



UNITARIAN UNIVERSALIST CONGREGATION OF THE GRAND VALLEY

Policies

UUCGV

We are vitally inclusive, justice centered and spiritually alive.

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00 - Policy Template with notes

The following items will always be included even if there is no information to add for the item. For example, if the policy does not have any relevance to the calendar dates, we will still include "Calendar" and leave it blank.

- *Calendar: summarize any specific actions based on the calendar. For example, "Four weeks prior to annual meeting", "Monthly", "Between July 1st and September 1st"*
- *Teams: List any Teams, Leaders or Staff that have special responsibility to this policy*
- *Date adopted: The Date on which the Board voted to adopt this Version of the policy*
- *Prior Versions: List adoption dates of past versions of this policy that have been replaced by this version.*
- *Authors: List the names of people who were primarily involved in drafting this version of the policy. If the policy was a created by a Team list the team and at least one key member. For example: 'President Betty Jones and the Board'. This information is to make it easy to ask the policy creators questions.*

Purpose

A brief explanation of the reason for this policy

Policy Statement

The formal description of the policy

Procedure:

Some policies may have detailed check lists or steps that must be followed. This is the only optional part.

Annual Reports

- **Calendar:** Annual Reports of from Teams 20 days prior to Annual Meeting
- **Teams:** TLC leaders & ad hoc teams such as Auction, Yard sale, etc.
- **Date Adopted:** January 8, 2001
- **Prior Versions:**
- **Authors:** Arleta Carr, Kitty Tattersall

Purpose

To develop UUCGV Annual Report Booklets for historical records.

Policy Statement

A UUCGV Annual Report Booklet will be produced and distributed to members at each Annual Congregational Meeting. Copies of the Annual Reports will be kept in the church office for historical records.

Procedures

1. **Preparation:** At least two months before the Annual Congregational Meeting, the Board will ask all Team Leadership Circle, ad hoc team leaders, Minister, Administrator, Board President, and others as appropriate, to write an Annual Report. Annual reports will be due 20 days before the Annual Meeting and will be sent, via e-mail if possible, to the person who is compiling the booklet.
2. **Format:** Each report will consist of the following:
 1. Name of the Team, Team Chair and Team members, or in the case of non-Team reports, the name of the person who is writing the report and their position.
 2. Accomplishments during the current church year.
 3. Future Plans.
3. **Compilation:** The UUCGV Board will delegate the compilation of the Annual Report Booklet to the Administrator or a UUCGV member.
4. **Distribution:** The Booklets will be printed and distributed to UUCGV members at the Annual Meeting. Copies of the Annual Report Booklets will be stored in the Church office.

Capital Funds Policy

- **Calendar:** Monthly Board meetings, UUCGV Annual Meeting
- **Teams:** *Board, Finance Team*
- **Date adopted:** *September 8, 2016*
- **Authors:** *Tim O'Brien*

Purpose

1. To establish a Capital Fund for accumulation of donations toward the maintenance and improvement of the UUCGV campus located at 536 Ouray Ave., Grand Junction, CO.
2. To keep moneys in the Capital Fund entirely separate from the operating funds of UUCGV
3. To institute a clear and open system of reporting donations, transactions, and balances to the Board and the Congregation.

Policy Statement

A Capital Fund will be established and maintained at UUCGV.

Procedure:

1. Funds collected will be immediately deposited to the UUCGV Building Fund account, which was established at the US Bank location in Grand Junction for the purchase and remodeling of our 536 Ouray Ave. location. Source of these funds will be documented and archived. These funds will be accounted for and reported on by the UUCGV Treasurer at the UUCGV monthly board meeting and to the UUCGV Congregation once yearly at the Annual Meeting. Immediate and ongoing projects recommended to the UUCGV Board by the UUCGV Property Team and approved by the Board will be funded from the monies collected and dispersed from this account. It will be the responsibility of the UUCGV Property Team to identify and clarify which projects are capital improvement projects to be paid from this account and which projects are maintenance issues to be paid from the Building Maintenance budget from the UUCGV Operating Fund.
2. Monies collected for future projects and excess amounts held in this account over 60 days will be transferred to the UUCGV interests bearing Vanguard Money Market Account. When these monies are needed to fund projects the UUCGV Board will instruct the Treasurer to return set amounts to the UUCGV Building Fund account at US Bank Grand Junction, Colorado for disbursement to pay costs of the approved project.
3. Disbursements for payments for approved projects will be from an assigned representative of the UUCGV Property Team. Representatives will present the UUCGV Treasurer with invoices and receipts for work performed and the Treasurer will pay these invoices and receipts in a timely manner. The Treasurer

will also provide budget and project balance information to the representative in a timely manner.

Dissolution of the UUCGV Capital Fund

If, for whatever reason, the fund is no longer needed, any remaining funds over \$100 will be returned on a percentage basis in proportion to the gift given to any living contributor. An amount lower than \$100 will be added to the UUCGV Reserve Fund.

Charitable Fundraising Policy

- **Calendar:** Scheduled facility use must be entered into the congregational calendar by the Administrator
- **Teams:** *TLC, Board*
- **Date adopted:** *November 12, 2015*
- **Authors:** *Todd Tawzer, Staff*

Purpose

To outline the process and procedure of UUCGV's charitable fundraising activities

Policy Statement

Fundraising activities are permitted and welcomed at UUCGV. The proper approval channels must be followed.

Procedure:

5. All UUCGV charitable fundraising activities are to be presented to TLC for approval and recommendation to the board for final approval.
6. UUCGV will generally support active UUCGV members and friends who wish to take personal initiative to run their own fundraisers for other individuals, groups or organizations, in accordance with the building use policy.
7. In rare circumstances UUCGV may give permission upon review to do a church sponsored charitable fundraiser for individuals, groups or organizations.

Church Funds

- **Calendar:** None
- **Teams:** Finance, Administrator, Board
- **Date adopted:** June?? 2016
- **Prior Versions:** July 9, 2015, June 19, 2008
- **Authors:**

Purpose

To describe the various funds of the church.

