

**Personnel Policy Manual**

**for**

**Unitarian Universalist Fellowship of Bozeman**

325 North 25<sup>th</sup> Avenue Bozeman, Montana.  
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# 1.0 WELCOME

Welcome to the Unitarian Universalist Fellowship of Bozeman (henceforth, UUFB). We are glad to have you as a member of our staff and hope you will enjoy working for the Fellowship and contributing to our liberal religious community.

Working together, we will help to ensure that the administrative, operational and other needs of the fellowship are met. This will support volunteer members of our Fellowship to do their work.

This Personnel Policy Manual (henceforth, Manual) is not a contract and can be modified or changed at any time.

If you have any questions or suggestions concerning information in this Manual, please feel free to contact the Minister or their designee.

Again, welcome!

# 2.0 FELLOWSHIP MISSION, VISION, AND HISTORY

## Mission

We ...  
Welcome Diversity  
Act for Justice Foster Spiritual Growth  
Inspire Compassion  
Nurture Community  
Sustain Our Living Planet

## Vision Statement

We of the UUFB

Knowing that the diversity of our beliefs and backgrounds coupled with our deeply held shared values gives us unique and necessary strengths,

Striving as a compassionate, just, caring and supportive community,  
to continually find ways to stay dynamic and receptive to those who seek a spiritual home,

Fostering spiritual growth and discovery by encouraging vibrant religious education and exploration for all ages and providing a safe space to discuss, test and share ideas,

Endeavoring to put our principles into action as recognized leaders who boldly and bravely act for social and environmental justice in our local community and beyond,

Remaining at the forefront with those advocating for and enacting personal and community solutions to the climate crisis,

Aspiring to be a strong, arching bridge with local, state and regional faith communities,

collaborating with those who share common values and holding creative discourse with those who challenge us in our search for larger truths,

Will move forward into an uncertain future with grace and humility, fostering compassion and love, claiming our prophetic heritage and making our fellowship, larger community and world a safer and better place.

## **History**

The Unitarian Universalist Fellowship of Bozeman is a member fellowship of the Unitarian Universalist Association and covenant to affirm and promote:

1. The inherent worth and dignity of every person,
2. Justice equity and compassion in human relations,
3. Acceptance of one another and encouragement to spiritual growth in our congregations,
4. A free and responsible search for truth and meaning,
5. The right of conscience and the use of the democratic process within our congregations and in society at large,
6. The goal of world community with peace, liberty and justice for all,
7. Respect for the interdependent web of all existence of which we are a part.

UUFB began meeting in 1959, first in individual member's homes, then in a variety of leased spaces in Bozeman. We initially were lay-led, and as the Fellowship grew, we added staff and began to have part time ministers in 2005. In 2015 an A-framed former Lutheran Church at 325 N 25th Avenue in Bozeman was purchased by a member and then transferred to the Fellowship on conclusion of a capital campaign to fund renovation and expansion. We remodeled and expanded the space in 2016-2017, dedicating the new space in September 2017.

## **3.0 ABOUT THIS UUFB PERSONNEL POLICY MANUAL**

This Manual has been prepared to help you understand the policies, procedures and practices of the UUFB (referred to herein as the Fellowship). You should familiarize yourself with the content of this Manual as it provides basic information about our expectations, policies, procedures and benefits. Nothing in this Manual is intended to create an employment agreement, expressed or implied, or a contract that employment or any benefit will be continued for any period of time.

Since every situation cannot be anticipated, this Manual provides a general overview only. In applying the policies and procedures in this Manual, the Congregation will take into consideration the specific facts and circumstances of each situation.

All employees are hired in accordance with Montana labor law.

As a progressive and evolving organization, which must respond to operating needs and other circumstances, changes and modifications in policies, procedures, and benefits will be made from time-to-time. This Manual replaces all previous personnel policy manuals, handbooks and documents, plus any inconsistent policies.

If you have any questions or comments about this Manual, or if you need more information, please ask your Supervisor/Minister, or an officer of the Board. Your comments and suggestions are encouraged.

