve an employee's absence or late arrival; however, the notification and approval of a particular absence does not insulate an employee from a review of the total number of absences or late arrivals in any given period of time.

Unscheduled absences (such as returning late from lunch or leaving work before the end of the workday) must be approved by the employee's supervisor or Head of Staff. If the employee expects to be absent the following day, they should inform the supervisor or Head of Staff of that fact at the same time. Any employee who fails to report to work without notice for three or more consecutive days will be considered to have voluntarily terminated employment, effective immediately.

PROFESSIONAL ATTIRE AND CONDUCT

Employees should maintain a neat and clean appearance that is appropriate to their position and the Church. If you have questions about what is appropriate, please ask your supervisor or Head of Staff. Name badges should be worn when employees are on duty on Sunday or at major congregational events.

ALCOHOL AND ILLEGAL DRUGS

The Church 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 Church premises or property is prohibited. Under no circumstances may an employee appear at work while intoxicated or under the influence of marijuana or illegal non-prescription drugs or alcohol or smelling of alcohol. Improper use of prescription drugs is also prohibited. A violation of this policy may be grounds for immediate disciplinary action up to and including termination.

The Employer recognizes that responsible consumption of alcohol might be acceptable at

occasional functions, but generally, the workplace is alcohol-free. On occasions where alcohol consumption is permitted, 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 Head of Staff. 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 Church is a smoke-free workplace. Smoking and vaping are not allowed anywhere on Church property, either inside or outside the Church building.

CONFIDENTIALITY

Employees may have access to confidential information about the Church, including but not limited to information about members, friends, or other staff members (e.g., personal information pledge amounts, requests for ministerial support). Such information must remain confidential and may not be released, removed from the Employer'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 Head of Staff.

COMPUTERS, INTERNET, EMAIL, AND OTHER RESOURCES

The Employer 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 Employer-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 Employer or used for Employer-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, social class, gender identity or expression, national origin, age, disability or any other classification protected by law;
- transmitting any of the Church's confidential or proprietary information, including member/friend data.

The Employer 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 Employer's computer system are the property of the Employer and may be reviewed and inspected at the Employer's discretion.

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

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

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 Employer may only be downloaded and used for Employer-related work provided the employee is given express written permission from the Employer, 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 Employer access to any personal electronic devices and passwords, to allow the Employer to retrieve and/or delete all Church files and documents from them. In the event that the Employer does not request such access, then the employee agrees promptly to return, to the extent practicable, and to delete any and all Church-related documents and copies thereof from any such devices or backups.

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

1. 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 Employer'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 shall not engage in any outside activity which, by its nature, hours, or physical demands, would impair the employee's performance of the duties of the position; reflect

negatively on the Church, or increase the Employer's obligations or costs for benefits such as sick leave or long-term disability benefits.

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

EMPLOYMENT OF RELATIVES AND MEMBERS

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

As a general policy, employment with UUCB is open to members of the congregation as well as non-members.

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 Employer 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 Employer-related business may be paid mileage at the current business rate per mile as established by the Internal Revenue Service. Mileage will be reimbursed monthly upon request by the employee and approval by the supervisor. Trips must be authorized by the employee's supervisor and reimbursement must be requested within two weeks of the completion of the authorized travel. Employees driving on Employer-related business must have a current and valid driver's license and proof of insurance. Employees may not take unauthorized passengers on such trips. All tickets for parking and traffic violations are the responsibility of the employee. The employee must pay all fines promptly and will not be reimbursed by the Employer. The use of hand-held cell phones or texting is strictly forbidden when driving on Employer-related business.

Other approved expenses incurred by an employee on behalf of the Employer will be reimbursed according to the Employer'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 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 Head of Staff. All on-the-job accidents or injuries to employees, no matter how minor, should be reported immediately to the Head of Staff, who will report it to the 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 Church property. Employees should report any lost items to the Director of Administration or Head of Staff 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 Director of Administration or Head of Staff.

WORKPLACE THREATS AND VIOLENCE

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

Anyone who verbally or physically threatens another, exhibits threatening behavior, or engages in violent acts on Church property may be removed and must remain off Church property pending the outcome of an investigation. If the Employer determines that a staff member has violated this policy, the Employer 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 the Head of Staff of any behavior which they have witnessed or experienced, which they regard as threatening or violent.

INSPECTION RIGHTS

Churches, like other organizations, are sometimes the victims of theft. The Church 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 Church premises. Therefore, the Employer 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 Employer-owned desks, cabinets, closets, or storage areas.

MEDIA INQUIRIES

All requests for information on behalf of or regarding the Church from newspapers, television and radio media should be directed to the Lead 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. Early in their employment, new employees will meet with their immediate supervisor and/or Head of Staff to clarify their responsibilities and to identify goals. At the discretion of the Head of Staff, new employees and employees who are transferred to another position may be required to complete an initial review period of up to ninety days. Upon completion of this period, the employee will be considered a regular employee.

