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EMPLOYEE HANDBOOK
(Last Updated Aug 2018)

This Employee Handbook applies to all employees of the Foothills Unitarian Church, except for called ministers with separate employment agreements. The contents of this Handbook supersede all prior guidelines, policies or practices with respect to the subject matter covered by this Employee Handbook.

Neither this Employee Handbook nor any other guidelines, policies or practices create an employment contract or an offer of an employment contract. This Employee Handbook is not a promise of employment for any length of time or under any particular conditions. Foothills Unitarian Church has the right at any time, with or without notice, to change any of its guidelines, policies, practices, working conditions or benefits (in an individual case or generally), and to amend or abolish this Employee Handbook.

All employees of Foothills Unitarian Church (other than clergy with separate employment agreements) are **employed at-will**, and as per Colorado employment law, employment may be terminated at any time, with or without cause.

Employee Acknowledgement

I acknowledge that I have received a copy of the Foothills Unitarian Church Employee Handbook and that I have read it. I understand that the Employee Handbook is not a contract of employment or an offer for a contract of employment, that I am employed at will, and that my employment may be terminated by me or by the Church at any time, with or without cause.

If I have questions about the Employee Handbook, I may contact my supervisor.

Employee

Date

(This original signed page should be kept in the employee's copy of the Employee Handbook, and a copy should be kept in the Employee's Personnel File.)

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WELCOME!

Welcome to Foothills Unitarian Church. We are delighted that you have decided to join our staff team and look forward to your partnership in serving the mission of this congregation to unleash courageous love in Northern Colorado and beyond.

This Handbook is intended to provide an introduction to our congregation, and to answer your employment questions. Your supervisor or the Director of Finance and Operations (DFO) can address any of your questions or concerns not adequately addressed in this handbook.

In addition to this Handbook, you will also receive a letter of employment outlining the specifics of your position including:

1. Job Description, noting specifically the essential functions of the position
2. Position supervisor
3. Normal working hours
4. Start date
5. Wages and other compensation particular to the position
6. Staff covenant (also included in the appendix)

We ask that you and our Senior Minister sign the offer, and we'll give you a copy, and place a copy in your personnel file. You can expect to receive an updated letter whenever we change your position description, supervisor, hours or compensation (which usually occurs annually at the time of the start of a new budget on January 1).

In the appendix of this handbook, you will find an organizational chart. Please review and if you have any questions, talk with your supervisor.

Our work is grounded in our shared values and inspired by our commitment to our religious mission. As a result, our goal is to create a work environment that aligns with these values – one that embodies mutual respect, fairness, equality and justice.

Additionally, although we hope that you come to this work by way of your own commitment to our religious mission and shared values, we want to underscore that as a staff member, you are here as a professional, and to do your part in facilitating and enabling the success of our institution and the spiritual journeys of others. Accordingly, you will be expected to achieve specific outcomes, and you will be held accountable to individual and team goals to further the vision of ministry and our shared goals.

With your partnership, we know we will be even more capable of unleashing courageous love within our congregation and our wider community. We look forward to all we will be and do together.

In partnership and with gratitude,

Rev. Gretchen Haley, Senior Minister

1. Foothills Employment Policies and Practices

A. Equal Opportunity / Non-Discrimination Policy

Foothills is an Equal Opportunity Employer. We do not discriminate on the basis of race, color, religion, sex, national origin, age, disability, family structure, sexual orientation, gender identity or expression, military status or veteran status, or any other classification protected by law. In addition, Foothills complies with state and local laws governing nondiscrimination in employment. This policy applies to all terms and conditions of employment including but not limited to recruiting, hiring, placement, promotion, termination, layoff, recall, transfers, leave of absence, compensation, benefits, training and all similar employment matters. Religious opinion and affiliation may be considered only to the extent that it may prevent an employee from being fully supportive of the Church's mission and values or perform their required duties.

B. Employee Accommodations

The Americans with Disabilities Act (ADA) requires an employer to provide reasonable accommodations for individuals with disabilities, unless it would cause undue hardship. A reasonable accommodation is any change in the work environment or in the way a job is performed that enables a person with a disability to enjoy equal employment opportunities.

We will make reasonable accommodations for qualified individuals with a known disability or medical condition. Employees needing such accommodation are requested to contact the Senior Minister as soon as the need for accommodation is known, and to put their accommodation request in writing. This policy governs all aspects of employment including selection, job assignment, compensation, discipline, termination and access to benefits and training.

C. Background Checks

All employees are subject to a background check prior to being hired.

D. Employment At-Will

All employees are **employed at-will** and may be dismissed at any time for any reason.

E. Anti-Nepotism Policy

Any family member within one generation, committed partner or spouse of an employee cannot serve on the Board of Trustees. The Senior Minister may make exceptions to this policy on a case-by-case basis, except for in the case of their own family member, for which there would be no exception.

Relatives of other employees can be employed by the Church, so long as employment does not create actual or perceived conflicts of interest. For purposes of this policy, "relative" is defined as a spouse or partner, child, parent, sibling, grandparent, grandchild, aunt, uncle, first cousin, or corresponding or "step" relation.

- a) Related individuals are permitted to work together provided no direct reporting or supervisor/management relationship exists. That is, no employee is permitted to work within the chain of command of a relative such that one relative's work responsibility, salary, or career progress could be influenced by the other relative.
- b) No relatives are permitted to work in the same Department or in any other positions where an inherent conflict of interest may exist. The Senior Minister may make exceptions to this policy on a case-by-case basis, except regarding their direct relative, in which case the Board's approval would be required.

This policy applies to all categories of employment at the Church, including regular, temporary, and part time classifications.

F. Exempt and Non-Exempt Designations

Our practice is to distinguish between exempt employees from non-exempt employees. Generally, those in administration, management or supervisory positions (i.e. Directors, the DFO, and other professionals) who are not subject to such regulation are "exempt" from overtime laws. All other employees are considered non-exempt and will be compensated based on corresponding state or federal minimum wage and overtime laws.

G. Established Work Week

The scheduled workweek starts at 12:01 a.m. Monday and ends at midnight on Sunday. Employees are expected to work with their supervisor to establish their work schedule, ensuring prompt communication of any expected variations.

H. Employee Supervision

All employees are supervised as set forth in the Job Description applicable to their position. Also, please note the organizational chart in the appendix of this handbook.

The Senior Minister is the Head of Staff, and is responsible for hiring, dismissal, and supervision of all employees except for other settled clergy, and delegates authority for supervision as provided in the employee job description.

The DFO works with all other Church employees regarding personnel concerns related to topics including but not limited to wages, hours, leave, benefits, office procedures, and general orientation.

If a supervisor position is either vacant or not readily available, the Senior Minister will act in their place. If not available, the Senior Minister will designate someone to act on their behalf.

I. Employment Termination

An employee may be separated from employment voluntarily or involuntarily by retirement, resignation, or termination.