## **4.0 DIVERSITY AND INCLUSION**

### **4.1 EQUAL EMPLOYMENT OPPORTUNITY**

Unitarian Universalist principles affirm the inherent worth of each human being, and commit to working towards justice, equity and compassion in human relations. The Fellowship believes that policies advancing diversity, equity and inclusion are essential in creating social change which responds to historical and current practices of discrimination. Additionally, we believe that significant diversity among our staff makes for a richer, more dynamic organization. Our Fellowship is committed to addressing the systemic prejudices and biases found within all parts of society by, among other things, working to ensure that all staff are trained to understand, welcome, and better serve a multiracial, multiethnic, increasingly diverse community and enhance the ability of each individual to live our values of justice, equity, and interdependence.

The Fellowship affirms its commitment to inclusion and equal employment opportunity for all individuals. Decisions about recruiting, hiring, training, promotions, compensation, benefits, and all similar employment decisions will be made in compliance with all federal, state, and local laws and without regard to race, color, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, genetic information, or any other classification protected by law. As a religious organization, the fellowship may consider religion in the hiring and terms and conditions of employment of certain positions. Any other discrimination in the workplace based upon any protected status/classification is illegal and against policy.

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

Employees who have questions about discrimination, harassment or retaliation in the workplace, or who believe this policy has been violated, should report their concerns immediately to their Supervisor/Minister, or a Board officer.

## **4.2 HARASSMENT**

Harassment of any kind has no place in the workplace. The Fellowship is committed to promoting an environment that is professional and respectful. Any harassment regarding race, color, religion, age, sex, sexual orientation, gender identity, national origin, disability or any other protected status will not be tolerated. Our Fellowship expects all employees to conduct themselves in a professional manner with concern and respect for their colleagues, Fellowship members, and others served by the Fellowship. Similarly, we expect all employees to be free from harassment from Fellowship members and others encountered while serving our congregation. Harassment by anyone in the workplace is unlawful.

Harassment includes verbal or physical conduct which may offend, denigrate or belittle any person because of or due to any of the characteristics described above. Such conduct includes pictures, jokes, comments, epithets, innuendoes, name-calling or any other behavior which creates an environment that is derogatory, intimidating, hostile or offensive to anyone.

Conduct prohibited by these policies is unacceptable in the workplace, and in any work-related setting or event outside the workplace, such as congregation meetings, social events, and any other Fellowship related activity. Any employee who believes that they have been harassed by another employee, Supervisor/Minister, a Fellowship member, or any other person who the employee encounters in the course of employment should report that conduct immediately to their Supervisor/Minister or an officer of the Board. If the report or complaint involves the Supervisor/Minister, or if the Supervisor/Minister is unavailable, the individual making the complaint or the individual receiving the report or complaint should immediately report the complaint to an officer of the Board. The UUA Ministries and Faith Development Staff Group is available to assist with complaints involving ministers.

### **4.2.1 SEXUAL HARASSMENT**

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

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

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

- Unwelcome sexual advances, whether or not it involves physical touching; sexual assault, or coerced sexual acts;

- Requests for sexual favors in exchange for actual or promised benefits such as a favorable review, salary increases, promotions, or other benefits;
- Unwelcome suggestions regarding, or invitations to, social engagements or social events;
- Any indication, expressed or implied, that any aspect of employment conditions, depends or may depend on the granting of sexual favors or on a willingness to accept or tolerate conduct or communication of a sexual nature;
- Unwelcome or coerced physical proximity or physical contact which is of a sexual nature or sexually motivated;
- Use of offensive or demeaning terms which have a sexual connotation;
- Inappropriate remarks of a sexual nature;
- Sexual gestures, suggestive comments, sexually insulting comments, epithets, jokes or name-calling; written or verbal references about sexual conduct;
- Communication or displaying sexually suggestive objects, pictures, cartoons or computer Web sites in writing, electronically or verbally;
- Sex stereotyping, such as when the conduct or traits are considered inappropriate simply because they may not conform to other people's ideas or perceptions about how individuals of a particular sex should act or look; or
- Hostile actions taken against an individual because of that individual's sex, sexual orientation, or gender identity, such as interfering with an individual's work area, equipment, or ability to do their job, name-calling, etc.

Any employee who believes they have been sexually harassed by another employee, a Supervisor/Minister, or any other person encountered in the course of employment, including a Fellowship member, should report that conduct immediately to their Supervisor/Minister or a Board officer. If the report or complaint involves the Supervisor/Minister, or if the Supervisor/Minister is unavailable, the individual receiving the report or complaint should immediately report it to an officer of the Board.

