

# **FOOTHILLS UNITARIAN CHURCH**

## **Operations Handbook**

**Last Updated 2018**

Updates continue to be drafted and incorporated once approved by the Executive Team

## **INTRODUCTION**

This handbook provides guidance to staff and lay leaders regarding the operational implementation of Board policy related to care for members and guests, as well as some components of our care for our resources. These procedures, along with those documented in the Financial and Employment handbooks, are intended to work in service of our mission and our vision, and in support of board policy.

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# 1. ADMINISTRATIVE PROCEDURES

## 1. Canceling Church Services or Events

Sunday worship or events may be canceled by the senior minister or staff person directly responsible for the event.

If a worship service or event is canceled due to weather or other emergency, notice will be posted on the website and congregants will be texted and/or emailed.

### 1.1. Database

The church database (Planning Center Online) keeps track of our congregants' names, addresses, contact information and the groups/classes they participate in. The database also tracks membership status, pledges, donations, pastoral notes, family members, and other key information regarding their participation in the life of the congregation.

Access to the church database shall be restricted based on a need-to-know basis, and congregant's confidentiality is protected particularly in terms of protecting the pastoral privilege. Permission to have access to the database must be granted by our Director of Finance and Administration (DFO).

### 1.2. Records Retention Policy (Requires update 2019)

<b>Administrative Records</b>	<b>Minimum Retention Period</b>
Agenda and Official Minutes of Board Meetings and Committees	Permanent
Building Blueprints, Floor Plans and Architectural Drawings	Permanent
Building Use Records	Three years
Calendars and Scheduling Records	Three years
General Correspondence	One year + current
Information on the establishment and implementation of policies and procedures, including manuals	Permanent
Organization Charts	Permanent
Membership Records	Permanent
Personnel Records	Seven years
Publications	Two years
Special Programs and Events Schedules and Records	Two years
Sunday Service Recordings	Three years

<b>Financial Records</b>	<b>Minimum Retention Period</b>
Accounting General Ledger	One year + current
Audits (Inventory)	Until updated + one year
Audits (Financial)	Permanent
Bank Account Records	Six years + current
Bonded Indebtedness Records and Payments	Permanent
Budget Preparation Records and Budget Documents	Six years + current
Insurance Policies	Term of Policy
Payroll Records	Two years + current
Pledging Records	Three years + current
Purchasing Records	Two years + current

## **1.7 Office Equipment Use Policy**

All office equipment is intended for official church business only. The office staff is responsible for monitoring use and arranging for maintenance of the equipment.

**Copier:** The general purpose copier in the church office is intended for official church business only. Church staff and church team members are able to use the copier as needed to conduct their official church functions

**Computers:** Each computer in the office has a designated primary user. Use of these systems is limited to those users. There are currently several laptops owned by the church that may be used as needed with permission from a staff member.

## **1.8 Church Office Hours**

The church office will be open from 9:00 AM to 3:00 PM Monday through Thursday and 8:00 AM to 12:30 PM on Sunday. The office shall be closed on official holidays as specified in the Leave and Vacation Policy.

## **1.9 Policy for Maintenance of Accurate Membership Rolls**

The Foothills staff will make an effort to keep the membership rolls accurate.

Every year the DFO will take the following steps to ensure the accuracy of our membership:

- A. Pledge commitments will be considered an affirmation of continued membership. Steps will be employed to affirm membership for members who do not contribute a financial pledge.
- B. A letter from the ministers to non-pledging members and inactive members will be sent explaining the need to update membership records. This can be done electronically.
- C. Members who do not respond to the letter in the time allotted - not to be less than 2 weeks - will be changed to “inactive” and not counted in the official membership number.

This process will certify the number of members which will be reported to the Unitarian Universalist Association by February 1 of each year.

## **1.10 Responsible Behavior**

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

There have been times when the disruptive behavior of an individual within the church building has led members to voice their concerns about one or more of the following:

- 1. Perceived threats to the safety of any adult or child;
- 2. The disruption of church activities;
- 3. Diminishment of the appeal of the church to its potential and existing membership.

The following shall be the policy of Foothills Unitarian Church in dealing with these issues:

- 1. If an immediate response is required, the Minister(s), if available, and/or the leader of the group involved will undertake this. This may include asking the offending person or persons to leave, or suspending the meeting or activity until such a time as it can safely be resumed. If further assistance is required the Police Department may be called. Anytime any of these actions are undertaken without the Minister(s) being present, the Minister(s) must be notified. A follow-up letter detailing what steps must be taken before returning to the activities involved will be sent by the Minister(s) to the offending party or parties.