- a) **Resignation/Retirement:** We request that employees who resign their position, or who intend to retire give as much notice as possible, with no less than three weeks considered a minimum courtesy.
- b) **Termination:** All employees are employed at-will and may be dismissed at any time for any reason.
- c) **Benefits upon termination:** Information regarding benefits upon termination is included in the Employee Benefits section of this handbook.
- d) **Employment conclusion:** Before concluding employment, all employees maybe asked to meet with the DFO. This meeting includes a review of eligibility for benefit continuation and conversion, ensures that necessary forms are completed, and collects all Church property that may be in the employee's possession, including assessing the transition plan for electronic files and access.
- e) **Exit interview:** Persons leaving our employ may be asked to participate in an exit interview with the Head of Staff or someone the Senior Minister designates. The purpose of this interview is to provide employees with an opportunity to discuss their job-related experiences. Information gained from exit interviews is helpful in evaluating working conditions, pointing out personnel problems, and possibly reducing turnover. This interview, though highly encouraged, is voluntary, and does not become part of an employee's personnel file.

J. Performance Evaluations

All paid staff receive a full evaluation annually, and participate in performance management supervisory meetings at least quarterly. In each of these conversations, employees are encouraged to share about and reflect on their work experience, in addition to the supervisor's feedback about their performance. These evaluation and supervisory meetings are conducted by the employee's direct supervisor.

A copy of all documents produced as a result of these meetings are given to the employee as well as placed in the employee's personnel file, which will be held in confidentiality. Each employee will be requested to acknowledge the discussion of the written report by signing or initialing the report, and will be encouraged to provide any written comments they deem appropriate.

Employees establish annual goals for their work no later than the end of August each year and are held accountable to the achievement of these goals as a primary feature of their annual evaluation.

An unsatisfactory evaluation may result in the use of a Performance Improvement Plan (PIP), wherein their supervisor will communicate the steps required for their performance to meet or exceed the expectations of their job within a specific time frame. Non-compliance with a Performance Improvement Plan will result in disciplinary

measures, up to and including termination. The use of a PIP as a part of communicating expectations is based on the discretion of the employee's supervisor.

K. Conflict Resolution Procedure

Misunderstandings or conflicts can arise in any organization. To ensure effective working relations, it is important that such matters be resolved before serious problems develop. Should a situation persist that an employee believes is detrimental to their employment, they should follow the procedure described here for bringing their complaint to the attention of their supervisor.

- a) **Step One.** Discussion of the problem with the person involved in the issue should always be the first step. Trying to work through a problem one on one is often an effective way to handle conflict resolution. If that does not resolve the concern, or if the issue is with the employee's supervisor, then the employee may proceed to Step Two.
- b) **Step Two.** If the problem is not resolved after discussion with the fellow employee, employees should meet with their immediate supervisor to work through the issue. They may also include a minister in those discussions. We encourage employees to strike a balance in ensuring direct communication and employee safety.
- c) **Step Three.** When this does not bring resolution, employees should follow the process outlined in the Grievance procedure described in this Handbook.

Religious professionals are also encouraged to consult with the Good Officer within their professional association for further guidance and support.

L. Harassment

Foothills Unitarian Church will not tolerate harassment of any kind or violent conduct that affects job performance or benefits, or that creates an intimidating, hostile, or offensive working environment.

Harassment consists of repeated and unwelcome conduct (whether verbal, physical or visual) that is based upon or directed toward a person's protected status, such as sex, color, race, ancestry, religion, national origin, age, physical handicap, medical condition, disability, marital status, citizenship status, gender identification, sexual orientation or other protected group status.

Sexual harassment deserves special mention. Unwelcome sexual advances, requests for sexual favors, and other physical, verbal, or visual conduct based on sex, constitute sexual harassment when:

- a) submission to the conduct is an explicit or implicit term or condition of employment;

- b) submission to or rejection of the conduct is used as the basis for an employment decision; or
- c) the conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive work environment.

Sexual harassment may include explicit sexual propositions, sexual innuendo, suggestive comments, sexual-oriented "kidding" or "teasing", "practical jokes", jokes about gender-specific traits, foul or obscene language or gesture, displays of foul or obscene printed or visual material, and physical contact, such as patting, or brushing against another's body.

Any employee who believes they has been harassed in violation of these policies should, immediately tell the offender the activity is unwelcome and it should stop immediately. If the activity does not cease or talking to the offender is not appropriate, the employee should report the harassment to his or her immediate supervisor who will consult with the Senior Minister regarding appropriate action.

M. Reports of Discrimination or Harassment

Employees who have questions about discrimination in the workplace, or who believe our equal opportunity policy has been violated, should report their concerns immediately to the Senior Minister. When the concerns involve the Senior Minister, employees should refer to the Grievances Procedure below.

N. Grievances

Members of the staff and the Church are expected to attempt to resolve their concerns with the person most directly involved following our church Covenant of Right Relations. When there is a suspected violation of policy or procedure, however, the person may go directly to the individual's supervisor. The supervisor is expected to address the concern with their employee. When this does not resolve the concern, or in the case of harassment, employees and members should bring their concern directly to the Senior Minister as head of staff, preferably in writing with information about the individuals involved and any witnesses. The Senior Minister will respond with a decision and appropriate action.

If a complaint is about the Senior Minister, employees can file a grievance directly to the Board of Trustees. Additionally, any staff member who alleges that the Senior Minister's decision has violated law or Board policy may present their grievance to the Board of Trustees.

All grievances must be submitted in writing to the Board of Trustees. The Board will conduct an investigation regarding the allegations, and respond in accordance with the values stated in this Handbook as well as Board Policies. All matters submitted to the Board will be resolved within a reasonable time frame, and the resolution described by the Board is considered final.

O. Whistleblower Protections

The Church prohibits retaliation against employees or other persons who in good faith report legal or ethical concerns. Any employee who suspects that they have experienced retaliation for making a report should immediately inform the Senior Minister. If the retaliation is from the Senior Minister, then the employee should inform the Board of Trustees.

P. Reimbursement for Job-related Expenses

An employee will be reimbursed for job-related expenses under the following conditions:

- A. Approval of the employee's supervisor or authorized budgetary owner is secured in advance;
- B. Submission of a Request for Payment form within 30 days after the expense was incurred; and
- C. Submission of receipts both for all expenses \$25 or over and for all expenses under \$25 if available.

Employees with a valid driver's license and proof of insurance may use their own cars for Church-related business or sanctioned Church activities. The IRS reimbursement rate will apply for mileage to attend out-of-town training or required professional meetings. For all other Church-related travel, employees may deduct such expenses from personal income taxes due, as allowed by the Internal Revenue Service.

Q. Personnel File

Foothills will maintain a personnel file on each employee. Employees may review their personnel file upon request and in the presence of authorized personnel. If an employee is interested in reviewing their file, they should contact the DFO to make arrangements.

To ensure that personnel files are up-to-date at all times, employees are required to notify the DFO of any changes in their name, telephone number, home address, marital status, number of dependents, beneficiary designations, scholastic achievements or accreditations, the individuals to notify in case of an emergency, and so forth.

R. Employment References

All employment verification or reference requests on current or former employees are to be referred to the DFO. The DFO will normally release only last title and dates of employment. All other requests for information on current or former employees also are to be referred to the DFO who will consider and respond to the request, and/or refer them to the Senior Minister.

Requests for employment verification for credit or mortgage purposes should also be referred to the DFO. Other information will be provided only if the employee has executed a release.