Every complaint or report of sexual harassment will be promptly investigated. Although investigations will be conducted with as much sensitivity and confidentiality as possible, investigative information will be communicated as appropriate to those with a need to know. If the investigation indicates that a violation of this policy may have occurred, timely and appropriate action will be taken.

Retaliation or reprisal against employees who report sexual harassment claims is prohibited and will not be tolerated. Any violation of this policy will be treated as a serious matter and will result in disciplinary action, up to and including termination.

### **4.3 PROCEDURE/RESOLUTION OF EMPLOYEE COMPLAINTS**

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

- The employee should communicate immediately with their Supervisor/Minister. If the report or complaint involves your Supervisor/Minister, the individual receiving the report or complaint should immediately report it to an officer of the Board. You may be asked to put your complaint in writing.
- The Fellowship may appoint an ad hoc committee to advise the employee and/or may involve the personnel committee.
- An investigation will then be initiated and evidence will be gathered. The investigation will normally include an interview of the employee, the accused, and any relevant witnesses.
- The Minister or Fellowship Board's President shall then take appropriate action. The complainant should be notified that appropriate action has been taken.
- If either the complainant or the alleged harasser objects to the resolution, they may seek a review by the Fellowship's Board. The resolution recommended by the Board will be binding upon the Fellowship and the employee.

## 4.4 ACCOMMODATIONS OF DISABILITY

The Fellowship provides reasonable accommodations to enable an individual with a disability to perform the essential functions of their job in compliance with state and federal law. If an employee is unable, or finds it difficult, to perform all the functions of their job due to a disability, they should inform their Supervisor/Minister about the disability and discuss the type and nature of any assistance or adjustment that would enable the employee to perform the essential functions of the job.

In most cases, the Fellowship will need medical documentation of the disability and of possible accommodations. The Fellowship may also need regular discussions with the employee to determine what, if any, accommodations are appropriate, the employee's continuing need for accommodations and the effectiveness of the accommodations provided. The Fellowship may also ask to speak to the employee's physician or health care provider to help the Fellowship assess the need for and the appropriateness of the proposed accommodations and to ensure that the employee can safely perform the essential functions of the job with the accommodations. The Fellowship may also ask the employee to submit to an independent medical or other appropriate examination, at the Fellowship's expense.

## 5.0 CATEGORIES OF EMPLOYMENT

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

**Part-Time:** Part-time employees scheduled to work at least 10 hours but less than 40 hours per week are eligible for benefits according to the benefit plan descriptions in this Manual.

**Casual/Temporary Employee:** An employee who works full or part-time for a specific time period, including during peak or seasonal periods, for specific projects, to fill in for an absent regular employee, or for other reasons for a limited period of time is considered a casual/temporary employee. Casual/Temporary employees are entitled to benefits consistent with the provisions of benefit plans offered by the Fellowship or as required

by law.

## **FLSA Definitions**

Employees are also categorized as either **Non-Exempt** or **Exempt** for purposes of the minimum wage and overtime provisions of the Fair Labor Standards Act (“FLSA”).

**Non-Exempt Employees** are compensated based on the number of hours worked each workweek and are entitled to be paid the minimum wage and overtime for hours worked over 40 in a workweek.

**Exempt Employees**, who are employed in an executive, administrative, or professional position which meet certain requirements, are paid on a salary basis, and are exempt from the minimum wage and overtime provisions of the FLSA.

**Ministerial Exception:** Ministers, and other employees who perform “essential religious duties,” are exempt from FLSA requirements under the ministerial exception (sometimes called the ecclesiastical exemption). Under this exemption, other employees, such as religious educators or music directors, might be classified as exempt depending upon their specific responsibilities. Unlike the FLSA exemptions, the ministerial exception is dependent only on responsibilities, not salary.

