

Personnel Policy Manual

For

First Unitarian Church, South Bend Indiana
dba Unitarian Universalists South bend

801 East Washington Street
South Bend, IN 46617

Date Adopted: June 29, 2026

TABLE OF CONTENTS

Welcome	4
Congregation Mission and History	4
About this Manual.....	5
Diversity and Inclusion	6
Equal Employment Opportunity	6
Harassment.....	6
Resolution of Employee Complaints	8
Accommodations of Disability	9
Categories of Employment	9
FLSA Definitions.....	10
Work Schedules and Pay	10
Orientation	10
Employment Authorization.....	11
Hours of Work	11
Meal and Break Periods	11
Timekeeping and Overtime.....	11
Pay and Payroll Deductions	12
Corrections of Errors in Pay	12
Personnel Information and Files	12
Policies Applicable to Employment.....	13
Absenteeism and Tardiness.....	13
Professional Attire and Conduct	13
Alcohol and Illegal Drugs	13
Smoking	14
Confidentiality	14
Computers, Internet, Email and Other Resources.....	14
Conflict of Interest/Outside Employment.....	16
Employment of Relatives and Members.....	16
Medical Documentation.....	16
Vehicle Usage and Expense Reimbursement	16
Safety and Accidents.....	17
Personal Property	17
Workplace Threats and Violence.....	17
Inspection Rights	18
Media Inquiries	18
Performance and Conduct Expectations	18
Supervision and Performance Reviews	18
Difficulties on the Job.....	18
Standards of Conduct.....	19
Work and Disciplinary Guidelines.....	19
Separation Pay	20
Resignation/Retirement.....	20
Benefits.....	21
Time Off Policies.....	21

Holidays	21
Vacation	21
Sick Leave.....	22
Personal Days.....	22
Funeral or Bereavement Leave	22
Jury Duty.....	22
Leaves of Absence	23
Family and Medical Leave.....	23
Paid Parental Leave.....	23
Extended Medical Leave.....	24
Military Leave.....	24
Insurance and Employee Benefits.....	25
Health Insurance Benefits	25
Group Dental, Term Life & Long Term Disability Insurance.....	25
Workers' Compensation Insurance.....	26
Retirement Benefits	26

Personnel Manual Acknowledgement

WELCOME

Welcome to the Unitarian Universalists of South Bend. We are glad to have you as a member of our staff and hope you will enjoy working for the congregation and contributing to our liberal religious community.

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

This 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.

If we are without a minister, the Board of Trustees President will be your supervision and first point of contact.

Again, welcome!

CONGREGATION MISSION AND HISTORY

Mission Statement

To further the vision of this church, we strive to:

- Provide a variety of religious education opportunities for all ages.
- Gather regularly for reflection and celebration on Sundays and at other times.
- Create and sustain a loving, caring community.
- Affirm our Unitarian Universalist heritage and identity.
- Provide avenues for working towards the good of the greater community.
- Provide the physical, personnel, and fiscal resources to realize our Vision.

The congregation formed as a fellowship in 1949 and by 1952 had gained enough families (50) to become members of the American Unitarian Association. A charter was issued on February 22, 1952, and a plaque with the names of the original members hangs on the wall in the foyer of the church.

In 2025, after market research and many discussions, the group voted to adopt “Unitarian Universalists of South Bend” as our “doing business as” identity, to acknowledge both the 1961 merger of the two denominations, and those who may be wary of the word “church.”

Today we are a robust community of committed Unitarian Universalists supporting each other and our local community.

ABOUT THIS MANUAL

This Manual has been prepared to help you understand some of the policies and procedures of the First Unitarian Church South Bend, Indiana, dba Unitarian Universalists of South Bend (referred to herein as "Employer" or "Congregation"). 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 or creates an employment agreement, express 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 on an at-will basis unless stated otherwise in a written individual employment agreement signed by the President/Chair of the Congregation's Board or prohibited by law. This means that the employee may terminate the employment relationship at any time, for any reason, with or without notice, and the Congregation retains the same right.

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 or handbooks and 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 officer of the Board. Your comments and suggestions are encouraged.

DIVERSITY AND INCLUSION

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 Congregation 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 adaptable organization, better equipped for the changing world. Our Congregation 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 Congregation 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, gender expression, national origin, age, disability, veteran status, genetic information, or any other classification protected by law. The Congregation may consider religion in the hiring and terms and conditions of employment of certain positions. Any 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, or discrimination; express or implied threats or intimidation intended to prevent or inhibit an individual from reporting harassment, discrimination, or retaliation.

