

# **Unitarian Universalist Church of Bloomington**

## **Board Policies Manual**

*Approved by the Board on 8/20/2025*

### **Preamble**

In 2024, the Board of Directors of the Unitarian Universalist Church of Bloomington, Indiana (herein referred to as UUCB) adopted these Policies to replace the Board Policies adopted in 2010. These new Policies, based on the writings of Hotchkiss (2016), place greater emphasis on partnership and Board–Minister collaboration than in the 2010 model. They are also reorganized and clarified to create a more easily understood, living document that can evolve and change with the needs of UUCB.

Like the 2010 Policies, these Board Policies delegate day-to-day responsibilities for UUCB administration to the Lead Minister, recognizing both (a) Board members’ roles as spiritual leaders of the congregation with responsibility for mission and vision discernment, monitoring the health and performance of UUCB, maintaining effective policies, building relationships within and outside of UUCB, and its fiduciary responsibility ; and, (b) the Lead Minister’s need for freedom to plan and enact appropriate procedures that lead to results for which the Lead Minister is accountable.

In this governance model, the Board and Lead Minister interact as partners in pursuit of the Mission and Ends of the Church, each with their own domains, but with overlapping responsibilities for planning and assessment. This model is characterized by, but not limited to: transparency in communication, joint planning and assessment, respect for each other’s functional domains, mutual commitment to common goals, and shared respect for each other and for the Mission of UUCB.

It is expected that the Board will change these Policies as needed in pursuit of UUCB, Board, and Ministerial goals, unlike the Bylaws, which require Congregational approval to amend. Other than by guiding the Mission and exercising oversight, the Board acts primarily through these directive Policies.

These Policies will be made freely available to any party wishing to examine them. By expressing the will of the Board, these Policies supersede any other policy created by Ministers, Staff or Lay Leaders. They are UUCB's sole governing Policies and all other policies or procedures in use at UUCB must conform to them.

The Board may modify these Policies at any time through a majority vote of the Board. These Policies are limited only by provisions in the Articles of Incorporation, the UUCB Bylaws, and applicable Laws and Regulations.

# 1 Board Governance

The Board of Directors will oversee UUCB on behalf of the Congregation by promoting policies and actions that move UUCB toward goals consistent with Board-approved Ends (Appendix A) and by resolving situations that may impede such movement.

## 1.1 Role of the Board

The Board will govern in partnership with the Lead Minister by clearly defining the Ends, rooted in the Mission as developed and adopted by the Congregation; engaging in future planning; holding itself and the Lead Minister accountable for progress and good governance; and delegating to the Lead Minister authority over implementation and day-to-day operations.

### 1.1.1 Annual Board Work Products

- a. Year-end Assessment: The Board and Lead Minister will complete annual self-assessments and assessments of each other's work prior to the Annual Congregational Meeting. These year-end assessments, including reflections on efforts to attain goals contained in the previous year's Annual Planning Document, will be included in the Board's annual written report, and summarized by the Board to the Congregation at its Annual Meeting.
- b. Board Monitoring Schedule: By **August 1**, the Board President, in collaboration with the Lead Minister, will produce its schedule for the upcoming year (through **July 31 of the following year**) including reports to be heard at Board meetings (see Board Monitoring Schedule and Calendar template in Appendix C) and activities needed to meet its defined goals to the extent that pre-planning is possible. This Schedule will be distributed to all affected personnel and the Congregation and modified as needed as the year unfolds.
- c. Annual Planning Document: Stemming from the year-end assessments, the Board, in partnership with the Lead Minister (and others as appropriate), will create plans that clearly envision Ministerial, Board, and UUCB goals for the coming year, as well as steps the Lead Minister and Board plan to take to meet these goals. The goals and plans for UUCB as a whole will be presented by the Board to the Congregation **after the August Board meeting**.

- d. Annual Reviews of Board Covenant, Ends, and Policies will be completed as part of the Board monitoring process.

### **1.1.2 Less Frequent Board Work Products**

- a. Ends (Appendix A): The Board will write, maintain, and update the Ends Statements that help to clarify and further UUCB's Vision and Mission. In collaboration with the Lead Minister, the Board will ensure the Congregation is made familiar with these Statements.
- b. Mission Statement: When needed, the Board will initiate a process of congregational review of the Mission and Vision Statements and Covenant.
- c. Long-term Goals and Implementation Plans: Together, the Lead Minister and Board will develop long-term goals for UUCB that become the basis for rolling three-year Implementation Plans. The Implementation Plans will consist of a short list of the most important results the Lead Minister and Board would like to see UUCB achieve over the next three years.
- d. Capital Development Plan: In collaboration with the Lead Minister and Finance Committee, the Board will develop a rolling five-year Capital Development Plan, and will monitor progress on this plan annually.

## **1.2 Responsibilities of Board Officers and At-Large Members**

All Members of the Board will:

- a. Fulfill their duties to the Church in a conscientious and expeditious manner.
- b. Prepare for and attend Board meetings regularly and participate in decision-making.
- c. As fiduciary, ensure that congregational resources are used to advance UUCB's mission and in accordance with its values. This includes annual review and approval of the budget.
- d. As a spiritual leader, engage in ongoing assessment of the Congregation, its goals and concerns, and how it can best serve itself, the local community, and the larger world.
- e. Serve as a primary point of contact between the Board and congregants. Report congregant concerns to the Board or Minister as appropriate and communicate Board positions and policies to congregants. Refer congregants to relevant committees or staff for resolution as appropriate.

- f. Participate in development of annual planning document, in partnership with the Lead Minister, and assess progress toward goals
- g. Know and follow the mandates contained within UUCB Bylaws and Board Policies.
- h. Serve in various capacities on subcommittees or other governing bodies as requested by the Board President or the Board as a whole.
- i. Review and update position descriptions annually.
- j. Take turns representing the Board at Sunday service(s) to ring the World Bell and monitor safety and security.

### **1.2.1 Board President**

The Board President will:

- a. Provide leadership to the Board and the Church and will set agendas for Board and Congregational meetings that include any items Board members or the Lead Minister may deem relevant.
- b. Provide the Board with a Board meeting agenda and any supporting documents at least three days before the Board Meeting.
- c. Chair Board and Congregational meetings expeditiously, allowing discussion and following commonly accepted rules of order.
- d. Ensure that an annual Board Monitoring Schedule is created and distributed to all affected parties by **August 15** annually.
- e. Ensure that year-end assessments are conducted in a thorough and productive manner and that written records of such assessments are maintained.
- f. Encourage creative and open discussion of all issues before the Board.
- g. Act as a spokesperson for the Board, accurately representing the Board's stated positions and decisions.
- h. Ensure that all officers fulfill their obligations to the Board and Church as specified in the Bylaws, in this document, or by agreement of the Board.
- i. Make routine decisions not normally requiring Board approval in ways that are consistent with Board Policies and past practice, keeping in mind that any decision impacting the fundamental operations, reputation, or assets of the Church requires prior Board approval.

- j. Take on other roles, including administrative roles, if necessary, at the direction of the Board.

### **1.2.2 Vice President**

The Vice President will:

- a. Work collaboratively with the President, assist in the completion of Presidential duties as requested, and substitute for the President upon request.
- b. In cooperation with the President and the Lead Minister, plan the agenda for Board and Congregational meetings.
- c. Take over as President for the duration of the President's term should they resign or become incapacitated.
- d. Assume other duties as assigned by the Board.

### **1.2.3 Secretary**

The Secretary will:

- a. Record and distribute approved copies of Board and Congregational meeting minutes.
- b. Send Minutes and other Board documents to appropriate staff to be posted or distributed to the Congregation.
- c. Send documents representing Board business to the appropriate staff for filing in the Church archives. All such documents, including Treasurer's reports, will be channeled by other Board officers through the Secretary.
- d. Maintain the master copy of the current board policies by recording amendments, distributing current policies to Board members and the Lead Minister as needed and ensuring that current policies are accessible to all congregation members.
- e. Ensure that all meetings called by the Board are appropriately announced to the Congregation in the manner specified in the Bylaws.
- f. Revise Bylaws, Board Policies, and other similar official documents under the Board's purview when changes are approved and ensure these documents are properly filed.
- g. Orient new Board Members to the Board Policies, Bylaws, Operating Procedures and similar governing documents of importance to Board and Church functions.
- h. Assume other duties as assigned by the Board.

#### **1.2.4 Treasurer**

The Treasurer will:

- a. Provide financial oversight on behalf of the Board
- b. Monitor income and expenses including individual budget lines
- c. Serve as Chair of the Finance Committee and member of the Special Purposes Fund Committee
- d. Prepare and present new or changed procedures or proposed Policies to the Board to govern UUCB financial management.
- e. Work with the Lead Minister and Finance Committee to prepare and present a five-year financial plan.
- f. Prepare and maintain, with the assistance of the Finance Committee and Facilities team, a rolling five-year capital financial plan.
- g. Work with the Lead Minister and Finance Committee to develop the annual operating budget.
- h. Present the proposed annual operating budget to the Board and to the Congregation for approval.
- i. Make financial reports to the Board as called for by Board Policies.
- j. Propose mid-year changes to the annual budget as necessary and present such changes to the Board and to the Congregation for approval.
- k. Ensure that the Congregation receives a summary of the proposed budget or budget changes at least 14 days prior to a vote for approval at any upcoming Congregational meeting.
- l. Ensure that copies of Treasurer's reports, i.e., reports for Board meetings and Congregational meetings, are provided to the Board Secretary for inclusion in meeting minutes.
- m. Assume other duties as assigned by the Board.

