

Unitarian Universalist Church of Chattanooga

Administrative Policy Manual

Appendices

March 2018

Updated March 5, 2018 by the Policy Manual Committee

Notes to Users

I. **This current, 2018 revision of the Administrative Policy Manual** includes policies, forms, and job descriptions from: 1) the previous revision of the Manual (approved by the Board of Trustees in September of 2012); and 2) those approved/updated since September of 2012.

Each Policy, form, or job description that remains unchanged from the previous revision is followed by the designation: Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Each policy, form, or job description that has been approved or updated since September of 2012 is followed by a designation indicating the group approving that policy or form and the date of the approval or update. These designations include:

- o Approved by the Board of Trustees on date.
- o Amended on date at Annual Congregational Meeting.
- o Updated by name of group on date.

Appendix 8 provides rationales for policies, forms, and job descriptions created, amended, or updated since the September 2012 revision of the manual.

II. As per both UUCB Bylaws and the Administrative Policy Manual, the Manual will be maintained by the church administrator, at the direction of the Board Secretary. As policies are initiated or updated, the Manual will be updated by either responsible party to include the new material. The source electronic copy of the manual will be maintained by the church administrator and made available through the UUCB website. Hence, from this point on, a continuously updated Administrative Policy Manual will be available on the church's website.

Unitarian Universalist Church of Chattanooga
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Dated:
March 2018

Updated March 5, 2018 by the Policy Manual Committee

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UUCC Affiliation with UU Association of Congregations

Membership Reporting Procedures

Certification of Membership is an annual process whereby member congregations report a current certified membership number, along with statistical and financial information from their previous fiscal year, to the Unitarian Universalist Association (UUA), following the established procedures for this reporting. Submitting this annual report before the deadline is a requirement for congregational membership with the UUA. The deadline for congregations to submit these materials is the end of the business day, February 1. Under no circumstances will the deadline be extended.

The certified number of members and other statistics submitted are used in part to calculate our congregation's Fair Share contribution to the G.I.F.T. (Generously Investing For Tomorrow) program and determines the number of voting delegates we may send to represent the congregation at the annual General Assembly. Fair share dues to the G.I.F.T. program are 7% of actual expenditures for the previous fiscal year, minus the G.I.F.T. payment. This fair share supports both the UUA and the Southern District.

The UUA sends out timely reminders to submit the form with a link to the current form. The Church's Administrative Assistant will notify the Board President, Treasurer, and DRE when s/he receives the first notice. S/he may request help in filling out the form from the above and anyone else familiar with the information requested. When all the statistics are gathered, s/he submits the form electronically. Beginning the process no later than early January is strongly advised.

Updated by the Policy Manual Committee on October 16, 2017.

UCC Employment and Staff Retention

Employment Categories

Church employees fall into two categories established by the federal Fair Labor Standards Act, (FLSA).

Employees defined as Professional, Executive, or Administrative are exempt from overtime pay provisions of the FLSA. All other employees are defined as non-exempt, and receive overtime pay of time and a half for work over 40 hours per week.

Full time employees are scheduled to work 24 or more hours per week. Part time employees are scheduled to work less than 24 hours per week. Temporary employees may be full or part time, but are hired for a limited period of less than 12 months.

Non- Discrimination Policy

The church will hire, recruit, train, assign, promote, and otherwise maintain employees without discrimination on the basis of race, ethnic origin, age, sex, affectional preference, religious or political beliefs, or medical disabilities.

Hiring

Ministers of the Church are hired according to the terms of the Church's Constitution and Bylaws, and UUA and UUMA guidelines. Conditions of employment are defined by individual contract agreements. All candidates who are interviewed for an employment or volunteer position will complete an "Application for Employment," in Appendix 1.

Church openings will be publicized within the local community, or by wider search, as required. Exempt employees will be interviewed and hired by the Board of Trustees in consultation with the minister and the Personnel Committee. Non-exempt employees will be interviewed and hired by the head of the department in which they will work, in consultation with the minister.

When a candidate has been selected for employment, the job will be offered on condition of a problem-free background and reference check, based on the Background Screening policy in this manual. Paperwork for obtaining background screening for the selected applicant will be included with the letter of offer.

Upon successful completion of all pre-hire requirements the hiring individual will provide a letter of employment, giving the job title, duties and responsibilities and agreed wages and benefits, with copy placed in the employee file.

Background Screening

Background checks, paid for by the church, will be part of the hiring process for employees and for Religious Education Program volunteers (see Volunteer's policy).

Prior to offer of employment, the hiring individual will obtain three employment and/or personal references for the candidate under consideration. Further checks may be carried out if they are relevant to the position, such as a credit check for positions handling funds, or criminal check for positions in child care or education. Inexpensive checks (usually less than \$12) can be carried out by firms such as "Hire Right" (<http://www.hireright.com>).

Volunteers who are assigned duties with children or youth in any capacity must have been active in the Church for at least six months. These volunteers will also pass a background screening before

undertaking any youth-related duties.

Work Time and Pay

The church work week is the seven days and runs from 12:01 AM Saturday to 12 Midnight Friday.

Time worked records will not be kept by exempt employees. Nonexempts scheduled to work more than 30 hours must keep written weekly records, showing time in, time out, and meal breaks.

Employees are paid semi-monthly by check. Deductions from the gross pay amount will be made as required by law or by pre-negotiated agreement with the employee.

Benefits

Unless established contractually, Church employees participate in benefit plans below:

- Employees who are scheduled to work 20 hours per week or more are eligible for health care benefits consisting of employer payment of 50% of the cost of single coverage to a maximum premium cost of \$3,000.
- Employees who are scheduled to work 24 hours per week or more accrue paid leave time of one day per month. Accrued leave time is normally used in the calendar year following its accrual, with time off prorated for the year following hire. It may be carried over to the following year only with approval of the Board of Trustees. Leave time accrued but not used will be paid at termination.
- Unpaid leave time is exceptional and must be approved by the Board of Trustees.

Employee Development

Employees of the Church are encouraged to grow professionally, and the Church will facilitate formal and informal training on the job. Growth opportunities outside, through denominational and professional growth programs, will be supported by the Church as time and budget constraints allow. Such opportunities as arise that require time off from the work schedule, or unbudgeted expense, must be approved by the Board of Trustees.

Job Descriptions

Current job descriptions for each budgeted position are included in this manual as Appendix 2. Before a new position is approved for the budget, a job description must be prepared by the hiring individual and approved by the Board of Trustees.

Performance Evaluations

In advance of the start of annual budget planning or 15 February, whichever comes first, every employee should receive a formal evaluation of performance during the past year, in writing, from the minister as their supervisor and the Vice President who oversees their Ministry area. All discussion will refer to the employee's job description, and the behaviors and outcomes associated with success in each responsibility; attention is particularly given to very strong or weak outcomes and efforts. The employee will also prepare a self-evaluation in writing and all evaluations will be shared and discussed in an evaluative interview. Both evaluations will be signed by the evaluator/s and employee and placed in the employee's file. The evaluations will be used when salary adjustments are determined. The job description that served as basis for the interview should be updated as necessary when the appraisal discussion is complete.

The Director of Religious Education (DRE) will conduct a performance evaluation of the childcare workers each year by 15 February, and include monthly RE attendance numbers. DRE will report back to the Board on the process and review.

Employee Problem Resolution

The church bases employment relations on the “Agreement for Fellowship” policy found in the “Relational Documents”; any employee may discuss any problem or concern, or ask any work-relation question, of the supervisor or a member of the Board Personnel Committee. Work-related issues might include the application of a policy or procedure that seems detrimental to work, treatment that seems unfair, discriminatory or harassing behavior, difficulties with administration of benefits, or disciplinary actions which the employee deems unjustified.

These employment problems should be discussed by the concerned employee with the supervisor. If the supervisor is involved in the problem, or does not decide things satisfactorily, the employee should bring the difficulty to a member of the Board Personnel Committee. If the employee is not given a satisfactory reply within five days of the meeting with the Personnel Committee Trustee, the issue will be brought to the full board in an investigatory meeting with the employee, who may bring advocates or witnesses if required. The Board will advise the employee of the outcome of the investigatory meeting within 10 days, and the decision of the board will be final.

Termination of Employment

Employees should give two weeks’ notice of their intent to resign their positions. Vacation accrued but unused will be paid at termination. References will be prepared by and released at the discretion of the Board Personnel committee.

Involuntary termination will be at the discretion of the Board of Trustees, after suitable investigation into the reasons for separation. Generally, conduct which may be disruptive, unproductive, unethical, dishonest, or illegal will not be tolerated.

An Exit Interview should be conducted by a member of the Board.

Volunteers

Volunteers who are assigned duties with children or youth in any capacity must have been active in the Church for at least six months. These volunteers will also pass a background screening before undertaking any youth related duties. Candidates who are interviewed for a volunteer position must complete an “Application for Employment or Volunteer Position,” in Appendix 1.

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

UUCC Permission for Outside Celebrants for Church Ceremonies

Outside celebrants may, for certain religious occasions such as weddings, holy unions, christenings or baby dedications, funerals or memorial services, be invited to lead ceremonies. The celebrant must meet with the church minister prior to the ceremony and discuss conforming to church standards for religious ceremonies. If the church has no minister at the time of the ceremony, the celebrant will meet with the president of the board. When these standards are accepted and agreed to, the ceremony may be planned, and must include a written note in the program, or if no program, an announcement thanking the church for the use of the building and noting the religious affiliation of the celebrant. Responsibility for making church members and outside renters aware of this policy lies with the church administrator or Chair of the Building & Facilities Committee.

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Finance and Accounting

Resources Ministry

The Resources Ministry composition and responsibilities are outlined in Article VI of the UUC Bylaws.

In addition to the finance and accounting processes, the Resources Ministry will be responsible for obtaining insurance required for church operations. The insurance arrangements should be audited and updated every five years.

UUC Endowment Committee Charter

Purpose

The purpose of the Endowment is to help secure, strengthen, and extend the long-term survival and mission of the Unitarian Universalist Church of Chattanooga (UUC). The Endowment serves as an emergency cushion in case of events that could not reasonably anticipated and budgeted and that present a severe financial hardship to the congregation. The Endowment may also serve to extend and strengthen the reach of Unitarian Universalism in the community.

Structure Within the UUC

The Endowment Committee is part of the Ways and Means Council (or successor bodies). However, decisions regarding investments and the disbursement of funds are made at the discretion of the Committee, subject to the provisions outlined below, and not the Board of Trustees of the UUC. A member of the Endowment Committee will serve as a member of the Ways and Means Council and its subordinate Finance Committee and represent the Endowment Committee at meetings of the aforementioned.

Committee Membership

The Endowment Committee will consist of three members appointed by the Board of Trustees. Committee members will serve for terms of five (5) years. (At inception, the committee member will serve staggered terms of two (2) years, four (4) years, and five (5) years. The Committee members will decide among themselves who will serve in the different terms of office.) The Committee shall select its Chairperson.

The minister and the president of the board or another member of the board designated by the president shall serve as advisory members of the committee.

Investment Objectives

The Endowment Committee will follow a long-term investment perspective, with the following objectives in order of priority.

The primary objective of the Endowment is the preservation of capital from the gifts made to the Endowment. While the Endowment Committee may invest the funds in risk-bearing instruments, the investment parameters should be constructed in a manner intended to emphasize the preservation of capital.

The secondary objective of the Endowment is the creation of investment income from socially responsible investments. It is explicitly acknowledged that such investments when made in the form of mutual fund investment may lag the overall financial market peer groupings. However, it is recognized that a Church has a responsibility to make socially responsible investments. The Committee shall strive to find socially

responsible investment vehicles that present the greatest potential return with the smallest level of risk.

The tertiary objective of the endowment is the growth of capital. The investment parameters should be constructed in a manner intended to require a level of growth investing. However, these parameters should impose limits on the types of growth investments that can be made to minimize the risk of such investments as much as possible.

In a time of severe financial crisis, the ranking of these objectives may be rearranged to better suit the needs of the church.

Investment Parameters

The Endowment Committee may make investments subject to the guidelines appearing below. It should be noted that, when applicable, the Committee may make such investments either directly in stocks, bonds, certificates of deposit, etc., or in mutual funds matching the investment type specified. It must be acknowledged that, in terms of adverse market conditions, the Endowment investments may incur short-term losses.

Cash

Between 0 – 15 percent of the assets of the Endowment may be placed in cash or cash equivalents such as certificates of deposit or money market funds.

Debt Securities

Between 40 – 60 percent of the assets of the Endowment must be placed in debt securities. Such securities may take the form of government bonds (federal, state, or municipal) or investment-grade corporate bonds.