Employees who have questions about discrimination, harassment or retaliation in the workplace, should pose their questions to their Supervisor/Minister, or a Board officer.

If you feel you have seen or been subjected to discrimination in the work place refer to page 5, Resolution of Employee Complaint.

HARASSMENT

Harassment of any kind has no place in the workplace. The Congregation 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 Congregation expects all employees to conduct themselves in a professional manner with concern and respect for their colleagues, congregational members, and others served by the congregation. Similarly, we expect all employees to be free from harassment from congregational 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 Congregation related activity.

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, gender identity or gender expression, such as interfering with an individual's work area,

equipment, or ability to do their job, name-calling, etc.

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.

Employees who have questions about discrimination, harassment or retaliation in the workplace, should pose their questions to their Supervisor/Minister, or a Board officer.

If you feel you have seen or been subjected to harassment in the work place, see the following section.

RESOLUTION OF EMPLOYEE COMPLAINTS

The Congregation takes allegations of discrimination, harassment, and/or retaliation seriously. If you believe you have seen or been subjected to any of these by another employee, a Supervisor/Minister, or any other person encountered in the course of employment, you should take the following steps:

- You should communicate immediately to any one of the following people (your first contact): your supervisor (Minister or Board of Trustees President), the Director of Religious Education, or any member of the Board of Trustees. If you feel in physical danger, please call the police and/or communicate this feeling to your first contact.
- If illegal actions are suspected, or anyone involved has communicated they feel in physical danger, the police will be contacted.
- The first contact will inform a member of the Board of Trustee or the Minister as appropriate. If the complaint involves the Minister, the committee of ministry and the BOT President will be contacted.
- Your complaint will be recorded, even if you withdraw it later.
- You may be asked to put your complaint in writing.
- The BOT may appoint an ad hoc committee to help with this matter. This small group may replace the first contact and you may be asked to interact with them about this complaint.
- You may be asked if you feel safe and willing to discuss this matter with the accused while in the presents of the first contact or the ad hoc committee. The church feels direct communication is the preferred method of resolving a complaint/dispute.

- If direct communication doesn't resolve the issue or if either you or the accused is unwilling to pursue the matter within the church, an investigation will then be initiated and evidence will be gathered. The investigation will normally include an interview of you, the accused, and any relevant witnesses.
- The Board of Trustees President shall then take appropriate action(s) based on all relevant materials. You will be notified that appropriate action has been taken.
- If either you or the alleged person objects to the action, either may seek a review by the Board of Trustees. The resolution recommended by the Board will be binding upon those involved.

Policies such as the following can be found on the church website and may help you understand the ways the church responds to employee and congregant complaints.

- Sexual Harassment
- Disruptive or Inappropriate Behavior
- Code of Ethics for Those Working with Children or Youth

ACCOMMODATIONS OF DISABILITY

The Congregation 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 Congregation will need medical documentation of the disability and of possible accommodations. The Congregation 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 Congregation may also ask to speak to the employee's physician or health care provider to help the Congregation 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 Congregation may also ask the employee to submit to an independent medical or other appropriate examination, at the Congregation's expense.

CATEGORIES OF EMPLOYMENT

Full-Time: An employee who works 40 hours or more per week, for 12 months of continuous service or congregational year, is considered a full-time employee.

Part-Time: An employee who works 10 hours or more per week, but less than 40 hours per week, for 12 months of continuous service, is considered a part-time employee. Part-time employees are eligible for benefits according to the benefit plan descriptions in this

Manual. Any part-time employee who works fewer than 10 hours per week is not eligible for benefits.

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. Regardless of whether an employee is scheduled to work for a limited period of time the employee will be considered “at-will.” Casual/Temporary employees are entitled to benefits consistent with the provisions of benefit plans offered by the Congregation 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. Examples non-exempt positions within this organization are Office Manager and Bookkeeper.

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.

WORK SCHEDULES AND PAY

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. 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.

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.

HOURS OF WORK

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

Staff members may not volunteer their time to the organization doing work covered by their job's description. Your supervisor cannot ask you to work unpaid. You cannot work beyond your scheduled and preapproved hours. This is due to FLSA laws and workers compensation liability.