2. Foothills Governance and Decision-Making Process

A. The Role of the Board of Trustees

Foothills is a congregational church, which means that the authority ultimately lies in the hands of its members. There is a democratically elected Board that governs by policy. The current Board Policy book can be found [here](#).

The policies and procedures detailed in this handbook are directed by these Board policies. More information about the role of the Board can be found in the Policy book.

The Board of Trustees is in turn governed by the By-Laws of the congregation, which can be found [here](#).

B. The Role of the Ministers

The congregation is in relationship with two ordained clergy who work in partnership to direct and partner with the paid staff and the members of the community to carry out the ministry of the Church. Any called ministers are held accountable through the Board of Trustees, yet cannot be directly dismissed (or called) by anyone other than the congregation as a whole. More information about calling and dismissing called ministers is detailed in the By-laws. Hired ministers are hired by the Senior Minister as a part of the staff team, and they are both hired and dismissed in the same way as other hired staff. However, any professional clergy (including interns) are provided a letter of agreement which describes the particulars of their employment agreement. In the case of any conflict between this Handbook and that letter, the letter is considered primary and accurate for that employment.

The Board delegates the supervision and direction of the paid and volunteer staff to the Senior Minister, and so authority for staff-related decisions reside with the Senior Minister as Head of Staff.

The ministers work as a professional team, grounded in a shared covenant, which can be found [here](#). Their partnership forms the foundation of the Executive Team, which works collaboratively to lead and unify the paid and volunteer staff in directing their efforts in fulfillment of the mission and vision, ensure compliance with By-Laws, Policies and applicable laws, and to uphold a high standard of ethical and professional conduct.

This Executive Team may have additional team members added on either an ad hoc or regular basis at the discretion of the Senior Minister.

C. Board Vision

Every five to seven years, the Board of Trustees engages the congregation and other stakeholders in developing Vision / Ends Statements for the coming five to seven years. This Vision is delegated to the Senior Minister to be accomplished through the paid and volunteer staff of the congregation. The Senior Minister is held directly accountable to the Vision through a process of monitoring and oversight by the Board of Trustees. The Senior Minister in turn is responsible for holding their staff team accountable to setting and achieving goals that align with the Vision.

D. Staff Oversight of Ministries

Each ministry or program in the Church has a designated staff lead, who is responsible for overseeing the activities of the program to ensure full alignment of the Vision of Shared Ministry and our congregational values, as well as compliance with established Operational Procedures. Staff leads regularly connect with the lay leaders of their designated ministries, help with recruitment, program design, development, and execution, and provide both spiritual and logistical support for the participants in the ministry. Ultimately this role prioritizes the spiritual experience and opportunity for deepening in faith formation over any other goals in more traditional “oversight.”

The full list of staff leads for each of our groups and ministries can be found [here](#).

Annually, the staff leads work with the Senior Minister to ensure alignment of the programs with the Vision. In this review, it is possible that some programs or ministries will be deemed either less of a priority than in prior years, or no longer in alignment. In these cases, the Senior Minister will work with the staff lead and the Executive Team to assess how to best ensure a renewed alignment, including the possibility of ending the program or ministry. Further, the staff lead is responsible for working with any program leads or congregants with a new idea at the outset of any new idea, event, or initiative to ensure that it aligns with the Vision, using the “Making Things Happen at Foothills Procedure” found at foothillsuu.org/idea.

More information about this Procedure, and the role of the staff in developing and running the programs and ministries of the Church can be found in the Operational Handbook.

E. Oversight and Reporting

The schedule for Board oversight of the Senior Minister is detailed in the Board Policy book. Most relevant for the employees of the Church are the monthly report by the Senior Minister to the Board, the Annual Report to the congregation, and the Operational Dashboard. Each of these require the cooperation and participation of the staff team in order to accurately represent the status of the Church’s programs and ministries and our progress on achieving the Vision.

3. Employee Responsibilities

A. Guidelines for Appropriate Conduct

Employee conduct affects the health and growth of the Church and reflects upon our image in the greater community. Employees have a responsibility to the Church, their colleagues, and themselves to conduct themselves in a professional manner at all times, and in ways that support healthy community life.

Employees must take extreme care around personal or special relationships with members, friends, or partners of Foothills because of the potential ethical problems, perception of favoritism, or nature of the unequal power dynamics between Foothills’ employees and its members, friends and partners.

a) **Employee's Role as Staff.** Although our team members often share a sense of passion and commitment to the mission of the Church and our faith in the same way they would if they were members, they are in a distinct role from our members. While we hope they find spiritual fulfillment in their work, this is not their Church home, nor are the ministers able to be their ministers. Only in rare occurrences and when approved by the Senior Minister would we consider hiring someone who is a Church member as staff, as it is inevitably a complex dual role for anyone to navigate. In those situations, the staff member is required to put their role as a staff above their needs and role as a member.

The Church asks all employees to wear their name badges whenever they are on duty, especially on Sunday mornings, so as to clarify their role as staff and to help people identify them as a resource.

b) **Relationship with Other Staff Members.** Furthermore, staff members are expected to abide by the staff covenant, and to work as a team in service of our congregation's mission and vision. Foothills staff members are prohibited from dating any other staff members.

c) **Relationships with Congregants.** The priority of staff members is to ensure that congregants can engage fully and safely with the Church and its ministries. As a result, staff members are to refrain from dating or engaging in any sexual relationships with members, friends, or regular attenders of the Church. Friendships with Church members are not prohibited, but are complicated by the staff role, and staff members must consistently prioritize their role as staff rather than as friend whenever these two needs come into conflict. It is always problematic for congregants to perceive that a given staff member has a "special relationship" with some congregants but not others, and so staff members should be cautious about forming friendships. It is never appropriate for staff members to share problems or challenges about the work environment with congregants, or turn to them for support (outside of the Grievance Procedure as outlined in this Handbook). Congregants come to Church with their vulnerabilities and need not be drawn into the work dynamics of the staff team. Ultimately, staff need to remember that congregants do not come to Church to meet staff's personal needs, but rather to become a part of a meaningful, faithful community dedicated to a larger purpose; they need and must expect the staff to serve their spiritual journeys and growth, rather than the other way around.

This social complication also plays out in social media, where staff members must be thoughtful about when or if to "friend" congregants, and in all cases to remember that what they share in social media reflects on the Church and their job.