Socially Responsible Investments

Between 30 – 40 percent of the assets of the Endowment must be placed in equity securities (stocks) of corporations that are socially responsible in that they do not damage the environment, make harmful products such as tobacco products, weapons, alcohol, or have a record of unfair labor practices, (either in this country or abroad), etc. The committee reserves the right to expand or contract these characterizations of a socially responsible corporation.

Growth Investments

Between 15 – 30 percent of the assets of the fund may be placed in equity investments that should bring a maximum return on capital. In addition to stocks deemed likely to have high future growth, the Endowment Committee may wish to invest in index funds, international funds, or similar investments designed to bring more diversity to the investment portfolio mix. However, the Endowment Committee should limit or prohibit exposure to sector funds (e.g., commodities, metals, health care, retail) as these investments do not provide sufficient diversity, with the exception of real estate investment trusts (REITs).

Restricted Gifts

The Endowment Committee may also invest restricted gifts made to the UCC, according to the provisions of the stated restrictions. Restricted gifts cannot be commingled with any other Endowment investments. Disbursement of monies from restricted funds will be governed by any stated restrictions on such disbursements.

Restricted gifts must be reported separately from the remainder of the Endowment Assets. Restricted gift investments will not be considered when calculating the portfolio mix.

Investment Advisor / Broker

The Endowment Committee may, at its discretion, retain the services of an investment advisor/broker to advise on specific types of investments and/or broker the purchase of securities and mutual funds. The Committee shall attempt to keep any fees associated with this service to a minimum. Such fees, if applicable, will be paid by the Endowment.

Disbursement of Funds

Except in the event of a financial emergency for the UUCC, the Endowment Committee may only disburse funds representing investment gains of the Endowment.

Record Keeping Requirements

The Endowment Committee will maintain records on the investment and gift history of the Endowment. As gifts are made to the Endowment, the gifts shall be recorded and acknowledged by a member of the Committee or of the Board of Trustees. It is of paramount importance to be able to measure the amount of the Endowment that represents gift amounts and investment gains or losses.

Meeting Requirements

The Endowment Committee will meet at least once per quarter during the course of the UUCC's fiscal year.

Reporting Requirements

The Endowment Committee will provide brief reports to the Ways and Means Council once per quarter during the course of the church fiscal year. An annual report will be prepared for inclusion in the materials presented at the congregation's Annual Meeting.

Approved June 2005 (Amended at 2015 Annual Congregational Meeting)

Endowment Fund Distribution Policy

UUCC Endowment Fund Disbursement Policy

The Unitarian Universalist Church of Chattanooga (UUCC) Endowment Fund was established in November 2003 and, since June 2005, has operated under a Charter approved by the congregation. The Charter states that the purpose of the Fund “... is to help secure, strengthen, and extend the long-term survival and mission of UUCC.” The Charter also states that the Fund “... serves as an emergency cushion in case of events that could not be reasonably anticipated and budgeted and that present a severe financial hardship to the congregation.” The Charter establishes an Endowment Committee, appointed by the UUCC Board of Trustees, and gives that Committee the authority to make decisions regarding investments of and disbursements from Endowment funds.

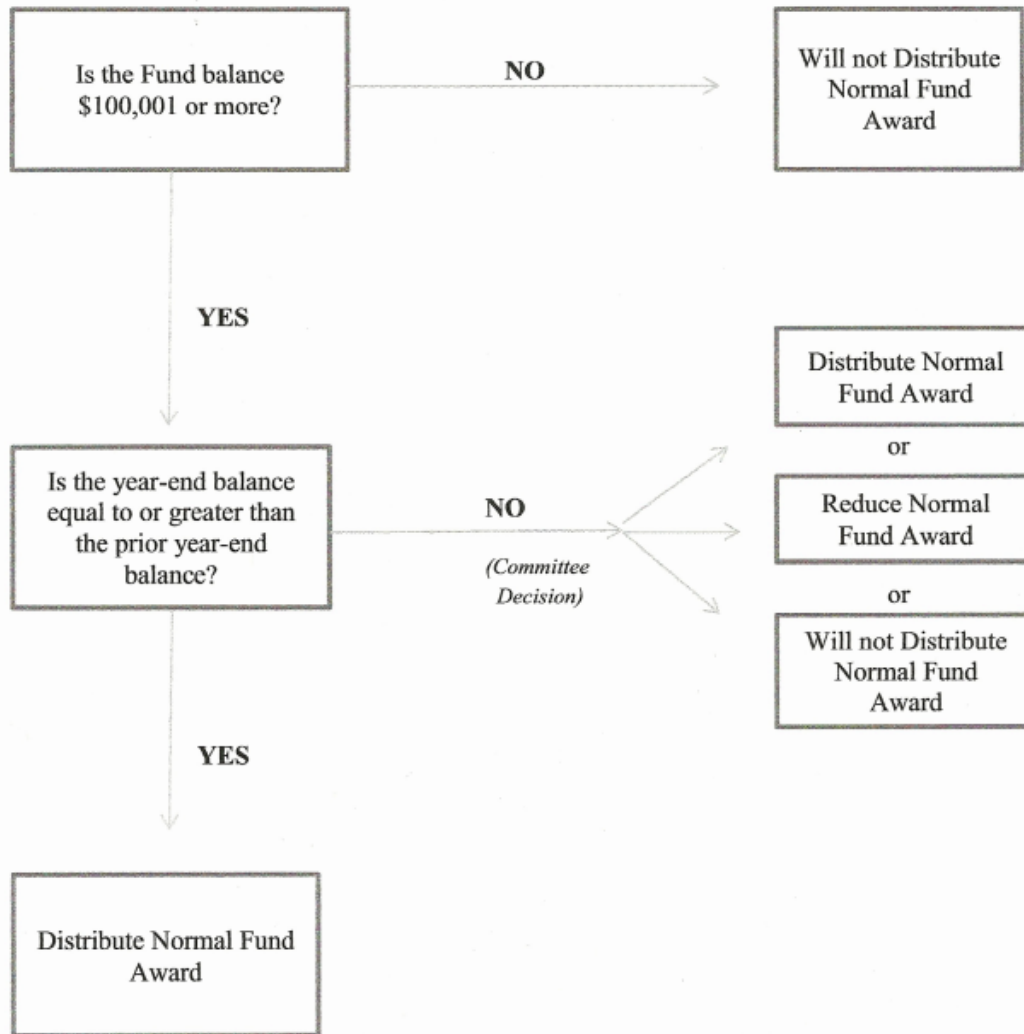
Disbursements from the Fund. The Endowment Fund Charter suggests two types of disbursements of monetary assets from The Fund:

- a) **A Normal Fund Award** results from the Committee’s initiative. Normal Fund Award disbursements shall be made by the Committee to UUCC on behalf of the Fund. Under usual circumstances, the total amount to be disbursed during the current calendar year through Normal Fund Awards shall be no greater than 90% of total Fund investment earnings during the prior calendar year. Principal will not be distributed. The UUCC Treasurer shall be responsible for disbursing the awarded funds according to UUCC Board of Trustees mandate. The Endowment Committee suggests that the Board use Normal Fund Awards to facilitate projects that advance the mission of UUCC but cannot be fully funded from the fiscal year operating budget.
- b) **A Severe Financial Emergency Award** results from a request by the UUCC Board of Trustees. The Board of Trustees would request the Endowment Committee to make a disbursement to the church to enable it to mitigate or overcome an event or situation that poses a severe financial hardship to the congregation (as defined above).

Minimum Fund Balance. The Committee shall make no Normal Fund Award disbursements from The Fund during a calendar year if the year-end fund balance for the prior year was less than \$100,000.00. In such an instance, the Committee’s priority is to grow the Fund. Annual Normal Fund Award distributions to the UUCC Board of Trustees will begin after the Fund balance reaches \$100,001 .00. The minimum fund balance may be changed by the Endowment Committee, depending on the investment environment and financial emergency circumstances.

Exception due to Unusual Circumstances. The existence of usual circumstances presumes annual growth in the Fund from some combination of donations, investment earnings and other revenues. However, in some years, any combination of Fund investment losses and/or disbursements may result in year-end balances that are lower than previous year-end balances. In such years, the Endowment Committee may decide to make a reduced distribution, or even no distribution at all.

Will the Endowment Fund Distribute a Normal Fund Award in a Given Year?



Approved by the Endowment Committee on November 20, 2017.

Budgeting Procedures and Schedules

Expense Procedures

Requests and Approvals

For budgeted expenses, requests for expenditures will be approved by the appropriate council chair or officer.

Reimbursing Guest Speakers and Performers

With prior expense agreement:

When a guest speaker or performer has agreed in advance to a stipend, a check will be cut and signed for the agreed amount in advance of the event. The event liaison to the guest will pick up the check for delivery to the guest on completion of the event.

With no prior expense agreement:

When the amount to reimburse the guest speaker or performer is unspecified (such as when the amount is dependent on donations at the event) the distributive ratio of the proceeds (i.e. 50% to the guest, 50% to the church operating budget) will be determined before the event and approved by the Board of Trustees. The guest will be advised that a check will be cut and mailed within five business days of the event.

Temporarily Restricted Accounts

Temporarily restricted accounts are accounts outside of the operating budget that have been accrued from donations or fundraising events. In addition, surplus funds may be transferred from the operating budget into one or more temporary restricted accounts at the end of a fiscal year, by approval of the Finance Committee with agreement of the Trustees. Donations carrying use-restrictions will also be kept in restricted accounts.

Releasing Restricted Funds

Application for release of restricted funds is in Appendix 4 of this manual. An affirmative vote of the board is required for funds to be released and checks to be written from a temporarily restricted account.

The Board of Trustees may give blanket approval for multiple expenditures from any temporarily restricted account, or may set a limit on the funds approved for any project. When blanket approval is given, individual checks may be written without additional authorization up to the expenditure limit set by the board.

Requests for approval for release of funds from a temporarily restricted account may be submitted to the board President by a staff member, a board member, the Minister, the Bookkeeper, or the Committee Chair involved with the proposed expenditure. If no board meeting is scheduled before the release of funds is required, an e-mail vote may be taken by the President of the board. If the President is unavailable, the President-Elect, the Vice President for Resources (language changed 10/16/17 and added to manual on 10/17/17), or the Treasurer may call for the e-mail vote. The form for requesting funds withdrawal from a temporarily restricted account is found in the appended forms at the end of this manual.

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Benevolence Fund Policy

The Goal of the Benevolence Fund is to provide temporary financial assistance to those members in the congregation in need of help. In meeting this goal, the UCC Benevolence fund will:

1. Fully comply with IRS regulations affecting 501(c)(3) charitable entities.
2. Balance member confidentiality with fiscal control.

The Minister, the church Administrator and the church Treasurer will be in charge of the operations of the fund. The minister will be responsible for handling the checkbook, writing checks and balancing the account. In the minister's absence, the church Treasurer or Board President will oversee these tasks.

Application Process: The church member must complete and sign a brief application form (available following this policy & in appendix 3). The minister must validate that the applicant has been a member for one full year and has not previously received funds in excess of \$250 over the last 12-month period. For any amounts in excess of this, the UCC board President must also approve these unusual situations.

Since the IRS frowns on repeat donations to the same individuals year after year, any individual receiving funds three years in a row will be issued a 1099 form on the third request and will be responsible for paying taxes on those funds.

Up to three times per year, the congregation will be asked to support the Benevolence fund through targeted collections. Monies will be counted and deposited into the church's standard checking account. As needed, the Church Administrator or Bookkeeper will replenish the funds in our Benevolence Fund by writing a check to this account.

When appropriate, the Minister may help direct the applicant to other community resources that provide help with food, clothing, shelter, etc.

Benevolence Fund Application

Date: _____

Congregant's Name: _____

Current Address: _____

Phone contact/email: _____

Short explanation of request for funds:

- 1. Food ()
- 2. Clothing ()
- 3. Housing ()
- 4. Utilities ()
- 5. Car repair ()
- 6. Medical ()
- 7. Other _____
- 8. Amount Requested _____

Short explanation of request for financial help

I do not have the financial capabilities to pay for the above mentioned request for funds.

Applicant Signature: _____

Minister Approval: Yes _____ No _____

Minister's Signature: _____

Approved by the Board of Trustees on June 1, 2017

Expense and Reimbursement Administration

UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA Accountable Reimbursement Plan

The Board of Trustees of the Unitarian Universalist Church of Chattanooga (UUC) establishes this expense reimbursement plan to state clearly the responsibilities of the church and of the ministers, staff, and volunteers claiming reimbursement. This plan is intended to be an Accountable Reimbursement Plan as defined by the IRS so that no part of the reimbursements will be subject to taxation as income to the recipient.