MEAL AND BREAK PERIODS

Employees are encouraged to take a 10-minute break for each 4-hour work period. Such breaks are paid but may not be accumulated or added to the end of the day to shorten the work day. Employees working more than a 6-hour period are required to take a 30-minute unpaid meal break. The time of meal and break periods will be scheduled at the discretion of the Supervisor/Minister. Employees should not perform any work during their meal period. For non-exempt employees, any time worked during meal breaks is compensable, including time they need to be available for work (e.g., to answer phone or door). As with breaks, the 30-minute unpaid meal period may not be accumulated or used to shorten the work day.

TIMEKEEPING AND OVERTIME

Non-exempt employees must submit a written record of their time worked on a weekly basis, consistent with the recordkeeping provisions of the Fair Labor Standards Act ("FLSA") and state law. The Supervisor/Minister is authorized to approve time sheets. Time sheets must be approved and signed by both the employee and supervisor to receive pay.

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.

PAY AND PAYROLL DEDUCTIONS

The Congregation 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 semi-monthly on the fifteenth and last day of the month. Your pay will be paid by check and available on payday.

CORRECTIONS OF ERRORS IN PAY

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

PERSONNEL INFORMATION AND FILES

It is very important that employees keep up-to-date all the information provided to the Congregation 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 Congregation 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; and
- Any relevant changes in licensing or education.

The Congregation 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 Congregation's representative at a mutually agreed upon time.

POLICIES APPLICABLE TO EMPLOYMENT

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 your work and must be kept to a minimum. Excessive absenteeism or repeated tardiness may result in discipline up to and including termination of employment. As few as three absences without authorization (consecutive or otherwise) during any 12-month period may lead to termination.

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 that time. Any employee who fails to report to work without notice for three or more consecutive days may be considered to have voluntarily terminated employment, effective immediately.

PROFESSIONAL ATTIRE AND CONDUCT

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

ALCOHOL AND ILLEGAL DRUGS

The Congregation 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 Congregation 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 Congregation 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.

SMOKING

The Congregation is a smoke-free workplace. Smoking or vaping is not allowed anywhere on Congregation property, both inside or outside the Congregation building.

CONFIDENTIALITY

Employees may have access to confidential information about the Congregation, 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 Congregation'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.

COMPUTERS, INTERNET, EMAIL AND OTHER RESOURCES

The Congregation 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 Congregation provided technology, use should be reserved for legitimate business use and not for more than incidental personal use.

All communication using tools provided by the Congregation or used for Congregation 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, gender expression, national origin, age, disability or any other classification protected by law;
- transmitting any of the Congregation's confidential or proprietary information, including member/friend data or other such materials.

The Congregation 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 Congregation's computer system are the property of the Congregation and may be reviewed and inspected at the Congregation's discretion.

Any software or other material downloaded onto the Congregation'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 Congregation's computer system.

Artificial Intelligence programs (AI) such as Chat GPT or other applications software that does not state in its privacy policies that it will not utilize the data given to it is considered not a secure program for use with congregants confidential or personal information. Congregant's confidential or personal information will not be given to any AI tool or application that has not been approved in advance by your supervisor/minister.

Only authorized staff members may communicate on the Internet on behalf of the Congregation. Any account established on behalf of the Congregation must be authorized with all access information, including passwords, communicated to and maintained by persons designated by the Board. Employees may not express opinions or personal views that could be construed as being those of the Congregation.

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 Congregation may only be downloaded and used for Congregation related work provided the employee is given express written permission from the Congregation, 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 Congregation access to any personal electronic devices and passwords, to allow the Congregation to retrieve and/or delete all Congregation files and documents from them. In the event that the Congregation does not request such access, then the employee agrees promptly to return, to the extent practicable, and to delete any and all Congregation related documents and copies thereof from any such devices or back ups.¹

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 Congregation. However, the employee must provide the Congregation with immediate notice should a personal device containing Congregation software or files be lost or stolen.

¹ For more information on policy issues related to the use of personal electronic devices for work purposes, go to <https://www.shrm.org/hr-today/news/hr-magazine/pages/0216-byod-policies.aspx>.

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 Congregation'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 Congregation duties; reflect negatively on the Congregation; or tend to increase the Congregation's obligations or costs for benefits such as sick leave or long-term disability benefits.