#### **1.2.5 At-Large Members**

In addition to items listed in Section 1.2, At-Large Board Members will:

- a. Attend Board meetings, providing input based upon their expertise and experience that will enhance the ability of the Board as a whole to fulfill its functions.

- b. Assume other duties as assigned by the Board.

### **1.3 Board Committees**

Board committees and working groups will be appointed by the Board and will work for the Board. Such groups will have no authority except that granted to them at the time of their formation by the Board. Other conditions are noted in UUCB Bylaws 6.3 and 6.4.

The Board will consult with Staff and the Leadership Cultivation Committee (see Bylaw 6.2) to identify potential committee members and to promote opportunities for service, especially at the Mid-year Congregational Meeting.

#### **1.3.1 Finance Committee**

The Finance Committee will be constituted and function in accordance with UUCB Bylaw 6.1.

#### **1.3.2 Personnel Advisory Committee**

The Personnel Advisory Committee is constituted by the Board, with one Board member as member of the committee. The Personnel Advisory Committee advises and supports the Lead Minister who serves as Head of Staff.

#### **1.3.3 Pledge Drive Committee**

The Pledge Drive Committee is constituted by the Board. Representatives will report to the Board at the **January meeting**. The Pledge Drive Committee works under the authority of the Board to plan and implement each year's Pledge Drive campaign.

#### **1.3.4 Right Relations Committee**

The Right Relations Committee is constituted by the Board. Representatives will report to the Board at the **March meeting**. The Right Relations Committee works under the authority of the Board to promote healthy conflict resolution within the congregation, to support individuals and small groups when working to resolve conflict, and to investigate and respond to disruptive and destructive behaviors.



## **1.4 Expectations of Board Members**

Board Members are expected to live up to the expectations of a Reasonably Prudent Person with regard to their service.

### **1.4.1 Board Covenant**

The Board will annually review, and may make changes as appropriate to, its Covenant, which represents expectations of the Board Members for themselves. This Covenant will be Board Policy and will be appended to this document as Appendix B.

### **1.4.2 Conflict of Interest**

- a. A conflict of interest exists when a Reasonably Prudent Person would question the ability of a Board Member to make a fair and impartial decision on a particular case or issue, or to make decisions on one or more issues in the best interest of the Church.
- b. Any Congregant or Staff member (including the Lead Minister) or Board Member suspecting a conflict of interest has an obligation to raise the issue with the full Board in a timely manner.
- c. The full Board (minus the affected Member, but with their input) will determine how to resolve the conflict. Resolution could include, but is not limited to, the affected Member: (1) fully participating on an issue, but with full disclosure of the nature of the conflict; (2) participating or not participating in discussion of the issue, but recusing themselves from any vote in which the conflict is a factor; or (3) resigning from the Board.

### **1.4.3 Discipline and Removal of Board Members**

- a. The Board may remove any Officer or At-large Member for missing three consecutive scheduled Board meetings (Bylaws 5.5) or for other comparably serious and continuous dereliction of duty.
- b. Based upon its duty of oversight stated in the Bylaws, the Board may consider removing any Board Member for behavior or speech or incapacity that would be deemed by a Reasonably Prudent Person to be detrimental to the good function or reputation of UUCB.
- d. Detrimental behavior includes but is not limited to: serious illegal behaviors; threatening behaviors; sexual misconduct; dishonesty; serious conflict of interest; or open espousal of

causes conflicting with recognized UUCB values. The right to speak freely on issues of importance or to engage in reasonable and orderly debate on an issue will be upheld except when such speech may, in the opinion of the remaining Board members, harm the Church in an important and tangible way.

- e. Prior to any such removal, the Secretary of the Board will notify the Board Member in writing of the intent to remove the Board Member and offer an opportunity to respond, either in writing or at a meeting of the Board called for that purpose. Pursuant to this exchange, the Board may remove the Board Member's voting privileges and/or remove the Member from the Board.

## **1.5 Electronic Communication for Board Meetings**

- a. A Board Member may attend a meeting by means of electronic communications if the medium permits communication with other participants at the meeting in real time.
- b. Board Members are encouraged to be physically present at the place where the Board meeting is conducted, except when conditions preclude an in-person meeting. In this case, a Board member may attend virtually, provided that the medium permits communications with other participants in real time.
- c. When a decision on an issue is required between regular meetings, the President may poll Members for a vote as long as reasonable provision has been made for discussion of the issue prior to the vote. In such cases, the Board will affirm that decision for the record through a formal vote at the next scheduled Board meeting.

## **2 Delegation to the Staff**

Certain powers of the Board will be formally delegated to the Lead Minister, except as limited by these Policies.

### **2.1 Global Delegation to the Lead Minister**

- a. The Board will delegate all responsibility for the work and resources of UUCB to the Lead Minister, except as limited by these Policies, by the UUCB Bylaws, or by emergency actions taken by the Board to protect UUCB functions and assets.
- b. To this end, only the Lead Minister is accountable to the Board for operational achievement and conduct. Only the Lead Minister has direct authority over Staff, who may in turn supervise other members of the Staff.
- c. Only decisions of the Board as a whole are binding on the Lead Minister. Individual Board members may not unilaterally exercise powers that have been delegated to the Lead Minister.
- d. In the event that the Lead Minister is unexpectedly incapacitated, the Director of Administration will assume daily oversight responsibilities in collaboration with the Board President or their designee.

### **2.2 Staff**

The Lead Minister will manage the work of UUCB, providing appropriate leadership to Staff and Volunteers, ensuring compliance with all regulations and policies, upholding high standards of ethical and professional conduct, and achieving goals developed through annual assessments.

### **2.3 Director of Administration**

The Director of Administration will:

- a. Manage the finances and office operations of UUCB and assume other related responsibilities as directed by the Lead Minister.
- b. Collaborate with the Lead Minister, attend relevant meetings, and otherwise be prepared to assume non-ministerial responsibilities for the management of UUCB in the event of an emergency.

- c. Exercise good, independent professional judgment in carrying out their functions, consistent with Church Operating Procedures and Board Policies.

## **2.4 Staff Accountability**

All Staff members are directly accountable to the Lead Minister for their performance.

## **3 Guidance and Limitations**

### **3.1 Personnel Policy**

The Lead Minister will operate within the written Personnel Manual approved by the Board and included in Appendix D.

### **3.2 Care for Congregants and Visitors**

#### **3.2.1 Health and Safety**

The Lead Minister will oversee the health and safety of congregants and visitors consistent with the Safer Congregation Manual approved by the Board and included in Appendix E.

### **3.3 Sanctuary**

- a. As authorized by Congregational vote on March 9, 2017, the Lead Minister is authorized to offer sanctuary, provided that such sanctuary is consistent with the UUCB Mission and Ends.
- b. If sanctuary is granted, the Congregation will seek support from the broader community to lessen risks to the Board, Ministers, Staff, and Congregation, as well as to those given sanctuary.
- c. The Lead Minister will educate the Congregation as to its commitment to provide sanctuary when sanctuary might be offered or is granted.
- d. The Lead Minister will inform the Board of any potential offer of sanctuary as far in advance as possible, and will report to the Board regularly should any sanctuary be granted.

### **3.4 Care for Material Resources**

All persons involved in UUCB affairs incur an obligation by virtue of that involvement to care for the material resources of UUCB under their jurisdiction.

### **3.4.1 Operating and Capital Budgets**

- a. Section 1.2.4 describes the responsibilities of the Treasurer and Finance Committee for developing and presenting the annual budget.
- b. Budget projections will be based on the most reasonably accurate data available, and on assumptions leading to the highest levels of accuracy; and, should only plan for expenditures consistent with anticipated income for the period in question.
- c. Budget planners should not deviate materially from Board-stated priorities and requirements in allocating resources among competing fiscal needs.

### **3.4.2 Spending Authority**

- a. Spending authority will be delegated by the Board to the Lead Minister, who is responsible for providing formal oversight of all spending from operating and capital accounts.
- b. To facilitate effective administration, the Lead Minister may delegate authority for spending to the Director of Administration and Staff.
- c. All Staff with delegated spending authority are responsible for accounting for such spending to the Lead Minister.
- d. When anticipated spending deviates significantly from the budgeted funds as defined in Bylaw 5.8, the Lead Minister must inform the Board of such deviations in a timely manner.

### **3.4.3 Gift Acceptance**

- a. In consultation with the Board when necessary, the Lead Minister will determine what gifts are welcome, and the conditions for accepting such gifts.
- b. Gifts will be accepted based on their usefulness and benefit to UUCB. Gifts that unduly burden or place UUCB at risk will not be accepted.

### **3.4.4 Special Funds**

- a. UUCB will maintain an Operational Reserve to receive any surplus from the annual operating budget. The Reserve may be drawn from to balance the annual budget, with approval of the Congregation, or may be used by the Board to cover unexpected

shortfalls in income. Any income generated by the Reserve will be deposited into the Reserve. The status of this fund will be reported to the Board at least **once a year**.

- b. An Operational Endowment will receive donations when so designated by the donor. Funds may be transferred to the Endowment from the Operational Reserve when approved by the Board. The Special Purposes Fund will manage the Endowment on behalf of the Congregation and provide the Board with a financial report at least **annually**. Distributions from the Endowment may be used for operations and, if so, will be included in the annual budget as income.