1. Adequate accounting for reimbursed expenses. Reimbursements shall be made for any ordinary and necessary business expense if the following conditions are satisfied:
 - a. The expense clearly supports work on behalf of the congregation.
 - b. The amount of the claimed expense is reasonable.
 - c. Each reimbursement claim provides the same kind of documentary evidence as would be required to support a deduction of the expense on the employee's federal tax return, specifically:
 - For transportation, travel, and hosting expenses, provide the amount, date, place, and business purpose;
 - For hosting expenses, provide also the business relationship of the person[s] entertained.
 - d. Reimbursement requests should be submitted to the Church Office for processing within a month of the expenditure. Requests submitted more than 60 days after the expense was incurred will not be approved unless the delay is adequately justified.
 - e. Funds are available in an appropriate budget account at the time of the expense.
2. Qualifying expenses as further detailed in Attachment 1 (following this policy) are listed in (a) through (j) below
 - a. Automobile expenses
 - b. Conference, meeting and travel expenses
 - c. Professional development expenses
 - d. Books, periodicals, audio-visual material and other resources
 - e. Professional association dues
 - f. Clerical gowns, robes, and religious garments
 - g. Entertainment, meals, gifts
 - h. Miscellaneous expenses
 - i. Cell phone, long distance calling and internet expenses
 - j. Equipment or tangible items with initial value greater than \$25
3. Receipts Required: Receipts are required for all expenses and must be submitted along with a Request for Reimbursement Form.
4. Request for Reimbursement form (following this policy as attachment 2 & in Appendix 4) must be filled in and signed by the applicant.
 - Requests from the minister and staff must be signed by either the treasurer or the president.
 - Requests from volunteers must be signed by the appropriate vice-president.

5. Excess reimbursements. Any congregation reimbursement that exceeds the amount of business or professional expenses properly accounted for under this plan must be returned to UUCC within 120 days after the associated expenses are paid or incurred by the minister/staff, and shall not be retained by the minister/staff. For example, if an item was purchased and reimbursed and subsequently returned to the store for refund, then the amount refunded shall be returned to the church.
6. Tax reporting. UUCC shall not include in a minister/staff's W-2 form the amount of any business or professional expense properly substantiated and reimbursed according to this plan, and the minister/staff should not report the amount of any such reimbursement as income on Form 1040.
7. Reimbursements to be paid by separate check. Reimbursements shall be paid by separate check drawn from appropriately budgeted funds and not by increasing paychecks by the amount of the business expense.
8. Unused budget. Any portion of the annual budget for professional expense reimbursement that is not used by the end of the fiscal year will be retained by UUCC and will not be distributed to the minister/staff.
9. Retention of records. All receipts and other documentary evidence used by a minister/staff to substantiate business or professional expenses reimbursed under this plan shall be retained by UUCC. It is recommended that ministers/staff keep copies of receipts for their own records.
10. Limitations. Only professional business expenses that are properly substantiated and meet the tax regulations will be considered. If the IRS disallows any expense after an audit, the person claiming the expense bears the tax liability.

Reimbursable Expenses

- a. Automobile expenses for miles driven, tolls and parking in performance of congregation business. Normal commuting costs are not included.
- b. Conference, meeting, and travel expenses with a defined purpose of supporting ministry while in the capacity of minister or employee of UUCC.
- c. Professional development expenses associated with a program, course of study or educational conference to further develop or enhance professional skills.
- d. Books, periodicals, audio-visual material and other resources needed to effectively carry out the particular ministry. This would include the purchase of reference material and/or curricula beyond that budgeted for in other line items.
- e. Professional association dues
- f. Clerical gowns, robes, and religious garments are assumed to have no market value as they are personal to the minister.
- g. Entertainment/Meals/Gifts in service of carrying out the ministry of UUCC

Gifts, which must satisfy the purpose of supporting ministry requirement, are limited to \$25 per person/per year. Entertainment/meals are reimbursable that meet the following IRS requirements:

- Must be an 'ordinary expense' – common and accepted in your profession.
 - Must be a 'necessary expense' – one that is helpful and appropriate for congregation related business (i.e. carrying out our ministry).
 - Must meet one of the following two tests:
 1. Directly Related Test – main purpose of entertainment/meal was the active conduct of congregation business/ministry, AND (a) the employee did engage in such business/ministry with the person, AND (b) the employee had more than a general expectation of getting some specific congregation-related benefit, or
 2. Associated Test – entertainment/meal was associated with congregation business/ministry, AND it directly preceded or followed a substantial church business/ministry discussion.
- h. Miscellaneous expenses in service of carrying out the ministry of UUCC, such as office supplies and printing.
 - i. Telephone Expenses, including cell phone, long distance calling and internet expenses in service of carrying out the ministry of UUCC.
 - j. Equipment or tangible items with an initial value greater than \$25 used primarily during time devoted to ministry to enable the employee to properly carry out her or his responsibilities and duties that meets the criteria outlined below.
 - Be for the convenience of the employer, (i.e., used primarily during time devoted to ministry to carry out the employee's responsibilities),
 - Are required as a condition of employment, (i.e., to enable the employee to properly perform his or her duties) and
 - Does not duplicate already provided equipment or tangible items.

It is understood that ownership of the equipment will be retained by UUCC with a declining value pursuant to IRS Publication 946, *How To Depreciate Property*.

If an employee leaves the employ of UGCC during the depreciation period and wishes to take the property, IRS Publication 946 will be applied to determine the remaining value of the purchased item. With the agreement of the Board of Trustees the employee may be offered a choice of two options:

- To reimburse UGCC for the remaining value of the property, or
- To have the remaining value added to the final W-2 for that employee.

If the employee leaves the employ of UGCC after the property has fully depreciated, the Board may offer the property to the employee if there is sufficient reason to believe the congregation will not benefit substantially from continued use of the property.

**UCC REQUEST FOR REIMBURSEMENT
RECEIPTS MUST BE ATTACHED**

we are tax exempt and cannot reimburse you if you elect to pay tax

DATE	VENDOR or PROVIDOR	ITEMS PURCHASED and/or SERVICES PROVIDED with further explanation if required by UCC's Reimbursement Policy	AMOUNT ON RECEIPT

Date submitted _____

Signature _____

Approved by _____

Date approved _____

Approved by Board of Trustees on October 14, 2014

Budget & Spending Policy

1. **BUDGETING.** Each spending area with someone officially in charge of that area should have a list of identifiable spending categories (e.g., YRE—disposable classroom supplies, curriculum material, etc.). The list doesn't have to be highly detailed but should clearly identify the categories and provide appropriate coverage of the area expenditures. Nor would the items have to have dollar amounts. The list should be submitted and approved with yearly budget proposals. The lists would not be presented to the congregation but would be made available to them when the annual budget is approved by them. Thus they would be part of the budget.
2. **REQUESTING FUNDS.** The person in charge of the area (hereafter, the "requestor") could expend funds from her or his budget without higher approval as long as the expense (a) falls into one of the budgeted spending categories and (b) would not cause total FY expenses for the area to exceed budget. If the requestor is not sure if the expense would do either, she or he should seek clarification from the relevant VP. The requestor could be a committee chair, an event chair, a VP, or staff member.
3. **UNBUDGETED EXPENDITURES.** If either (a) or (b) in Paragraph 2 above is not true, the requestor will need to fill out a request form, Request for Unbudgeted Expenditure (RUE, following this policy and in Appendix 4). If the request is for funds for an unscheduled event, its income should cover its expenses to the extent possible.
4. **APPROVAL.** After it is determined that an unbudgeted expenditure request needs to be made, the requestor should fill out the RUE form, and PIC if necessary.
 - A. If the request is within the overall budget total for the relevant council, submit it/them to the appropriate VP. The VP can take one of three actions:
 - i. Approve the expenditure,
 - ii. Reject the expenditure, or
 - iii. Do neither, noting so on the form, and forward the request to the Finance Committee.
 - B. If the VP rejects the request, the requestor may appeal to the Finance Committee, arranging with the Committee's Chair to place the request on the committee agenda.
 - C. If the request exceeds the budget for the Council, the VP should forward the request to the Finance Committee along with a recommendation for approval or disapproval, or no commitment.
 - D. If the request is for expenditure of funds from a Temporarily Restricted account, the RUE should be filled out and submitted directly to the Finance Committee.
 - E. If the request is for an expenditure which is not clearly within a specific Council's budget, the requestor should confer with the Treasurer, another member of the Board, or the church Bookkeeper to identify an area within the budget or Restricted Funds to use. The requestor should then fill out the appropriate form(s) and submit it/them to the Treasurer for approval/disapproval/no recommendation. If the Treasurer approves or has no recommendation, the request should be forwarded to the Finance Committee.
 - F. In all cases, the Finance Committee will forward all requests it approves, or for unusual cases in which it has no recommendation, to the Board of Trustees. Requests which it disapproves may be appealed to the Board by the requestor, who should arrange with the President to have the request placed on the Board's agenda.
5. **TRACKING EXPENDITURES.** Each budget area should receive a budget report at the beginning of the fiscal year or earlier when possible; and a quarterly, or monthly if needed or requested, report of expenses along with other detail as needed. The VPs should review their individual reports and go over them with the persons most directly responsible for each area.

Approved by BOT (date) 10/18/2012

6. **COMMITTEE SPENDING.** Committees may spend their budgeted funds to advance their missions as they see fit.

Committee members may use one of the following methods for spending committee funds:

- Using their own money or credit card and getting reimbursed
- Using the church's credit card
- Having the church issue a check directly

These methods are outlined below.

- A. If committee members use their own money to pay for items or services, they should complete a Request for Reimbursement form (available from the Church Administrator), attach receipts to that form, and return to the Church Administrator.
- B. If a committee member wants to use the church's credit card to pay for items or services, he/she should arrange to pick it up from the Church Administrator at mutual convenience.
 - i. At that time or before, he/she must complete a Credit Card Sign-Out Form (available from the Church Administrator) and give the form to the Church Administrator when picking up the credit card.
 - ii. After using the credit card, he/she must return the credit card to the Church Administrator along with receipts for the items or services.
- C. If committee members want the church to issue a check to an individual, company or organization, they need to complete a Direct Payment Form (following this policy & in Appendix 4) and return the form to the Church Administrator at least a week before they expect the check to be written.

Each form requires both the signature of the member making the request and approval from the committee chair or appropriate Vice President.

Approved by the Board of Trustees on January 17, 2017

Unitarian Universalist Church of Chattanooga
Request for Unbudgeted Expenditure

Do you have questions or need help with this form? Either the Treasurer or Church Administrator will be happy to assist.

Name of Requestor _____ **Date of Request** _____
Amount Requested _____ **Date Funds Needed** _____

Event/Reason- *Please give a brief description of the event or reason for requesting the funds. In other words, how will the funds be used? Also tell us if you need the funds by a specific date.*

Which area does this impact? RE Ways/Means Programs Development
 Other- *Please*

identify _____

If this is for an event, is it already on the church calendar? Yes No Not applicable

Does this request represent "seed money", which you propose to repay? Yes No Not applicable

Signature of requesting person _____

Accounting Fund Information- *If possible, tell us from which account(s) you propose to withdraw the funds? Ask the treasurer or church administrator if you need help.*

Account Name _____ Account No. _____ Current Balance _____

If requesting money from a Temporarily Restricted Account, what is the purpose of the account, as stated by donor or BOT?

Finance Committee Recommendation to the Board of Trustees

Approve Disapprove Date _____
Reason _____

Board of Trustees Final Dispensation
 Approve Disapprove Date _____
**Signature of Board President or
Secretary** _____

Approved by the Board of Trustees on 10/18/2012

**Request for Release of Restricted Funds
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA
Request to Withdraw Funds from a Temporarily Restricted Account**

For assistance with this form, please contact the current Treasurer.

Account name and/or account number: _____

Total amount currently in this account: _____

Amount of withdrawal requested: _____

Reason for withdrawal request: _____

If withdrawal is for an event, is it on the church calendar? Yes _____ No _____

Print name of Requestor; _____

Requestor's church or event position: _____

Signature of Requestor: _____

Date of Request: _____

Updated: 10/16/2017

Approval: Vice President supporting request _____ Date: _____

Approval: Board President or Secretary _____ Date: _____

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Church Credit Card Sign-Out Form
CHURCH CREDIT CARD SIGN-OUT FORM

Date & time signed out: _____

Person signed out to _____

email _____

phone # _____

For purchase of _____

Church accounts(s) to be Charged _____

Authorized by: (VP, Committee Chair, etc) _____

(may be emailed or called in to Church Administrator ahead of time)

Latest Date & Time Credit Card will be Returned to Church Administrator _____

User Agrees to the following terms of use:

I will use the church's credit card only for what's indicated above. I will return the card to the church office on or before the date indicated above.

Signature of user _____

Date & Time Credit Card Returned to Church Office _____

Received by _____

(signature of Church Administrator or authorized representative)

Approved by the Board of Trustees on January 17, 2017.