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

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

As a general policy, employment of members of the congregation will be avoided because a member who becomes staff will necessarily forfeit certain benefits of membership to appropriately perform the staff role. For some positions, hiring a member may add significant enough value to counteract the potential risks associated with employment of a member. Positions open to members of the congregation are so designated by the Board of Trustees. These positions include the Director of Religious Education, and the Child-Care Provider.

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 Congregation with requested documentation, such as evidence of the existence or duration of medically required absence, ability to return to work, etc.

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 Congregation. 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 Congregation will be reimbursed according to the Congregation's expense reimbursement policy.

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 congregation 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.

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 congregation 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.

WORKPLACE THREATS AND VIOLENCE

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

Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts on congregation property may be removed and must remain off congregation property pending the outcome of an investigation. If the Congregation determines that a staff member has violated this policy, the Congregation 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, refer to page 5, Resolution of Employee Complaint for the steps to make a complaint.

INSPECTION RIGHTS

Congregations, like other organizations, are sometimes the victims of theft. The congregation 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 Congregation 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.

MEDIA INQUIRIES

All requests for information on behalf of or regarding the Congregation from newspapers, television, radio, or all other 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?”

PERFORMANCE AND CONDUCT EXPECTATIONS

SUPERVISION AND PERFORMANCE REVIEWS

Supervisors/Ministers assist employees in learning their jobs and identifying priorities and goals. On a regular basis, Supervisors/Ministers usually 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.]

Supervisors must treat those they supervise with dignity.

- Refer to the information on Harassment, Sexual Harassment, and Resolution of Employee Complaints in the Diversity and Inclusion section of this Manual.
- Supervisors/Ministers must not engage in bullying or emotional abuse of colleagues, staff, congregants, or anyone else they serve. This is made explicit in the Unitarian Universalist Ministers Association Guidelines (<https://www.uuma.org/page/guidelines>; see part A of the Addendum, which outlines examples of bullying and emotional abuse.)

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 Congregation will strive to help employees succeed in their work. However, continued employment depends on the Congregation'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 Congregation 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.

STANDARDS OF CONDUCT

The Congregation expects that all employees will conduct themselves in a manner consistent with the highest standards of professional conduct and that is 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 Congregation 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 Congregation's standards, such as violations of Congregation policies, a lack of respect or courtesy to a fellow employee or member, disruptive or disorderly conduct, etc., will not be tolerated and will be grounds for immediate disciplinary action and may result in termination of employment. In addition, any breach of trust or conduct which shows a serious lack of dependability or good judgment, such as theft, falsification of Congregation records, destruction of Congregation property, conflict of interest, insubordination, etc., may be grounds for immediate discipline, up to and including termination from employment.

WORK AND DISCIPLINARY GUIDELINES

Certain guidelines must be observed by all employees to protect the integrity of the congregation. Violations may result in disciplinary measures including verbal warnings, written warnings, or termination.

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 Congregation.
- 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 Congregation property without paying for it or without written permission.
- Reckless, careless or unauthorized use of Congregation property, equipment or materials.
- Improper or profane language.
- Violation of any other Congregation policy or the standards of conduct generally applicable to a professional and respectful workplace.

SEPARATION PAY

Employees terminated in the first three months of employment will not receive severance pay or any other benefit accrual payout.

If an employee's position is terminated for reasons unrelated to work performance or employee conduct, the employee is eligible for 2 weeks of severance pay, calculated as the regularly scheduled hours x the hourly pay rate for non-exempt hourly employees, for each year of employment up to a maximum of 16 weeks.

If employment is ended for poor performance before the second anniversary, the employee will be paid 2 week's severance pay, calculated in the same manner. If the employee has completed two years or more then they shall receive one additional week of severance for each year of service up to 6 weeks. If an employee is dismissed for serious misconduct, no severance is paid and all benefits cease at the time of dismissal. Accrued, unused vacation will be paid.

RESIGNATION/RETIREMENT

Resignations and Retirements are voluntary terminations of employment initiated by the employee. Employees resigning from the Congregation 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 vacation time is paid at the end of employment. Sick leave and personal time are not subject to payment at the end of employment.