Policy Statement

1. **Operational Fund:** The Operational Fund pays for regular expenses including administration, program expenses, salaries, building expense and payments to the UUA and District, etc. The income to this fund comes from contributions, fundraisers, grants and transfers from the Reserve Account when necessary.
 1. **The Operational Budget**, which governs this fund, is approved by the congregation at each year's annual meeting.
 2. **The treasurer makes disbursements** from the Operational Fund not to exceed budget line items without Board approval.
2. **Reserve Fund:** The Reserve Fund is kept in a separate account. With Board approval, it can be used to pay for one-time expenses designed to further the mission and growth of the church or for temporary use as described below. The income to this fund comes from grants, fundraisers, and designated gifts.
 1. **One-time Expenditures and Transfers**
 1. One-time expenditures must be approved by the Board of Trustees
 2. **Temporary Use of the Reserve Account**
 1. Should the cash flow in the Operational Fund be insufficient to pay expenses, the treasurer, with board approval, may use money from the Reserve Account.
 2. The amount used shall be recorded and reported to the Board.
 3. When cash flow in the operational fund is sufficient, the borrowed amount shall be returned to the Reserve Account, preferably in the same fiscal year.
3. **Capital Fund:** See "Capital Fund Policy"
4. **Reporting:**
 1. The treasurer shall report any activity in each of the funds to the Finance Team and the Board of Trustees monthly.
 2. A report of expenses and income to each fund and account shall be provided to the congregation at the annual congregational meeting.

Disruptive Behavior

- **Calendar:** None
- **Teams:** Board, Minister, COM
- **Date adopted:** 11-13-2014
- **Prior Versions:** Unsure
- **Authors:**

Purpose

To deal with disruptive behavior in line with our beloved community guidelines.

Policy Statement

Because 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 utilize our beloved community guidelines on an individual basis to support and maintain such a safe and open atmosphere. When these guidelines fail on an individual basis and a person's physical and / or emotional well-being, or freedom of opinion remains threatened, the source of this threat will be addressed firmly and promptly. Such action may ultimately result in the expulsion of the individual(s) from our UUCGV congregation's membership.

Conflict Resolution: Guidelines and Suggestions for Success

Step 1

- Agree on a mutually acceptable time and place to talk in private and as soon as possible after the incident.
- Talk directly with the person (fellow member, minister, etc.) with whom you have the disagreement & Examine your own role in the conflict. Why is the matter important to you?
- Do some soul searching so you can take responsibility for your own issues rather than making anonymous complaints.
- Use "I" statements in your discussion ("I feel.." not "You did.."): use active listening.

If a direct conversation is too difficult, consider putting your thoughts into writing. Be available to hear the response from the reader. If you feel that safety is an issue, use the Committee on Ministry (COM) to provide a safe environment for the discussion as in step 2 below. If the conflict is less with a person than with how they are performing a job (staff, religious educator, etc.), address the concern to the proper supervisor so that individuals are not being "supervised" from all sides.

Step 2

- If still unresolved, go the COM (which includes the minister) regarding the issue.
- If the conflict involves the minister specifically, the mediation body is the COM.

We anticipate that all who participate in the process will use the Unitarian Universalist Principles and Purposes to inform their own actions and will treat everyone with compassion and dignity. Finally, when no resolution is possible, concern for the well-being, openness, safety and stability of the congregation as a whole shall be given priority over the feelings or actions of any individual.

Distribution of Keys to Building

- **Calendar:** Yearly update, in July as new Board & TLC are installed
- **Teams:** Board, TLC, staff members
- **Date adopted:** 12/07
- **Prior Versions:** 9/3/2002
- **Authors:**

Purpose

To outline appropriate distribution of keys and the responsibilities of each key holder.

Policy Statement

Specific keys will be provided to appropriate church members and recurring renters as needed to facilitate their access to the building in order to perform their function.

Procedure:

1. All recipients of keys will be given an information sheet outlining responsibilities when using the building.
2. A signed copy of the information sheet will be kept in office files and a copy given to keyholder.
3. The information sheet outlines the importance of re-locking anything the person has opened (outside doors, closets and windows). (see attached)
4. The return date of any key will be noted on this form when the key is returned to the office.
5. A \$25 charge will be made to any individual losing a key given to them.

Endowment Fund Policy

- **Calendar:** None
- **Teams:** Board, LDT, TLC, Finance
- **Date adopted:** July 9, 2015
- **Prior Versions:** 2/10/2011
- **Authors:** Arleta Carr, Dale Foreman

Purpose

To outline the Endowment Fund and the Endowment Directors of the Fund.

Policy Statement

I. PURPOSE

1. **Congregation.** The purpose of the Endowment Fund is to further and augment the principles and mission of the Unitarian Universalist Congregation of the Grand Valley (UUCGV) by receiving gifts, bequests and conveyances, where the intent of the donor is to make a lasting contribution to the Congregation.
2. **Use.** The Endowment Fund shall be carefully nurtured with restraint to protect the principle from invasion, except as permitted herein. Only income from the Endowment Fund and realized increases or gains in the value of the Endowment Fund assets shall be used for special projects. The principle of the Endowment Fund shall not be used for expenditures for special projects, except to protect assets in the Endowment Fund. The principal shall be defined as the value of the gift at the time it is received by the Endowment Fund or the value at the time it is sold, whichever is less.
3. **Special projects.** Special projects are projects and activities of long-term and lasting benefit that further the principles and mission of the Congregation.
4. **Exclusions.** Special Projects shall not include: operating expenses; day-to-day expenses; expenses ordinarily included in the annual budget; and expenses that have been or will be incurred on a regular and ongoing basis. The endowment fund shall not be used for expenditures for which there will be no lasting benefit.

II. ASSETS

1. **Acceptance.** Any person or entity may give or bequeath money, property or assets to the Endowment Fund. Assets in monies transferred to the Endowment Fund shall be held, managed, invested and disbursed by three Endowment Directors who shall act in accordance with the principles and mission of the Congregation.
2. **Restrictions.** Donors may impose reasonable restrictions on the use of the tender gifts. However, the Endowment Directors shall only accept a gift or request without restriction if it is practical, possible and consistent with the principles and mission of the Congregation.