Direct Payment Form
DIRECT PAYMENT FORM

Pay to _____
(how check should be made out)

Charge to _____
name of committee and/or church account, plus account # if available

For _____

Speaker/Performer/Music
Support of a Cause
(Services (e.g., tech support, cleaning))

OR

Purchase of _____
(Furnishings/Equipment, etc.)

Date submitted _____

Date payment needed _____

Signature of person submitting request _____

Signature of person authorizing request _____

Approved by the Board of Trustees on January 17, 2017

Policy on Soliciting, Selling, and Promotion of Merchandise & Services at Church

Unitarian Universalist Church of Chattanooga limits the selling of items or services at church for personal profit or for the benefit of any group not directly sponsored by the church.

Such selling shall be permitted only in one of the following circumstances:

- In conjunction with church-sponsored Craft Fairs. This Craft Fair is to be held no more than twice during the fiscal year.
- After services by individuals who have been invited to speak or perform. The sale of merchandise promoted by the invited speaker shall be permitted in the Social Area.
- Events put on by members for personal profit must be approved by the Vice President of Resources, and/or the Vice President of Outreach, in consultation with the minister.

Promotion of personal businesses at church should not be overt. This policy is not intended to discourage networking among members, only the explicit advertising, promotion, or sales of services or products. Solicitation of donations will be limited to efforts specifically adopted by the Social Justice Committee and approved by the Vice President of Resources, and/or the Vice President of Outreach, in consultation with the minister as compatible with Internal Revenue Service (IRS) rules and regulations. Solicitation of donations will take place only at a designated table.

Exceptions:

- The solicitation of sales by children for school or group organizations will be allowed as before provided that it is done informally and without display tables unless the individuals go through formal approval process listed above.
- Previously approved delivery of goods requiring minimal space will be allowed provided that such does not become intrusive to overall atmosphere of worship and fellowship on Sunday mornings.

Procedure

- Individuals would contact the Church Administrator about the desire to sell merchandise as set forth above .
- Individuals would be expected to make a donation to the church that corresponds appropriately to the kind of use made of the church.

Individuals wanting to solicit donations for social justice causes will be referred to the chairs of the Social Justice Committee for consideration.

Approved by the Board of Trustees on July 24, 2014

Credit Card Use

The minister and the Office Administrator will each hold a card in their offices, and may use the card as required by budgeted church operations. Additionally, cards may be loaned out when required to the Director, Religious Education, Resources Ministry VP, and members of the board. Persons using the church credit cards will sign them out on a short form developed by the Office Administrator for the purpose (in Appendix 4), showing name, date, purpose of purchase, expected dollar amount, and expected date of return, with signature obtained on sign out, and again on return of the card. Purchase receipts must be handed in along with the card and matched with the bill for filing each month. The full bill will be paid each month.

Under no circumstances may a church credit card be used for personal purchases.

Cash and Check Handling

Cash and check Reimbursements

Expenses paid by members on behalf of the church will be reimbursed. Reimbursement forms are available in the church office, and may be completed and submitted to the administrator. The administrator will have reimbursements approved by the appropriate committee chair, VP, or the treasurer and return a check to the member in the amount of the expenditure.

Approved purchases which are donated to the church are considered “non-posting gifts” and cannot be applied to outstanding pledge balances.

Sales Tax Reimbursements

Churches are exempt from sales tax in the state of Tennessee and the Tennessee Department of Revenue has issued a Sales & Use Tax Certificate of Exemption to the Unitarian Universalist Church of Chattanooga. Merchants need this form to excuse sales tax. Some merchants frequently used by the church have the exemption forms on file. Most, however, do not. So it is best to always take a form with you when purchasing for the church. Forms are available in the bin on the outside of the office door. If someone makes a purchase in the state of Tennessee on behalf of the church and neglects to provide an exemption form, sales tax will be added by the merchant. The church will not reimburse TN sales tax.

The state of Georgia does not exempt churches from sales tax. Accordingly, the church will reimburse Georgia sales tax if buying from a merchant that does not have a Tennessee outlet in or near Chattanooga.

Those who use the church credit card in TN also need to provide merchants with a sales tax exemption form. If no exemption form is used and TN tax is charged, the amount of tax is owed to the church by the purchaser.

Updated by Finance Committee in May of 2016.

Unitarian Universalist Church of Chattanooga

Policy: Reimbursement of Mileage for Volunteers and Staff Committee: Finance

Paid Staff: Mileage for trips related to church business (subject to budget authorization) will be reimbursed either at rate as published in Internal Revenue Service guidelines (currently 56.5 cents per mile) or for actual gasoline expense. The church will require beginning and ending odometer readings (for the flat rate per mile) or gasoline receipts (for actual gasoline expense) as required by IRS guidelines.

Volunteers: Mileage for approved trips related to church business made by volunteers will be reimbursed at:

Option one: Reimbursement at the rate as published in Internal Revenue Service guidelines (currently 14 cents per mile). This requires beginning and ending odometer readings, according to IRS guidelines.

Option two: Reimbursement for actual gasoline expense. Requires beginning and ending gasoline receipts as required per IRS guidelines.

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Income Administration

Sunday Collections

Each Sunday the designated Board Reps are responsible for collecting the offering and placing it on the altar. At the end of the service, a designated member of the Finance Committee takes the collection plates into the Church Office to count. Before counting, s/he finds another member of the congregation, not an Finance Committee member, to assist with the counting. Having two counters is a necessary precaution and protection. Paper money and coin count must be verified by the two individuals who fill in and sign a log form. Checks are given to the Administrative Assistant. If s/he is not there, then the checks should be added to the envelope with the cash which is then slid into the slot on the safe.

Updated by the Policy Manual Committee with approval from the Vice President of Resources on October 16, 2017.

Special Events, Cash and Expense Handling

For events requiring handling of money, the office will, if notified in advance, provide a cash box with appropriate funds, including specific cash denominations, for making change. (The usual amount for this cash box is \$50, but advance notice is always needed to ensure that this amount is available.) The cash box is accessible only to the Minister, the office administrator, the treasurer, and the Vice President of Resources Ministry. After the event, all cash and checks received should be added to the beginning cash amount and locked into a secure place in the office. No expenditures nor reimbursements may be made from the event income, except by the Treasurer. If a vendor requires payment for services from incoming cash, arrangements must be made in advance with the treasurer, and the vendor's bill/receipt submitted in the cash box to account for the missing income.

Church Income from Credit Cards

The church accepts credit card payments through its website for pledges, donations, registrations, etc. Both PayPal and direct credit card payments can be made. In addition, on-site credit card payments for special events can be accommodated with coordination between the Finance Committee and the organizer of the event.

Updated by the Policy Manual Committee with approval from the Vice President of Resources on October 16, 2017.

Communications Administration

The Communications Committee will have responsibility for most internal and external communications of the Church, including content of the church web site, advisories and information to the media, informational listing such as yellow pages, and bulletin boards.

Personal opinions in letters for an Editor, for publication or not, will not be on church letterhead or signed as a representative or member of the UUCC congregation. The exception to this is the minister, who will state that the opinion is his or her own.

Any media marketing policy which the Communications Committee might consider regarding internal and external communication will be reviewed by a qualified consultant or advisor. The committee will first seek such an advisor from among the congregation.

Newsletter

The nUUsletter is distributed electronically every Thursday morning. The deadline for submitting articles to the newsletter is mid-day Tuesday prior to the Thursday distribution.

All submissions should be sent to the newsletter editor at nuus@uucc.org. Electronic submissions are preferred in a Google doc, a standard word processing program, or embedded in the body of an email. Hard copy submissions should be delivered to the church office where they will either be scanned, or typed, as the Administrator has time.

Updated by the Communications Committee with approval of the Vice President of Outreach on December 17, 2017.

Order of Service and Announcements

Each Sunday's Order of Service is prepared and shared with other participants by the person(s) responsible for that service, with assistance from the church administrator. Deadline for submissions is noon on the preceding Thursday.

Updated by the Church Administrator with approval of the Vice President of Outreach on December 17, 2017.

Mailings

Mailings on approved subjects should be prepared by the member or committee involved with the assistance of the administrator. If more than minimal assistance of the church office is required, at least two weeks notice of the mailing particulars is required. The mailing and contact lists of the church are for approved church use only.

Child Care Policy

Welcome to the Unitarian Universalist Church of Chattanooga Nursery!

We recognize that caring for your child so you can attend Sunday programming and worship is an important role that we play in your family's life, and we strive to fulfill that role well. (Should you choose, infants and children are always welcome to remain in the sanctuary with their parent/guardian.)

Our nursery staff provide loving care for our youngest congregants: Infant through age 5, from 9:30 a.m.-12:30 p.m. in the Emerson Room, second door on the left downstairs. We have comfy chairs, age appropriate toys, and a diaper changing station.

We require parents/guardians to sign their child/ren in and out, and let our Nursery staff know how to locate you. When you sign your child in, please indicate where you expect to be in our building, set your cell phone on vibrate, and leave your cell number. If your child becomes upset while in our care, and cannot be comforted, a staff member will contact you.

Please inform our Nursery staff of any special care, including medical needs, allergies, or foods, which your child may require. You may also bring a bottle or sippy cup and snack for your child. Please honor our Well Child Policy by caring for sick children at home to avoid spreading illness.

For safety reasons, we do not allow children above the age of 5 to enter the Nursery on Sunday mornings, so that our staff may maintain their focus on the children in their care at all times.

Please honor our Nursery staff's time by picking up your child promptly after service.

Background Screening

Background checks, paid for by the church, will be part of the hiring process for employees and for Religious Education Program volunteers.

Volunteers who are assigned duties with children or youth in any capacity must have been active in the Church for at least six months. These volunteers will also pass a background screening before undertaking any youth-related duties.

(also see UUCS Policy & Procedures, **Section 2. Employment & Staff Retention**, sub-section **Background Screening**)

Approved by the Board of Trustees on August 18, 2016.

Building and Grounds Administration

Facility Use Policy Unitarian Universalist Church of Chattanooga

This policy is adopted under the authority of the Board of Trustees (Board) of the Unitarian Universalist Church of Chattanooga (UUCC) and is effective until revised.

Adopted by Board of Trustees: August 20, 2015, supersedes September 18, 2014

1. General Policy

- A. UUCC facilities are available for use on a combination of priority and first-come/first-served basis for the benefit of the organization itself and its members, and with certain limitations, for the use of groups and individuals not associated with the church. UUCC recognizes that users may have diverse religious belief systems, views or spirituality, and philosophical approaches, but all user groups and individuals should respect UUCC principles and are expected, as a condition of use, to refrain from denigrating or dishonoring these principles.
- B. Facility use administration is under the direction of the Vice President, Resources, and may be made a responsibility of the Building/Facilities committee or a subcommittee may be formed to assume the obligations, which are:
- To administer these policies as promulgated.
 - To generate user fees and donations consistent with reasonable market value and needs of the church.
 - To arbitrate user conflicts that may arise from time to time.
 - To report on building usage to the Vice President, Resources, at each quarterly council meeting and provide an annual summary for year end.

The committee charged with facility use responsibilities will have decision-making authority in all matters related to the facility use that are not otherwise addressed in the UUCC policies. However, users may appeal decisions of the committee to the board at a regularly scheduled Board meeting.

- C. User groups/individuals are categorized by the purpose of their facility use and by their nature of their affiliation with the church. A user category determines the parameters of facility use. Following this policy, there is a table which defines user categories and list principal parameters of use.
- D. Committees may elect to sponsor various facility uses, thus giving favorable status to certain users. Such sponsorship shall be acknowledged in writing and should be granted only if the function of the requesting group is consistent with that of the committee and the church, and the committee's mission is materially enhanced by enabling the group to enjoy formal sponsorship. Sponsorship may be revoked by the Board upon recommendation by the Facility Use Committee.
- E. The Board recognizes that all facility use results in costs to the church. Thus, parameters of use address expectations regarding financial arrangements for all facility users. Committees considering facility-use sponsorship of a group should also be cognizant of the financial impact of building use.
- F. User fees are shown following this policy and are subject to revision at any time by the Board

upon recommendation by the Facility Use Committee. The committee chair may discount rental fees up to fifty percent from the schedule or waive deposits at her/his discretion, consistent with the financial needs of the church.