2. Situations not requiring immediate response will be referred to an ad hoc committee appointed by the Board. The committee will respond in terms of their own judgment observing the following:
  - a. The committee will respond to problems as they arise.
  - b. Persons identified as disruptive will be dealt with as individuals; stereotypes will be avoided.
  - c. The committee will collect all necessary information to fully understand the situation.
  - d. To aid in evaluating the problem, the following points will be considered:
 

DANGEROUSNESS - Is the individual the source of a threat or perceived threat to persons or property?

DISRUPTIVENESS - How much interference with church functions is going on?

OFFENSIVENESS - How likely is it that prospective or existing members will be driven away?
  - e. To determine the necessary response, the following points will be considered:
 

CAUSES - Why is the disruption occurring? Is it a conflict between the individual and others in the church? Is it due to a professionally diagnosed condition of mental illness?

HISTORY - What is the frequency and degree of disruption caused in the past?

PROBABILITY OF CHANGE - How likely is it that the problem behavior will diminish in the future?
  - f. The committee will decide on the necessary response on a case-by-case basis, and inform the Board and the Minister of their recommendations. However, the following three levels of response are recommended:
 

LEVEL ONE - The Minister(s), a member of the committee, and/or a member of the Board shall meet with the offending individual to communicate the concern and expectations for change, as well as consequences if the behavior does not change.

LEVEL TWO -The offending individual is excluded from specific church activities, with reasons and the conditions of return made clear.

LEVEL THREE - The offending individual is excluded from the church premises and all church activities. If it is decided that



expulsion will take place, the Minister(s) and/or the Board explaining the expulsion and the individual's rights and possible recourse will send a letter.

Foothills Unitarian Church strives to be an inclusive community, affirming our differences in beliefs, opinions and life experiences. However, concern for the safety and well being of the congregation, as a whole must be given priority over the privileges and inclusion of the individual. To the degree the disruptive behavior compromises the health of this congregation, our actions, as people of faith must reflect this emphasis on security and on restoring our covenant.

Note that full Safety Procedures and Policies are documented separately, in this [Handbook](#).

## **2. BUILDING & GROUNDS**

### **2.1 Building Use**

- A. It is the policy of the Foothills Unitarian Church to make its facilities available for the use of all church-related groups and for non-profit community groups whose purposes are consistent with the goals and objectives of Foothills Unitarian Church. The Office staff is authorized to make a determination on whether or not a group seeking to use church facilities falls within the guidelines of this policy. Should a question arise as to the appropriateness of any request, office staff may seek a final decision from the Senior Minister.
- B. Regular church program activities will always have first priority on the use of facilities and may reserve facilities as far in advance as necessary.
- C. The facilities covered by this policy are the church building, the church school building, and the grounds and parking space incidental to their use.
- D. The facilities of the church may be reserved by outside groups no further than six (6) months in advance or more giving consideration to the program and worship schedule. Exceptions being made only for good cause shown and with the specific approval of the Senior Minister or DFO. Facilities may not be reserved more than one (1) year in advance (with the exception of regular church programs – 1.1B). Any use deposit and/or fee must be paid prior to scheduled use.
- E. All use of the facilities shall be contingent upon the execution of an appropriate Building Use Agreement.
- F. Any of the provisions of this Building Use Policy, including the Building Use Fees, may be modified or waived by vote of the Board for groups that, in the judgment of the Board,

significantly advance the church’s mission. If the Building Use Fee is waived, the group may still be required to pay the Sound Tech and Building Attendant expense if a volunteer is not available.

## 2.2 Building Use Fees

- A. All fees charged shall be reasonable and shall be reflective of the church’s cost in allowing the use of the facilities. For purposes of this policy, “use” is defined as ”per ½ day” and/or “per day”.
- B. Use of church facilities for regular church program activities will be free of charge.
- C. Weddings, wedding receptions, anniversary parties, memorial services, and similar events will be considered normal and traditional uses of the church by its members and supporting friends, and the only fee charged for such events will be for sound technicians.
  - a. Weddings and memorials will be conducted by one the ministers OR a minister/officiant approved by the ministers.
- D. The foregoing notwithstanding, the Board may allow certain entities such as schools or daycare centers to lease portions of the religious education building on a long-term basis. When negotiating lease agreements, these uses shall be considered by the Senior Minister on a case-by-case basis.

## 2.3 Schedule of Fees

- A. Custodial services fee for use of facilities: will be \$35.00 per hour if not returned to its original condition. This will be deducted from deposit if necessary.
- B. A building attendant will be required at \$25 per hour for all non-member/non-Foothills Unitarian Church events. The Church Administrator can authorize the building attendant to be present at only the beginning and end of a building use as opposed to the full extent of the use.
- C.