In summary, staff need to remember that interactions with Church members, whether online or in person, reflect on each employee's role as a staff member, and a result, reflect on and relate to each employee's professional role.

d) *Relationships with Other Unitarian Universalists and UU Congregations.*

As our congregation affirms a shared sense of mission and purpose with all other Unitarian Universalist congregations, all employees are expected to engage with other area UU congregants with the same degree of service and care as they do with Foothills congregants.

e) *Inappropriate behaviors:*

- a. Expectations for our employees not only involves sincere respect for the rights and feelings of others, but also demands that employees refrain from any behavior that might be harmful to themselves, co-workers, or the Church that might be viewed unfavorably by current or potential members or by the public at large. Employee conduct reflects on the Church. Employees are, consequently, expected to observe the highest standards of professionalism and ethical behavior at all times.
- b. Categories of behavior that the Church would consider inappropriate and could potentially lead to immediate termination include, but are not limited to the following:
 - i. Using the Church or the employee's role for personal gain, for example:
 1. Soliciting gifts or gratuities from vendors or community members;
 2. Excessive, unnecessary, or unauthorized use of Church property and supplies, particularly for personal purposes;
 3. Theft of property from co-workers, customers, or the Church;
 - ii. Neglecting the safety or security of the Church community, for example:
 1. Creating a hostile work environment
 2. Reporting to work under the influence of drugs or alcohol, and the illegal manufacture, possession, use, sale, distribution or transportation of drugs;
 3. Fighting or using obscene, abusive, or threatening language or gestures;
 4. Disregarding safety or security regulations;
 5. Failing to maintain the confidentiality of Church or member information
 - iii. Failing to maintain personal integrity or professionalism, for example

1. Falsifying employment or other Church records;
2. Complaining or venting to or in front of congregants about their work responsibilities (including on social media);
3. Insubordination

Furthermore, all staff are required to be active members of their applicable professional association (i.e. UU Ministers Association, Liberal Religious Educators, UU Administrators, etc.), learning with and from others in their field, attending applicable professional education opportunities, furthering the health of their professional organization, and complying fully with their professional guidelines and codes of conduct.

This list is not exhaustive of the Church's concerns. Always remember that the Church can terminate an employee for any reason.

Should an employee's performance, work habits, overall attitude, conduct or demeanor become unsatisfactory based on violations either of the above or of any other Church policies, rules, or regulations, the employee will be subject to disciplinary action, up to and including immediate termination.

B. Progressive Discipline

It is our practice to ensure that all employees and supervisors are in regular dialogue and constructive feedback regarding job expectations and performance, and when an employee is off-course, supervisors will provide them feedback and support to correct performance deficiencies. When this feedback does not change the employee's performance delivery, the Church may follow a progressive discipline that may include warnings, suspensions, and up to/including termination. However, the Church may not provide any progressive discipline and may terminate without notice. In the case progressive discipline is used, the following outlines the Church's terms and expectations:

- a) **Verbal Warning.** A verbal warning is a notice to an employee that his/her conduct or performance is unacceptable, and that repeated or continued failure to conform his/her conduct or performance to the Church standards will result in more severe disciplinary action. A record of the notice of the verbal warning may be made and retained in the employee's personnel file.
- b) **Written Warning.** A written warning will describe the unacceptable conduct or performance of the employee and specify needed changes or improvements. A written warning may also include the initiation of a Performance Improvement Plan (PIP). A copy of the written warning will be retained in the employee's personnel file.
- c) **Suspension.** Suspension of the employee's employment may be used, particularly when there is a need for investigation regarding an employee's

behavior. During the suspension time, the employee will be paid from his/her PTO balance.

- d) **Termination.** When an employee fails to conform his/her conduct or performance to the standards required by the Church, the Church may, in its sole discretion, terminate the employee's employment.

The Church reserves the right to administer discipline in such a manner as it deems appropriate to the circumstances, and may, in its sole discretion, bypass any or all of the steps in the discipline process.

C. Professional Misconduct

Professional misconduct is defined as the serious and egregious violation of standards for an employee's profession. For example, this may include financial malfeasance, boundary violations with congregants, or other serious ethical violations on the part of any religious professional. Religious professionals include religious educators (at the director, coordinator or administrative level for children, youth, or adults), music staff (anyone who is a part of the worship team or who oversees music), administrators, membership staff, and ministerial staff (including interns).

Professional misconduct has serious and long-lasting consequences for religious communities, as it constitutes a breach of our covenant and a break in trust between staff and congregants. Individuals and congregations can be damaged by one person's misconduct, with long-term negative consequences.

As a result, allegations of misconduct are taken seriously in all cases, and will trigger a three-phase response: Reporting; Investigation; and Response. These are outlined in below and describe principles, actions and possible outcomes; however, in all cases the Church retains the right to terminate employment at-will.

Reporting Phase

1. Allegations of misconduct can be brought to any staff member at any time.
2. In most cases and whenever possible, confidentiality of the reporter and those impacted will be maintained.
3. If there is immediate risk to the health or safety of staff and/or congregants based on the allegation, the ministers have discretion to swiftly address the situation, up to and including immediate suspension or termination of employment.
4. Any issues that involve illegal or dangerous activity will result in contacting the police or other authorities, and all staff members are empowered to make this judgment call whenever necessary.
5. Staff members who receive a report of alleged misconduct must direct the person coming forward to speak immediately to one of the ministers.
6. Within 24 hours of any initial report, regardless of what the reporter chooses to do, staff members are required to verbally communicate the incident to one of the ministers.

7. Within 48 hours of the report, staff members are required to write a summary paragraph of the report given to them and provide that to the Senior Minister.

Investigation Phase

8. The Senior Minister is responsible for investigating and taking action in response to any allegations of professional misconduct, using their discretion and professional judgment as Head of Staff and professional clergy. Generally, this investigation will engage the following principles:
 - a. Direct conversation with the person most impacted by the alleged misconduct.
 - b. Written documentation of the incident by the reporter and/or the Senior Minister.
 - c. Communication with any other professional ministers on staff, unless the misconduct involves the other minister.
 - d. Pastoral care and support for the potential victim(s) will be upheld throughout the process.
 - e. Partnership in the investigation, and the decision making process - the Senior Minister will engage the President and Vice President of the Board of Trustees, and potentially the entire Board, as well as appropriate UUA staff, and any other specialists or colleagues with expertise in the sort of situation being alleged.
 - f. Legal counsel will be sought early and regularly.
 - g. Our insurance carrier will be notified by either the Senior Minister or the DFO.
 - h. Methods of investigation may include:
 - i. Conversation with the staff member who has allegedly misconducted (see note below);
 - ii. Conversations/interviews with witnesses;
 - iii. Reviews of email or other correspondence;
 - iv. Social media review;
 - v. Church records review (i.e. financial records, database review, etc.);
 - vi. Other data review based on the particular allegations.
9. Upon validation and verification, the following process continues. If it has been disproven or there is sufficient doubt, there will be additional investigation as necessary until there is no further reasonable doubt. During this time, the staff member may be put on paid or unpaid leave.
10. It is the standard practice to give any employee accused of misconduct an opportunity to respond to the allegations. However, a decision on *when* to contact or involve the staff member who allegedly misconducted is made by the Senior Minister in consultation with the Board of Trustees, particularly taking into consideration:
 - a. The level of certainty regarding the allegations before this consultation occurs;

- b. The assessed risk of retaliation or cover up; and
 - c. The potential for harm to the congregation, particularly any confirmed victims of the misconduct.
11. Any employee who has been accused of misconduct is encouraged to reach out to their Good Officer as soon as they are notified. Good Officers serve as advocates and allies to UU professional staff. Employees should know who their Good Officers are and why/when to bring them in. This information is available through the employee's professional association.
 12. When the complaint is about one of the ordained ministers, the staff member receiving the complaint must assess whether they can take it directly to that minister, or to another minister on staff, or if they feel they need to go directly to the Board. All of these are options that the staff member can choose, based on their sense of safety, comfort, and seriousness of the situation.
 13. The Senior Minister will complete the investigation phase as quickly as possible, ideally within a few days and at most a week after the initial report was made.