- G. UUCC may use its own facilities for fundraising activities at any time, subject to appropriate scheduling through both the Facilities Use Committee and the Fundraising Committee. A fundraiser may be an official function of the church in which case it comes under the purview of the Fundraising Committee, or it may be sponsored and conducted by an entity of the church, such as a standing committee. In the latter case, no user fee is required if the entity conducts the fundraiser within the context of an official function (e.g. A committee holds a fundraising luncheon as part of regular Sunday programming.) If an entity of the church conducts a fundraiser as a separate event, the normal rental fee for the facility is required.
 - H. Individuals and outside groups are not permitted to use the church for activities whose primary purpose is to raise funds or generate profits unless the Board has agreed to cosponsor the event. Full, undiscounted user fees are required for such an event as is a percentage of the revenue generated by the event, the latter to be determined by the Board in negotiations with the requesting group. This policy does not preclude users from collecting donations from attendees at their event in order to defray user events, which include but are not necessarily limited to facility user fees.
 - I. Overnight use of the facilities requires prior Board approval.
 - J. Facilities may not be used for partisan political events, or political party campaign meetings. If facilities are used for promotion of nonpartisan political issues, of social action, or other issues, the user must agree to the provisions of the disclaimer section of building use agreement. (following policy).
 - K. Unitarian Universalist denominational guidelines are to be followed in regard to the presence of appropriate adult supervision while children are present for various types of programs. At a minimum, however, at least two responsible adults must be present through events which involve minors.
- II. Facility Use Priorities
- A. The following list of priorities shall govern allocation of facilities when competing request are received.
 - First priority:** Official UUCC functions, with religious activities having precedence over nonreligious activities.
 - Second priority:** UUCC sponsored functions with religious activities having precedence over nonreligious activities.
 - Third priority:** Individuals or groups which are affiliated with UUCC but which are not sponsored by UUCC, with religious activities having precedence over nonreligious activities.
 - Fourth priority:** Individuals or groups not connected with UUCC, with religious activities having precedence over nonreligious activities.
 - B. The Facility Use Committee has responsibility for arbitrating conflicts that may arise from administration of these priorities.

III. Facility Use Application Procedures

- A. Users and applicants for facility use should follow the procedures outlined below:
1. Users or representatives of using groups obtain financial use agreement from the church administrator who assist applicants in completing this form and determines category of use. The administrator determines availability of facilities and helps to coordinate simultaneous uses, but the administrator is not empowered to make any adjustments to the fee structure, or other parameters. The administrator is the accepting official on behalf of the church for routine use agreements that require no further negotiation. If the applicant desires adjustment of fees or other use arrangements, the application and request is submitted to the Chair of the Facilities Use Committee for further consideration.
 2. If the event is approved by the Facility Use Committee, the user makes required payments (fee and/or deposit) to the church then receives key(s), security system briefing, and temporary arming code if appropriate.
 3. After use of facility, make sure it is restored for the next users in accordance with facility use agreement. The last group to leave the building must make certain that the security system is armed.
 4. The church administrator or another person designated by the Facility Use Committee inspects the facilities that were used and determines if cleaning or repairs must be performed as a result of the use. After all keys are returned and charges are deducted from the deposit, the balance is returned to the user's representative. If the user group fails to arm the security system after a use or if all keys are not returned within ten (10) days after the final use, the user is automatically charged an amount equal to the normal security deposit on the particular facility.

UUCC reserves the right to revoke any space use agreement without cause

Approved by the Board of Trustees on August 20, 2015

General Facility Use Restrictions

Advertising and other publicity should not state or imply church sponsorship, unless there has been BOT approval for the church to co-sponsor the event.

All publicity elements must be submitted to the Communications Committee for approval prior to release. Submissions shall list a contact person (name, phone, email) within the host organization who is responsible for providing information about the event on the request.

The applicant representing the user organization/group assumes responsibility for the group, including observation of these guidelines, and restitution for any loss or damage to church property if the amount exceeds the deposit.

Facility users must provide their own food and beverage. Food and beverage are not to be stored in building.

UUCS is a non-smoking environment. Smoking is prohibited in the building and on the grounds with the exception of the smoking gazebo.

UUCS reserves the right to revoke any space use agreement without cause

**Updated by the Policy Manual Committee with approval from the Vice President of Outreach on
February 22, 2018.**

Building Use Priorities

The Church Office facilitates the rental of church space to groups or individuals both internal and external to the church community. Members are not charged for church rentals when the space is used for “rites of passage” such as weddings, memorial services or baby dedications. Persons outside the church, members and friends of the church may rent the building for personal events such as parties, receptions, lectures, group meetings and performances.

Using groups/individuals are categorized by the purpose of their facility use and by the nature of their affiliation with the church. A user’s category determines the parameters of facility use.

Building Use Priorities

Purpose	Official UUCC Function	UUCC Sponsored Function	UUCC affiliated Individuals, use not sponsored by UUCC	Outside groups, Individuals not connected with UUCC
Religious Service or Ceremony	Donations encouraged, PLATE No Deposit No Disclaimer	Donations encouraged, PLATE No Deposit No Disclaimer	Donation encouraged 50% normal rent Deposit (Waivable)	Advanced fee required Deposit Required Disclaimer required
Non-religious activity	Donations When appropriate No deposit No disclaimer	Donations expected 50% normal rent Deposit (Waivable)	Normal rental fee Deposit required Disclaimer required	Normal rental fee Deposit required Disclaimer required

For official UUCC functions and for UUCC sponsored Function use PIC form. A Facility Use Agreement should be completed for events not sponsored by or connected with the UUCC.

Approved by the Board of Trustees on August 20, 2015

Rental Fee Structure

Room	First 4 hours	Each Additional hour	Deposit Required ***
Livingston Hall & Fellowship Area	\$150	\$25	\$150
Fellowship area only	\$75	\$15	\$75
Kitchen light refreshments	\$25	\$10	\$25
Kitchen full meal	\$50	\$10	\$50
Emerson Chapel (Nursery)	\$50	\$10	\$50
Jefferson Room (Teens)	\$50	\$10	\$50
Thoreau Room (east or west, Medieval)	\$50	\$10	\$50
Thoreau Rm (entire, Medieval)	\$75	\$15	\$75
Fahs Nursery (Sprouts)	\$50	\$10	\$50
Channing Room (Forum)	\$50	\$10	\$50

** Sexton Fee may apply to external groups, see Sexton Fees schedule.

*** Deposit will not be applied to rental or reimbursed until building keys returned.

Approved by the Board of Trustees on August 20, 2015

Disclaimer

It is the policy of the Unitarian Universalist Church of Chattanooga that:

Whenever a NON-CHURCH group or individual uses UUCC facilities for the purpose of promoting political or social action, the following disclaimer shall be signed by them and filed with other forms pertaining to use of the building in the church office before the event takes place.

Furthermore, any announcement of the meeting or event which uses the public media shall not use the name of the church but it may include "the church at 3224 Navajo Drive, Chattanooga."

Disclaimer

"The Unitarian Universalist Church of Chattanooga seeks to make the facilities of the church available to the people of the community as a place they may satisfy their needs for devotion, work, study, discussion, concern with political issues. Or for recreation, with out, however, assuming responsibility for the opinions or activities of the organization or individual not officially connected with the church.

Thus, the Unitarian Universalist Church of Chattanooga is happy to make its facilities available to your group while at the same time it in no sense endorses the program of outside groups utilizing the church facilities."

We have read and understand the above policy and Disclaimer and agree that any announcement of our meeting or event which uses the public media shall not use the name of the church but may include "... The church at 3224 Navajo Drive, Chattanooga". We further agree that the phone number of the church will not be used for information regarding your event.

Organization/Group: _____

Date: _____

Representative: _____

Phone: Home _____ Cell _____

E-Mail Address: _____

UUCC reserves the right to revoke any space use agreement without cause

Approved by the Board of Trustees on August 20, 2015

Sexton

A facility sexton must be appointed for all events, internal or external, who is competent to open the facility, oversee the use of the space, the equipment and the food service items, and competent to ensure cleanup, shut down, lock up and security at event's end. The sexton must also assure that outside groups fulfill the rental agreement performance for cleanup.

For a UUCC event the sexton would ordinarily would be the event chair or his/her designee.

For outside groups a Sexton would be appointed from volunteer congregants, who will be trained and confirmed to be proficient in Sexton duties listed above, and to receive pay under "Sexton Fees", below.

Alternatively, a Sexton may be appointed from the renting group (must also be a member of UUCC for insurance purposes).

The office administrator will insure that this appointee be trained in shutting down lights and appliances, locking up, and security procedures.

The designee will be held accountable and sign a release of UUCC responsibility for event security if so appointed and trained.

The Sexton will ensure that any keys issued to the outside group are submitted back to UUCC at end of event, or advise the office administrator to follow up on securing them.

Sexton Fees

When the UUCC must provide a sexton for an event, a \$50 sexton fee will be charged for outside rentals for the first four hours of required sexton time; the fifth hour and any beyond will be charged at \$15 per hour, with any partial hour longer than 15 minutes being charged as a full hour.

If a renter who is trained and has the written approval by church is on file, performs this work, no sexton fee will apply.

*If the sexton is required to remain after the renters depart to clean or arrange furniture, this additional time will be charged at \$30 per hour, with partial hours counted as above.

Approved by the Board of Trustees on August 20, 2015

Building Security and Keys

Building Security Keys

The Office Administrator is responsible for safekeeping of building keys, distributing them to congregants as required, noting the security code that each recipient will use, and keeping security code numbers and signatures of recipients on file until keys are returned. Recipient will provide signatures on a form for that purpose when issued a key or returning a key.

Board members and committee chairs may be issued keys as required. When key recipients rotate off or resign from leadership positions, they will return keys to the office administrator, who will cancel the code assigned to that key. The key may be reassigned to the next eligible congregant, who will choose a new code.

Keys may also be assigned on an “as needed” basis: Examples include members who have agreed to be sextons and have completed the training for this assignment; members who have response responsibility in case of a security alarm; those who perform either continuing or ad hoc repairs or improvements, or who set up for meetings or rentals.

The office administrator may make routine distribution of keys under the guidelines above. For key requests outside of these guidelines, the administrator should consult with the Minister, the board President, or the VP Resources Ministry.

Alarm System

The security system is maintained by Turner Security Systems. Their phone number is on the handset of the phone just outside the office door. The church personnel to be notified in case of an abnormal situation are also listed with their phone contacts on the base of this phone. There is a police response if the alarm is tripped and no follow-up information is provided to advise of a mistake in procedures. It is therefore urgent that all procedures be known to and followed by all members who have key access to the church.

Entering the Building

Immediately upon entering, go to the security keypad on the wall to determine whether the system is armed:

If armed: A steady, high-pitched tone sounds, there is a small red light shining to the right of the keypad, and the keypad reads: ON: AWAY DISARM NOW. Disarm the system immediately by punching in your security code.

If disarmed: There will be no high-pitched tone sounding. There will be no red light to the right of the keypad, and the keypad will read either: “NOT READY ZONE 006 FOYER MOTION,” or “SYSTEM READY UNITARIAN CHURCH.” If the system is disarmed, do nothing further. Either someone else is in the building, or has left the building without securing it.

Leaving the Building

- Return all areas to clean readiness, especially securing and unplugging any electrical items, such as coffeepots.

- Ensure that no other meetings are still in session, and that all persons have left the building.
- Ensure that all EXIT doors are closed and all lights are off.
- Turn ON the two light switches near the door.
- At the keypad, wait without motion until the system reads “SYSTEM READY UNITARIAN CHURCH” and this message holds steady.
- Enter your code on the keypad. When the keypad says “EXIT NOW” and the high-pitched tone and red light go on, leave the building, making sure the front door is locked by testing both doors behind you. When the doors are definitely secure, you may leave the area.

Abnormal Situations

The system may not arm, in some situations, after procedures for leaving are carried out. If the keypad does not read “EXIT NOW” after your code is entered, check that all emergency exits (two in basement and one in sanctuary) are securely closed and locked. If the system still does not arm, call the numbers on the phone base, for instructions.

Accidental Alarm Tripping

There are several reasons why an alarm may be accidentally tripped, including keying in the code too slowly or erroneously. If the loud horn sounds for this reason, simply re-enter your code.

Once the alarm is tripped, however, Security monitoring is alerted, and must be advised of the error immediately to prevent police notification. Call monitoring service at the number on the phone handset outside the office door. The responder will ask for your code or password, and you should provide it calmly. When service is assured that you are a designated key holder, you may explain that the alarm was tripped in error. When you get off the phone with the service, immediately call the first Church member on the notification list on the phone base to explain the situation, as monitoring service will have alerted this person to the tripped alarm. If the first name is unreachable, try the second, or the third. It is possible that the phone may be in use as part of the automatic security notification system, and if you are unable to use it, use your cell phone or wait for the automatic call to end and make the notification. If there is a delay in reaching monitoring to explain the error, and they have notified the police, you must stay in the building until the police arrive to explain the situation to them.

Approved by the Board of Trustees on August 20, 2015

Facility Use Agreement

Unitarian Universalist Church of Chattanooga

Instructions: Groups or individuals that request use of facilities should determine their category of use (see facility use policy) with the concurrence of the administrator or the Facility Use Committee. Complete this form as appropriate.

Complete Appropriate Line with date(s) and time(s)

1) Request for one time use on _____

2) Request for multiple, limited- term use on _____

3) Request for multiple, indefinite-term use on _____

A deposit of \$_____ will be posted prior to the use of the facilities. Note: The deposit will be forfeited if the alarm is not properly armed or disarmed, or if key(s) not returned.