III. TRUST DIRECTORS

1. **Management.** Three (3) Endowment Directors shall hold, manage, invest, sell, lease and protect Fund assets and shall receive and collect the income

therefrom. Endowment Directors shall exercise the judgement and care under the circumstances which persons of prudence, discretion and intelligence exercise in managing their own affairs.

2. **Impartiality.** Any Endowment Director shall disqualify him or herself from decisions about which he or she cannot be impartial. Endowment Directors shall refrain from the appearance of impropriety including participation in decisions that may result in direct or indirect personal financial gain.
3. **Investment.** Endowment Directors shall have absolute and sole authority and discretion to retain assets, real property, personal property, securities, certificates of deposit and savings accounts in banks, savings and loans, mutual funds, the Unitarian Universalist Association General Investment Trust and other investments.
4. **Voting.** Endowment Directors may conduct their votes either in person or by general or limited proxy, and may refrain from so voting if they see fit. Endowment Directors may exercise or sell any subscription or other rights to Endowment Fund assets and may select options or benefits under life insurance policies or other endowment fund assets.
5. **Authority.** The Endowment Directors are authorized to settle, compromise, contest, prosecute or abandon claims involving the Endowment Fund. The Endowment Directors shall execute and deliver all proper and necessary instruments concerning the Endowment Fund and the assets thereof. Endowment Directors may employ accountants and other professionals at the expense of the Endowment Fund.
6. **Signatures.** Endowment Directors may establish one or more bank or other accounts to carry out their functions. Checks, withdrawals or loans made by or for the Endowment Fund shall require the signatures of two Endowment Directors.

IV. ELECTION OF ENDOWMENT DIRECTORS

1. **Qualifications.** Endowment Directors shall be at least twenty-one (21) years of age and shall have been voting members of the Congregation for at least three years.
2. **Term.** The regular term of each Endowment Director shall be three (3) years, and the Leadership Development Team shall annually select an Endowment Director to be approved by the Board of Trustees and elected by the Congregation. When donations to the Endowment Fund reach \$10,000, The Leadership Development Team shall recommend 3 temporary directors for approval by the Board to serve until the next Annual Meeting. The Leadership Development Team shall select three Endowment Directors: one (1) for a term of (3) years; one (1) for a term of two (2) years; and one (1) for a term of one (1) year to be elected at the next Annual Congregational Meeting. Thereafter, at each Annual Meeting, the Congregation shall elect one member for a term of three (3) years.
3. **Vacancy.** In the event of an Endowment Director vacancy, the leadership development team may recommend a replacement to the Board. The Board shall appoint a member to fill the vacancy until the next Annual meeting of the Congregation, at which time the Congregation shall elect a member to fulfill the term of the vacancy. The replacement would then be eligible for reelection to one further term.

4. **Conflict.** No person can, at the same time, serve as an Endowment Director and as a member of the Board of Trustees.

V. DUTIES OF DIRECTORS

1. **Meetings.** Endowment Directors shall elect a Chairperson and such officers as may be necessary to carry out its functions. Decisions of Endowment Directors shall be by majority vote at meetings held as often as necessary to carry out the purpose of the Endowment Fund. A quorum of these meetings shall be two directors.
2. **Reports.** Trust Directors shall make quarterly reports to the Board, and shall make such other reports as may be requested by the Board of Trustees.
3. **Proposals.** All proposals for special projects shall be submitted to the Endowment Directors. The Endowment Directors shall have the sole and absolute authority to allocate Endowment Fund income for special projects on an annual basis.
4. **Procedures.** The Endowment Directors may implement such procedures and forms as they may deem necessary to carry out the purpose of the Endowment Fund.

VI. MODIFICATION AND DISSOLUTION

1. **Modification.** The provisions herein may be modified by the UUCGV Board of Trustees.
2. **Dissolution.** Upon dissolution of the Congregation or the winding up of its affairs, the Endowment Fund shall be distributed in accordance with the provisions of the Bylaws of the Congregation.

Handling Earmarked Donations and Requests for Donations

- **Calendar:** None
- **Teams:** Finance, TLC, Board
- **Date adopted:** May, 5 2012
- **Prior Versions:** October 13, 2009
- **Authors:**

Purpose

Describe how to handle requests for funds outside of the budget and earmarked donations

Policy Statement

Special Request for Monies

Any special request for monies (outside of budget) by any member of the congregation must be approved first by the executive Team. Upon approval of the Executive Team, the request shall be placed on the agenda of the Board of Trustees for its consideration.

Earmarked Donations

Earmarked donations designating monies for a particular fund or project are encouraged to be done only in the last 3 months of the fiscal year. Earmarks shall first be approved by both the Finance Team and the executive Team. Upon their approval, the request shall be placed on the agenda of the Board of Trustees for its consideration.

Facility Use

- **Calendar:** Scheduled facility use must be entered into the congregational calendar by the Administrator
- **Teams:** TLC, Administrator, Board
- **Date adopted:** February 2017
- **Prior Versions:** May 22, 2008; Fee changes approved Sept 11, 2014, November 12, 2015
- **Authors:**

Purpose

The purpose of this policy is to prioritize the use of UUCGV's physical space, to give guidance to those requesting and scheduling space, set out a fee table, and create the guidelines for those entering into rental agreement.

Policy Statement

The primary use of the facilities of UUCGV shall be for the ministries of the church and its members and active constituents. Any activity that does not come under the direct control of the church Board of Trustees shall be guided by this policy. The schedule of church activities will take precedence over outside activities and may prevent or cancel these activities at any time.

Activities by outside groups (those just renting our space) will be approved and scheduled by the Administrator, and do not need Board or TLC approval. While the church must "sponsor" those activities in order for UUCGV's insurance to cover use of our space, the church is not responsible for advertising or generating attendance at those activities. Minister, TLC or Board approval may be needed if an event requested is viewed as controversial by the administrator or if facility use is requested free of fees.