### **3.4.5 Accounting and Finance Standards**

- a. The Treasurer, in consultation with the Finance Committee, will oversee the implementation and enforcement of all accounting and finance standards.
- b. Procedures in Church accounting and finance must conform with accepted practices in the accounting industry, including honest representations of financial conditions to the Board.
- c. Funds will only be received, processed, or disbursed under controls sufficient to meet a Board-appointed auditor's standards.
- d. Any purchases made must be provided for in either the capital expenditures or current budget, except in the case of emergency and in consultation with the Board.
- e. Any purchase over \$10,000 requires at least two competitive bids. If only one source is available, justification and approval by the Finance Committee is required.
- f. Any debt that is incurred when expenses in the fiscal year exceed revenues must be repaid by unencumbered revenues within 90 days, except with Board approval.
- g. Cash levels must always be sufficient to settle payroll and debts in a timely manner.
- h. Cash shifted between funds must be restored by otherwise unencumbered revenues within 30 days.
- i. Any significant debts or deviations from anticipated spending should be reported to the Board in a timely manner.
- j. Tax payments or other government-ordered payments or filings must be accurately filed and paid when they are due.

- k. Board Members, Ministers, and Staff must disclose to the Board any competing financial, professional, or personal obligations or interests that might interfere with their ability to award purchases, grants, or other contracts in a fair and impartial manner.
- l. Operating capital should only be invested and held in secure instruments including insured, interest-bearing checking accounts and bonds of at least AA rating. Funds may be held in noninterest-bearing accounts only when necessary to ease operational transactions.

#### **3.4.6 Asset Protection**

- a. Staff, Ministers, and Congregants must maintain and secure UUCB assets they oversee or employ.
- b. UUCB will maintain insurance against theft and casualty losses at replacement value less reasonable deductible and coinsurance limits.
- c. UUCB will maintain insurance covering corporate liability and personal liability of Board Members, Ministers, and Staff, taking into account pertinent statutory provisions for indemnification and exemptions applicable to Indiana non-profit organizations.
- d. Staff, Ministers, or Board Members should not unnecessarily expose UUCB, the Board, or the Staff to claims of liability, or risk UUCB's nonprofit status, or damage its reputation in the community.
- e. All persons handling cash and/or checks for UUCB business should follow procedures for asset security established by the UUCB Fiscal Manual.
- f. UUCB assets may not be appropriated for personal gain or loaned to any private individual or organization.

#### **3.4.7 Document Retention and Handling**

- a. Document retention and handling will be overseen by the Director of Administration.
- b. The Staff will develop and maintain written procedures governing the backup, retention, security and destruction of UUCB documents, giving definite retention periods for classes of financial, business, pastoral, personnel, and corporate records in both paper and electronic forms.
- c. UUCB will maintain records of all formal committee minutes, including Board meeting minutes, as well as an archive of documents detailing UUCB activities. Such a system



must be designed to serve as a permanent archive of all official documents and must keep records confidential that are not open for public scrutiny.

## 4 Oversight

Oversight by the Board will be accomplished through systematic monitoring and accountability.

### 4.1 Monitoring

#### 4.1.1 Monthly Financial Statements

The Treasurer will briefly update the Board on the most current state of Church finances at each regular Board meeting.

#### 4.1.2 Quarterly Financial Statements

The Treasurer will provide the Board with the most current statements of cash flow at the regular Board meetings in **October, January, and April**.

#### 4.1.3 Programmatic Monitoring

- a. The Lead Minister will submit a brief written and oral report to the Board at each monthly Board meeting summarizing changes and issues related to the operation of UUCB that should be of concern to the Board in its oversight role, including progress made toward achieving Ends, or factors inhibiting such progress. This report should include, as needed, input and concerns from staff related to current or pending issues. Through their ex officio position on the Board, the Lead Minister will act as partner in governance and chief counselor on UUCB affairs. They will be responsible for concise, transparent, and timely reporting of any changes in affairs that could impact the status of UUCB and its welfare, including options for dealing with such issues after consultation with Staff or other affected parties. This may include failure of the Board to comply with its own policies.
- b. Any required report to the Board should be distributed to all Board Members at least three days prior to the pertinent Board meeting.

#### 4.1.4 Other Monitoring

- a. Insurance: The Director of Administration will provide a report on insurance policies, limits, and coverage at the **August** Board meeting.

- b. Religious Education: The Director of Lifespan Religious Education will offer a summary of the state of the Lifespan Religious Education Program twice a year , at the **September and March** Board meetings.
- c. Personnel Policies and Safety: The Lead Minister will provide an overview of changes in the status of personnel policies and safety procedures, including any issues of concern at least annually, at the **December** Board meeting.
- d. Special Purposes Fund: The SPF will provide a written summary of the six-month performance of invested funds, including the Operational Endowment, at the December Board meeting and the annual meeting.

#### **4.1.5 Board Monitoring Schedule**

A monitoring schedule is appended to this document in Appendix C. This schedule will be reexamined and updated by the Board as called for by changing conditions.

## **4.2 Evaluation**

### **4.2.1 Board and Lead Minister Evaluation of Governance and Church Performance**

- a. Prior to the Annual Congregational Meeting, both the Board and the Lead Minister will annually self-assess their achievement with regard to the expectations and goals they set for themselves in the previous year; and also will assess UUCB's progress in achieving the goals they set for it in the previous year. These assessments will be shared by both parties with one another, and new goals will be developed by both parties for themselves and for UUCB, as well as ways to meet those expectations.
- b. A standardized format and calendar for conducting these assessments and setting new goals will be developed by the Board in partnership with the Lead Minister each year and maintained in the Board files
- c. All assessments and evaluations will be undertaken in a positive spirit of honest mutual collaboration and respect, with the goal of resolving perceived problems and increasing the benefits of Ministerial and Board leadership to UUCB.
- d. Review and revision of Board Policies should be part of this process as needed, including, if relevant, the revision of position descriptions.

- e. Success in meeting visionary goals will not supersede the need for success in fulfilling the ordinary needs of UUCB.

#### **4.2.2 Staff Evaluation**

- a. The Lead Minister will collaborate with Staff to develop clear criteria and procedures for Staff evaluation that include employee input and agreed-upon performance goals and criteria for each position.
- b. Staff evaluation must be documented in writing in a fair and impartial manner by supervisors and may only be based upon the agreed-upon criteria. Any changes in criteria and/or performance goals must be clearly stated and understood by all.

#### **4.2.3 Lead Minister Performance Evaluation**

The Lead Minister will be formally evaluated by the Board in accordance with the terms of their letter of agreement.

#### **4.2.4 Annual Financial Audit or Review**

- a. An internal audit will be conducted biennially and reported to the Board in **November** by the Board Treasurer when no external audit is scheduled for that year.
- b. Results of an external audit will be reported to the Board in **September** of every fourth year by the Board Treasurer.

## **APPENDIX A: UUCB MISSION AND ENDS STATEMENTS, Revised by the Board, August 2024**

### **PREAMBLE**

In Partnership Governance, the Board sets forth Ends Statements which establish our general principles as well as what our Congregation aspires to do. These statements expand upon our Congregation's vision statement of "Seeking the Spirit, Building Community, and Changing the World" and our Congregation's mission statement (below) to provide spiritual and governance guidance to the Ministers, Staff, and lay leaders.

### **MISSION STATEMENT**

UUCB's Mission Statement, adopted by the Congregation, along with the Vision Statement, at the June 7, 2009 Congregational Meeting:

"In this liberal religious community of inspiration, love and action:

- we celebrate life
- we nurture one another
- we welcome all
- we care for the earth and
- we work for the common good."

### **ENDS STATEMENTS**

The term "Ends" refers to the fact these statements do not dictate "means" or how things are done but rather articulate our reason for existence as an institution. The current Ends statements were first adopted by the Board in September of 2010 during the transition to policy governance. They are a living document maintained by the Board. The Ends statements were revised in 2021 following the Congregation's decision to adopt the 8th principle and again in August 2024 following the move to a new governance model and the UUA's adoption of Article 2 (Shared Unitarian Universalist Values).

By adopting the 8th principle, we committed ourselves to working to build a multicultural Beloved Community in which people of diverse backgrounds and identities come together in mutually respectful, loving, and caring relationships to seek justice within our Congregation, the local community, and in the broader world.

## **Seeking the Spirit**

UUCB exists to:

1. Provide Congregants from a variety of faith traditions with a liberal, universally accepting spiritual home.
2. Provide compassionate spiritual care to Congregants without the burden of restrictive creeds, tenets, covenants, or preordained beliefs.
3. Provide a space where people from diverse backgrounds with different perspectives can freely gather to explore their beliefs.
4. Provide people of all ages with opportunities to grow together spiritually through liberal religious education and practice, leadership, and community action.
5. Encourage Congregants to practice the UUA Principles and the Values and Covenant of the UUA, adopted in 2024, which underscore the 8<sup>th</sup> Principle adopted by UUCB in 2021.