BENEFITS

TIME OFF POLICIES

HOLIDAYS

The following are holidays for which an employee is paid:

New Year's Day	Fourth of July
Martin Luther King Jr. Day	Labor Day
Memorial Day	Thanksgiving Day
Juneteenth	Christmas Day

If a paid holiday falls on a weekend, the workday closest to the holiday will be a paid holiday.

Employees regularly scheduled to work at least 20 hours or more per week are eligible for holiday pay if they would normally be scheduled to work that day. If eligible employees are required to work on a holiday, they generally will be granted another day off. Eligible part-time employees only receive holiday pay if they are scheduled to work on a holiday and are paid for the number of hours they are normally scheduled to work that day.

VACATION

The Congregation grants paid vacation to regular employees proportional to the number of hours worked as stated in their job description. Regular employees accrue vacation time on a monthly basis and can use it as it is earned. No more than five vacation days can be carried over to the next year. Earned and unused vacation within the final year will be paid at separation. Accrued vacation time may be used for an approved leave of absence. The rate of accrual is based on the following chart.

Length of Service	Annual Amount of Vacation
0-5 years	2 x the employee's regularly scheduled weekly hours per their job description
5+ years	3 x the employee's regularly scheduled weekly hours per their job description

Vacation accrues each month. Increases in vacation accrual rate will be made on the first day of the month following the anniversary date of the year in which an employee completes their 5th or 10th year of employment.

Vacation time must be requested in advance and can only be taken with the approval of the Supervisor/Minister. In the event of conflicting vacations requests, vacation generally will be granted in the order the requests are received, in accordance with length of service and consistent with workload requirements.

SICK LEAVE

All employees are eligible for Sick Leave. Sick leave is earned upon hire. Sick leave is earned in 1 hour increments proportional to the employee's regular weekly number of hours stated in their job description. The rate of accrual is defined in the following chart. There is no accrual limitation, but the unused hours will not be paid upon termination of employment.

Weekly Regular Hours, per job description	Monthly Amount of Sick Leave Accrued
31- 40 hours	4 hours
21-30 hours	3 hours
11-20 hours	2 hours
1-10 hours	1 hour

Sick leave may be used in the event the employee is unable to work due to the employee's own or an immediate family member's illness, injury or other medical condition. While employees are encouraged to schedule appointments outside of work time as much as possible, sick leave may be used for routine dental or medical appointments for the employee or for the employee's child, spouse, parent or parent of spouse. Accrued sick leave can be used for an approved leave of absence, such as bereavement.

Employees must notify their Supervisor/Ministers before their starting time if they are ill and unable to come to work. Employees may be required to provide a physician's statement regarding their medical condition.

PERSONAL DAYS

Employees are credited with Personal Leave at the beginning of each calendar year. One hour of Personal Leave annually is granted for each hour scheduled to work weekly up to 40 hours. Personal Leave is not an entitlement; it is available to employees only when the reason justifies its use. Employees are expected to take care of their personal business on their own time whenever possible. Employees may request Personal Leave for critical personal, house/apartment, and family matters. Personal Leave must be approved in advance by the employee's Supervisor/Minister. Unused Personal Leave does not carryover at the end of the year, and is not paid out at termination of employment.

FUNERAL OR BEREAVEMENT LEAVE

A regular employee will be granted up to 10 days of consecutive work days for bereavement leave to attend to arrangements and to take care of matters attendant to the death in the event of a death of an immediate family member (spouse/partner, child, parent), up to 5 work days for death of a member of the extended family (siblings, inlaws), or 1 work day for other relatives (aunts/uncles, neices/nephews). Additional time may be requested from your Supervisor/Minister.

JURY DUTY

The Congregation recognizes jury duty as a civic and community obligation and duty of a citizen.

While you are serving on a jury, you will receive your regular paycheck with no loss of regular pay for up to 30 days as long as you provide your Supervisor/Minister with copies of court documents affirming the facts concerning your service on a jury. If you receive pay from the court, you will be required to advise your Supervisor/Minister and arrange to turn the amount you receive over to the Congregation.

You are expected to keep your Supervisor/Minister informed of your service as a juror so plans can be made to provide continued coverage of your position during your absence. On any day or half-day you are not required to serve, you are expected to return to work.

LEAVES OF ABSENCE

From time to time, employees may need to have time away from work in order to address certain urgent issues. During such leaves, an employee may use their accrued sick/vacation and personal time and any applicable insurance coverage. When possible, such leaves must be requested in advance in writing and require the approval of the employee's Supervisor/Minister. The exact nature of the leave and its anticipated length must be included in the written request. Employees are expected to return to work upon the expiration of the leave as granted. If prevented from returning as expected, the employee must immediately notify their Supervisor/Ministers.