Satisfactory completion of the initial review period does not alter the employment-at-will relationship. Employees must continue to perform satisfactorily even after the initial review period is completed. Although regular employees typically work on an ongoing basis, there is no guarantee that any job position will continue indefinitely. Any position may be eliminated at any time at the discretion of Employer.

On a regular basis, the immediate supervisor and/or Head of Staff meet with employees who report to them, reviewing job performance, goals and priorities, assessing needs, and working through challenges. Any employee performance concerns will be discussed with the employee and documented. To complement ongoing performance feedback, a formal written performance review will also be conducted annually. Factors considered in assessing performance include but are not limited to quality and quantity of work; attainment of goals for the position; dependability; attendance and punctuality; effective interpersonal relationships with other employees and with congregants; and personal conduct. As part of that review, all employees are given the opportunity to respond in writing.

DIFFICULTIES ON THE JOB

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

We hope problems will be resolved at an early stage with open communication between the employee and the supervisor and Head of Staff. When improvements are necessary in the conduct or performance of an employee, the Employer will attempt to give the employee written advance notice of the problem and inform the employee that their job is in jeopardy if satisfactory improvement is not made. Under some circumstances, the supervisor or Head of Staff may choose to establish a performance improvement plan which provides specific details of the conduct or performance in question along with metrics for evaluating improvement. However, because of the circumstances or the nature and seriousness of the conduct or performance deficiencies involved, the Head of Staff may immediately terminate an employee's employment without prior notice.

STANDARDS OF CONDUCT

Certain guidelines must be observed by all employees to protect the integrity of the Church. Violations may result in disciplinary measures including verbal warnings, written warnings, or termination.

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

- Failure to perform work in a manner acceptable to the Employer.
- Absenteeism or tardiness.
- Leaving work without permission.
- Failure to report absences as required.
- Discrimination, harassment, or retaliation described in this Manual.
- Unauthorized possession of weapons.
- Disclosure of confidential information.
- Smoking in unauthorized areas.
- Failure to report-on-the job injuries.
- Working another job while taking time off from work for UUCB.
- Failure to accurately complete or permitting another person to complete the employee's timecard.
- Theft or dishonesty.
- Falsifying records or information (or misuse or unauthorized manipulation of any computer or electronic data processing equipment or system).
- Discourteous or disrespectful treatment of others.
- Taking Church property without paying for it or without written permission.
- Reckless, careless, or unauthorized use of Church property, equipment or materials.
- Improper or profane language.
- Violation of any other Church policy or the standards of conduct generally applicable to a professional and respectful workplace.

Except in the case of serious misconduct, in which the Head of Staff retains the right to terminate an employee immediately, employees who are believed to have engaged in unacceptable conduct will typically be provided with written documentation of the concern and will be given an opportunity to respond. While the Head of Staff has hiring and firing authority (see Difficulties on the Job), if an employee believes that they have been falsely accused of unacceptable conduct, they may request a review of the matter by the Personnel Advisory Committee. During the review period, the employee will be temporarily suspended without pay. If the Personnel Advisory Committee determines that the accusation of unacceptable conduct was unwarranted, the employee will be compensated retroactively for the review period.

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.

RESIGNATION/RETIREMENT

Resignations and Retirements are voluntary terminations of employment initiated by the employee. Employees resigning from the Employer 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

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. The following are holidays for which eligible employees are paid:

- New Year's Day
- Martin Luther King Jr. Day
- Presidents' Day
- Memorial Day
- Juneteenth
- Fourth of July
- Labor Day
- Indigenous Peoples' Day
- Veterans' Day
- Thanksgiving Day
- 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. Eligible staff may choose to take up to two floating holidays in place of holidays listed above.

Vacation

The Church 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 Church 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 accrues each pay period and employees may not use more than the amount accrued without approval of the Head of Staff. Increases in the vacation accrual rate will be made on the first day of the month following the anniversary date of the year in which an employee completes their 5th or 10th year of employment.

Vacation time must be requested at least two weeks in advance and can only be taken with the approval of the supervisor or Head of Staff. In the event of conflicting vacation requests, vacation generally will be granted in the order the requests are received, in accordance with length of service and consistent with workload requirements.

Employees may carry over from one year to the next no more than 50 percent of the employee’s annual accrual amount. Upon termination or resignation, employees will be paid for accrued, but unused, vacation time.

Sick Leave

All employees are eligible for Sick Leave. Sick leave begins to accrue upon hire.

- Employees who work 40 hours or more per week will accrue sick leave at the rate of 80 hours per year up to a maximum of 160 hours. Sick leave may be carried over from year to year up to a maximum of 80 hours.
- Employees working less than 40 hours per week shall earn at least 1 hour of sick leave with pay for every 30 hours worked up to a maximum of 4 times their weekly hours. For example, an employee working 20 hours per week shall earn 1 hour of sick leave for every 30 hours worked (approximately 1 hour of sick leave every week-and-a-half) up to a maximum of 80 hours per year.