## **Building Community**

UUCB exists to:

1. Build a liberal community dedicated to accountably dismantling racism and other oppressions both within itself and in the larger community.
2. Foster a climate of purposeful inclusion where all can feel safe, valued, and cared for, and are given an opportunity to form meaningful connections with each other.
3. Create a community that values the full range of human experience, including (but not exclusive to) differences in sex, age, race, ethnicity, national origin, physical and mental abilities, sexual orientation, gender identity, educational and class status, and financial means. We commit to working consciously in all of our activities and decisions to honor experiences and identities that are usually minimized or devalued.
4. Build an active community where members share their time, talents, and resources for the common good.
5. Build a thoughtful community where people can explore ideas and perspectives without trepidation or fear of rejection.
6. Provide Congregants, Ministers, and Staff with an environment where they know they will be welcomed and valued.

## **Changing the World**

UUCB exists to:

1. Encourage leadership and participation in efforts to eliminate prejudice, injustice, and oppression within the community and in the world at large.
2. Provide Congregants with the means to undertake and support projects fostering social justice and community welfare through direct action and financial contributions.
3. Partner with other congregations and organizations in efforts to foster positive social change.
4. Engage with and encourage the UUA to build a diverse and multicultural beloved faith community.
5. Encourage leadership and participation in projects that foster ecologically sound, sustainable, and livable communities, both locally and throughout the world.

## **APPENDIX B:**

### **Board Covenant**

Adopted by the Board August 20, 2025

Recognizing that the members of the UUCB Board of Directors are spiritual leaders of the congregation, we covenant to:

Work well together by:

- Respecting each other's experiences and learning from one other;
- Acknowledging and respecting the limits of our individual and collective resources (time, energy, money, etc.);
- Encouraging ourselves and congregants to communicate concerns directly to the subject of those concerns, and offering assistance for that communication, as needed;
- Being accountable to one another and to the Congregation;
- Showing clear love and concern for the welfare of the Congregation; and
- Encouraging the expression of diverse opinions and perspectives within the Board.

Honor our shared values by:

- Exhibiting an encouraging positive attitude;
- Treating each other and congregants with respect and dignity;
- Looking to our shared values for guidance when making decisions and taking actions;
- Being honest and kind with each other and with congregants; as well as
- Approaching our work with a spirit of joy and good humor.

Uphold the trust of the Congregation by:

- Being available to the Congregation and to each other;
- Listening deeply to the joys and concerns of congregants;



- Ensuring that Board decisions and actions take into account diverse opinions and perspectives of congregants;
- Exploring creative solutions to congregational challenges;
- Acting reliably and in a trustworthy manner;
- Embracing conflict and critique as a path toward deeper understanding and more complete problem-solving;
- Engaging in thoughtful and deliberate decision-making; and then:
- Speaking as one voice.

The Board will support the Minister by

- Acknowledging their hard work and celebrating their successes;
- Hearing their concerns and challenges and, when needed and appropriate, offering assistance;
- Providing thoughtful, honest feedback to the Minister, both on an ongoing basis and in the annual Ministerial appraisal.

The Minister will support the Board by

- Soliciting input from staff in the areas of their concern or expertise on relevant matters before the Board;
- Helping the Board appreciate and act on the shared values and goals that inform its work;
- Offering a broader perspective on the Board's work, informed by denominational matters and prior experience;
- Connecting the Board to broader resources available to religious organizations.

## APPENDIX C: BOARD CALENDAR AND MONITORING SCHEDULE for FY\_\_ TEMPLATE

Month	Meeting/Deadline	Date	What		Who
<b>July</b>	Deadline		Perspectives article		TBD
<b>August</b>	Deadline		Distribute Board monitoring schedule		President
	Board retreat		Draft annual planning document and finalize monitoring schedule (as needed) Covenant review		Board
	Board meeting		Please submit meeting materials by		
			Lead Minister Report		Lead Minister
			Treasurer's Report		Treasurer
			Report on Insurance, Limits and Coverages		Director of Administration
			Finalize Annual Planning Document		Board
	Deadline		Perspectives article		
	Deadline		Post Annual Planning Document and Monitoring Schedule to website		President
<b>September</b>	Board meeting		Please submit meeting materials by		
			Lead Minister Report		Lead Minister

Month	Meeting/Deadline	Date	What		Who
			Life Span Religious Education Update		DLRE
			Treasurer's Report		Treasurer
	Deadline		Perspectives article		
<b>October</b>	Board meeting		Please submit meeting materials by		
			Lead Minister Report		Lead Minister
			Treasurer's Report		Treasurer
			Quarterly Statement of Cash Flow		Treasurer
			Connections Coordinator Report		Connections Coordinator
			Bylaws revisions update		TBD
	Deadline		Perspectives article		TBD
<b>November</b>	Deadline	30 days prior	Notification to Congregation of Mid-Year Meeting		Regina
	Board meeting		Please submit meeting materials by		
			Lead Minister Report		Lead Minister
			Treasurer's Report		Treasurer
			Report on Internal Audit		Treasurer
			Proposed Agenda for Mid-Year Congregational Meeting		President

Month	Meeting/Deadline	Date	What		Who
			Social Justice Report		Social Justice Coordinating Team
	Deadline		Perspectives article		
	Deadline		Summary of budget changes for Congregation (if necessary)		Treasurer
<b>December</b>	Meeting		Congregational Mid-Year Meeting		Board
	Board meeting		Please submit meeting materials by		
			Lead Minister's Report		Lead Minister
			Personnel Policies and Safety Update		Lead Minister
			Treasurer's Report		Treasurer
			SPF Update on performance including operating fund		SPF Chair
			Perspectives article		TBD
<b>January</b>	Board meeting		Please submit meeting materials by		
			Lead Minister's Report		Lead Minister
			Treasurer's Report		Treasurer
			Quarterly Statement of Cash Flow		Treasurer

Month	Meeting/Deadline	Date	What		Who
			Pledge Drive Committee Report		Chair of Pledge Drive Committee
			Midyear assessment of progress toward annual goals		
	Deadline		Perspectives article		TBD
	Deadline		Solicit GA delegates		President
<b>February</b>	Board meeting		Please submit meeting materials by		
			Lead Minister's Report		Lead Minister
			Review the Lead Minister's salary, housing, and benefits		Board
			Treasurer's Report		Treasurer
			Music Director Report		Music Director
			Draft FY26 budget for review		Treasurer
			Choose GA delegates		Board
	Deadline		Perspectives article		TBD
<b>March</b>	Board meeting		Please submit meeting materials by		
			Lead Minister's Report		Lead Minister
			Treasurer's Report		Treasurer

Month	Meeting/Deadline	Date	What		Who
			Life Span Religious Education Update		DLRE
			Right Relations Committee Report		Right Relations Committee Chair
			Finalize annual assessment instruments		Board
			Perspectives article		TBD
<b>April</b>	Deadline		Complete Board self-assessment		Board
	Board meeting		Please submit meeting materials by		
			Lead Minister's Report		Lead Minister
			Treasurer's Report		Treasurer
			Quarterly Statement of Cash Flow		Treasurer
			Leadership Cultivation Committee Report		LCC Chair
			Proposed Agenda for Annual Meeting		President
			Finalize proposed bylaws changes		
			Complete annual assessment of Lead Minister (discuss in Exec Session)		Board
	Deadline		Perspectives article		TBD

Month	Meeting/Deadline	Date	What		Who
May	Deadline		Solicit annual reports for annual meeting		President
	Deadline	30 days prior	Notification to Congregation of Annual Congregational Meeting		Secretary
	Deadline		Send year-end assessment of Lead Minister to Rev. Susan		
	Board meeting		Please submit meeting materials by		
			Lead Minister's Report		Lead Minister
			Treasurer's Report		Treasurer
			Final Proposed Budget for Approval		Treasurer
			Proposed Agenda for Annual Congregational Meeting		President
			Discuss year-end assessment of Lead Minister in Executive Session		Board/Rev. Susan
	Deadline		Annual reports		Task force and committee chairs, staff, etc.
	Deadline		Perspectives articles		TBD
	Deadline		Summary of proposed budget for Congregation		Treasurer

Month	Meeting/Deadline	Date	What		Who
June	Meeting		Annual Congregational Meeting		Board
	Board meeting		Please submit meeting materials by		
			Lead Minister's Report		Lead Minister
			Treasurer's Report		Bill
			Review Board policies, annual monitoring schedule for coming year		Board/Lead Minister
			Approve housing allowance for Rev. Susan		Lead Minister
	Deadline		Perspectives article		TBD
	Deadline		Orient new Board Members to governing documents		Secretary
	Deadline		Orient new Officers		Previous Officers



## **APPENDIX D: Personnel Advisory Committee**

The overall purpose of the Personnel Advisory Committee is to assist the Lead Minister and the Board in developing and reviewing policies and related procedures pertaining to employment of the congregation's paid staff.

This work includes:

- Working with the Lead Minister as Head of Staff to develop and review personnel policies and practices;
- In accordance with the budget cycle, analyzing the costs of maintaining staff with fair and appropriate salaries and benefits, based on UUA guidelines, local cost-of-living, and other best practices;
- Serving as advisors to the Lead Minister as Head of Staff in resolving staff grievances.
- Serving as the Investigation Committee for cases of alleged discrimination, harassment, or sexual misconduct involving staff members.. In cases of alleged discrimination, harassment, or misconduct, against the Lead Minister, the Lead Minister does not serve on the Investigation Committee. In cases of complaints involving ministers, the UUA Ministries and Faith Development Staff Group is available to assist;
- Providing consultative support to the Lead Minister in the management and utilization of staff as well as benefits administration.