## **6.0 WORK SCHEDULES AND PAY**

### **6.1 ORIENTATION**

Your Supervisor/Minister or a designated congregational leader will introduce you to your co-workers and orient you to your work area and job responsibilities. In some cases, a written job description has been prepared that contains a summary of duties and responsibilities. Of course, it is impossible to list or to describe all of the duties of a particular job. Moreover, from time to time, changes in jobs will occur to reflect temporary or long-term changes in staffing or operational needs. Please keep in mind that your Supervisor/Minister has the authority to assign duties, responsibilities, or functions to you even though the duties have not been yours in the past or are not specifically mentioned in your job description.

### **6.2 EMPLOYMENT AUTHORIZATION**

Federal law requires that prospective employees must show proof of eligibility to work in the United States by completing Form I-9 within 3 days of time of hire. When applicable, employees must provide an original document or documents to the employee’s Supervisor/Minister that establishes identity and employment eligibility from the date employment begins.

### **6.3 HOURS OF WORK**

Your Supervisor/Minister will establish individual work schedules, which may change from time to time based on the needs of the Fellowship and at the discretion of the Supervisor/Minister. Attendance at meetings outside of established work schedules at the request of the employee's Supervisor/Minister will be considered time worked. Employees may occasionally be required to attend staff retreats or off-site events which are relevant to their positions.

## **6.4 TIMEKEEPING AND OVERTIME**

Non-exempt employees must submit a written record of their time worked on a weekly basis, consistent with the record keeping provisions of the Fair Labor Standards Act ("FLSA") and state law.

From time to time, employees may be required to work in excess of their regularly scheduled hours. Any time worked by a non-exempt employee in excess of 40 hours in a workweek will be overtime which must be approved in advance. Paid holidays, sick days, vacation days, or any other paid time off does not count as time worked for purposes of calculating overtime. Non-exempt employees will be paid time and one half for all hours over 40 in a workweek. Exempt employees do not receive overtime pay when working in excess of 40 hours.

## **6.5 PAY AND PAYROLL DEDUCTIONS**

The Fellowship strives to offer its employees equitable and competitive wages and salaries commensurate with its ability, resources, and sound policy. Pay adjustments generally will be considered for all employees once a year, with any adjustments effective at the beginning of the fiscal year. There is no guarantee of an annual pay adjustment. Pay adjustments are usually based upon such factors as individual performance, job responsibilities, and other appropriate factors, such as increases in the cost-of-living as well as changes to UUA salary recommendations.

Deductions made from employees' wages are reflected on a pay stub. Federal law requires deductions from pay for income tax, Social Security, and Medicare. Other deductions may include state and/or local taxes or wage garnishments. Some deductions, such as voluntary retirement contributions, or medical or other benefit cost-sharing, are optional and are made only if the employee has authorized the deduction. Paychecks and pay stubs should be reviewed when they are received. If an employee believes a mistake has occurred, or if there are any questions, the employee's Supervisor/Minister should be contacted immediately.

Employees are paid by the 10<sup>th</sup> of each month for the prior month's hours worked.

## **6.6 CORRECTIONS OF ERRORS IN PAY**

It is the Fellowship's policy to comply with federal and state laws governing payment of wages, and the Fellowship makes every effort to ensure employees are paid correctly. Occasionally, however, mistakes may happen. When mistakes occur, employees should call them to the Fellowship's attention immediately. The Fellowship will promptly investigate the issue and make any corrections necessary.

## **6.7 PERSONNEL INFORMATION AND FILES**

It is very important that employees keep up-to-date all the information provided to the Fellowship at the time of hire and as requested from time to time. This information is essential for many purposes, including benefit administration, mailing information to the employee's home, and contacting friends or family in case of emergency. Please notify the Fellowship administrator promptly of any changes in:

- Address and telephone number;
- Marital status (including legal separation);
- Legal change in employee's name;
- Changes to hours or salary;

- Dependents;
- Changes in beneficiaries;
- Person to notify in case of emergency;
- Any relevant changes in licensing or education; and
- Updates and changes to your W-4

The Fellowship maintains a personnel file for each employee that contains new hire paperwork, performance reviews, and other documents related to the employee's employment. An employee is allowed to write their response to any document added to the file. Employees may review the contents of their file in the presence of a Fellowship's representative at a mutually agreed upon time. Files are retained for seven years.