Activities and Conduct on the Property

1. All activities must be in accord with the general policies, mission, and principles of UUCGV. A copy of the principles is attached. The activity or program shall not discriminate on the basis of race, gender, gender identity, sexual orientation, religion, ethnicity or marital status.
2. This is a place of worship and it should be respected. Children, including high school age, must be supervised and not allowed to access areas not included in the agreement. Renters may use only the parts of the building for which they have made arrangements.
3. Users must show respect for other persons or groups using the building at the same time.
4. Service animals are always welcome in our building. Due to allergy concerns, we request that you keep your pets at home, unless permission is obtained through the Board of Trustees and/or Board President and/or Minister.

5. Smoking is NOT ALLOWED in the building.
6. UUCGV reserves the right to refuse use to any person or group, including those which have demonstrated disrespect for property or the rights of others or have violated the policies of UUCGV.
7. Inappropriate behavior, use of drugs, or unauthorized use of alcohol may be cause for dismissal from the building and refusal of use of the building in the future.
8. UUCGV is not responsible for users' lost or stolen items, not liable for users' injury or private property damage.
9. Building use shall be completed by 10:00 pm unless users are granted prior approval by UUCGV for use to a later hour.
10. Each group shall be responsible for setting up, taking down, and returning to its proper location, all equipment which they use. Trash and garbage must be placed in appropriate containers and the areas used must be clean after each use.
11. No materials are to be used that will cause damage or mar the existing walls, floors or windows, or any other surfaces of the building. No candles are to be placed near any flammable materials and must be approved. No rice, confetti or birdseed will be allowed in the building or the outside property during weddings or other activities.
12. Food and beverages may be served or consumed in the kitchen, sanctuary, and designated meeting rooms. Because of county health standards, if food is served, it must be pre-prepared or packaged. Drinks may be prepared on site. Cleanup must be in line with county health standards. No food items shall be left in the facility after the activity has concluded.
13. Outside posters or signs must be approved by the TLC, a member of the UUCGV Board of Trustees, or Minister before being displayed.
14. The renter agrees to protect, indemnify and hold harmless the church and its agents and employees from any and all claims, loss, cost damage or expense, including reasonable attorney's fees arising from any accident or other occurrence on or about the premises which cause injury or damage to any person or any property. The renter agrees to pay reasonable cost for any property damage incurred during the use by the renter.
15. Fees will be charged according to the following Fee Schedule.

For Profit Renters:		
Room	Half Day	Full Day
Sanctuary (large groups)	\$150	\$300
Rear of Sanctuary (up to 24 people)	\$75	\$150
Basement (large groups)	\$150	\$300
Small Room (up to 12 people)	\$45	\$90
Non Profit Renters		
Room	Half Day	Full Day
Sanctuary (large groups)	\$75	\$150
Rear of Sanctuary (up to 24 people)	\$40	\$75
Basement (large groups)	\$75	\$150
Small Room (up to 12 people)	\$25	\$45

Weddings and Funerals:	
Relationship	Cost
Members	No Charge
Relatives of Members	\$75
All Others	\$150

Family Celebrations including but not limited to showers, birthdays, anniversaries and reunions		
Room	Half Day	Full Day
When sponsored by a church Team or group	No Charge	No Charge
Members	Non-Profit rental fees, depending on room	
All Others	For-Profit rental fees, depending on room 150 300	

Use of Audio Visual Equipment	\$20
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19. The fee schedule may be revised at any time. UUCGV reserves the right to allow exception from the fee schedule for certain charitable or community groups, as well as unusual extenuating circumstances. Fees are based upon the estimated cost for use of the facility. All fees and deposit are due at the time of application for use.
20. A \$100 cleaning, compliance and damage deposit is required with this application. This will be fully refunded if facilities are left completely clean, and if all rules and regulations in the Facility Use Policy are complied with. It will also be fully refunded if this application is not approved by the Board of Trustees or Board Designee. If the activity is cancelled less than seven days before the event, a \$20 administrative fee will be withheld from the returned deposit.
21. The UUCGV Property Chair or other designated person will check on the condition and cleanliness of the used rooms after each use. An additional charge may be assessed if warranted. A non-refundable custodial fee may be applied to certain functions.
22. Requests for use of building should be at least (2) weeks in advance. Inquire with UUCGV office.
23. Audio Visual equipment is available for use for an additional fee of \$20. A UUCGV representative or staff member will assist in the set-up and shut down of the audio visual systems. This fee can be waived over time for recurring events if an individual from the group is willing to be a responsible operator of the audio visual equipment and has gone through training with UUCGV.
24. UUCGV staff or representatives are available to run the audio visual equipment for the duration of an event, in which case an additional fee of \$25 per hour will be assessed for compensation of their time.
25. Occupancy: Occupancy of certain areas are as follows:
 1. Main floor – Sanctuary: 92; Upstairs kitchen: 13; Chancel: 32
 2. Downstairs Areas – Basement main room: 110

Newsletter and Weekly Calendar Email

- **Calendar:** Monthly newsletter and weekly emails
- **Teams:** Administrator, Minister, President
- **Date adopted:** 7/9/02
- **Prior Versions:**
- **Authors:**

Purpose

The UUCGV newsletter and the weekly calendar email exist to support the mission of UUCGV by keeping members, friends and potential members informed of events, programs and business

Policy Statement

Procedure

1. Topics are accepted into the newsletter in the following order:
 1. UUCGV events and business
 2. Community events and Social Action Projects with which UUCGV is involved.
 3. Mountain Desert District and Unitarian Universalist Association articles
 4. Relevant general material as space permits.

All entries are subject to space constraints.

2. Articles and information will be given to the Administrator who serves as Editor.
3. Articles will be accepted up to the published deadline each month.
4. Articles are preferably submitted by email; also by US mail or personal delivery to UUCGV office.

Articles will not be composed by the editor from telephone messages.