The Personnel Advisory Committee will have a minimum of three members, appointed by the Board for staggered three-year terms. At least one member should be a member of the Board.

The Lead Minister is an additional, ex officio member of the committee.

## **APPENDIX E: Safer Congregation Manual**

### **UUCB Safer Congregation Manual of Policies and Procedures for Supervision of Children and Youth**

*Our Religious Education programs for children and youth entail a high degree of responsibility for the adults working directly and peripherally with the young people. All of us in the congregation teach our children not just how to be Unitarian Universalist but, perhaps more importantly, how to live in a Unitarian Universalist community, a community that gives to, cares for, critiques, affirms, questions, and blesses those within its fold.*

*Thus, for a people who expect their adults to be faith-keepers, trust-builders, and caregivers, it is easy to see why it is so important for us to be clear about how adults interact with children. Our responsibility to nurture spiritually and emotionally the children in our community is huge. With the stakes so high, we must not fail to guard them adequately against physical and emotional abuse. Will we safeguard against every perceivable abuse? This is not likely. However, we can significantly reduce the risk by creating and following preventative policies.*

*When we create explicit guidelines for appropriate behavior, we define the values that are important to us as religious people. Our statements about safe relationships create a structure in which our religious community can thrive.*

*—Rev. Tera Klein and Laurel Amabile*

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# Policy Statement

Safety for all is a priority for Unitarian Universalist Church Bloomington, Indiana (UUCB). Even though the congregation and its leadership recognizes that we cannot make any venue 100% safe, we are committed to ensure that UUCB gatherings, programs, and activities are as safe as possible. We are especially attentive to the safety of vulnerable populations such as (but not limited to) children, youth, and older adults. The following safety guidelines speak to our dedication to safety and our special attention to children and youth as a vulnerable population.

In this document “child” will mean anyone aged from infancy to 12 years, and “youth” will mean anyone aged from 12 up to and including 17 years.

## **We will achieve our safety goals through:**

- Screening and training all church staff and volunteers who work with children or youth.
- Supervising our children and youth and those who work with them.
- Providing a specific process by which allegations of abuse are reported and investigated.
- Treating all persons with dignity and respect.
- Requiring those at risk of incident or accusation to refrain from contact with children or youth.

These policies are directed at those working with our children or youth. However all UUCB members carry a responsibility to provide a safe and caring community in which our children and youth are respected, in which their self-worth is affirmed, and in which spiritual, social and intellectual growth are encouraged.

We are committed to the care of our children and youth, and to the principles of fairness, kindness and forgiveness that have long been part of our religious tradition. The Director of Lifespan Religious Education (DLRE) will periodically make the congregation aware of these policies and procedures. Each person working with our children and youth will be screened in accordance with this policy, under the leadership of the DLRE and minister, who may delegate tasks to responsible individuals.

## **Screening and Training of Staff and Volunteers**

This policy applies to all committees, task forces and organizations that function under the umbrella of Unitarian Universalist Church Bloomington, Indiana. It also applies to other groups and events sponsored by UUCB and using the facility. For example, if a youth conference is held at Unitarian Universalist Church Bloomington, Indiana, all adult advisors must complete the screening process described below or be screened by their church, denomination, or another organization satisfactory to the DLRE and Lead Minister. This policy does not apply to non-church groups using church facilities whether for a fee or not.

### **Application to work with children and youth**

All potential employees and volunteers interested in positions involving work with children and/or youth must submit an Application for Paid or Volunteer Employment form. Finalists for each position will be asked to allow a background check from a third party.

At least two people from the reference list must be contacted and their responses recorded in writing.

### **Processes for new hires and volunteers:**

- At least every third year, and as often as annually, employees and volunteers working with children and/or youth will undergo a new background check.
- Each person who is working with children and youth must read and sign The Code of Ethics Statement (see sample in the appendix)
- Each employee will supply a copy of a photo identification.

- Each person will sign a statement noting that they received a copy of UUCB's Safer Congregation Policies and have read them in their entirety, and will agree to act in accordance.

## **“Two-Person Rule”**

At least two unrelated adults, who are not in a relationship with each other, are required to be present at all times as teachers/volunteers for religious education, youth group, children and teen choirs, and other children or teen activities in the congregation. For example, a third staffer would need to be present with a wife/husband team in the nursery.

One adult should never be alone with a child or in a classroom, and, under no circumstances, is a child to be left in a classroom or anywhere unattended. This protects children from abuse, and it protects our children's ministry volunteers from accusation.

## Implementation Specifics

- The DLRE will be responsible for overseeing completion of the appropriate paperwork, except where noted.
- Anyone expressing interest in ongoing volunteer work with children or youth in the church first must have been involved in worship or other congregational community for at least six months unless the minister and DLRE determine otherwise after screening.
- Those working with Junior and Senior High youth groups (6<sup>th</sup> -8<sup>th</sup> grade and 9<sup>th</sup>-12<sup>th</sup> grade) should be at least 25 years of age. The Director of Lifespan Religious Education must approve workers below the age of 25. Those youth working in the nursery must be at least 14 years of age, and those aged 14-17 must always work with someone who is at least 18 years of age.
- Records will be kept in a secure location. Paper files may be shredded after three years if digital format has been created.
- Conviction of any of the following offenses does not preclude an individual from working with children and youth. Instead, the lead minister, DLRE, and President of the Board of Directors will use the information to decide if and how the person is allowed to work with children and youth. The decision must be unanimous. It is possible that the answer is that they are not allowed to work with children and youth. (1) Any offenses involving illegal drugs (2) any sex offense, (3) any felony within the past 12 years, or (4) any offense involving violence against any person.
- In the case of a potential or existing church staff member, conviction of (1) any offense involving illegal drugs (2) any sex offense, (3) any felony within the past 12 years, or (4) any offense involving violence against any person, the potential or existing staff member will not be hired or will be terminated
- If it is determined by the Lead Minister, DLRE, and President of the Board of Directors that a potential volunteer or other congregant should have restricted access to children or youth, he/she/they will be required to sign and follow a limited access agreement, with such restrictions and limitations as will be required by the minister, DLRE, and President of the Board of Directors. The level of restriction and limitation will depend on the level of offense and the perceived danger to children or youth. A registered sex offender will not be allowed to have any further contact with children or youth. A registered sex offender might be eligible for a Limited Access Agreement, if agreed by the lead minister, DLRE, and President of the Board of Directors, or could be banned from participation in all church activities if determined by unanimous agreement of the lead minister, DLRE, and President of the Board of Directors.



- The Lead Minister will keep on file indefinitely all information required to be gathered by this policy in secure locations in accordance with current church record keeping procedures.

## **Training**

**Every person working with children and youth will attend a yearly training or take a comparable online training designed or approved by the DLRE or lead minister. The training will include:**

- The definition of child abuse,
- Sexual and physical abuse symptoms,
- What constitutes inappropriate conduct,
- What are appropriate boundaries
- Church policies and practices that govern working with children or youth,
- That there are civil and criminal consequences of misconduct,
- Reporting procedures for observed or suspected misconduct, and
- The rationale behind screening procedures.

# **Children and Youth Supervision Requirements**

## **Nursery and any gathering with children ages 0-5**

- Nursery and early childhood programming will follow the same protocols as outlined in the *Children and Youth Safety and Supervision* section below.
- In addition, all children supervised in programming for children ages 0-5 will be signed in and out by the responsible adult. Records of sign in and sign out forms will be kept in a file in the locked DLRE office. These forms can also be digitized and safely kept in accordance with current church record keeping procedures.
- Church functions providing childcare require at least two screened childcare workers. One worker must be at least 18 years old. The second child care worker must be at least 14 years old. There should be at least one child care worker for every 5 children.

## **Children and Youth Safety and Supervision**

- At every church sponsored activity where there are children and youth present without their parents and caregivers in the same room, there will be at least 2 unrelated screened adults supervising and/or leading the program.
- An intentional and well-communicated check-in and check-out process will be created each year based on the needs of the participants, caregivers and leaders.
- Visibility and access into classrooms must be maintained at all times.
- For Sunday morning programs, a DLRE/ Religious Education Associate and /or designee will circulate in the RE classroom area and monitor classroom activities randomly during the regular RE classes.
- All UUCB outings and events, onsite or offsite, will follow the same safer congregations regulations as stated in this document. Participating children and youth must have a formal permission form signed by a parent or guardian.
- The lead minister and DLRE will stay abreast of Indiana Mandated Reporters laws and follow them accordingly.

## **Diapering, Bathroom Use, and Toileting**

The “two person” rule applies when diapering children and during bathroom trips. Diapers should be changed in the nursery, where two unrelated adults are present. Under no circumstances should one volunteer take a child into a bathroom or other separate room for a

diaper change. Children over age 4 are expected to take care of their own bathroom needs or request the assistance of their parent/caregiver if necessary.

When a child with special needs requires additional toileting assistance, their parents or another certified guardian should be located.

## **Food Allergies and Children's Safety**

Food is often a part of congregational life. Meals, potlucks, coffee hour, and classroom snacks can all pose a potential threat to persons with severe food allergies. We strive to keep children and youth safe through communication with parents about their children's allergies, documenting relevant information and action plans and ensuring access to that documentation for all who work with affected children/youth, and training volunteers and staff.