Response Phase

14. When the complaint has been verified as true, the following occurs:
 - a. The Board President, Vice President and the Ministers develop a recommendation for appropriate action, including whether or not to convene the entire Board.
 - b. If the entire Board is convened, members will receive a summary of the allegations and situation as well as the recommendation developed by the President, Vice President and Ministers, and a decision will be made.
 - i. Possible outcomes or recommendations include: immediate termination, further investigation, or some other disciplinary action.
 - ii. This determination will ideally be made by consensus of the Board of Trustees, the Senior Minister and the Executive Team.
 - c. Based on these recommendations, the Senior Minister will request the staff member meet with the Senior Minister, Board President, and potentially the Executive Team.
 - i. During this meeting, the staff member has the opportunity to respond fully to the allegations and leadership has the authority to pause the prior recommendations if this perspective alters the understanding in any way, and place the employee on suspension while further investigation occurs.
 - ii. When there is not a change in understanding, it is likely that termination will occur immediately, the staff member will be issued a final paycheck, and they will be escorted off Church property.
 - d. Once misconduct has been confirmed, this information will be shared as quickly as possible with the congregation, as such transparency is required by our covenantal religious practice and our need to repair the break in our covenant and move towards healing.

- i. This disclosure will be shared with all members and friends of the congregation, and will include the general nature of the misconduct and the resulting action taken. While staff members will likely be given a chance to see this disclosure before it is released, they will not have a chance to provide input.

D. Conflict of Interest

Employees shall not engage in any collateral employment or business activity that is incompatible or in conflict with their duties, functions or responsibilities as a Church employee. The DFO should be consulted if there is any question whether an activity is acceptable.

Employees are expected to avoid conflicts of interest, and the appearance of a conflict of interest, defined as any situation where an employee may attain personal gain or which may serve as a detriment to the Church, either monetarily or to its public image, because of the use of information or personal contact which is not generally available except through employment with the Church.

Potential conflicts of interest should be discussed with the DFO. If the DFO determines that the proposed activity does not constitute a conflict, written documentation will be provided to the employee and placed in the employee's personnel file.

E. Attendance and Punctuality

The supervisor should be notified as far in advance as possible if the employee is going to be absent or delayed in reporting to work. If the employee is absent or late without prior notification, the supervisor should be notified as soon as possible as to the cause. The supervisor may assign make-up time or recommend reduced compensation when appropriate.

F. Staying Informed and Communication Practices

Each employee has a responsibility to stay informed about what is going on in the Church generally and most especially related to those things in their assigned area of responsibility. As a result, staff members are expected to subscribe to the Foothills' Leadership Blog (foothillsuuleaders.wordpress.com) and the weekly newsletter, as well as remain regularly engaged with the Communication worksheet (Marketing and Communication/Foothills Communication Schedule *Year*).

It is also important for employees to keep the Church informed of their intended schedule, accurate personal information, and preferred method of contact in the following ways:

- a) Intended Schedule: Employees should inform their supervisor and the office staff of their generally expected schedule and keep up to date the google staff calendar with any changes.

- b) Each employee will use their work email address for all Foothills related work. All work related documents should be stored on the Foothills Google Drive.

Internal staff communication is primarily done through Slack. Employees are expected to learn and integrate this communication platform into their workflows.

Generally, our work integrates the use of technology and emerging tools for productivity, project management and collaboration, and employees are expected to regularly learn and integrate these tools as they are identified. Support for this learning process is available through employee's supervisor or the DFO.

G. Confidential Information

As an employee at Foothills, one may be privy to confidential information about the organization, including but not limited to, information about members, friends, volunteers or other staff members. This information must remain confidential and is not to be released, removed from the Church's premises, copied, transmitted or in any other way used or disclosed for any purpose by employees outside the scope of their employment. Additionally, employees are cautioned to be extremely careful when discussing any Church matters in a social setting and potentially risk disclosing information inappropriately. All requests for information concerning past or present employees received from organizations or individuals should be directed to the DFO.

I. Media Inquiries

The Church realizes the importance of the press in creating public support and encourages attention from the media. We believe in utilizing the media to increase community awareness, and publicize special events. We must always conduct ourselves in the most professional manner in front of the media – at work and out in the community - and treat members of the media with respect.

All requests for information about the Church from newspapers, television and radio media should be directed to the Senior Minister or President of the Board of Trustees. An appropriate response to a media inquiry would be, "I am not the best person to answer that question. May I contact the appropriate person and have that individual get back to you?"

J. Electronic Communication

During work hours, it is the Church's expectation that employees will be engaging in work-related duties. This means that internet use, phone calls, and other tasks completed during work time must be primarily for legitimate work-related assigned duties and all personal internet/phone use during work hours should be kept to a minimum.

All materials, information and software created, transmitted, downloaded or stored on the Church's computer system or in the Foothills Unitarian Church google drive are the property of the Church and may be accessed only by authorized personnel.

For any Church-related software or devices, employees must provide the DFO with any personal passwords and access codes relating to the use of electronic communication

during working hours or on Church equipment. Employees should not consider their Internet usage, e-mail communications, or voice mail communications to be private.

Only authorized staff members may communicate on the Internet, through email or otherwise, on behalf of the Church. Employees may not express opinions or share any information about Church members on any social media.

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

All employee computers have virus protection software installed on them. Employees are responsible for ensuring this software is running and updated whenever necessary. All employee files must be regularly backed up on the google drive.

K. Job Injury/Worker's Compensation

It is an employee's legal responsibility to immediately report all on-the-job injuries or illnesses, regardless of severity, to the DFO. First Report of Injury forms are available in the Church office. She will assist you in filing a first report of injury to our carrier, Church Mutual. If an employee has an injury at work, they should get treated and the Church will work with them to ensure coverage. If an employee has been out of work and collecting a worker's compensation benefit, a "return to work" declaration from a physician will be required to resume their duties.

L. Personal Property

Because churches, like other organizations, are sometimes the victims of theft, the Church can make no assurances that personal property will always be secure. Additionally, given the number of people who may be coming in and out of the Church at any time, it is possible that there may be errors or mistakes that would cause items to go missing. As a result, employees are advised to take appropriate cautionary steps to secure their belongings, including refraining from bringing valuable items onto Church grounds.

M. Inspection Rights

The Church reserves the right to open and inspect any property on Church premises without prior notice or consent. The storage of any unauthorized alcohol, firearms, illegal drugs or drug-related paraphernalia is prohibited on Church premises. Employees may not use personal locks on Church owned desks, cabinets, closets or storage areas.

N. Working Off-Site

It is important for team cohesion and congregational connection for employees to work regularly on-site in the Church office while other staff are present. However, employees are often able to accomplish their work off site. Determining the schedule and location of an employee's work must be coordinated with their supervisor on an ongoing basis.

4. Employee Compensation

A. Employee Compensation

Employee salary or hourly rate is based on the guidelines provided by the UUA for our GEO-Index (3). These guidelines can be found at <http://www.uua.org/finance/compensation/program/salary-recommendations>.