<b>One time use members and friends</b>			
(for use not listed in 2.2C)			
Room	Room Capacity	Half-Day (0-4hrs)	Full-Day (4-8 hrs)
Sanctuary	180	\$ 175.00	\$ 225.00

Social Hall	220 (100 if seated at tables)	\$ 125.00	\$ 145.00
Kitchen		\$ 30.00	\$ 40.00
Sanctuary/Kitchen/Social Hall		\$ 300.00	\$ 370.00
Classroom		\$ 20.00	\$ 30.00
Triple RE		\$ 60.00	\$ 80.00
Security deposit		n/a	
Key Deposit		n/a	

<b><i>One time use general public</i></b>			
Room	Room Capacity	Half-Day (0-4hrs)	Full-Day (4-8 hrs)
Sanctuary	180	\$ 250.00	\$ 300.00
Social Hall	220 (100 if seated at tables)	\$ 175.00	\$ 200.00
Kitchen		\$ 60.00	\$ 70.00
Sanctuary/Kitchen/Social Hall		\$ 450.00	\$ 525.00
Classroom		\$ 40.00	\$ 50.00
Triple RE		\$ 110.00	\$ 140.00
Security Deposit		\$ 100.00	
Key Deposit		\$ 35.00	

<b><i>Recitals</i></b>	\$ 150.00
<p>Maximum of 80 people and simple snacks only (Cookies and Juice for example, no sit down tables and chairs)</p> <p>Room Deposit (\$100.00) and key (\$35.00) deposits will be required from general public</p> <p>If tickets are being sold it will be considered a concert and charged at full rental rate.</p>	

We offer this discount in anticipation of the recitals being a low impact use of our facility and to make it possible for community members to enjoy our sanctuary and piano at a reasonable rate.			

D. Repeat use (weekly or monthly) by member or non-member to be negotiated. Repeat or recurring use by a for-profit group will not be allowed due to the Church's 501c3 status. Occasional use by a for-profit group is allowed.

E. Only a church-trained and approved technician may operate the sound system.

- \$25 for setup and leave
- \$50 for setup & 1 hr for sound tech and
- \$25 per hr for each additional hour
- \$75 for setup, rehearsal and 1 hr sound tech.

## 2.4 Security and Maintenance

A. Church related groups will not be required to pay a security deposit. All security deposits shall be retained until an inspection of the premises following the event has been concluded and all keys have been returned to the church. The church retains the right to deduct from the security deposit cleaning charges or other expenses incurred by the church as a result of the use of the facilities.

B. All persons and groups using the church facilities will maintain them in good condition and return the premises to the condition in which they were found. Furnishings will be returned to their normal locations. Floors will be swept, mopped, and vacuumed as needed. All fans and lights turned on will be turned off. Opened windows should be closed and locked. Building use checklist should be honored.

C. In the case of church groups, team and group leaders shall be responsible to lock and unlock the facilities and to oversee cleanup.

D. For non-church groups, the person applying for use of space shall be responsible for the facilities to complete all of the required activities set forth on the Building User Agreement and Checklist. The building attendant will provide guidance as needed but is not responsible for setup or cleanup. Building attendant will be responsible for lockup.

- E. When a church committee or church-related group sponsors an outside group's event, at least one member of the committee or group must be present for the entire event and will be responsible for all of the required tasks listed in paragraph 2.4.B above.

## **2.5 Use of Alcoholic Beverages**

- A. The use of alcoholic beverages shall be strictly limited to church-related functions. Non-Church-related functions will not be allowed to serve alcoholic beverages under any circumstances.
- B. The sale of alcoholic beverages is prohibited.

## **2.6 Miscellaneous Building use**

- A. The piano in the sanctuary may be used for weddings or other special events.
- B. Smoking shall not be permitted inside or within 50 feet of any building, including the patio area and the playground.
- C. A non-church group or individual wishing to publicize an event which is to take place at the church, may do so, but in such an event it must be clear that the church is not hosting or sponsoring the event and that the function is merely being held at the church.
- D. Political parties may use the church's facilities for caucuses. A building use donation is requested.
- E. Arrangements for the services of a Minister of the Foothills Unitarian Church must be made directly with the Minister.

## **2.7 Child Care**

One person from the committee and/or the member who signs the contract sponsoring an event at the Church is responsible for ensuring all Childcare Procedures for Activities at Foothills Unitarian Church are followed and clean up is complete. Please review all child care procedures.

## **2.8 Church Archives**

- A. There is a designated area in the Church basement for the accumulation and storage of the Church archives. This area shall be uniquely maintained for such purpose and no other.

## **2.9 Universal Access (disability)**

- A. As part of regular building review the DFO will confirm continued compliance for people with disabilities. print, hearing, rummage sale access.

# **PUBLICATIONS POLICIES (Under Revision as of 2019)**

## **3.1 Commercial Advertising**

- Commercial advertising on campus or in other church publications is not permitted.

## **3.3. Website**

**PURPOSE:** The purpose of this policy is to establish guidelines for development and ongoing management of the Foothills Unitarian Church Website.