1. Communication between leaders, parents, and children about the child's specific allergies. Parents will describe all known food allergies on each child's annual registration form, and will update that information throughout the year as necessary. The DLRE will follow up with any questions about the allergy. Parents will fill out an Allergy Action Plan form for each child who may experience a severe allergic reaction.
2. Documentation of the child's allergies and who will have access to those records. Each child's allergies reported by parents will be listed in the class roster book, which will be kept in the classroom accessible to all volunteers and staff working with that class. An Allergy Action Plan will also be included for each child who may experience a severe allergic reaction.
3. Volunteer and staff training will include education on common food allergies, how to recognize the signs and symptoms of allergies, how to minimize risk of allergic reactions, and what to do in case of allergic reaction.

# Supervision Requirements for Field Trips, Youth Gatherings, Vehicle Rides, and Sleepovers

Procedures for field trips, youth gatherings, vehicle rides, and sleepovers will follow the Unitarian Universalist Association and MidAmerica Protocols and recommendations whenever appropriate.

- Permission slip and medical release form is required for each child or youth.
- All drivers must be at least 25 years of age and must have an approved background check including a drivers background check.
- Every driving adult will provide proof of adequate insurance.
- Every person transported in the vehicle must wear a seatbelt or be restrained in an appropriate car seat.
- Drivers should have two or more children or youth in the car when they are transporting children and youth to and from activities. The only exception is when the driver is transporting a child or youth with prior parent approval and notification of the DLRE or minister
- The DLRE will develop written procedures for supervision for field trips, youth gatherings, vehicle rides and sleepovers.
- There must be two adults at any late night or overnight event at Unitarian Universalist Church Bloomington, Indiana. There will be at least one adult for every 5 youth in attendance.
- All night events will develop a protocol where supervising adults take turns being awake and present for youth.

## Maintaining Healthy Boundaries

### Tobacco, Drugs and Alcohol

Children and youth are prohibited from using tobacco, drugs or alcohol, and must not be allowed to engage in illegal behavior while participating in church – sanctioned activities. Volunteers and paid staff should, at all times, be aware that their own behavior is a powerful statement to children and youth. Adults, while actively supervising children and youth at a church sponsored event or gathering, must not consume alcohol, use illegal drugs, or use tobacco products.

Whenever alcohol is present at a UUCB event, adults of legal drinking age (21 and older) who are consuming alcohol are expected to do so in a responsible manner, which does not endanger themselves or others.

### Communication

All communication, regardless of the method, between adults and children and youth **must be AND appear to be** above reproach. It is highly recommended that all communication with youth include either parent or caregivers unless explicit written permission to communicate directly with youth has been provided by parents and caregivers and approved by DLRE or religious education staff (i.e. youth coordinator). In the permission, the mode of communication must be identified.

## Rules for Youth Events and Lock-ins

These rules and suggestions should be reviewed by youth and advisors who work with youth on a regular basis. They will be the rules used at late nights, sleepovers, lock-ins and any youth event at the church. When away at an event it is expected that the youth follow the rules stated in the signed covenant of the event.

1. If coming late, notify organizers, as there will be a clear start time.
2. Do not bring, use, or arrive under the influence of tobacco, alcohol, illegal drugs, or controlled substances.
3. Refrain from any sexualized behavior. There is a ZERO tolerance policy.

4. NO means NO.
5. Be aware of personal space. Make sure there is no pair-wise space.
6. Maintain the wearing of appropriate clothing at all times. Dress as if you are going to school in front of parents. Upper and lower torso must be covered at all times.
7. The bringing or use of weapons, fireworks, explosives or flammable items is prohibited.
8. No pets.
9. Consuming or bringing energy drinks or pills is not allowed.
10. Events have clear end times. Youth are not allowed to leave church without the agreement of one supervisor.
11. Be sure to take care of yourself.
12. Be careful not to break the law.
13. Do not take photos, video, or audio or post pictures without the permission of all the people in the photo video or audio conversation. (Think of the Vegas Rule)
14. No sexting on cell phones will be allowed.
15. There will be designated sleeping spaces: Loud and quiet. NO SLEEPING ELSEWHERE. Supervising adults will work with the youth to develop a plan so that adults are available and present.

## **Safe Spaces for Youth Pastoral Care**

Because of the power disparities and the potential for boundary violation in pastoral care conversations between adults and youth, adults will engage in these recommended practices to create a supportive, appropriately confidential, and safer space for youth:

- Choose a space for pastoral care and conversation that is easily observable by others. If it's in a minister's study or religious educator's office, the door should have a window and/or be ajar.
- There should be someone else working nearby in the building, such as a church administrator who understands the importance of maintaining the privacy of the young person visiting as well as the safety of the space.
- A pastoral conversation could take place at a crowded coffee shop or mall, where the participants (especially the adult) are visible to others and the noise provides privacy.

## **Child Abuse Prevention in church sponsored activities, programs and gatherings**

UUCB recognizes the reality of child abuse in our society, its impact on children and families, and the need for a responsible means of addressing this issue. By overcoming secrecy and by providing a framework for addressing problems and concerns, we reflect our commitment to provide protective care for all children, youth and volunteers who participate in church-sponsored activities.

Child abuse means the non-accidental injury, sexual abuse (both touching and non-touching), exploitation, neglectful treatment or the maltreatment of a child (from birth to 18 years) by any person under circumstances that indicate that the child's health, welfare or safety are harmed.

### **Reporting and Responding Procedures**

Inform and consult with the Lead Minister and/or the DLRE as soon as possible. However, according to Indiana law, all adults are mandated reporters and must report suspected child abuse or neglect directly to the Indiana Department of Child Services

(<https://www.in.gov/dcs/contact-us/child-abuse-and-neglect-hotline/>) (1-800-800-5556)

If the report involves a church employee, volunteer, or youth then the minister, the board president, and the DLRE shall additionally:

- Collect and review all pertinent facts regarding the incident or charges;
- Review application and reference forms kept on the person;
- Carefully document all meetings, conversations, information, etc. regarding the matter, and keep all related information as confidential as the circumstances warrant.
- In the event that knowledge of the incident becomes public, the minister and the board president will designate a spokesperson for the church. The spokesperson will use the text of



a prepared statement to answer the news media and convey the incident to the congregation, taking care to safeguard the privacy of all parties involved.

- The minister, the board president and the DLRE will carefully document the handling of the incident, and report the incident, as appropriate, immediately to the child's or youth's parents and inform the church's insurance company.
- The minister, the board president, and the DLRE (or one of them) will consult an attorney for advice as to what steps are necessary or prudent to protect the interests of the children and the church.
- The minister, the board president and the DLRE will determine how to address the incident within the congregation with an understanding that transparency is better than secrecy
- If the accused is the minister, DLRE or board president, that person will be removed from the decision-making process for the review of the alleged abuse, and the remaining two will select a third person as a replacement to conduct this process.
- In the event that the charges involve a minister, the board president will then notify and consult with MidAmerica Regional Staff and/or the UUA Department of Ministries and Faith Development.

## **Actions by the Church Regarding Allegations of Abuse**

If the minister, board president and DLRE unanimously conclude that allegations of child abuse, personal abuse or neglect are more likely true than not, then they will notify the appropriate Indiana authorities per Indiana law. They will also provide written documentation on the decision to be kept in a locked file or secure digital location. This written document will include a description of the incident, the decision, follow up action items, and who is included in the communication.

In addition, the minister, board president, and DLRE may do any of the following:

- Require a limited access agreement which includes supervision requirements. If these allegations are against a person under the age of 18, then restrictions from regular youth gatherings and future lock-ins or CONS may be a part of the limited access agreement. If the person is under the age of 18, their parents or caregiver must be a part of the negotiations of the limited access agreement.
- Determine who in the church and the larger community should be notified, and means of notification;
- Suspend or terminate volunteer duties or membership, or in the case of an employee, suspend or terminate employment. If termination of membership is recommended, they will report the decision to the Board of Directors, and inform the individual of the right to appeal the decision to that body.
- Take any other action(s) that, in the opinion of the minister, DLRE, and board president, would be in the interests of the church, the church community, or children or youth.

## **Procedures for Working with and Caring for a Person against Whom Allegations of Abuse or Neglect Have Been Made**

- Throughout the review process, the accused will be treated with dignity and respect.
- If the accused is a paid staff person or a volunteer, that person will be suspended immediately from all activities involving the supervision or care of children, youth or other vulnerable persons. If the accused is a youth allegedly involved in sexual misconduct, he or she will be suspended from all youth activities. This is true for an incident that allegedly occurred either within or outside the realm of the church.

- Regardless of where or under what circumstances any incident is alleged to occur, if the minister, DLRE, and board president have placed restrictions upon an employee, volunteer or youth those restrictions will remain in effect until all allegations have been cleared.
- The minister, DLRE and board president may remove the person from service at their discretion, and for employees, that removal may be with or without pay. The youth may be removed from the youth gatherings, lock-ins, CONS and children and youth religious education programs for one or more meetings.

## **Procedures for Working with and Caring for a Person Who Has Engaged in Abuse, Neglect, or Inappropriate Behavior**

Because we affirm the inherent worth and dignity of every person, we do not believe any person should be automatically excluded from participation because of his or her actions. However, we have a responsibility to ensure the well-being of all of our attendees. The ability of some perpetrators to change their behavior is uncertain. If someone wishes to participate in this church who has been convicted of abuse or neglect, we will welcome that individual to the extent that their participation does not compromise the safety of others. However, the person's participation may be limited to ensure the safety of all.