If more than 10% of the words in a submitted article are edited, it will be returned to the author to check content.

Acronyms need to be spelled out at the beginning of each article.

Articles should include information pertaining to What, When, Where, How, Who and Why.

An Editorial Board will be comprised of the Minister, President of Board of Trustees and Administrator (Editor).

General direction and style of the publication will be developed by this Board.

When necessary the Editorial Board will consider the relevance of a topic to the congregation as well as the appropriateness of the content.

Pets and Animals

- **Calendar: None**
- **Teams: Board, TLC, Minister**
- **Date adopted: February 12, 2015**
- **Prior Versions: not previously adopted, although the original submission dates from about 2008**
- **Authors: Original unknown, edits by MA Winniford & G Dolezal**

Purpose

To provide a standard policy that protects our building, furnishings, and the rights of people with allergies.

Policy Statement

Service animals are always welcome in our building. Pets are welcome at our annual Blessing of the Animals service and when specifically invited to be a part of RE classes or other activities. Due to allergy concerns, we request that you keep your pets at home at other times that you visit us.

We do not routinely allow animals in the building because:

1. People with dander allergies cannot be around animals, or even in spaces that have been overly contaminated by dander. These people take precedence over those who wish their pets to accompany them to church.
2. Pets can accidently consume foods or things that are not good for them. The congregation does not accept the responsibility of keeping its premises free of items that may be bad for animals to ingest.
3. Animals do, at times, create messes or destroy property. Additionally, pets can fight with each other, or bite or frighten people. Rather than deal with problems that arise, the congregation has chosen to preemptively avoid such situations.

Procedure

Notwithstanding the Animal Blessing Service, in the event someone brings an animal into the church, pet or otherwise (not including a service animal), the Minister, another staff member, or someone from the Board or TLC or LDT will approach them and discuss the situation and the policy. The person should be asked to take the pet to their car, or to be restrained outside. It is not advisable to say "Well, OK, just this once" as we do have people with allergies in the congregation.

If the person refuses, another member of leadership should be brought into the conversation. If the person chooses to leave if their pet is not welcome, they should be assured that they will be more than welcome without their pet.

Policy on Policies

- **Calendar:** Annual review by Board in Fall
- **Teams:** Board, TLC
- **Date Adopted:** 3/10/2011
- **Prior Versions:** 12/11/2000
- **Authors:** 2000: Arleta Carr and Kitty Tattersall, 2011: Board of Trustees

Purpose

To develop Unitarian Universalist Congregation of the Grand Valley (UUCGV or the Church) Policies as needed and in a consistent format.

Policy Statement

A UUCGV Policy Handbook has been created to contain all policies that will direct the operation of the Church as a whole and its various operating groups. Policies developed will give direction for implementing the Bylaws and other direction as deemed necessary by the Board of Trustees.

Procedures

1. **Proposal:** The UUCGV Board of Trustees, any operating Team, or any member may propose the development of a Policy. Such proposals must appear in the Minutes of the Board. If the Board of Trustees approves such a development, a group will be assigned to the task.
2. **Format:** The format for all Policies will include the Policy Title, its date of adoption or modification, the authors thereof, the teams or individuals affected by it, the Policy's purpose, a Policy Statement and the procedures relevant to the Policy.
3. **Development:** The group assigned with a policy development will present its final draft to the Board of Trustees for final approval. In the event the Board of Trustees does not so approve, the policy draft will be returned to the development group with recommendations for revision. A submitted policy will be considered approved only upon the acceptance of the entire sitting Board of Trustees.
4. **Publishing and Distribution:** Upon approval, a Policy will be added to the Policy Handbook and to the UUCGV website Policy file. Additionally, an electronic copy will be maintained in a UUCGV computer archive file as well as provided to the sitting Board of Trustee members. Copies may be made available to Church members upon request.

Review: An Ad Hoc Team will be appointed by the Board of Trustees in the fall to review all active Policies. The Team will submit a report of its findings along with any suggestions for revisions to existing Policies, the addition of additional Policies or the removal of any existing Policy. Origination of a Policy will refer to 1. above. A revision to

any policy may follow the same procedure or may be undertaken by the Board of Trustees.

Providing References on Current or Former Employees

- **Calendar:** None
- **Teams:** Board, TLC, Minister, Administrator
- **Date adopted:** February 12, 2015
- **Prior Versions:** not previously adopted, although the original submission dates from 2010
- **Authors:** Original unknown, edits by MA Winniford & G Dolezal

Purpose

To provide an organizational procedure for giving references for staff that have left the church's employ or are considering doing so. To provide consistency in giving references, and to avoid UUCGV liability.

Policy Statement

All requested references will be provided **only** by the Administrator, Minister or the President of the Board of Trustees. The information given will be limited to the start and end dates of employment, the title of the position held and whether a part time or full time position, and the salary paid (if asked). The name and phone number of the District Executive and the appropriate department of the UUA will also be offered to the inquiring party for further information.

The above is meant to apply only to those who represent the church in leadership roles. Any other individuals can certainly give personal references as they choose.

Procedure:

All inquiries, written or verbal, will be forwarded to the Administrator, Minister or the President for a response.

These inquiries and the response will be noted in the monthly Administrative report to the Board. The information given will be limited to the start and end dates of employment, the title of the position held and whether a part time or full time position, and the salary paid (if asked). The name and phone number of the District Exec. and the appropriate department of the UUA will also be offered to the inquiring party for further information.

Do not answer the question "would you rehire?" or provide personal opinions as to the employee.

References

Sources for information:

1. A congregant with business experience
2. A local attorney known to be a strong employee advocate

3. District Executive
4. UUA Legal Department
5. UUA Human Resources Director

One can refer any inquiry to the District Exec and/or to UUA. Since they are not the direct employers, they are not subject to same legal consequences and can furnish more information.

In case of a minister, a caller can be referred to District Exec and the UUA Department of Ministry.

In case of other staff, the caller can be referred to District Exec and any department at the UUA where a working relationship had existed.