## **7.0 POLICIES APPLICABLE TO EMPLOYMENT**

### **7.1 ABSENTEEISM AND TARDINESS**

Each employee is expected to maintain good attendance and to report to work on time. Absence and lateness hinder the effectiveness of our work and must be kept to a minimum. Excessive absenteeism or repeated tardiness may result in discipline up to and including termination of employment.

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

Unscheduled absences (such as returning late from lunch or leaving work before the end of the workday) must be approved by the employee's Supervisor/Minister. If the employee expects to be absent the following day, they should inform the Supervisor/Minister of that fact at the same time. Any employee who fails to report to work without notice for three or more consecutive days will have provided their supervisor with substantial grounds for terminating their employment.

### **7.2 PROFESSIONAL ATTIRE AND CONDUCT**

Employees should maintain a professional appearance that is appropriate to their position and the Fellowship. Name badges should be worn when employees are on duty on Sunday or at major congregational events.

### **7.3 ALCOHOL AND ILLEGAL DRUGS**

The Fellowship maintains a drug-free workplace. The use, possession or distribution of any illegal drug (or prescription drugs not being taken or possessed according to medical direction) on Fellowship premises or property is prohibited. Under no circumstances may an employee appear at work while intoxicated or under the influence of illegal non-prescription drugs or alcohol or smelling of alcohol. Improper use of prescription drugs is also prohibited. A violation of this policy may be grounds for immediate disciplinary action up to and including termination.

The Fellowship recognizes that responsible consumption of alcohol might be acceptable at occasional functions, but generally, the workplace is alcohol-free. On such an occasion, all employees are expected to uphold an atmosphere of professionalism and respect for those who choose not to participate. Any staff function at which alcohol is served must first be cleared with the Supervisor/Minister. It is expected that employees consuming alcohol on the premises do so in moderation and in the spirit of maintaining a safe and comfortable environment for all.

## **7.4 SMOKING**

The Fellowship is a smoke-free workplace. Smoking and vaping are allowed only outside in a designated area by the bike rack.

## **7.5 CONFIDENTIALITY**

Employees may have access to confidential information about the Fellowship, including but not limited to information about members, friends, or other staff members. Such information must remain confidential and may not be released, removed from the Fellowship's premises, copied, transmitted or in any other way used for any purpose by employees outside the scope of their employment. Employees have the right to use and share information about their personal wages and benefits. All requests for information concerning past or present employees received from organizations or individuals should be directed to the Supervisor/Minister.

## **7.6 COMPUTERS, INTERNET, EMAIL AND OTHER RESOURCES**

The Fellowship provides a wide variety of communication tools and resources to employees for use in running day-to-day business activities. Whether it is the telephone, voice mail, fax, scanner, internet, intranet, e-mail, text messaging, or any other Fellowship-provided technology, use should be reserved for legitimate business use and for not more than incidental personal use.

All communication using tools provided by the Fellowship or used for Fellowship related-business should be handled in a professional and respectful manner. Inappropriate use includes, but is not limited to:

- transmitting obscene, harassing, offensive or unprofessional messages;
- accessing, displaying, downloading, "liking" or distributing any offensive or inappropriate messages including those containing racial slurs, sexual connotations or offensive comments about race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability or any other classification protected by law;
- transmitting any of the Fellowship's confidential or proprietary information, including member/friend data or other materials covered by the Fellowship's confidentiality policy.

The Fellowship reserves the right to monitor and review the content of employee e-mails or the use of the Internet at any time. Employees should not consider their Internet usage or e-mail communications to be private. Personal passwords are not an assurance of confidentiality, and the Internet itself is not secure.

All materials, information and software created, transmitted, downloaded or stored on the Fellowship's computer system are the property of the Fellowship and may be reviewed and inspected at the Fellowship's discretion.

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

Any account established on behalf of the Fellowship must be authorized with all access information, including passwords, communicated to and maintained by the Fellowship.

Employees may not express opinions or personal views that could be construed as being those of the Fellowship.

With prior authorization, employees may use their own personal electronic devices (computers, tablets, phones, etc.) for work related purposes provided the devices have appropriate security software and the employee agrees to follow appropriate data protection and back up practices. Any files or software belonging to the Fellowship may only be downloaded and used for Fellowship related work provided the employee is given express written permission from the Fellowship, and proper documentation is maintained regarding the files downloaded in the event that future retrieval is required. In addition, upon employment termination for any reason, the employee agrees to give the Fellowship access to any personal electronic devices and passwords, to allow the Fellowship to retrieve and/or delete all Fellowship files and documents from them. In the event that the Fellowship does not request such access, then the employee agrees promptly to return, to the extent practicable, and to delete any and all Fellowship related documents and copies thereof from any such devices or backups.