Note: Committee chairpersons, conveners, etc., are responsible for checking the church calendar if they wish to alter an established meeting schedule!

If reserved space becomes unavailable due to unplanned maintenance, every effort will be made to provide alternate accommodation.

UUCC reserves the right to revoke any space use agreement without cause.

FOR INDIVIDUAL AND External Organizations and Groups:

The Unitarian Universalist Church of Chattanooga grants to _____ (user),
the use of _____ (rooms),
for the purpose of _____ (event),
on the following date(s) _____

The user agrees to pay the sum of \$ _____ to the Unitarian Universalist Church of Chattanooga (UUCC) prior to use of said facilities in appreciation of the privilege of using the facilities specified above. In addition, a deposit of \$ _____ will be posted prior to the use of the facilities and to hold the date(s) and time(s) requested.

.....

.....

IMPORTANT NOTES: *Deposits are promptly returned to the user provided the facilities are left in the same condition and they are found and the key(s) returned to the church office. Any charges incurred for cleaning/repairs will be deducted from deposit.*

External individuals or groups request for rental agreement must also include details of the nature of the group and its activities, and disclosing reason for the request. What type of event is planned, the number of individuals expected, and what amenities additional to the space will be required, such as audio-visual equipment, child care arrangements (which require two adults in supervision).

Complete contact information for person/s responsible for event/s:

If reserved space becomes unavailable due to unplanned maintenance, every effort will be made to provide alternate accommodation.

UUCC reserves the right to revoke any space use agreement without cause.

Non-Rental Church Event

This Form should be used when a church member, committee, or other group wishes to schedule a non-routine event (such as one requiring special arrangements for childcare, a sexton, audio-visual equipment, transportation, and/or income/expenses).

UU Church of Chattanooga
Non-Rental Church Event
Person-in-Charge (PIC) Form

BE SURE TO COMPLETELY FILL OUT (THREE PAGES) AND SIGN:

Thank you for planning a church event! This form is intended to provide information on steps that will lead to a successful event and approval of that event from the church's Board of Trustees. This form must be submitted to the Church Administrator for approval no later than ONE MONTH PRIOR to the event, so there is sufficient time to obtain approval, post it online and print it in the church bulletin. Entries preceded by a * must be completed.

*Name of Event _____

*Date _____ *Starting Time _____
of Event _____ *Ending Time _____

When first submitting this form, if you are unsure of the exact time of day but know the part of the day (i.e. morning, afternoon, evening, morning through early afternoon, etc.) please state this. The BOT will need a specific timeframe when your form is returned to you for either approval or clarification in the event of other approved events on the same day.

*Person in Charge (PIC) _____ *Email _____

*Home Phone _____ * Cell Phone _____

Backup (PIC) _____ Email _____

Home Phone _____ Cell Phone _____

*Event Plan (Purpose of Event)

Before answering the remaining questions, please read the UCC Facility Use Policy (available on the church's website or from the church administrator). Specifically, those sections on: General Policy; Facility Use Priorities, Alcohol Policies and Procedures; as they contain important information for those planning an event.

*Is this event being sponsored by a UCC committee? ___ Yes ___ No

*If yes, the sponsoring committee is _____

If yes, the chair of the sponsoring committee must sign this form below. The chair's signature signifies that the committee is sponsoring this event and approves all details of the event plan presented on this PIC form.

*Does this event impact any other church activities or groups? (Please review the church calendar)
_____Yes _____No

* If yes, please have the persons responsible for these activities or groups sign this form below and indicate whether they support or do not support this event, including all the details of the event plan presented in this PIC form.

For example: A church committee is sponsoring a nonmember to present an evening concert at the church. The committee also wishes this musician to perform during Sunday service. In this case, the Minister and the Director of Music should sign this form below and indicate whether they support or do not support the musician performing during a church service.

*Will event require childcare? _____ *If yes, have you contacted the approved church caregivers and had the expense approved? _____Yes _____No

* Will the event require a sexton (overseer of the maintenance of the church)? _____Yes _____No

*If yes, has the sexton been arranged through the church administrator? _____Yes _____No

*Will you need audiovisual equipment? _____Yes _____No

If yes, describe _____

*Is transportation required? _____Yes _____No If yes, please supply details below.

For a successful and productive event, it is important to remember that the PIC is responsible for full coverage and oversight of the entire event. This includes cleaning and locking the church and providing for the needs of those who are scheduled to attend the event. You will be informed when the proposed event is approved and officially placed on the calendar. We suggest you fill in and submit your reservation as soon as possible. Even as much as one year in advance is not unreasonable.

If you need help answering the following, ask the Treasurer. She/He will be glad to help.

*Are there expenses and/or income involved in this event? _____Yes _____No

*If you checked yes, you must answer the following questions:

*What is your best estimate of the cost for this event? _____

* To what account do you plan to charge the costs? _____

*Is there enough money in that account to readily fund the event? _____Yes _____No
(If you answered no here, you will need to approach the BOT before proceeding)

Please note that an invoice or bill for goods or services will be required for payment directly by the church or receipts or cash register tickets for payment, if reimbursing you.

*Do you require a check for payment of a performer on the day of the event? _____Yes _____No

*Are you anticipating income from the event? _____Yes _____No

*If yes, to what account should this income be entered? _____

Non-Rental Church Event Person-in-Charge (PIC) Form

*If you anticipate income, will it be "in and out" (to cover expenses), sheer profit (no expenses), or a mix of the two (income exceeds expenses)?

_____ In & Out _____ Profit Only _____ Both In & Out and Profit

Signature of PIC (Person in Charge)

Date

Signature of Chair of Sponsoring Committee

Date

Signature(s) of Impacted Church Activities or Groups

Date

Signature of Vice President with Bookkeeping Account Affected by this Activity

Date

If reserved space becomes unavailable due to unplanned maintenance, every effort will be made to provide alternate accommodations.

UUCC reserves the right to revoke any space use agreement without cause

This section is for OFFICE USE only.

Event has been cleared and noted on the church calendar. _____ Yes _____ No, there is a conflict

What budget accounts are involved in this event? _____

Has the PIC been informed? _____ Yes, by (circle one) Phone Person Email _____ No

Has the _____ Minister, _____ BOT, or _____ appropriate Board Member been informed of the event?

Do they need a check on the day of performance? _____ Yes _____ No

Does the event need a Sexton? _____ Yes _____ No Has a sexton been arranged? _____ Yes _____ No

Does the event need a Sound Tech? _____ Yes _____ No Has a tech been arranged? _____ Yes _____ No

Calendar Request for Church Activity

This Form should be used when a church member, committee, or other group wishes to schedule a routine event (such as a committee meeting that requires use of a room or space in the church on a certain date/time but not any out of the ordinary arrangements).

UU Church of Chattanooga Calendar Request for Church Activity

BE SURE TO COMPLETELY FILL OUT AND SIGN:

*Thank you for planning a church activity! This form is intended to provide information needed to place your activity on the Church Calendar. This form must be submitted to the Church Administrator for approval – preferably at least ONE MONTH PRIOR to the event, so there is sufficient time to obtain approval, post it online and print it in the church bulletin. Entries preceded by * must be completed.*

*Name of Activity/Committee _____

*Date of Activity _____ *Starting Time _____
*Ending Time _____

When first submitting this form, if you are unsure of the exact time of day but know the part of day (i.e., morning, afternoon, evening, morning through early afternoon, etc.), please state this. The Administrator will need a specific timeframe when your form is returned to you for either approval or clarification in the event of other approved events on the same day.

If this will be a recurring activity, what is the schedule? (For example, 2nd Thurs of each month)

Request for particular room/space _____

*Will event require childcare? Yes _____ No _____ *If yes, have you contacted the approved church caregivers and had the expense approved? Yes _____ No _____

*Person in Charge (PIC) _____ *Email _____

*Home Phone _____ *Cell Phone _____

Backup PIC _____ Email _____

Home Phone _____ Cell Phone _____

.....
Signature of PIC (Person in Charge) _____ **Date** _____

This section is for OFFICE USE only.

Event has been cleared and noted on the church calendar ___ Yes ___ No, there is a conflict.

Has the PIC been informed ___ No ___ Yes, by (circle one) Phone Person Email

Approved January 28, 2016

UUCC Alcohol Policies and Procedures

1. Tennessee laws concerning age restrictions and prevention of intoxication must be followed.
2. Alcoholic beverages are to be provided only by host group.
3. There is no unattended alcohol allowed at any time. No self-serve.
4. Alcoholic beverages are limited to wine, beer, and champagne.
5. Non-alcoholic beverages must also be served, and displayed attractively and prominently.
6. Food must be served along with alcoholic beverages.
7. Alcohol may not be allowed outside at any time.
8. Alcohol may not be sold. Price of admission or tickets not allowed. Technically this is selling. Donations may be requested.
9. If someone becomes intoxicated, they must leave, do not allow to drive, arrange transportation.
10. Any renter wanting to serve alcohol must have a signed rental agreement. Approval from BOT to serve alcohol, comply with UUCC alcohol policy, as well as state and local laws. If state or local laws require a permit it must be on file at UUCC office one week prior to event.
11. For renters, a designated person is to staff the table at all times. Alcohol is served only by the adult(s) manning the table. No self-serve.
12. For all non-church events, any leftover alcohol must be removed from the premises after the event.

UUCC reserves the right to revoke any space use agreement without cause

Approved by the Board of Trustees on August 20, 2015

Miscellaneous

Child/Youth Care

Unitarian Universalist denominational guidelines are to be followed in regard to the presence of appropriate adult supervision while children are present for various types of programs. At a minimum, however, at least two responsible adults must be present through events which involve minors.

UUCC Permission for Outside Celebrants for Church Ceremonies

Outside celebrants may, for certain religious occasions such as weddings, holy unions, christenings, or baby dedications, funerals, memorial services, be invited to lead ceremonies. The celebrant must meet with the minister prior to the ceremony and discuss conforming to church standards for religious ceremonies. If the church has no minister at the time of the ceremony, the celebrant will meet with the president of the board. When these standards are accepted and agreed to, the ceremony may be planned, and must include a written note in the program, or if no program an announcement thanking the church for the use of the building and noting the religious affiliation of the celebrant. The responsibility for making church members and outside renters aware of this policy lies with the administrator or chair of the building/facilities committee.

Kitchen and Activity Room Use

Kitchen

Kitchen cleanliness is a primary responsibility of any person or group using the kitchen.

- Unused perishable food items will not be stored in the kitchen or refrigerator, but either removed or thrown out. Condiments, and staple food items (spices, sugar, tea, and coffee) may be returned to storage.
- If a staple item is used up, information about requiring a replacement supply must be provided to the office administrator in writing so that more may be supplied immediately.
- Dishes, flatware, glassware, and preparation utensils must be washed by hand or by dishwasher, dried, and returned to the proper storage place.
- All trash/garbage to be removed from building, placed in bin rear of parking lot.
- Recyclables, bag and take with you, do not leave in building.

Activity Rooms

In addition to the responsibility for keeping the kitchen area clean, person using any church room or area for a meeting or event must return all furniture to the original positions, dispose of trash, vacuum as required, and return any materials

Approved by the Board of Trustees on August 20, 2015.

Office Administration

Calendar Maintenance

The office administrator and the Minister must be consulted for approvals when any meetings or events are planned, and after approval, they will add them to the church calendar. Events planned around or during the Sunday service must be cleared through the Board, Worship Committee and Minister before they are calendared. Events are usually calendared on a first-come, first-served, basis.

Bulletin Board

Items may be posted on the church bulletin board only by church staff or Communications Committee members. The board is for:

- Informational and community news items
- News clippings, pamphlets or other church-related items
- External advertising materials may be posted if costs, fees, or other pricing information are not mentioned, and so are for informational value only
- Personal items from individuals regarding services, needs, rentals, etc. are limited to half-page letter paper in size, and must be typed. Business cards may be posted.

All items must be dated and placed in the Bulletin Board folder in the church office. The member who submitted the item must remove it from the board after 30 days.

Office Supplies and Use of Equipment

The church copier may be used, with permission of the office administrator, for necessary church-related business. With sufficient notice (usually 2 weeks) the church administrator can assist with copy projects. Routine, small jobs are charged to the office expense budget line; large projects will be charged to the committee or group requiring the materials.

If the copier should break down during a job, the user will contact the office administrator immediately, at home if required, so that repair may be scheduled. The user should prepare and place a sign advising of the broken condition on the copier before leaving the office.

Religious and Other Literature; Postings and Displays

Unitarian Universalist religious literature will be available to all congregants on a table in the fellowship area. The Membership Chairman is responsible for keeping a sufficient inventory. Literature, CDs, or crafts by guest speakers and musicians may be offered on separate tables after services.