Publicity Policy

- **Calendar:** Not specific
- **Teams:** TLC, Board, LDT, Minister, and any ad hoc (event) team created by the Board or TLC
- **Date adopted:** May 14, 2015
- **Prior Versions:** None approved
- **Authors:** MaryAnne Winniford and 2015 Board

Purpose

This policy clarifies who is responsible for publicity, both of single events and general marketing campaigns.

Policy Statement

Spokespersons for UUCGV: The only people authorized to speak to reporters from the newspaper, TV, radio, etc. for UUCGV are the Minister and the Board President. It is important that people have the requisite skills and proper authority to speak for the congregation. The Board may authorize other persons in some situations. This policy does not cover or constrain individuals writing letters to the newspaper, or any other situation where a congregant wishes to put forth their personal opinion. Such individuals must not make any broad statements about UUCGV's policies, stands, or beliefs in their personal writing nor should such personal opinion statements, specifically or through implication, indicate a concurrence from UUCGV.

General marketing: The Board is responsible for making decisions on general marketing of UUCGV. This would include generic or seasonal ads in newspapers, paid-for inclusion in various church listings, or other paid marketing campaigns that are not specific to an event, and are not part of the UUCGV calendar. These would be approved by the Team Leadership Circle (TLC), as indicated below. The Board expects that the TLC and individual congregants will help the Board identify possible venues and marketing opportunities.

Event advertising:

- **TLC approval:** All paid advertising for any event must be specifically approved by the TLC prior to the expenditure. An advertising budget, if required, must be included in the event proposal submitted to TLC. Calendar events approved by the TLC have tacit approval for any free advertising for an event.
- **Advertising copy** should be reviewed by at least one other member of the TLC or event team, to help identify any errors in writing, potential confusion, missing or incorrect information, etc.
- **Responsibility for advertising:** Timely advertising for an event is the responsibility of the event organizers. This includes making, putting up and taking down posters; finding artwork; writing copy, etc. The UUCGV administrator will work with media/publicity channels when requested. This will include reviewing and submitting press releases, contacting media and publicity channels, etc. The administrator is not responsible for writing creative copy, finding appropriate artwork, or layout work. The administrator may be able to recommend persons to help with design.

- **Lead-time:** There are long lead times associated with various advertising venues. It is the event organizers' responsibility to be aware of those deadlines and to provide the administrator with information well before deadlines. UUCGV has general information on publicity – lists of free and paid advertising venues, their lead-time, and our general view of how they align with UUCGV.
- **Time intensive free advertising:** When proposing large community-focused events, thought must be given to having adequate support to create advertising, if it is desired. The Leadership Development Team (LDT) can help identify more volunteers, although event organizers are also responsible for creating a team to support their event.

Publicity funds: The first choice is that publicity funding is repaid to UUCGV from any revenue the event might generate. This would be the case for any fund-raising activity, or any activity where a donation is requested. If the activity is not fund-raising, the TLC must approve the decision to allocate publicity funds, based on its view of 1) the overall mission of UUCGV, 2) the perceived ability of the event to draw new membership to UUCGV, 3) competing events requiring advertising.

Procedure:

Requests for an interview will normally go through the administrator to the Minister and/or Board President. They will schedule an interview, and arrange who will speak.

Paid advertising requests will be included in the event proposal when it is brought to the TLC. General marketing suggestions brought to the Board should also include a budget. A total dollar amount will be specified, as well as a breakdown of how the funds are to be used.

After receiving advertising approval, an individual will usually pay for advertising himself or herself, and submit a receipt and voucher for reimbursement. Checks are usually cut within two weeks. If this is not possible for the congregant, other arrangements may be made with the administrator.

Line items in the budget (programs) are created to include funds that might be used to advertise events that fit within that line-item. The Treasurer will allocate advertising funds to and drawn from those line items (such as RE, Membership, etc.) where possible.

Any congregant may request the advertising venue list at any time, for use in planning an event. This is available from the administrator.

Safe Congregation Policy: Children and Youth Activities

- **Calendar:** none
- **Teams:** Religious Education, Religious Education Coordinator, Minister, etc.
- **Date Adopted:**
- **Prior Versions:**
- **Authors:**

Purpose

Preventing, Reporting and Dealing with Child Abuse and Inappropriate Conduct.

Policy Statement

The members of the Unitarian Universalist Congregation of the Grand Valley covenant to promote and affirm the sharing of our Unitarian Universalist values and diverse religious heritages with our children in an atmosphere embracing the vision and wonder of their spiritual journeys.

Although not common in children and youth church programs and activities, child abuse and inappropriate conduct does sometimes occur as revealed in experiences of church communities. We can take steps to reduce the likelihood and potential adverse effects of child abuse and inappropriate conduct by addressing child abuse issues openly and setting out written guidelines.

This policy is designed to:

- (1) Improve the safety of children and youth in our church programs by implementing preventive steps and by providing guidelines regarding appropriate behavior with the children and youth of our church;
- (2) Provide guidance on how to effectively respond to incidents that may occur, whether during a church activity or at other times; and
- (3) Through prevention steps, reduce the likelihood that allegations (true or false) will be made against church staff and volunteer workers.

Underlying Principles for This Policy

Unitarian Universalists have a covenant with one another. Our covenant outlines our relationship with one another.

In adopting this policy, we accept the responsibility to educate ourselves about child abuse, and to take the steps which are necessary to assure the policy's successful implementation.

PREVENTION

It is ultimately the responsibility of the entire congregation, in partnership with parents, to

create and maintain a safe environment that supports the growth and welfare of children and youth in our church programs. However, this policy is devoted primarily to those occasions in which children are in a situational or supervisory relationship with church members other than their parents.

All adults and older youth working with children and youth in the church will be required to sign the Code of Ethics. The policy also encourages other church members and friends to read and sign the Code of Ethics for Adults Working with Children and Youth. Signed policies are kept by the Director of Religious Education in the RE office.