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

## **7.7 CONFLICT OF INTEREST/OUTSIDE EMPLOYMENT**

Employees shall not engage in any other employment or business activity that is incompatible or in conflict with their duties, functions, or responsibilities as an employee. Activities that may constitute a conflict include use of the Fellowship's time, facilities, equipment or supplies, or the use of the title, prestige, or influence of the congregation for private gain or advantage. An employee must obtain the prior approval of their Supervisor/Minister before engaging in any other such employment or activity.

An employee shall not engage in any outside activity which, by its nature, hours, or physical demands, would impair the employee's performance of Fellowship duties; reflect negatively on the Fellowship; or tend to increase the Fellowship 's obligations or costs for benefits such as sick leave or long-term disability benefits.

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

## **7.8 EMPLOYMENT OF RELATIVES AND MEMBERS**

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

Members of the Fellowship will not be hired unless an exception is approved by the Board of Directors and the

Minister. Conversely, employees are not expected or required to be members of the Fellowship.

## **7.9 MEDICAL DOCUMENTATION**

From time-to-time, employees may be required, as a condition of employment, to undergo a medical examination or otherwise to provide the Fellowship with requested documentation, such as evidence of the existence or duration of medically required absence, ability to return to work, etc.

## **7.10 VEHICLE USAGE AND EXPENSE REIMBURSEMENT**

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

Other approved expenses incurred by an employee on behalf of the Fellowship will be reimbursed according to the Fellowship's expense reimbursement policy.

## **7.11 SAFETY AND ACCIDENTS**

The safety of employees, as well as members and visitors, is of paramount concern. All employees are expected to abide by accepted safety standards and any other Fellowship policy regarding safety of children and youth, disruptive conduct or any other safety related policies at all times. They should know the whereabouts of fire extinguishers, first aid kits, and defibrillators.

Any unsafe condition, equipment or practice observed by an employee should be reported immediately to the Supervisor/Minister. All on-the-job accidents or injuries to employees, no matter how minor, should be reported immediately to the Supervisor/Minister and workers compensation insurance carrier. In the event of a fire or other emergency, the fire department and/or other emergency services should be called immediately, and all staff and members of the congregation should leave the premises.

## **7.12 PERSONAL PROPERTY**

The Employer cannot be responsible for damage to or loss of personal property, including loss or damage to vehicles or other property in or on Fellowship property. Employees should report any lost items to the Supervisor/Minister so that the item can be returned if it is found. If an employee finds an item, it should be immediately turned in to the Supervisor/Minister.

## **7.13 WORKPLACE THREATS AND VIOLENCE**

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

Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts

on Fellowship property may be removed and must remain off Fellowship property pending the outcome of an investigation. If the Fellowship determines that a staff member has violated this policy, the Fellowship may take appropriate disciplinary action that may include, but is not limited to, suspension and/or termination of employment, and/or legal action as appropriate.

All employees shall inform their Supervisor/Minister of any behavior which they have witnessed or experienced, which they regard as threatening or violent.

## **7.14 INSPECTION RIGHTS**

Fellowships, like other organizations, are sometimes the victims of theft. The Fellowship has on its premises storage facilities such as desks, file cabinets, closets and storage areas for the use of employees. The storage of any unauthorized alcohol, weapons, explosives, or illegal drugs or drug-related paraphernalia is prohibited on congregation premises. Therefore, the Fellowship reserves the right to open and inspect any desk, file cabinet, storage closet, or storage area at any time and without prior notice or consent. Employees may not use personal locks on congregation owned desks, cabinets, closets or storage areas.

## **7.15 MEDIA INQUIRIES**

All requests for information on behalf of or regarding the Fellowship from newspapers, television and radio media should be directed to the Supervisor/Minister. An appropriate response to a media inquiry would be, "I'm not the best person to answer that question. May I contact the appropriate person and have that individual get back to you?"