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

Employees must notify their supervisor 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.

Personal Days

Employees are credited with Personal Leave at the beginning of each calendar year. One hour of Personal Leave annually is granted for each hour scheduled to work weekly up to 40 hours. Personal Leave must be approved in advance by the supervisor or Head of Staff. Unused Personal Leave does not carry over at the end of the year and is not paid out at termination of employment.

Funeral or Bereavement Leave

A regular employee will be granted up to 10 consecutive work days for bereavement leave to attend to arrangements and to take care of matters attendant to the death in the event of a death of an immediate family member (spouse/partner, child, parent), up to 5 work days for death of a member of the extended family (siblings, in-laws), or 1 work day for other relatives (aunts/uncles, nieces/nephews). Additional time may be requested from the Head of Staff.

Jury Duty

The Employer recognizes jury duty as a civic and community obligation and duty of a citizen. While employees serve on a jury, they will receive their regular paycheck with no loss of regular pay for up to 20 days as long as they provide the Head of Staff with copies of court documents affirming the facts concerning their service on a jury. If they receive pay from the court, they will be required to advise the Head of Staff and arrange to turn the amount they receive over to the Employer.

Employees are expected to keep the Head of Staff informed of their service as a juror so plans

can be made to provide continued coverage of their positions during their absence. On any day or half-day they are not required to serve, they are expected to return to work

Leaves of Absence

From time to time, employees may need to have time away from work in order to address urgent matters. During such leaves, an employee may use their accrued sick/vacation and personal time and any applicable insurance coverage. When possible, such leaves must be requested in advance in writing and require the approval of the Head of Staff. 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 the Head of Staff.

Family and Medical Leave

Consistent with UU Values, the Employer 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 the Head of Staff. All benefits continue as usual during paid periods of family leave covered under sick leave, parental leave, and long-term sick leave policies discussed elsewhere in the Manual. During unpaid periods of leave, no time off with pay benefits will accrue and no contributions will be made to any retirement or insurance plans. The employee is responsible for paying the entire monthly premiums for health, dental, life, and long-term disability insurance coverages.

Parental Leave

After successful completion of 90 days of employment, as a full-time employee, an employee will be provided 8 weeks of unpaid leave for the birth or adoption of a child under the age of 18 years or 23 if mentally or physically disabled. This unpaid leave counts toward the FMLA leave period. The employee must give 2 weeks’ notice of anticipated date of departure and notice of intent to return to work.

Extended Medical Leave

Employees who work a minimum of 10 hours per week, who have been diagnosed with a serious illness or disabling condition by a physician, and who 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 Employer also reserves the right to request a second opinion from a physician chosen by the Employer on any medical leave of absence. If an employee is covered by the Employer's health insurance, the Employer portion of the health insurance premium will continue to be paid by the Employer during the unpaid medical leave. The Employer 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 Leaves

Religious professionals benefit from time spent in study, reflection, spiritual renewal, continuing education, or community service. Sabbatical leaves are a privilege applicable to only certain positions, are completely discretionary, and may be suspended, terminated, or altered at any time. Any sabbatical leaves offered by the Employer will be addressed in employees' letters of agreement.

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 Employer. These benefits are subject to change at any time at the discretion of Employer. In the event of any discrepancy between the benefits outlined below and the Summary Plan Description ("SPD") or Plan documents, the SPD documents will govern. Any questions about employee benefits should be directed to the Head of Staff.

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 Church. The Employer currently pays 80% of the health

insurance premiums and 50% of dependent coverage for these employees, currently the Lead Minister, Director of Administration, and Director of Religious Education.

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 Head of Staff or by going to <https://www.uua.org/finance/compensation/health>.

The Employer has established a Section 125 plan through which employees can make pre-tax contributions to health and dental insurance.

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 cost of insurance is deducted post-tax from the employee's salary. Employees who work 750 hours per year may also enroll in group dental and vision insurance. The Employer pays 80% of the premium cost for dental and vision coverage for these employees and 50% of dependent coverage. Further information concerning these policies is available from the Head of Staff or by going to <https://www.uua.org/finance/compensation/uua-insurance-plans>

Workers' Compensation Insurance

The Employer 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 Head of Staff. 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

The Employer 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 Employer 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 Head of Staff, with the Retirement Plan staff at the UUA, and/or with a trusted personal financial advisor.

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

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

PERSONNEL MANUAL ACKNOWLEDGMENT

By signing below, I acknowledge that I have received a copy of the Personnel Policy Manual of the Unitarian Universalist Church of Bloomington dated <February, 2023>. I understand that it is my responsibility to read the Manual and to comply with the policies, practices, and rules as outlined therein.

Employee name

Employee signature

Date signed