FAMILY AND MEDICAL LEAVE

Consistent with UU Values, the Congregation voluntarily provides certain aspects of the Family Medical Leave Act ("FMLA"), which allows an employee after 12 months of employment to take up to 12 weeks of unpaid leave due to the employee's own serious health condition, for the birth, adoption or placement for foster care of a child or to care for a family member (child, spouse, or parent) with a serious health condition. Up to the conclusion of this leave period, an employee generally has the right to return to the same position. This leave may be taken all at once or intermittently, depending on the circumstances. Medical certification is required.

All employees who take family leave must give thirty days' notice, or in case of unforeseen circumstances, as much notice as possible to their Supervisor/Minister. All benefits continue as usual during paid periods of family leave covered under sick leave, parental leave, and long term sick leave policies discussed elsewhere in the Manual. During unpaid periods of leave, no time off with pay benefits will accrue and no contributions will be made to any retirement or insurance plans. The employee is responsible for paying the entire monthly premiums for health, dental, life, and long-term disability insurance coverages.

PAID PARENTAL LEAVE

After six (6) months, employees who work 1,000 or more hours per year and who become natural or adoptive parents are eligible for up to 12 weeks of paid parental leave. Parental leave must begin within six weeks of the birth or adoption. The rate of pay for weeks of paid parental leave is based on wages for the employee's regularly-scheduled workweek. Rather than taking twelve consecutive weeks of leave, the equivalent number of days may be spread out over up to a year, at the discretion of the Supervisor/Minister. Such intermittent parental leave must be used within one

year of birth, placement, or whenever the leave begins, whichever is first. Parental Leave benefits apply only to adoptions in which the child is new to the parent(s).

Employees who know they will be taking Parental Leave are asked to give their Supervisor/Minister as much notice as possible, but at least 30 days' notice of the anticipated departure date and whether they intend to return to employment.

EXTENDED MEDICAL LEAVE²

Employees, who work a minimum of 10 hours per week, have been diagnosed with a serious illness or disabling condition by a physician and have exhausted their vacation, sick and personal leave benefits, may be paid extended sick benefits at 75 percent of their regular pay until the earlier of release to return to work by the physician, approval for long-term disability payments, or 90 days whichever occurs first. Vacation and other time off with pay benefits do not accrue during this period. Extended medical leave goes into effect after all other leave (sick and vacation) has been used.

The Congregation also reserves the right to request a second opinion from a physician chosen by the Congregation on any medical leave of absence. If an employee is covered by the Congregation's health insurance, the Congregation portion of the health insurance premium will continue to be paid by the Employer during the unpaid medical leave. The Congregation will also continue to pay the premium for long-term disability, life insurance, and dental insurance.

MILITARY LEAVE³

Employees who are members of the uniformed services of the United States (including the National Guard or other reserve unit) will be granted paid and unpaid leaves of absence in accordance with state or federal law to perform military duties on a voluntary or involuntary basis. Requests for military leave of absence must be made in writing and should include verification of the duty call from military authority, the date the leave is to commence, and the expected date of return.

Employees may choose to use any accumulated vacation time or professional development time for all or part of the period of military service. Leaves of absence in excess of any available vacation or professional development time will be without pay. In accordance with applicable law, eligible employees will be reinstated to the same job upon returning from an authorized military leave of absence.

² **Extended Medical Leave:** While providing an extended medical leave is consistent with UU principles, this policy provides pay to bridge the period between the end of an employee's vacation and sick time and the beginning of long term disability insurance.

³ **National Guard/Reserve Service:** For more information, see the "Guidelines for Reserve and Guard Chaplain Support" at: <https://www.uua.org/sites/live-new.uua.org/files/uua-approved-reserve-guidelines-20160616.pdf>.

INSURANCE AND RETIREMENT EMPLOYEE BENEFITS

The benefits outlined in this Manual represent significant additional compensation to eligible employees. Outlined below is a brief summary of the types of employee benefits currently available through the Congregation. These benefits are subject to change at any time at the discretion of Congregation. In the event of any discrepancy between the benefits outlined below and the Summary Plan Description (“SPD”) or Plan documents, those documents will govern. Any questions about employee benefits should be directed to the Congregation administrator or Minister.