Code of Ethics

for Adults and Older Youth Working with Children and Youth
adopted by the Unitarian Universalist Association 1986

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

The relationship between young people and their leaders must be one of mutual respect if the positive potential is to be realized. Among the most important areas of growth are those of self-worth and the development of a healthy identity as a sexual being. Adults play a key role in assisting children and youth in these areas of growth. Wisdom dictates and research shows that children, youth and adults suffer damaging effects when leaders become sexually involved with young persons in their care.

Therefore, I will not engage in sexual, seductive or erotic behavior with children and youth. I will not sexually harass or engage in behavior with youth which constitutes verbal, emotional or physical abuse.

I will not be under the influence of illegal drugs, alcohol, or any other drug which would impair my judgment or ability to function effectively while in a leadership role with children or youth.

I have read and understand the above Code of Ethics for leaders of children and youth, and I am in agreement with their spirit and purpose.

Signed _____ Date _____

Prevention through Training and Education

Greater understanding of the complexities of sexuality and abuse will help us to avoid situations that could lead to abuse or false accusations. The Board of Directors and RE committee will see to the implementation of the following education program.

For our children and youth, the RE Committee will provide:

- Age appropriate information about development and sexuality. Our children must be empowered to protect themselves and report abuse.

For RE teachers, child care providers and other volunteers working with children and youth, including staff and leadership, the RE committee and minister are providing the following resources:

- Basic training and written information designed to prevent child abuse.
- Copies of Creating Safe Congregations (by the UUA) in office and RE office.
- Balancing Acts : “Keeping Children Safe in Congregations” UUA Online Curricular for certification, a 3 hour course. www.neari.com click on courses, sign in and take class for free.
- CD by Church Mutual Insurance Company “Making Your Church Safe From Sexual Abuse.” (www.reducingtherisk.com)

For new members of the church, the Membership Committee will provide: A copy of this policy will be printed for congregational meetings and written information regarding this policy to be included in all new member packs by 2009.

Prevention through Screening and Supervision of Adults Working with Children and Youth

The following guidelines will be put in place for the 2008/2009 program year:

All RE teachers, child care providers and other adults working with children and youth

- a) will have been a congregant for at least one (1) year, as determined by the RE director, or have references from other UU churches that include the minister or RE director.
- b) will be screened as necessary by background check.
- c) will have attended at least one training session on child abuse put on by, or approved by, the RE committee. (i.e. neari training)
- d) will have read, understood and signed the “Code of Ethics.”
- e) Child care providers will provide two references in addition to the above.

- At least one teacher or child care provider shall be present in each classroom on Sunday mornings.
- On every outing, overnight and other church-related activity with groups of children, including children and youth trips, the expectation is that there shall be at least two adults present. Exceptions to this guideline (for example, to transport children from one location to another) require DRE approval.
- Confidential criminal background checks will be conducted for all paid adult staff prior to hiring or signing of any contract and may be conducted, at the discretion of the RE Committee, for adult teachers and other adult volunteers working with the children and youth. In the case of paid staff information will be shared with the Personnel Committee and Board of Directors as appropriate. For purposes of this policy, an adult is defined as an individual eighteen years of age or more.
- Individuals who have been convicted of, are under current indictment for, or self disclose any act of sexual misconduct involving a child or child abuse are precluded from participation in the RE program and other children or youth church activities.

In addition, this policy encourages any congregant who has been convicted of, is under current indictment for, or has been involved in any act of sexual misconduct involving a child or of child abuse to make him or herself known to the minister, DRE, or COM. Other members or friends of the congregation, including the minister and DRE, who becomes aware of such information, should report this to a member of the Committee on Ministry.

The RE Committee in conjunction with the Board of Trustees is also responsible for developing and publicizing the UUCGV guidelines for safety and behavior management.

REPORTING & RESPONSE

Situations of suspected child abuse are seldom simple and straightforward. Religious leaders should be guided by a commitment to the overriding priority of protecting the children. They should also be sensitive to the harm that can be done by false or mistaken accusations.

If a church member or friend or staff person has reason to believe that a child has been abused, either while in the church program or at other times, the person should report the incident to State authorities.

Minister, Director of Religious Education are persons required to report child abuse or neglect.

Mesa County Child Protection services 970-242-1211

Reporting Within the Church

In addition, if the person with the concern believes or suspects abuse or inappropriate behavior occurred during a church program, the individual should report his or her

concerns to;

- 1) The minister, or
- 2) The DRE, or
- 3) Any member of the Committee on Ministry.

When an allegation of child abuse occurring during a church program is reported to the minister, DRE, or COM the responsible person receiving the allegation should take the necessary steps to;

- 1) Abide by Colorado law on reporting child abuse;
- 2) Take appropriate action to assure protection of the children in the church; and
- 3) Convene a meeting of a response team consisting of the COM, minister and

DRE.

Response Protocol

The Response Team does not have the legal authority, or the expertise to determine guilt or innocence. It is designed instead to protect members of the church community, and to ensure that the victim and accused are treated with dignity and respect. The team responding to the allegation should keep the following response guidelines in mind.

1. Safety of the Children - the safety of the children in the church program should be of primary importance. Reasonable and timely actions should be taken to insure their safety based upon the credibility and severity of the allegation and other pertinent factors. All allegations will be taken seriously and will be documented.

2. State Law - A copy of Colorado state law on child abuse should be kept in the Safe Congregations policy notebook and should be referenced when an incidence is reported. Appropriate and timely reporting will be made to the Colorado Department of Health and Welfare or proper law enforcement agency.

3. Professional Resources - The Response Team should call on or make referrals to whatever professional resources they deem appropriate, both within the church and outside of the church.

4. Whom to Inform - Decisions about whom to inform about the incident (parents, teachers, the board, the congregation, the child or children in question, the alleged perpetrator) and the information to be provided should be made in a careful, but timely manner by the Response Team. The decision should be made based upon the individual situation (e.g., severity and credibility of allegation; does the threat to the safety of the children still exist).