B. Forms

A completed W-4 Form and a completed I-9 Form with supporting documentation as needed must be turned in to the DFO before a paycheck can be issued.

C. Time sheets

Timesheets are required of all non-exempt employees. A written or electronic time sheet must be turned in to the direct supervisor by the designated due date. Late timesheets will result in delayed pay. Any scheduled hours not worked or time worked in excess of the regular schedule must be noted and approved. It is important that all time worked is recorded accurately.

D. Pay Schedule

Employees shall be paid twice monthly on or before the 15th of the month, and again on or before the last working day of the month. Employees are required to regularly review their pay stubs upon receipt and report any concerns to their supervisor or DFO immediately.

E. Overtime Pay

Overtime hours apply to non-exempt employees working over 40 hours in a week. Should an employee be required to work over 40 hours in a week, the time will be compensated at 1 ½ times the regular hourly rate for those hours worked over 40. All hours are computed by rounding to the nearest quarter hour. Time paid but not worked, e.g. paid time off (PTO) is not added into the calculation of overtime. All overtime hours, including signing in early, shortened lunch periods, and time worked beyond that of the employee's scheduled shift, must be approved by the direct supervisor. All changes to the worked schedule should be discussed and approved ahead of time with your supervisor. The time sheet must reflect all overtime hours, indicate the reason, and include the name and signature of the approving supervisor. Unapproved overtime is considered a serious violation of Church policy that can be subject to termination. By submitting time sheets an employee is verifying that the hours were in fact worked.

F. Advances, Loans or Grants

No personal loans or advances for employees are allowed. When an employee finds themselves in an emergency financial situation, they should approach their supervisor about the possibility of a one-time financial hardship grant. These will be granted once during an employee's tenure, and is distributed at the discretion of the Senior Minister,

subject to budgetary capacity. This money is considered income and is subject to payroll taxes.

G. Payroll Deductions

Federal and state laws require payroll deductions for income tax, Social Security, and Medicare. Deductions are shown on the stub of the paycheck. Changes to withholdings or errors in deductions should be called to the attention of their supervisor or the DFO. Adjustments will be reflected in the employee's next paycheck.

H. Unemployment Compensation

Foothills is covered by the Federal Income Tax Exemption Ruling as a § 501(c) (3) corporation. As such, Foothills is specifically exempt from the requirement to pay Federal Unemployment Compensation Taxes. Therefore, terminated employees are not eligible for unemployment insurance payments, either Federal or State, for the period of employment.

5. Employee Benefits

A. Insurance Plans

Foothills participates in Unitarian Universalist Association (UUA) health, long-term disability (LTD) and life/accidental death and dismemberment (Life/AD&D) Insurance Plans. These plans can be found on the UUA website:

<https://www.uua.org/finance/compensation/health/eligibility> and here

<https://www.uua.org/finance/compensation/health/premiums>. We participate in the High Deductible PPO (employees can choose to participate in the Health Savings Account).

We pay 100% of the cost of this coverage for employees working 30 to 40 hours per week (or .75 to 1 Full Time Equivalent, or FTE). Employees working 15 to 29 hours per week (or .36 to .73 FTE) qualify for coverage through the UUA plans at their own expense. Family members may be added to health or life insurance at employee's expense. Long term disability insurance is available only to the employee. Any eligible employee may elect not to receive health insurance benefits, but such employee's compensation will not be increased as a result.

The Consolidated Omnibus Budget Reconciliation Act (COBRA) provides certain terminated employees and their covered family members the ability to continue coverage with the UUA Health Plan. COBRA typically lasts for up to 18 months. Currently the monthly premium for COBRA is 2% greater than the cost of an active employee's monthly premium. Visit the UUA website for specific information related to COBRA coverage.

Upon termination, employees have 31 days from termination to apply to port their Life/AD&D coverage. LTD insurance may sometimes be carried during a gap in employment. Contact the UUA to learn about requirements.

B. Dental and Vision Insurance

Group dental/vision insurance is available to eligible employees through the Unitarian Universalist Association (UUA), with coverage at the employee's cost. In keeping with the UUA, Foothills currently defines eligible employees as those who work at least 750 hours per year. Employees are eligible to gain coverage on their first day of work. However, eligible employees *must* enroll within the first 60 days from the hire date to avoid having to submit evidence of insurability or, for dental/vision insurance, having waiting periods for certain services. Specific plan information is available on the UUA website. Family members may be added at the employee's expense.

COBRA dental/vision coverage continuation election/refusal materials will be sent to the employee once UUA has been notified of their end of service.

C. Retirement Plan

Foothills participates in the UUA 401(k) Plan. The Church will contribute 10% of the employee's annual compensation for all eligible employees. Eligible employees may also make voluntary employee contributions. Specific and up-to-date plan details regarding eligibility, annual contribution limits, and investment options are available on the UUA website. Find details here:

<https://www.uua.org/finance/compensation/retirement>.

Eligible employees are currently defined as those who are employed 1,000 hours or more per year, who have reached the age of 18, and who have completed one year of service with any one or combination of UUA organizations, may be enrolled as participants in the UUA 401(k) on the first day of the month after meeting these requirements. A year of service is defined as a twelve-month period in which an employee completes at least 1,000 hours of paid employment. All participants have an immediate vesting and non-forfeitable interest in their assets in the Plan. Employees should consult with the UUA Plan administrator and their financial or tax advisor regarding options for managing their UUA 401(k) upon termination.

D. Paid Time-Off

Regular employees working a minimum of 20 hours per week are eligible for paid time off based on their length of service and adjusted by their FTE rate, as follows:

<u>Years of Employment</u>	<u>Amount of PTO</u>
Throughout the 1st year	2 weeks of PTO at their FTE rate
From 1 - 3 years	3 weeks of PTO at their FTE
After the 3 year anniversary -5 years	4 weeks of PTO at their FTE rate

More than 5 years

5 weeks of PTO at their FTE rate

A week, for the purposes of PTO, is considered an employee's standard work schedule within the (1.G) work-week established in this Handbook.

An employee earns their PTO upon the anniversary date of their employment. For example, upon hire, an employee has immediately earned up to 2 weeks of PTO for their entire first year of employment. Upon their 1st anniversary date, they are eligible for 3 weeks per year of employment. Upon their 3rd anniversary date, they are eligible for 4 weeks per year. After their 5th anniversary, they are eligible for 5 weeks per year.

An employee is eligible for using their PTO after 90 days of employment. Use of PTO hours must be requested in writing and approved by the employee's supervisor as much in advance as possible. Employees are expected to consider the Church schedule and the needs of the Church when requesting time off. Employees may not take PTO that has not been approved by their supervisor and any unapproved PTO may be considered an employee's absence without notice ("no call/no show") and is subject to disciplinary action, up to and including immediate termination.

Upon written request, an employee may carry over available (earned, not used) PTO hours from one anniversary year to the next with a maximum of 2 weeks. **All other available PTO hours will be forfeited at the beginning of the employee's anniversary year.** For example, if an employee has just passed their 4th anniversary, they are eligible for 4 weeks of PTO. If they use only 1 of these weeks during that year, they can still only carry over 2 into the following year, so that the maximum PTO after their 5th anniversary is 7 weeks.