HEALTH INSURANCE BENEFITS

Employees who are expected to work at least 1000 hours per year may enroll in the group health insurance plan sponsored by the congregation. The Congregation currently pays 80% of the premium for full-time employees for the standard PPO plan offered by the UUA. Part-time staff working 1000 hours or more receive a pro-rated payment of the premium toward coverage of health insurance benefits. Eligible employee dependents may also be enrolled and the Employer pays 50% of the additional premium for dependents, again pro-rated for part-time staff according to the following schedule:

2000 hours per year or more	80% of employee/50% of dependent premium
1500 hours per year or more	60% of employee/37.5% of dependent premium
1000 hours per year or more	40% of employee/25% of dependent premium

Employees will be required to make their required contributions by payroll deduction or timely payment as appropriate. Consistent with federal law, if an employee has health insurance through another qualified group plan (i.e. spouse’s employer plan), the congregation will reimburse the incremental cost of the employee’s coverage up to the value of the health benefit the employee qualifies for in the above chart. The reimbursed amount is calculated as the difference between the cost of individual coverage and the cost of employee + spouse coverage in the other plan.

Further information concerning the UUA health plan may be obtained from the Supervisor/Minister or by going to <https://www.uua.org/finance/compensation/health>.

GROUP DENTAL, TERM LIFE, AND LONG TERM DISABILITY INSURANCE

Employees who are expected to work 1000 hours per year are enrolled in term life insurance and long-term disability insurance through the group plan sponsored by the UUA. The congregation pays 100% of the cost of long-term disability insurance and term life insurance. Employees who work 1000 hours per year may also enroll in group dental insurance. The congregation pays the premium cost for dental coverage according to the same schedule as health insurance (see table above). Employees will be required to make their required contribution. Further information concerning these policies is available from the Supervisor/Minister or by going to <https://www.uua.org/finance/compensation/uua-insurance-plans>.

WORKERS' COMPENSATION INSURANCE

The Congregation carries workers' compensation insurance that 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.

All on-the-job injuries or illnesses, regardless of severity, should be reported immediately to the employee's Supervisor/Minister. Employees may be required to provide a written report on the illness or accident and a physician's statement in order to receive worker's compensation benefits, or to return to work.

RETIREMENT BENEFITS

Our Congregation has adopted the Unitarian Universalist Organizations Retirement Plan (UUORP). The plan is an IRS qualified, defined contribution, 401(a)/(k) multiple employer, Church retirement plan designed to help ensure employees of UUA-related organizations have an opportunity to accumulate savings for their retirement years. Every employee has the option to enroll and authorize Elective contributions (pre-tax salary reduction contributions) immediately upon employment, irrespective of hours worked or scheduled.

In addition, in keeping with the Employer's Participation Agreement on file with the UUA Office of Church Staff Finances our Congregation contributes 10% percent of the employee's gross wages for each of our employees who have met the Plan's qualifications.

To be eligible for Employer contributions, the employee must satisfy the Plan's Year of Eligibility Service provision: an individual must have a) worked a minimum of 1,000 hours during a twelve (12) consecutive month period defined in the Plan (each calendar year), or b) have successfully completed a UU Ministerial Internship.

If an employee is employed at more than one participating UU congregation, concurrently or consecutively, their hours of service must be combined to make the initial determination of eligibility to receive Employer's contributions.

Per the governing Plan's provisions, employees who previously received Employer contributions at another UU participating congregation or employer are immediately eligible for Employer contributions at our congregation.

The Congregation provides an enrollment form, a description of the plan, including investment options, to the employee at the start of employment. Each employee should review this material carefully and discuss any questions they may have with their Supervisor/Minister, with the Retirement Plan staff at the UUA, and/or with a trusted personal financial advisor.

When an employee incurs severance from employment, they are ineligible to make or receive contributions.

More information can be found at: <https://www.uua.org/finance/compensation/retirement>.

PERSONNEL MANUAL ACKNOWLEDGMENT

By signing below, I acknowledge that I have received a copy of the Personnel Policy Manual of the Unitarian Universalists of South Bend. I understand that it is my responsibility to read the Manual and to comply with the policies, practices and rules of the Congregation as outlined therein.

Date	Print Name	Signature