If it is determined that any person should have restricted access to children, youth or other populations, he/she will be required to sign a limited access agreement, and will not be allowed to have access to children, youth or other populations except as consistent with that agreement. The minister, DLRE, and board president will determine if a limited access agreement is necessary, and the terms of that agreement.

## **Monitoring Policies and Procedures**

This policy should be routinely communicated to the Religious Education Development Team, Connections Coordinator, and all volunteers who work with children and youth. This policy should be posted on the church website and annually be placed in some form of church communication.

The Lead Minister and DLRE will determine who is responsible for implementing screening procedures, and initial training for all volunteers working with children and youth, and the Lead Minister will ensure that all staff are up to date on the most current guideline. The Board will see that these responsibilities are performed.

The DLRE, Lead Minister, and Board of Directors will review this policy every two years to be sure it is up to date and appropriate for the current congregation.

***This version is adopted on August 20, 2025 by the Board of Directors***

# Appendix

- Code of Ethics
- Children and Youth Participation Release and Authorization for Emergency Medical Treatment
- Rules for Youth Events and Lock-ins
- Protocol for Reporting Suspected Abuse
- Training for Staff Members, RE Teachers, Youth Advisors and Child Care Workers
- Limited Access Agreement
- Annual Notice for UUCB Regarding the Safe Congregation Policies and Procedures for Supervision of Children and Youth
- Religious Education Program Accident Report Form

## Code of Ethics

Code of Ethics for Adults and Older Youth  
Who are in leadership roles with children/youth  
(adopted by the Unitarian Universalist Association in 1986)

Unitarian Universalist Church Of Bloomington, Indiana, Inc.

Adults and older youth who are in leadership roles are in a position of stewardship and play a key role in fostering spiritual development of both individuals and the community. It is, therefore, especially important that those in leadership positions be well qualified to provide the special nurture, care and support that will enable children and youth to develop a positive sense of self and a spirit of independence and responsibility.

The relationship between young people and their leaders must be one of mutual respect if the positive potential is to be realized. There are no more important areas of growth than those of self-worth and the development of a healthy identity as a sexual being. Adults play a key role in assisting children and youth in these areas of growth. Wisdom dictates that children, youth and adults suffer damaging effects when leaders become sexually involved with young persons in their care therefore leaders will refrain from engaging in sexual, seductive or erotic behavior with children and youth. Neither will they sexually harass or engage in behavior with youth, which constitutes verbal, emotional, or physical abuse.

Leaders will be informed of the code of ethics and agree to it before assuming their role. In cases of violation of this code, appropriate action will be taken.

When any minister, adult leader, child care employee, church school teacher or other person working under the auspices of the Unitarian Universalist Church of Bloomington, IN has reason to suspect that a youth or child under 18 has been the victim of sexual abuse, physical abuse, or neglect, these suspicions will be immediately reported to the President of the Congregation, one of the ministers, or a professional staff person of the church.

I have read and understand the above statement and the expectations that it places on me.

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SIGNED

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POSITION

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DATE

## Children and Youth Participation Release and Authorization for Emergency Medical Treatment

I, \_\_\_\_\_, represent that I am the parent/guardian of \_\_\_\_\_. I grant permission for my child/youth to participate in the following supervised activity:

\_\_\_\_\_

This activity will take place at \_\_\_\_\_ from \_\_\_\_\_ AM/PM to \_\_\_\_\_ AM/PM on \_\_\_\_/\_\_\_\_/20\_\_\_\_. I also grant permission for my child/youth to be transported to and from the location.

I know that Unitarian Universalist Church Bloomington, Indiana (UUCB) will do everything in their power to keep my child safe. I agree to hereby release Unitarian Universalist Church Bloomington, Indiana (UUCB) from any and all liability which may arise from damages, loss or injuries, either to person or property, which my child/youth or I may sustain while my child/youth or I engage in the activity conducted including, but not limited to, any damages, loss or injuries that may be sustained through transportation to and from the activity, except that this release will not apply to any damages, loss or injuries covered by liability insurance of the activity venue itself. I further agree to assume responsibility for any liability that may arise from damage to property caused or contributed to by my child.

Should any injury or illness occur, I grant permission for my child/youth listed above to receive treatment from a health care provider to be selected by a supervisor of the activity, when in such supervisor's opinion the need for such treatment is immediate, and when efforts to contact me/us are unsuccessful. I also agree to pay and be responsible for all medical, hospital or other expenses that may be incurred as a result of such treatment.

Home Address \_\_\_\_\_

Home Phone \_\_\_\_\_ Emergency Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Employer \_\_\_\_\_

Family Physician \_\_\_\_\_ Phone \_\_\_\_\_

Health Insurance Provider and Record Number \_\_\_\_\_

Child's Allergies \_\_\_\_\_

Medication child is currently taking:

**I HAVE PROVIDED ALL NECESSARY MEDICATIONS FOR MY CHILD OR YOUTH, INCLUDING WRITTEN INSTRUCTIONS FROM THE PHYSICIAN REGARDING SUCH MEDICATION. MY CHILD OR YOUTH WILL HAVE THE MEDICATIONS WITH THEM, AND MY CHILD/YOUTH IS CAPABLE OF *SELF-ADMINISTERING* THE MEDICATION *OR* I HAVE PROVIDED INSTRUCTIONS FOR USE OF MEDICATION, WHICH THE DIRECTOR OF RELIGIOUS EDUCATION HAS APPROVED FOR THIS ACTIVITY.**

Signature \_\_\_\_\_ Date \_\_\_\_\_



## **Sample Rules for Youth Events and Lock-ins**

These rules and suggestions should be reviewed by youth and advisors who work with youth on a regular basis. They will be the rules used at late nights, sleepovers, lock-ins and any youth event at the church. When away at an event it is expected that the youth follow the rules stated in the signed covenant of the event.

1. If coming late, notify organizers, as there will be a clear start time.
2. Do not bring, use, or arrive under the influence of tobacco, alcohol, illegal drugs, or controlled substances.
3. Refrain from any sexualized behavior. There is a ZERO tolerance policy.
4. NO means NO.
5. Be aware of personal space. Make sure there is no pair-wise space.
6. Maintain the wearing of appropriate clothing at all times. Dress as if you are going to school in front of parents. Upper and lower torso must be covered at all times.
7. The bringing or use of weapons, fireworks, explosives or flammable items is prohibited.
8. No pets.
9. Consuming or bringing energy drinks or pills is not allowed.
10. Events have clear end times. Youth are not allowed to leave church without the agreement of one supervisor.
11. Be sure to take care of yourself.
12. Be careful not to break the law.
13. Do not take photos, video, or audio or post pictures without the permission of all the people in the photo video or audio conversation. (Think of the Vegas Rule)
14. No sexting on cell phones will be allowed.
15. There will be two sleeping spaces: Loud and quiet. NO SLEEPING ELSEWHERE. Supervising adults will work with the youth to develop a plan so that adults are available and present .

## **Protocol for Reporting Suspected Abuse**

Child abuse means the non-accidental injury, sexual abuse (touching and non-touching), exploitation, neglectful treatment or the maltreatment of a child (from birth to 18 years) by any person under circumstances which indicate that the child's health, welfare or safety are harmed.

If any religious education (RE) teacher, other classroom volunteer, advisor, child care worker, or RE committee member or church employee is in a situation where a child, youth or other person discloses information that causes suspicion of abuse, the recipient should do the following:

1. Listen carefully.
2. Provide an appropriate setting. If, for example, a child begins to reveal possible abuse during a RE program, have the assistant teacher or another appropriately screened leader take over your supervising responsibilities, and take the child out of the room but stay with him/her.
3. Be open to his/her story and affirm his or her courage; do not be surprised by silences or tears.
4. Be honest with the person telling the story. Don't make promises you can't keep, such as guaranteeing confidentiality in all circumstances. Offer support and hope.
5. Write notes on what is said. If it is not possible to take notes while the story is being told, write them immediately afterward, so you can record the person's story as accurately as possible. Include all details offered. (*Remember, however, that you are recording, not investigating.*) If you ask questions, they should be open-ended, for example, "And then what happened?" Be sure to indicate in your notes your name, the victim's name and the time and date you received the story. Your notes will enable you to make an accurate report. You will need them if you are asked to testify later on.
6. Inform and consult with the Lead Minister and/or the DLRE as soon as possible. However, according to Indiana law, you are a mandated reporter and must report suspected child abuse or neglect directly to the Indiana Department of Child Services
7. According to the Indiana Department of Child Services (<https://www.in.gov/dcs/contact-us/child-abuse-and-neglect-hotline/>):

If you suspect a child is being abused or neglected, call the Indiana Department of Child Services' Child Abuse and Neglect Hotline today at **1-800-800-5556**. It is available 24 hours a day, 7 days a week, including weekends and holidays. You can report abuse and neglect anonymously.

**Who is required to report child abuse or neglect?**

Indiana is a mandatory reporting state; anyone who suspects a child has been neglected or abused must by state law make a report.

**Can the person making the report remain anonymous?**

State law requires DCS to protect the identity of those reporting abuse or neglect allegations. DCS keeps the name and contact information of all report sources confidential. While DCS accepts child abuse and neglect allegations from persons who wish to remain anonymous, DCS encourages individuals to provide contact information. Providing your contact information allows the family case manager who is assigned the report to follow up with additional questions if needed.