5. Notification of Board and District Executive - If any action is taken or recommended by the Response Team, the President of the Board and the District Executive of the Mountain Desert District will be notified 1) that a Response Team has been convened, 2) of the nature of the issue and 3) whether a report has been made or will be made to the Colorado Department of Health and Welfare or proper law enforcement agency. The President will report to the executive committee of the board in a closed meeting at the earliest appropriate time.

6. Confidentiality - Since these matters are sensitive, it is important that all persons involved, including the reporting person and the accused, maintain the level of confidentiality recommended by the Response Team for the time period

determined by the Response Team. It is understood that action may be appropriate that would include removal of the matter from confidential status (for example, investigating the allegations; the Board of Directors, the District Executive Director, State authorities; expulsion of an individual from UUCGV premises and/or termination of membership.

a. In order to ensure that the safety of our children and youth is our highest priority, we must encourage the responsible reporting of all concerns or suspicions of child abuse. To this end, all reports will be considered confidential and will be disseminated only on a "need to know" basis until such time as the Response Team determines other action is appropriate.

b. In cases not referred to the Department of Health and Welfare or law enforcement agency, the Response Team may advise removal of a person from teaching or leadership position. Also, if it is appropriate to consider actions other than removal from teaching, or leadership those options will be fully explored.

c. The Response Team will provide as much information as possible without violating confidentiality about the reason for its advised action.

7. False Accusations - The protection from false or mistaken allegations of adults who teach in the RE program or otherwise interact with children at church is also an important goal of this policy. A key way to prevent false or mistaken allegations is to abide by the prevention guidelines outlined in the Prevention portion of this policy. We should be sensitive to the disruption and damage a false accusation may cause to both the adults and the children involved. This is true even when the accusation is one due to a misunderstanding or misinterpretation of what seems a child's straight-forward report of an event.

a. If the Response Team determines that an accusation has been made with malice or for any other reason believes that a report has not been made in good faith, the confidentiality of the reporting person will not be protected, except as may be determined by the Response Team in the case of a minor. The Response Team may determine that a false accusation by a child or youth requires further consideration.

Leave of Absence & Restrictions with Children

In order to protect the children and youth in our programs from potential risk and to protect the accused from further suspicion, decisions about removing the alleged perpetrator from interacting with children in the RE program or other church programs will be made by the Response Team, including the DRE and the minister. A decision should be made and action taken in a timely manner based on the possible threat to the children, the credibility and seriousness of the allegation and other factors that may relate to the situation. Actions other than removal from teaching or leadership will be given full consideration depending upon the situation. Alternative actions might include additional training, review of the policy or changing classrooms.

a. If a report is made to the Department of Health and Welfare or law enforcement agency this leave will be mandatory.

- b. If disputes arise out of the actions taken by the DRE, the Minister, or the Response Team, the matter may be taken to the Board.

Other Inappropriate Behavior

Some incidents or allegations in the RE or other children or youth programs may involve behavior that is not clearly child abuse, but may be in other ways deemed inappropriate by a parent, by the DRE or by the RE committee. In such cases, the Response Team will review the situation and decide what action to take.

Other Responsibilities of the Board

If the Response Team is convened in addition to the above protocol it will provide a report and final recommendation to the Board of Trustees. The board will determine how to disseminate information to the congregation.

The Board of Trustees of UUCGV will make the final determination of any additional consequences appropriate to the violation of this policy, including, but not limited to, termination of a staff person and any additional action in the case of volunteers beyond that for which the Response Team is authorized.

Violation of this policy by the minister or DRE shall constitute good cause for discipline under the terms of the minister's or DRE's contract.

The Board shall also inform the following of any determination of serious violations by the minister of this policy:

- The Mountain Desert District Executive
- The Director of the Department of Ministry of the UUA
- The Ministerial Fellowship Committee of the UUA
- The Unitarian Universalist Ministers Association

What is Child Abuse?

The UUA defines child abuse as “an act committed by a parent, caregiver, or person in a position of trust that harms or threatens to harm a child's well-being or physical or mental health. Child abuse is also against the law.

There are four categories of child abuse according to the UUA:

1. **Physical Abuse:** Deliberately inflicting bodily harm to a child. Instances of child abuse include violent assault with hands, feet, a knife, or other instrument, or burns, fractures, and bruises resulting from being beaten, shaken, or thrown.

2. **Sexual Abuse:** Engaging in sexualized behavior, verbal or physical, with a child, using a child for the sexual gratification of an adult or older child. Any time a child is used for the sexual stimulation of an adult or a significantly older child, abuse has occurred. The child

is powerless either to consent to or resist such sexual acts. Sexual abuse can include the fondling, sexual intercourse, forced participation in sexual acts, incest, and exploitation for the purpose of pornography or prostitution. Child sexual abuse is illegal regardless of whether the child "consents" or not. Consent is not an issue. The offender bears the entire responsibility for the abuse, whatever form it takes.

Child sexual abuse may be violent or non-violent. All child sexual abuse is an exploitation of a child's vulnerability and powerlessness in which the abuser is fully responsible for the actions. Child sexual abuse includes behaviors that involve touching and non-touching aspects.

Types of abuse that involve touching include:

- * Sexual Fondling;
- * Oral, genital, and anal penetration, Intercourse; Forcible rape.

Types of abuse that do not involve touching include:

- * Verbal comments such as statements intended to seduce children;
- * Pornography;
- * Obscene phone calls; Exhibitionism.

3. **Emotional Abuse:** Emotional abuse may be very difficult to identify and document. Emotional abuse deeply affects a child's self-esteem by subjecting a child to verbal assault or emotional cruelty. It can include close confinement, inadequate nurturance, extreme discipline, or deliberately permitting destructive behaviors such as drug or alcohol abuse.

4. **Neglect:** Children have basic physical, nutritional, and environmental needs that must be supplied. Chronic withholding of food, clothing, medication, and proper living quarters, as well as abandonment are all acts of neglect. Neglect can include physical, emotional, or educational neglect through such actions as inadequate supervision, health hazards in the home, refusing to seek treatment for illness, providing inadequate nurturance, and deliberately permitting chronic truancy.