# **8.0 PERFORMANCE AND CONDUCT EXPECTATIONS**

## **8.1 SUPERVISION AND PERFORMANCE REVIEWS**

Supervisors/Ministers assist employees in learning their jobs and identifying priorities and goals. On a regular basis, Supervisors/Ministers meet with employees who report to them, reviewing job performance, goals and priorities, assessing needs, and working through challenges. Any employee performance concerns should be discussed with the employee and documented. To complement ongoing performance feedback, a formal written performance review will also be conducted on a regular basis. [If you are supervised by the Board of Trustees or designated committee, the term Supervisor/Minister in this manual refers to your supervising entity.]

## **8.2 DIFFICULTIES ON THE JOB**

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

We hope problems will be resolved at an early stage with open communication between the employee and the Supervisor/Minister. When improvements are necessary in the conduct or performance of an employee, the Fellowship will attempt to give the employee written advance notice of the problem and that their job is in jeopardy if satisfactory improvement is not made. However, because of the circumstances or the nature and

seriousness of the conduct or performance deficiencies involved, the Minister or Board Chair/President may immediately terminate an employee's employment without prior notice.

### **8.3 STANDARDS OF CONDUCT**

The Fellowship expects that all employees will conduct themselves in a manner consistent with the highest standards of professional conduct conducive to creating a harmonious and pleasant work environment. This includes courtesy, respect, and working collaboratively and cooperatively, demonstrating the characteristics of high performing team members. As a staff of professionals in whom trust and power have been placed, all staff are called to be faithful both morally and legally to upholding professional relationships. Staff must never abuse the authority of their position by manipulating others to satisfy personal needs, or engage in any exploitative relationship that abuses the power and damages the trust that has been placed in a staff member.

The Fellowship seeks to provide the highest quality of service and support to its members. Thus, poor work habits, such as careless work, failure to complete assignments on time, or a failure to follow instructions, are unacceptable.

Conduct that does not meet the Fellowship's standards will not be tolerated and will be grounds for immediate disciplinary action. In addition, any breach of trust or conduct which shows a serious lack of dependability or good judgment, may be grounds for immediate discipline, up to and including termination from employment.

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

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

professional and respectful workplace.

## **8.4 RESIGNATION/RETIREMENT**

Resignations and Retirements are voluntary terminations of employment initiated by the employee. Employees resigning from the Fellowship are requested to provide at least one month's notice to allow for adequate planning and a smooth transition without undue strain on other staff. If covered by health benefits, resigning staff members may be eligible to continue their health insurance under the provisions of COBRA (Consolidated Budget Reconciliation Act of 1985). Accrued, but unused Paid Time Off is paid at the end of employment.

## **8.5 TERMINATION OF EMPLOYMENT**

During the Probationary Period when a mutually beneficial continuing working relationship is being determined employees may be terminated without cause. The Probationary Period is stated in the Letter of Agreement or if not stated in the Letter of Agreement is 180 days from the time of beginning employment. Employees will be notified of termination two weeks prior to their last day of employment.

Prior to any Termination for Cause based on performance, the supervisor shall provide written performance assessment and reasonable opportunity to bring performance levels up to acceptable standards. If advance notification is not possible or appropriate; consideration will be given to paying the employee for two weeks in lieu of notice.

All employees may be subject to layoffs due to declining work loads or financial exigencies. The Minister is not covered under section 8.5

## **9.0 BENEFITS**

UUA benefits plans require that if a benefit (such as health or life insurance) is offered to one employee, it must be offered to all eligible employees.

### **9.1 HEALTH/DENTAL BENEFITS**

UUFB currently participates in the UUA's benefits offerings. Individual benefits for each employee are described in Letters of Agreement, if included. Eligible employees can decline to enroll in the health/dental benefits but will be able to sign up during open enrollment or a qualifying event such as getting married, having a baby or losing health coverage.

For employees working 750 hours or more per year, benefits will start on the first day of work and as per Letter of Agreement. UUFB offers the Health Benefits Fund at the Gold Level [Standard PPO Plan] described in the UUA benefits manual.

UUFB will pay medical insurance premiums at 80% for FTE (Full Time Employee) and 50% for dependents; these will be prorated for employees working from 750 hours to 1500 hours. Above 1500 hours will be considered full time regarding health benefits.