Information posted elsewhere in the church must be cleared by the administrator or minister prior to posting. The glass wall in the foyer area may hold postings of the Adult Religious Growth & Education only. The church doors may hold postings of immediate necessity only: i.e., "Meeting Canceled" or similar. The glass wall in the fellowship area may be used for approved postings of church information, or activity sign-up sheets. Any posting may be removed at any time by the minister or office administrator. Tape may be used for postings on glass areas, but may not be used on painted walls.

Maintaining the Policy Manual

This policy manual is the repository for policies governing operation of the church, and all policies must be approved by the Board of Trustees and/or the congregation to be included as official. The manual will be maintained by the church administrator, at the direction of the Board Secretary. As policies are initiated or updated, the Manual will be updated by either responsible party to include the new material. Pages will be numbered in the Manual style established, and dated in the footer of each page. If a policy affecting one page is revised, the page with the new material will show the month and year of the revision in the footer.

The source electronic copy of the manual is maintained by the church administrator and made available through the UUCC website. A current edition of the Manual will be made available to the Board of Trustees, Minister, and Committee Chairs on appointment to their positions and revisions will be circulated to current manual holders when adopted. Church office holders will hold manuals during the period that they hold office; At the end of the term, all church leaders will return the edition so that old, unrevised manuals are not in circulation.

Church members may obtain a Policy and Procedures Manual on request, and their names will be added to a list of manual holders who will be sent revisions when they are issued.

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

UUCC Policy: Records Retention and Purge Committee: Finance

This policy provides guidelines for the retention and purging of documents, whether paper or electronic, related to church operation. Current paper and all electronic documents will typically be held in the church office. Non-current, but not permanent or ready for purging, paper documents will be held in boxes in the closet immediately to the right of the stairs in the basement. Documents which have reached the end of their retention period will be shredded or permanently removed from the hard drive. The church "archives" will have separate guidelines for maintaining documents pertaining to the history of the church.

Administrative Records Minimum Retention Period

Agenda and Official Minutes of Board Meetings and Committees	Permanent
Articles of Incorporation and By-Laws	Permanent
Authorizations to Perform Background Checks and Results	Seven years
Building Blueprints, Floor Plans and Architectural Drawings	Permanent
Building Use Records	Seven years
Calendars and Scheduling Records	Seven years
Contracts & Leases	While in effect + 7 years
General Correspondence	Seven years
Information on the establishment and implementation of policies and procedures, including manuals	Permanent
Organization Charts	Permanent
Membership Records	Permanent
Personnel Applications/Interviews – Not Hired	Seven years
Personnel Records after Termination	Seven years
Publications	Seven years
Special Programs and Events Schedules and Records	Seven years
Sunday Service Recordings	Seven years

Financial Records Minimum Retention Period

Accounting General Ledger	Seven years
Annual Financial Statements	Permanent
Audits (Inventory)	Seven years
Audits (Financial)	Permanent
Bank Account Records	Seven years
Bank Deposit Slips	Seven years
Bonded Indebtedness Records and Payments	Permanent
Budget Preparation Records and Budget Documents	Seven years
Bank Reconciliations and Bank Statements	Seven years
Cancelled Checks	Seven years
Insurance Policies	Term of Policy + 7 years
Payroll Records	Seven years
Pledging Records	Seven years
Purchasing Records	Seven years
Vouchers of Payments for Reimbursement	Seven years

Approved by the Board of Trustees on May 16, 2013.

Behavioral Policies

Disruptive Behavior Policy

In furtherance of the UUCC goal of maintaining a safe, welcoming, and healthy environment for all members, staff and visitors, the UUCC has adopted a policy for identifying and correcting the behavior of anyone who would disrupt progress toward this goal. The process laid out below should be known to all and followed when occasions arise which appear to interfere with a safe, welcoming and healthy environment.

Disruptive words or actions should be differentiated from personality conflicts or disagreements on facts or opinions, which are treated under the UUCC policies on developing right relations. Behaviors which rise to the level of a disruptive incident would normally be any that affect

- The safety of individuals because of a threat or perceived threat,
- Actual Interference or threat of interference in any church activity,
- Encounters that are abusive, deceitful, or may be perceived to cause current or future members to abandon the church.

Responsibility for interrupting the course of disruptive behavior may be assumed by any congregant, staff member, or visitor who observes an incident. The observer should intervene if there is threatening or abusive activity, to try to escort the victim of bullying or rancor to a safer area. After the incident, the observer should report to any member of the board, in writing, the nature of the incident, giving time, place, and persons involved or witnessing it; the Board President will receive and analyze the report, and if the action is judged to be possibly disruptive, will ask two more members of the board or of active church committees, to join in meeting with the alleged offender. At the meeting, the three will explain the damaging nature of the behavior and its outcomes, and ask for apology, if warranted. They will explain this Disruptive Persons policy, and advise of the escalations it stipulates, as follows:

- The first offense results in the warning now being administered, and guidance in right behavior;
- The second offense results in a severe warning, giving additional guidance, and advising that a third offense, absent mitigating circumstances, will result in severance of the offender's relationship with the UUCC. The committee of three will point out that the board will not decide whether to terminate, but the offender will, himself or herself, determine this through future behavior.
- Report of a third offense will cause the full board to review the case and determine if the third disruption is, effectively, the offender's decision to resign from the church. If so, he or she will be asked for a resignation from the church or be otherwise terminated, and barred from church premises and activities. The Board President and the two other members involved in the case so far will meet the offender and carry out the severance from membership.

If the offender does not accept the final discipline for disruptive behavior, he or she may request a meeting with the full board to review the case. The board will hear the appeal presented by the offender, as well as any supportive persons who speak on his or her behalf, and by vote of a majority will determine whether to readmit the person to membership.

Each meeting should take place within two weeks of learning of the latest disruptive incident. To each meeting, the person accused of disruptive behavior may bring a support person, who may speak in the person's defense. If there are mitigating circumstances learned at any meeting, or a successful defense is presented, the report of the incident will be destroyed and the meeting will not be considered an escalation event. Every meeting must be fully documented by a participant appointed as secretary, and the board must keep this file of the meetings and interactions among the participants throughout the entire process. The file of reports will be considered active for two years, after which if no additional disruptive incidents have taken place, the file will be discarded, and any

new disruptive incident will start the process anew.

Approved by the Board of Trustees on July 18, 2017

Membership Policies

Pathway to Membership Policy

Thank you for your interest in becoming a member of the Unitarian Universalist Church of Chattanooga (UUCC). We hope that the following guidelines help you understand the steps involved in becoming a member.

If you have not been a member of another UU church, completing the following steps will lead to your becoming a Voting Member of the UUCC. According to the church's Bylaws, Voting Members can participate fully in all aspects of church life, including voting at congregational meetings (one month after becoming a Voting Member), serving on the Board of Trustees, and chairing or serving on any church committee.

New to Unitarian Universalism

1. Schedule a meeting with our Minister and discuss with him/her your interest in becoming a church member. He/she can provide an initial overview of the denomination and this church and answer questions you may have about becoming a member.
2. Enroll in and complete the UU101 class that is typically offered twice a year at the church. This three-session class is designed to inform you about the history and theology of the UU denomination, this church's history and processes, and the privileges and obligations of membership in UUCC. We want you to understand what the church stands for and how it functions before deciding to become a member.
3. Commit to actively supporting the UUCC by living the Seven Principles of Unitarian Universalism and by sharing your time, talents, and treasure with your church. In regard to treasure, our Bylaws require an annual financial pledge of record at least equal to but, hopefully, greater than the combined annual dues that the church pays for each member to the Unitarian Universalist Association (the UUA), the Southern Region of the UUA, and the Southeast District of the UUA.
4. Attend the next New Member Sunday, at which time you will sign the Book of Membership and be introduced and welcomed into the congregation.

Previously a Member of Another UU Church

If you have been a member of another UU Church, we invite but do not require you to enroll in and complete the UU101 class. Steps 1, 3, and 4 above are required before you can become a Voting member of the UUCC. If, at any time, you have questions about any aspect of becoming a Voting Member, please contact our Minister or the Chair of the church's Membership Committee.

Approved by Board of Trustees November 20, 2013

Appendices

Appendix 1: Employment or Volunteer Application UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

Application for Employment or Volunteer Position

Personal Information

Name _____ Soc. Security No. ____ - ____ - _____

If school or employment records are under another name, please supply it below for purposes of verifying records: _____

Current Address _____ City _____ State _____ Zip _____

Previous Address _____ City _____ State _____ Zip _____

Mobile Telephone (_____) _____

Home/Office Telephone (_____) _____

Are you legally eligible for employment in the US?

Yes ____ No ____ (Verification required upon employment)

Have you ever been convicted of a felony which has not been annulled, expunged or sealed by a court?

Yes ____ No ____

If YES, please explain: (Age, nature and seriousness of violation and rehabilitation will be taken into account.) _____

Job Information

Position Applied For _____

Wages desired \$ _____

How did you hear of this opening? _____

Date Available _____

Are you related to or acquainted with any employee or member of UUCC?

Yes ____ No ____

If YES, please list name(s): _____

Please list your computer or other office skills and indicate if they are at Excellent, Good or Fair level:

Skill _____ Level _____ Skill _____ Level _____

If applying for Religious Education or Nursery area, please list relevant experience:

Education

Do you have High School diploma or GED? Yes No

College or Vocational School: Degree Degree Date: Major Field School Name Address

Post Graduate: Degree Degree Date: Major Field School Name Address

Professional and Community Interests

For the following questions, do not give any information that Federal, State, or local law restricts employers from obtaining before employment, such as race, color, national origin, citizenship, religion, age, sex, sexual orientation, marital status, or disability. Please list any professional associations to which you belong, certifications, awards or recognition you have received which indicate your preparation for the job for which you are applying:

Please list any civic or community organizations to which you belong or for which you perform services if you consider it helpful to your ability to perform the job for which you are applying:

Employment History Start with your most recent job and please provide all information requested.

Company Address Position Supervisor Email Phone () Dates of Employment: From To Salary : Start \$ Final \$ Reason for Leaving May We Contact? Yes No

Company Address Position Supervisor Email Phone () Dates of Employment: From To Salary : Start \$ Final \$ Reason for Leaving May We Contact? Yes No

Company Address Position Supervisor Email Phone () Dates of Employment: From To Salary : Start \$ Final \$ Reason for Leaving May We Contact? Yes No

Company Address Position Supervisor Email Phone () Dates of Employment: From To Salary : Start \$ Final \$ Reason for Leaving May We Contact? Yes No

Have you ever been discharged or suspended from employment, or left a position while disciplinary charges were pending? Yes No. If YES, please give the employer and describe the circumstances:

Personal References

Please list the names and contacts of three people (not relatives or employers) who have known you for six months or longer who could provide a reference for you:

Name _____ Telephone () _____
 Address _____ Email _____
 Name _____ Telephone () _____
 Address _____ Email _____ Name _____
 _____ Telephone () _____
 Address _____ Email _____

I understand that in all hiring and employment decisions, the UUCC does not discriminate among individuals with regard to race, color, national origin, citizenship, religion, creed, age, sex, sexual orientation, gender identification, marital status, veteran status, medical condition, disability, membership in any labor organization or political affiliation. I understand that if I am employed by the UUCC, I will be required to provide proof of my eligibility to legally work in the United States.

I certify that all responses and information I have provided in this application are true. I authorize UUCC to thoroughly investigate my work and personal history and verify all data given on this application, or in related papers and interviews. I authorize all individuals, schools and firms named therein (except as I have noted) to provide any information requested and I release them from all liability for damage in providing this information. I agree that any misleading or false statements or omissions of relevant facts render this application void and are sufficient grounds for my dismissal in the event of employment.

I agree, if hired or permitted to volunteer, to follow all of the UUCC's regulations, policies and procedures.