Please note, any hired/non-called ordained clergy are to receive PTO at the level described by the UUMA or as outlined in their letter of agreement.

In the event of an employee's termination or resignation, any PTO earned but not used will be paid in the employee's final paycheck.

PTO hours earned and PTO hours taken shall be tracked in the Church bookkeeping system and will appear on an employee's paycheck.

Employees are required to inform their supervisor of their used PTO time, either on their timesheet or by email notification. The supervisor will inform the bookkeeper for accurate reflection on the paycheck.

E. Holiday Pay

Foothills Unitarian Church typically observes the following paid holidays for employees: New Year's Day, Martin Luther King Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day and the Friday after, and Christmas Day.

All regular employees working a minimum of 20 hours per week receive holiday pay at the calculated average work day hours according their FTE.

In the event any of the above holidays occur on Saturday, outside the regularly scheduled workweek, the holiday will be observed on the preceding Friday. In the event the holiday occurs on Sunday, the following Monday will be observed as the holiday. All employees must be present the working day preceding or following the holiday to qualify for holiday pay, unless excused on PTO. All planned working time on a recognized holiday must be authorized in advance by the employee's supervisor. Any employee who works a normal schedule of hours on a holiday will receive straight time pay or will receive compensatory time off.

F. Additional Leave

Written requests for extended leaves of absence must be approved by the employee's supervisor in advance of the first day of absence. The exact nature of the leave and its anticipated length must be included in the written request. PTO must be used first for any leave of absence; after which the time is considered unpaid leave.

Employees are expected to return to work upon expiration of the leave as granted or to notify his/her supervisor as soon as possible if it is not feasible to return on that date.

With the possible exception of military leave, an employee is not guaranteed reinstatement to his/her position if they return to work more than 12 weeks from the first day of absence. Any combination of leaves of absence may not exceed 12 weeks in any 12 month period. The 12 month period is defined as the period of time that begins with the first day of leave and ends twelve months later.

1. **Parental:** In the event of the birth or adoption of a child, employees will be granted an additional 6 weeks of PTO at their FTE rate. Employees must be employed for at least one year to request parental leave benefits. The maximum parental leave that may be granted, including both PTO and unpaid leave is eight weeks in any twelve-month period. Additionally, when unpaid leave begins, the change in employment status may result in the loss of benefits as described in this Handbook, unless the employee elects to pay for benefit premiums. It is the employee's responsibility to check with the DFO regarding disposition of benefits during unpaid leave.
2. **Military Leave:** Employees who are members of the uniformed services of the United States (including the National Guard or other reserve unit) will be granted unpaid leaves of absence in accordance with state or federal law to perform military duties on a voluntary or involuntary basis. Requests for military leave should include verification of the duty call from military authority, the date the leave is to commence and the expected date of return. Employees may choose to use any earned PTO time for all or part of the period of military service. Military leaves of absence in excess of accrued PTO will be without pay. In accordance

with applicable law, eligible employees will be reinstated to the same job upon returning from an authorized military leave of absence.

3. **Bereavement Leave:** Employees working a minimum of 20 hours per week may be eligible for bereavement pay for the death of a member of the employee's immediate family. The Ministers and the DFO have discretionary authority to grant a reasonable period of leave with pay, typically four days, in the event of a death in the immediate family. The immediate family includes a staff member's spouse, mother, mother-in-law, father, father-in-law, brother, sister, child, or grandparent. Bereavement pay is calculated based on an employee's regular wage rate at the time of absence, excluding overtime. Employees may not receive bereavement pay unless they were actually scheduled to work on the day(s) for which bereavement leave was requested.
4. **Jury Service:** Employees are encourage to fulfill their civic duty and serve on jury duty when summoned. A summons is usually received well in advance of the date when an employee would need to report, and employees are expected to notify their supervisor of this summons as soon as it is received. Employees called for jury duty will receive regular pay for the first three days of jury duty if they were scheduled to work. For jury duty in excess of three days, employees will receive the difference between jury duty pay and their regular pay up to a maximum of 120 hours.
5. **Family Medical Leave:** In the case of Family Medical Leave (as qualified by the Family Medical Leave Act), employees working at least 20 hours each week will receive up to an additional ten days of Paid Time Off.

6. Use of and Changes in Employee Handbook

Foothills Unitarian Church intends to comply fully with all laws governing employment practices. If any of the policies or practices outlined in this Employee Handbook are or become unlawful for any reason, the applicable law will be followed.

Foothills reserves the right to make changes to its policies without prior notice. Any additions, deletions, or changes in the policies or practices described in this Employee Handbook shall become effective immediately upon notice to employees, unless stated otherwise. Employees will receive notice of an update to the Handbook, as well as an updated link to the google doc by way of either email or slack communications.

Any suggestions, questions, or comments concerning Foothills' benefits, policies, practices, or work rules should be directed to the Senior Minister. The policies stated in this Employee Handbook, however, are expected to be followed unless the Senior Minister has approved a change or exception in writing.

As an internal personnel management document, this Employee Handbook is considered to be proprietary and confidential. Except in connection with Foothills Unitarian Church's business, the content of the Employee Handbook may not be reproduced for any purpose without the specific knowledge and express written authorization of the Senior Minister.

Appendix Item 1: Foothills Mission Statement

Foothills Unitarian Church unleashes courageous love in Northern Colorado and beyond by embracing our diversity, growing our faith, and awakening our spirits to the unfolding meaning of this life.

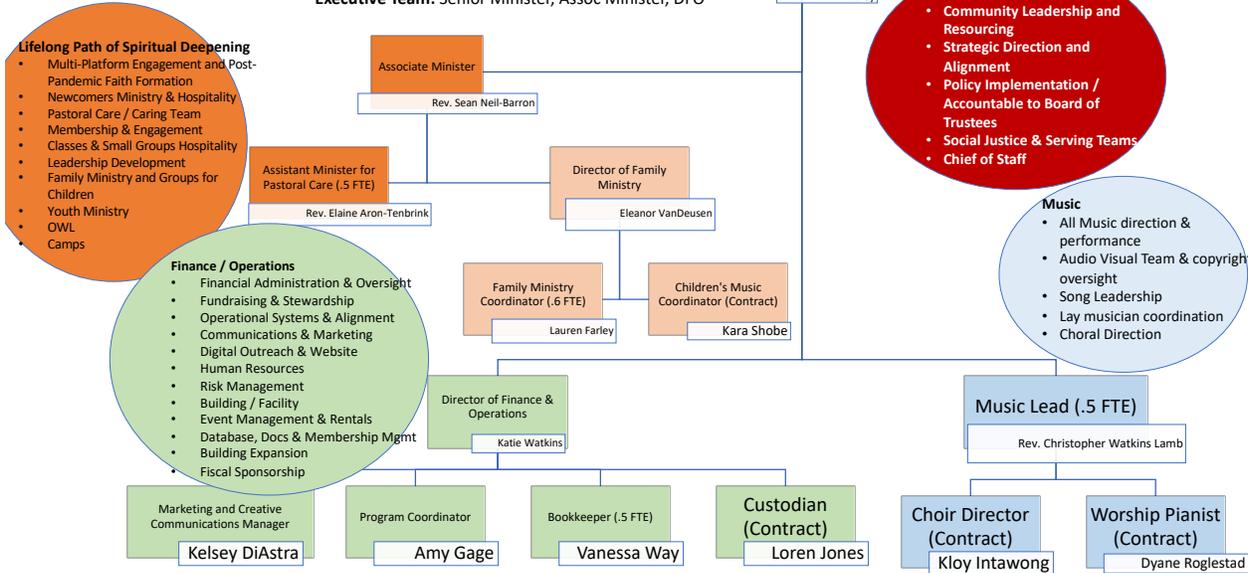
Appendix Item 2: Glossary and Definitions