UUFB only pays for Dental Benefits if such benefits are included in the Letter of Agreement. If Dental Benefits are not included in the Letter of Agreement, an employee will be offered the opportunity to enroll in the UUA Dental Benefits program at his/her own expense.

## **9.2 WORKERS' COMPENSATION INSURANCE**

UUFB carries workers' compensation insurance as required by the State of Montana and the Federal Government. It pays for certain medical expenses and provides partial income protection in the event of illness or injury arising out of or in the course of employment. Notification of injury or illness must be made to the UUFB supervisor or board president within one week of its occurrence.

## **9.3 PENSION & RETIREMENT BENEFITS**

UUFB currently participates in the Empower Plan through UUA. The UUA Plan is a qualified multi-employee 401 (a) defined contribution plan with a 401(k) component. All employees who receive an IRS W-2 form and are over 18 years of age are eligible to enroll.

Employee eligibility for employer contributions of up to 10% of gross wages per annum depends on completion of a successful probationary period as per Letter of Agreement and who are working more than 750 hours a year.

Employees working less than 750 hours receiving an IRS W-2 form can authorize elective contributions (pre-tax or Roth) to the retirement program.

### **HOLIDAYS**

Regular full-time employees and part-time employees working greater than 750 hours a year will have 9 holidays off: New Year's Day, Martin Luther King, Jr. Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day and day after, and Christmas Day. An employee who works on a designated holiday with supervisory approval must take an alternate day off during the same pay period. If the holiday falls on a weekend or employee's day off the employee will take either their work day preceding the holiday or their work day following the holiday off.

## **9.4 PAID TIME OFF (in lieu of sick and vacation leave)**

Paid time off does not distinguish between traditional categories of leave, such as medical, vacation, personal, etc.

Accrual starts from day one of employment and can be taken within the probationary period.

Up to 50% of the allotted time can be carried over to the following fiscal year.

Time off is to be approved in advance by the supervisor, with the exception of emergencies, such as medical leave. Nevertheless, all emergency leave should be submitted for approval at the earliest, practical convenience.

PTO (Paid Time Off) can be advanced with supervisory approval after the probationary period.

- A full-time employee earns 160 hours/year (2000 hours of employment)

- ¾-time employee earns 120 hours/year (1500 hours of employment)
- ½-time employee earns 80 hours /year (1000 hours of employment)
- .375-time employee earns 60 hours per year (750 hours of employment)

Carryover of PTO (Paid Time Off): A maximum of 50% of the employees earned hours per year can be carried over so that the maximum an employee can use in one year is all earned hours plus 50% of the previous year's PTO. Time not taken is lost after two years.

## 9.5 OTHER TIME OFF

Unpaid leave and employee's position will be held in accordance with the Federal Law:

Jury Duty: unpaid leave and position held.

Military Reserve Duty: granted time without pay and job held for up to 5 years.

Family, Paternity and Maternity Leave: unpaid leave, position held for 12 weeks.

## 9.6 PROFESSIONAL DEVELOPMENT

This is handled on a year-to-year basis depending on the budget, administrative needs and the approval of the supervisor and the UUFB board. Employees are encouraged to avail themselves of appropriate, applicable professional development opportunities. In the event professional development funds are not fully utilized during the year, the employee can request a reasonable carry-over of funds into the coming year.

# 10 LETTER OF AGREEMENT

All employees will have a Letter of Agreement that describes the duties of the position, hours of work, pay and selected benefits. It will be signed by the employee, supervisor and board president. All Letters of Agreement will specify a probation period, and during the specified period the employee's service with UUFB may be terminated by UUFB or the employee without statement of cause.

**\*\*\* End of UUFB Personnel Manual \*\*\***

## UUFB PERSONNEL MANUAL ACKNOWLEDGMENT

By signing below, I acknowledge that I have received a copy of the Personnel Policy Manual of the Unitarian Universalist Fellowship of Bozeman. I understand that it is my responsibility to read the Manual and to comply with the policies, procedures, practices and rules of the UUFB as outlined therein. Note: A copy of the signed Acknowledgement is retained in the employee's personnel file.

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Signature

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Date

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Printed Name