### **RESPONSIBILITIES**

The Senior Minister is ultimately responsible for the content of the website, and the accurate representation of the church. The Communications Manager maintains the website with the support of our contracted web developer.

### **WEB SITE CONTENT MANAGEMENT**

Content management and design rests with the submitting staff members, committees and webmaster.

### **WEB SITE CONTENT GUIDELINES**

The purpose of the website is to make information about the church available to church members, community members searching for a church, and the general web-browsing public around the world.

The website will represent Unitarian-Universalist principles and the Foothills Unitarian Church accurately and positively. In addition to providing accurate and timely information, the site will attempt to capture the spirit of the church in its design and tone. The site will employ generally accepted guidelines for ease of navigation

While the website may contain articles of interest authored by members, the website shall not be used as a forum for editorial commentary.

Each committee, Church Affiliated Group, or Board-approved informal organization desiring a web page(s) may submit their request to the Church Administrator at any time.

#### PRIVACY CONSIDERATIONS

Maintaining privacy of personal information of visitors to the website and respecting the privacy of our staff, church members and friends is of the utmost importance.

##### *Privacy of Visitors to our Website*

Personal information is obtained from our visitors on a voluntary basis. Personal information may include name, address, phone number, and email address. This information is not required to obtain access to any public part of the website.

The personal information collected may only used to process a request that has been placed by the visitor. Typically this is in the form of a request for material or newsletters, but it may on occasion include other voluntary submittals of similar information for survey purposes or for event registrations. We do not sell or rent this personal information to other organizations, including other UU organizations.

#### PRIVACY OF CHILDREN AND YOUTH

No information (names, pictures, phone numbers, email addresses) about persons under the age of 18 will be published on any pages of the website unless written permission by a parent or guardian is granted and kept on file in the office. This permission is for one event or one purpose only.

#### FUND RAISING GUIDELINES

The Website may be used to solicit funds for the church or its committees.

#### COMMERCIAL ADVERTISING

The Foothills Church Website shall comply with the Commercial Advertising Policy of the Foothills Unitarian Church.

#### COPYRIGHT CONSIDERATIONS

Any intellectual property copied on website pages or any original intellectual property written for a website page must be released by the author. A statement to that effect must

accompany the material. Such material includes sermons, music, articles, or pictures, whether or not they contain the copyright label. Blanket permission can be granted for use of one type of material. Each page of the website will contain a copyright statement. If the author grants permission for copying of information, that statement will appear on that page and the permission supercedes the blanket copyright statement.

ADOPTED: November 15, 2005; REVISED: December 15, 2006 Revised 3.21.12

### **3.4 Podcast Policy (new policy 3/21/12; needs revision)**

- 1) All uploaded material to the Podcast may only be sound files from and approved by Foothills Unitarian Church.
- 2) Sound files of sermons may be uploaded only after permission is given by the minister/speaker who has delivered the sermon. Guest speakers/Neutral Pulpit Sermons will be uploaded only with their permission.

## **4. REMEMBRANCE GARDEN POLICIES**

**Who can be memorialized:** Members, their relatives, and pledging friends of the church may be memorialized. Pets will not be memorialized in the Garden.

**Fees:** The fee will cover the cost and installation of a bronze plaque engraved with the name and dates of birth and death, inclusion in the Remembrance Book and perpetual maintenance. The fee is \$350. The fee is payable at the time of application.

**How to apply:** Application forms are available from the DFO.

**Prepayment:** Those wishing to prepay for themselves and/or family members may do so. A sincere effort will be made to accommodate families who wish to have plaques placed together, but such placement cannot be guaranteed.

**Records:** The DFO along with the bookkeeper will be responsible for keeping financial records.

**Remembrance Book:** The Church will also keep a Remembrance Book. One page (which may be double-sided) will be devoted to each person memorialized, containing the obituary, pictures or whatever information the family wishes to include. It will also recognize donors and record the history of the Garden.



**Flowers and other additions:** Only those plants, stones, urns, benches, sculptures and plaques specified in the Garden Landscape Plan will be placed in the Garden. Flowers and plants may be used during a memorial service.

**Maintenance:** Garden maintenance will be the responsibility of the DFO and will be funded through the church budget.

**Memorial Plaques:** Bronze plaques (6" x 2 ½") engraved with the name and dates of birth and death will be installed on the Remembrance Garden wall. No other markers will be allowed. Installed plaques become the property of the church and may not be removed.

**Ashes:** Ashes may be spread or buried directly into the garden to be mingled with the earth. Records will not be kept of the exact location of individual burial sites. Burial of ashes will be done only in months when the ground is not frozen.

**Ownership:** The purchase of a plaque or burial of ashes shall not give survivors any claim upon the church property of Foothills Unitarian Church

**Exceptions to policies:** The Senior Minister may make exceptions to these policies and regulations.