**What will I need to provide when making a report?**

If you call to make a report, an intake specialist will ask for information about the circumstances creating a risk of harm to the child including:

- who was involved
- what occurred
- when and where it occurred
- the extent of any injuries sustained
- any other relevant information

You may be asked for detailed information including names, addresses and phone numbers for the child, parent or alleged perpetrator. Even if you are unable to provide all of the information, please contact the hotline to make a report if you suspect a child is a victim of abuse or neglect.

# **Training for Staff Members, RE Teachers, Youth Advisors and Child Care Workers**

[www.churchmutual.com](http://www.churchmutual.com)

*Church Mutual has a proven record of maintaining the most up to date training and resources for congregations. Church Mutual is Unitarian Universalist Church Bloomington's insurance company.*

## **What is child abuse?**

Child abuse means the non-accidental injury, sexual abuse (touching and non-touching), exploitation, neglectful treatment or the maltreatment of a child (from birth to 18 years) by any person under circumstances that indicate that the child's health, welfare or safety are harmed.

## **Sexual and physical abuse symptoms**

### Signs of Physical Abuse

Consider the possibility of physical abuse when the child:

- Has unexplained burns, bites, bruises, broken bones, or black eyes
- Has fading bruises or other marks noticeable after an absence from school
- Seems frightened of the parents and protests or cries when it is time to go home
- Shrinks at the approach of adults
- Reports injury by a parent or another adult caregiver

### Signs of Sexual Abuse

Consider the possibility of sexual abuse when the child:

- Has difficulty walking or sitting
- Suddenly refuses to change for gym or to participate in physical activities
- Reports nightmares or bedwetting
- Experiences a sudden change in appetite
- Demonstrates bizarre, sophisticated, or unusual sexual knowledge or behavior
- Becomes pregnant or contracts a venereal disease, particularly if under age 14
- Runs away
- Reports sexual abuse by a parent or another adult caregiver
- Reports being inappropriately touched by another youth or adult (C)

### Appropriate conduct for those working with our children and youth

Adults who work with children and youth at the UUCB are expected to have the best interests of children and youth at heart. They are expected to nurture their physical, emotional and spiritual

growth by fostering an environment of kindness, trust, respectfulness and fun. Their charge is to encourage kindness and genuineness among the children and youth, and to discourage unkindness and falseness.

### Friendship with Youth

It is the adult volunteer or compensated worker's responsibility to avoid or discourage inappropriate friendships. The adult should take the responsibility to establish and maintain appropriate friendships. The adult should take the responsibility to establish and maintain appropriate boundaries and to cultivate a healthy atmosphere of trust.

A teenage child is no more responsible to maintain healthy boundaries than is a 3-year-old. In fact, teens may have more confusion about appropriate boundaries and should be treated appropriately.

### Unofficial Contact with Youth

Sometimes a genuine mentoring relationship will develop between a youth and an adult. These relationships can be healthy and transformative for both. However, it is our concern that someone who might not have the best interest of the youth at heart could try to disguise an unhealthy relationship with a youth as a mentoring relationship. Any relationship developed between an adult and a youth outside of church must be with the knowledge and consent of the youth's parents. This is for the protection of the youth and the adult. Adults will best protect themselves from false accusations of misconduct by keeping the parents informed of their actions.

### Sexualized Behavior

It is never appropriate to engage in any manner of sexualized behavior with or among children or youth. (C) This refers not only to explicitly sexual behavior, but also to sexually provocative behavior or language. It is inappropriate to tell jokes with sexual content, for instance, or to make "double entendres." Physical expressions of affection such as hugs certainly have their place, but it is best to allow the child or youth to initiate them, and the adult must be sensitive not to allow them to be prolonged.

### Confidentiality

If a child discloses incidents of abuse or neglect, the church volunteer or staff should follow the guidelines in the Form for Reporting Suspected Abuse, (V.13) including contacting the minister, director of religious education, board president as soon as possible. While you can assure a child that you will respect the information, never give the child the impression that you will keep secrets. If the child is in harm's way, the information must be shared with people who can help the child.



## Rationale for Screening Procedures

One provision of the proposed Safe Congregation Policies and Procedures for the church is a requirement that all staff and volunteers working with children or youth go through a background screening process. It's one way we are seeking to care for our children and youth by reducing the risk of abuse in our church.

### What does such a screening consist of?

First, the Director of Religious Education (DLRE) will initiate the congregation's background check system. The background check through Church Mutual's third party relationship with Trusted Employee's is highly recommended.

The DLRE will also verify the identity of all applicants by photo ID. Results of the reference and database checks will be maintained in writing and retained in locked files. The location of these files will be kept in an locked space agreed upon by the minister and DLRE.

### What are we looking for?

First, we are NOT looking for the record of an arrest during a student protest or a DUI offense from 20 years ago. We are primarily looking for indications that the applicant might use the position as a way of getting close to children for the purpose of abusing them. We are also looking for convictions of a crime involving violence or a felony. The policy is intended to protect our children from persons who might act in a violent or dishonest way when under stress.

Specifically, the policy states: Conviction of any of the following offenses will preclude the individual from working with children or youth: (1) any offenses involving illegal drugs, (2) any sex offense, (3) any felony within the past 12 years, or (4) any offense involving violence against any person. Because we know that some people have made mistakes in the past that do not reflect on their ability to be a child or youth worker or volunteer, the policy also states that the DLRE and minister may make exceptions to the foregoing on a case-by-case basis by agreement.

In addition, the DLRE may disapprove any person wishing to work with children or youth if there is substantial evidence the person committed any of the crimes listed above, even if there is no conviction. This might happen, for example, if the person pleaded guilty, but received a type of probation that resulted in no conviction.

We realize that at first a few people may be uncomfortable with undergoing screening. However, this type of inquiry is now mandatory for working in schools, and most people accept that background checks are necessary to protect children. We believe the same protections should apply to our church school. Although the Safe Congregations Policies and Procedures adhere to UU principles of fairness, kindness and forgiveness, our top priority is safeguarding our children and youth.

## **Limited Access Agreement**

**[Sample Form to be modified by Minister, DLRE, and Board President  
As Appropriate to the Circumstances]**

### **Confidential**

## **Limited Access Agreement**

The Unitarian Universalist Church of Bloomington (UUCB) has reason for concern that your contact with children, youth, or other persons who may be vulnerable in our congregation potentially places both you and them at risk of incident or accusation. UUCB specifies that the following is required of you. Within these terms, UUCB welcomes your participation in worship services, committee meetings, adult discussion groups, and adult social events.

Unless in the presence of a church-approved chaperon you must:

1. Avoid all contact with children and youth on church property or at church-sponsored events.
2. Not enter the nursery or religious education classes (except adult religious education classes).
3. Not attend coffee hour or intergenerational events.
4. UUCB must provide safety for a variety of groups that use the building during the week. To that end, you are not allowed in the church building unsupervised when activities involving children or youth are in session. You may not possess or borrow a key to any church room.

UUCB will attempt to keep this matter as confidential as deemed prudent by the Lead Minister, DLRE and Board President, while ensuring the church remains a safe place for our children and youth. Staff and Safety Team members may be informed as deemed prudent. Please contact the minister should you have questions or are unsure of how to handle a particular situation.

Agreement



I have reviewed these terms, and I agree to abide by them. If I do not follow these terms, I will relinquish my participation and/or membership in this church.

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Signature

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Date

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Lead Minister

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Date

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Board President

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Date

## **Annual Notice for UUCB Regarding the Safe Congregation Policies and Procedures for Supervision of Children and Youth**

All members of the Unitarian Universalist Church Bloomington, Indiana have a responsibility to provide a safe and caring community in which our children and youth are respected, in which their self-worth is affirmed, and in which spiritual, social, and intellectual growth are encouraged.

We will achieve these goals in part through the implementation of the Safer Congregation Policies and Procedures (SCPP) for Supervision of Children and Youth. A complete copy of the SCPP is available on the church web site and the church office. Some important highlights are:

- Staff and volunteers working with children or youth will be screened and trained, and volunteers will have attended the Unitarian Universalist Church Bloomington, Indiana regularly for at least six months unless approved by the DLRE.
- Two appropriately screened supervisors will be present at all times in the nursery, religious education classrooms and during any church-sponsored activity involving children or youth.
- The church building will not be open to children or youth for any activity until one screened supervisor is present.
- Rules for youth events have been written by the youth and should be read, signed and agreed to for each youth event.
- No child younger than third grade will be dismissed from religious education class without an appropriate parent, guardian or other supervisor.
- Other children will be dismissed without supervision to join their parent/guardian or other appropriate supervisor.
- All children in the nursery will need to be signed in and out.
- Church functions providing childcare require at least two screened childcare workers.

## Religious Education Program Accident Report Form

Date of accident \_\_\_\_\_

Time of accident \_\_\_\_\_

Place(s) where accident occurred:

Name(s) of person(s) involved:

Brief description of accident:

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Treatment for injuries was:

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(Use the back of this form as needed, or attach any supporting materials when completing.)

Did you observe the described accident directly? Yes No

If not, who or what was your source of this information?

Did you notify parents? Yes No When?

Signature \_\_\_\_\_

**Signed date** \_\_\_\_\_

**(Please return this completed form with any supporting material to the Director of Religious Education)**