- Congregants: Includes all participants, members and regular attendees of the Foothills Unitarian Church.
- Employee: Any person who has been hired by the Foothills Unitarian Church.
- Religious Professional: Generally, this is a designation that includes those who have received advanced training and/or certification in their field, particularly as it relates to Church leadership. In our staff team it includes the ministers, the Director of Faith Formation and the Music Director.
- Member: Any person who has signed the membership book at the Foothills Unitarian Church.
- Head of Staff: The person responsible for supervising the staff team and is either the direct supervisor or the supervisor's supervisor for every person on staff.
- Senior Minister: The called minister who is designated per Board policy to act as Head of Staff for both paid and volunteer staff.
- Church: The members, friends, community and institution of the Foothills Unitarian Church.
- Clergy: Any professional, fellowshiped ministers employed by the Foothills Unitarian Church.
- Volunteer Staff: Any non-paid person who helps to make things happen at Foothills.

Appendix Item 3: Organizational Chart



Staffing Structure 2021
 10 regular employees; 4 contractors
 8.1 Full time Equivalents
Executive Team: Senior Minister, Assoc Minister, DFO



Appendix Item 4: Staff Covenant

Foothills Unitarian Church - Staff Covenant - Updated August 2017

We enter this covenant to cultivate and sustain clarity in how we work together in a nurturing, safe environment characterized by respect and collaboration as a means of accomplishing -- collectively and creatively, with love, joy and humor -- more than we might accomplish on our own. We do this in service to the congregation.

We, the staff of Foothills Unitarian Church, make the following commitments to each other:

1. We Commit to Work as a Team
 2. We Foster Healthy Relationships
 3. We Model Professionalism
 4. We Commit to the Vision of Life-Giving Generativity
-
1. We Commit to Work as a Team
 - a. We affirm and trust the passions and gifts each staff person brings to the team and to their individual positions, recognizing one another as whole beings with complex stories and unique personalities.
 - b. We treat one another with kindness, goodness and respect.
 - c. We support each other in fulfilling our varied responsibilities by learning about one another and the work we do, listening and sharing without interruption, being open to feedback and seeing other truths.
 - d. *We are committed to one another's personal and professional growth.*
 - e. We are clear about boundaries and let others do their jobs, mindful that individual personalities and job realities may dictate differences in how work is done.
 - f. We welcome differences of opinion.
 - g. We align with the core values and commitments of Unitarian Universalism.
 - h. We assume good intentions in one another and in all those with whom we work and serve.
 2. We Foster Healthy Relationships
 - a. Our model for handling complaints or concerns within the staff team or with congregants shall be:
 - i. Ask the person to approach the staff member directly and, as needed, help the person get clearer about the issue at hand.
 1. *If the concern or complaint is related to a potential breach of Church policy then it should be directed to the staff person's direct supervisor. If appropriate the supervisor will handle in accordance with the Grievance process outlined in the Handbook.*
 2. If helpful, the staff member will offer to go with the person to speak to the staff member or congregant;

3. Otherwise, the matter will be dropped.
 - ii. Triangulation is to be avoided.
 - b. We deal in issues and behaviors, not personalities.
 - c. We are generous with our gratitude for fellow staff.
3. We Model Professionalism
 - a. We value positive attitudes, experimentation, wholeness and grace.
 - b. We maintain boundaries porous enough for constructive and necessary communication to flow while firm enough to remain focused on our respective areas of responsibilities and do not become enmeshed in others' work.
 - c. When we disagree, we bring forward concerns, listen to understand, and remain open to compromise.
 - d. Regardless of personal feelings, when a decision is made or a direction has been determined, we present a united front to those outside the team and we speak with one voice.
 - e. We commit to holding regular staff meetings and making available to all staff members information resources they need. In turn, we all are responsible for using those resources.
 - f. We uphold confidences and respect sensitive information. We use discretion in communicating outside the team about Church issues, mindful that whatever is communicated will be broadcast.
4. We Commit to the Vision of Life-Giving Generativity
 - a. We make the best choices we can to be good stewards of our resources.
 - b. We recognize our own limitations and ask for help before we have reached our limits.
 - c. Faced with limited resources and competing priorities, we will seek clarity and, when necessary, do fewer things, knowing we will do them with greater capacity and success.
 - d. We respect one another's time off.

Appendix Item 5: Quarterly Supervisory Meetings Template

Frequency: Quarterly

Duration: 1 Hour - 90 minutes

Preparation: Person being supervised responds to the questions below in writing; this becomes the basis of the conversation during the meeting

Questions/Agenda

1. Review of past quarter
 - a. What actions have you taken? Details of performance over past quarter, including appropriate details and specifics. Focus in on those things that advanced your goals for the year, the mission, or shared staff goals.
 - b. What discoveries have you made? An account of formal and informal learning done in past quarter. What are your new insights, and from where did they come?
 - c. What partnerships have you built? What new relationships have been built, or what old relationships have been strengthened? It is important that the staff person take responsibility for building his/her network of relationships.
2. Forecast of next quarter:
 - a. What is your main focus? What are the primary goals that will get your priority attention over the next quarter?
 - b. What are you planning to learn over the next quarter?
 - c. What new partnerships (new relationships or strengthening of old relationships) are you hoping to build over next quarter?
3. Preparation and Response:
 - a. The staff person prepares for the conversation by providing written notes to the senior clergy that outline response to the above.
 - b. The written notes are shared with the senior clergy in advance of the meeting.
 - c. The senior clergy drafts a one page written response memo within 2 days, noting issues of agreement from the conversation, as well as topics that should be revisited in the subsequent conversation.

Appendix Item 6: Performance Evaluation Template

Employee Name:

Position Title:

Supervisor's Name:

Date of Review:

Period Reviewed:

1. Accomplishments

a.

2. Evaluation of Essential Functions and Responsibilities (from Job Description; ratings from (1) Unacceptable through (5) Outstanding)

1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

3. Core Competencies (from Job Description) Narrative only

4. Review Goals for the Prior Year

5. Goals for the Coming Year

Employee Comments

Employee Signature
 Supervisor Signature

Date

Appendix Item 7: Performance Improvement Plan Template

Employee Name:

Supervisor Name:

Date:

Performance in need of improvement: (List the goals and activities the employee will initiate to improve performance. Include skill development and changes needed to meet work performance expectations.)

Targeted date for improvement:

Expected results - list measurements, where possible:

Dates to review progress by the employee and supervisor:

Progress at review dates:

Employee Signature: _____

Date: _____

Supervisor Signature: _____

Date: _____