Signature of applicant _____

Date _____

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Appendix 2: Job Descriptions

UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

TITLE: Administrative Assistant

TASKS	FREQUENCY
Calendar:	
Maintain Master Calendar and assist with meeting and event planning. Schedules building usage, rentals, maintenance and Sextons as needed.	Continuous
Newsletter Items: Transmit calendar items to nUUsletter coordinator	Weekly
Communication:	
Correspondence: Respond to individuals needing written communication. Compose letters when requested by the pastoral staff. Create letters to all first-time visitors to the church for minister signature. Be sure all correspondence is mailed in a timely manner.	Weekly or As Needed
Mail: Retrieve, date stamp, and sort mail, re-directing to appropriate individuals as needed.	Daily
Reception: Answer phone and receive visitors to office and respond to needs.	Continuous
Retrieve messages from phone, voice mail and e-mail and respond or route appropriately.	Continuous
General Office Duties:	
Inventory Control / Supplies: Provide uninterrupted support of total church office operations. Order supplies as needed.	As Needed
Keys: Maintain a current list of key holders and provide keys to individuals as needed. Collect keys when individuals leave.	Continuous
Lost and Found: Administer a Lost and Found center.	Continuous
Office and Computer Equipment: Operate, clean regularly, and recommend maintenance needs for all office equipment (i.e., copier, computers, printers, etc.). Proficiently use computer equipment, including see that changes and updates are applied. Generate reports for pastor or committees when required.	Continuous
Office Files: Keep all office files in an orderly manner and prepare filing system directions for other users. Maintain records of births, weddings, deaths, membership and visitor attendance.	Continuous
Personnel Records: Maintain personnel files on all personnel, as outlined in Policy Manual.	Continuous
Update UUA: Add and update membership records with UUA when needed. Tally attendance and send to UUA first of each calendar year. Assist Board in preparing and transmitting Annual Report to UUA.	Yearly or As Needed
Membership Coordination	
Membership Database: Maintain membership rolls and information on members and friends in PowerChurch, including adding or removing entries. Create name tags when requested.	Weekly or As Needed
New Members: Work with Minister and Membership Team to ensure a hospitable and welcoming environment and to create pathways to membership.	Weekly or As Needed
Current Members: Work proactively with existing members to promote continued membership and involvement in church activities.	Weekly or As Needed

TASKS	FREQUENCY
Small Group Ministry Coordination	
Existing Small Groups: Support group leaders and help with planning and resource needs.	Monthly or As Needed
New Small Groups: Assist Minister and Small Groups Team with planning and resource needs, in order to grow new small groups.	As Needed
Pastoral Support:	
General Support: Help pastoral staff with correspondence, telephoning, calendar appointments and any other tasks that might be done to free her/him/them to do more important duties. Notifies pastor of special ministry needs, such as sickness or death of member.	Continuous
Preparation of Order of Service: Gather information, type OOS information in designated format, spell-check, proofread, get pastoral approval, copy and fold OOS for Sunday services, memorial and special events.	Weekly or As Needed

STATUS: Non Exempt

UPDATED by the Ad-Hoc Human Resources Committee working under the supervision of the Board of Trustees on December 23, 2017.

Appendix 2: Job Descriptions
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

TITLE: Bookkeeper

TASKS	FREQUENCY
Accounts Payable: Issue checks or electronic payments for church expenses, contacting designated individuals for signatures, and post into PowerChurch. Keep tickets or invoices for verification of expenses.	Weekly or As Needed
Contribution Records: Record and maintain contributions to individual's records. Generate contribution/pledge reports.	Weekly
Generate Financial Reports: Use PowerChurch to generate various financial reports per requests.	As Needed
Income Deposits: Receive contributions and other income, prepare deposit slips and transmit to bank. Send ACH pledges to bank monthly. Post deposits in PowerChurch.	Weekly or As Needed
Electronic Deposits: Send ACH pledges to bank monthly. Post deposits in PowerChurch.	Monthly
Payroll: Retrieve time-sheets, and prepare payroll checks or direct deposit payments to staff.	Twice Monthly
Payroll Tax Deposits: Calculate payroll tax liability and transmit same to IRS electronically.	Monthly
Petty Cash: Maintain petty cash records, if UUCS creates a petty cash fund.	As Needed
Tax Reporting: Create quarterly payroll tax report (Form 941), verifying that the Payroll Tax Deposits for each month were adequately transmitted. Send Form 941 to IRS.	Quarterly
Yearly Tax Reporting: Create calendar-year-end reports for employees (W2's). Transmit W2 and W3 to IRS; distribute W2's to employees.	Annually

STATUS: Non Exempt

UPDATED by the Ad-Hoc Human Resources Committee working under the supervision of the Board of Trustees on December 23, 2017.

Appendix 2: Job Descriptions
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

TITLE: Director of Religious Education for Children & Youth

REPORTS TO: Minister

PRIMARY ACCOUNTABILITIES:

The Director of Religious Education (DRE) designs and implements a curriculum of engagement and instruction for young congregants from pre-K age through high school; recruits, schedules, and supervises Religious Education teachers and assistants from volunteers within the congregation. Oversees Nursery personnel. Prepares an annual budget for RE activities. Assists Minister with planning and providing Multigenerational services throughout the year. Scripts and directs 3 Children & Youth services per calendar year. Manages/oversees Our Whole Lives (OWL) program.

DUTIES & RESPONSIBILITIES:

- Research and select curricula for use in each age cohort every year. Review curricula not currently in use for adaptability or use at UUC. Present curricula choices for RE committee review for fall classes.
- With the Vice president for Religious Growth, prepare and present annual RE budget for the Board and Annual Meeting approval.
- Script, direct, and rehearse 3 annual UU Kids services.
- Assist Minister with planning and directing of multigenerational services.
- Oversee/manage Our Whole Lives (OWL) sexuality education program. Schedule classes, provides training opportunities for volunteer facilitators, offer outreach.
- Recruit RE teachers and classroom assistants.
- Prepare teacher and assistant schedules.
- Create Newsletter notification of RE news. Submit by deadline.
- Hold weekly office hours as directed by the Minister.
- Serve as an advocate for the interests of children, youth, and families within our church.
- Oversee Nursery personnel and responsible for providing an annual performance of the Supervisor of the Nursery.
- Write monthly DRE Report for the BOT.
- Maintain RE files and records, to include student/family registration forms.
- Maintain contact with other DREs in region and nationally, and attend UU programs as scheduled and RG&E budget allows.
- Work toward RE Credentialing, with time allowed for study, writing, and reflection.
- Coordinate annual RE trips: Youth Cons at The Mountain, RE Families Trip.
- Create and/or Edit/Adapt weekly lessons for all classrooms.
- Create/purchase/gather supplies for all classrooms.
- Serve as replacement for teachers/assistants when staffing needs are not met.
- Recruit childcare workers for church gatherings/classes/special events (other than RE sponsored events).

SCHEDULE:

Thirty hours per week. Weekly office hours to be agreed with the Minister and posted. One Sunday off per

month.

REQUIREMENTS:

Bachelor Degree, preferably related to childhood education. Two years experience working with children, preferably in an educational setting. Work toward obtaining Certification from UUA Liberal Religious Educators' Association, as time and professional budget allows. Proven written and verbal communication skills. Familiarity with basic budget preparation and administration.

STATUS: Exempt

Approved by the Board of Trustees in October of 2017.

Appendix 2: Job Descriptions
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

TITLE: Music Director

REPORTS TO: Minister

PRIMARY ACCOUNTABILITIES

The Music Director provides planning and performance of music as a part of the UU Sunday liturgy, selecting pieces appropriate to different occasions, and coaching and rehearsing the choir to achieve superior presentation.

DUTIES & RESPONSIBILITIES

- Provide music for Sunday worship at least 40 weeks each year. Direct the choir during Sunday morning performances a minimum twenty (20) Sundays per year. ???
- Rehearse and direct choir as needed for performances on the minimum twenty (20) Sundays of the year, usually Sundays prior to the Service, and one weekday evening.
- Select and play music for the Sunday Service that enriches the worship experience and supports the speaker's message.
- When not in attendance on Sunday, assist arrangements of Worship Committee for guest musicians to cover parts of the service.
- Participate as required in the Worship and Music Committee monthly meetings to ensure integration of music and liturgy; Attend quarterly Council meetings.
- Assist the Chair of the Worship and Music Committee to develop an annual music budget.
- Prepare monthly report for the Vice President, Congregational Life to present to the Board, outlining activities and planning for upcoming worship services.
- Prepare an annual summary of music activities for the VP, Congregational Life to present at the Annual Meeting.
- Be available for two floating services to be selected and designated at the option of UUCC Board of Trustees.
- Use resources such as the UUA Musician's network to develop UUCC music programs.

REQUIREMENTS:

Prior experience with choral music; proficiency at playing piano.

SCHEDULE:

On average, between 12 and 16 hours per week.

STATUS: Exempt

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Appendix 2: Job Descriptions
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

TITLE: Nursery Worker

REPORTS TO: Director, Religious Education

PRIMARY ACCOUNTABILITIES

Care for and engage children entrusted by parents to the UUCC Nursery during Sunday Services, and on other occasions as required.

DUTIES & RESPONSIBILITIES.

- Read to children, and engage them in play.
- Change children's diapers as needed.
- Clean and straighten nursery each Sunday before leaving.
- Document all hours worked and turn into office for payment.

SCHEDULE

9:30 to 12:30 PM each Sunday as scheduled, with extended hours as required when congregational meetings follow the service.

REQUIREMENTS:

High School diploma or equivalent; One year experience in an early child care setting.

STATUS: Non Exempt

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Appendix 2: Job Descriptions
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

TITLE: Board Representative, Sunday Service

REPORTS TO: Minister

PRIMARY ACCOUNTABILITIES

Prepare Church grounds and interior for Sunday services; Welcome congregation, and

DUTIES & RESPONSIBILITIES.

Before “most” people arrive:

1. Arrive at 10:15!
2. Open Spehar parking lot gate if it is not already open (key in office)
3. Check front door – both doors must be set up to open when pushed, and there is an easy procedure to be done on the right door that accomplishes this task.
4. Find Cathy & find out who the worship assoc. is that morning & if there are any special instructions
5. Put 1 glass of water at the pulpit
6. Put offertory plates somewhere close to table that holds the Order of Service
7. Check restrooms for toilet paper or ask someone to check for you.
8. Stack up 8 or so chairs to the right of the sound booth (but don't block the space leading to the exit door). If these or others are needed, please set them out quietly, so as not to be too distracting.

As people arrive:

9. Pass out order of service & greet folks, especially visitors! And as you identify and introduce yourself to people who seem to be new to UUC try to find a board member to introduce them to. The board member can then engage them in conversation and chose to sit with them if they seem amenable.

Just before service begins:

10. A couple of minutes before 11:00, flip the lights on and off to signal that church is about to start; wait another minute (just before 11) and flip them on and off again – then turn the florescent lights in the fellowship hall off. At that point, if needed, people should be gently and quietly “ushered” into the sanctuary because it is time for the service to begin.

During service:

11. Help late-comers find a seat.
12. Sit in the back of the church during the service (near the table with Orders of Service)
13. Offertory: Pass out the offertory plates as usual (if a 3rd person wants to help, that's fine). One Usher takes the plates up front and puts them on the pulpit table.
14. After the children have gone downstairs for RE, count all the people (children/babies separate) upstairs (including anyone in the office, sound booth, etc. and give the count to Mandy in the office. (Kay counts the children and adults downstairs.)

After service:

15. Closing the Church: The board representative is responsible for checking exits, turning off lights, setting the alarm, and closing up the church. (This includes resetting one of the front doors so it cannot be pushed open.) If there are people staying for a meeting, R.E. or working in the office, you can get a verbal commitment from someone staying late who agrees to close up the church (including setting the alarm, locking the doors, etc)! If someone else does agree to lock up and set the alarm, please lock the door before you leave, so the church does not remain open with so few people in the

building. The main thing to remember is: DO NOT LEAVE THE CHURCH UNOCCUPIED AND UNLOCKED.

SCHEDULE

10:30 to 12:30 PM each Sunday as scheduled, with extended hours as required when congregational meetings follow the service.

REQUIREMENTS:

Member of the Board.

STATUS: Volunteer

Approved by the Board of Trustees on September 23, 2017.

**Appendix 3: Benevolence Fund Application
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

Benevolence Fund Application

Date: _____

Congregant's Name: _____

Current Address: _____

Phone contact/email: _____

Short explanation of request for funds:

- 1. Food ()
- 2. Clothing ()
- 3. Housing ()
- 4. Utilities ()
- 5. Car repair ()
- 6. Medical ()
- 7. Other _____
- 8. Amount Requested _____

Short explanation of request for financial help

I do not have the financial capabilities to pay for the above mentioned request for funds.

Applicant Signature: _____

Minister Approval: Yes _____ No _____

Minister's Signature: _____

Approved by the Board of Trustees on June 1, 2017

**Appendix 4: Expense & Reimbursement Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

**UUCG REQUEST FOR REIMBURSEMENT
RECEIPTS MUST BE ATTACHED**

we are tax exempt and cannot reimburse you if you elect to pay tax

DATE	VENDOR or PROVIDOR	ITEMS PURCHASED and/or SERVICES PROVIDED with further explanation if required by UUCG's Reimbursement Policy	AMOUNT ON RECEIPT

Date submitted _____

Signature _____

Approved by _____

Date approved _____

Approved by Board of Trustees on October 14, 2014

**Appendix 4: Expense & Reimbursement Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

Unitarian Universalist Church of Chattanooga
Request for Unbudgeted Expenditure

Do you have questions or need help with this form? Either the Treasurer or Church Administrator will be happy to assist.

Name of Requestor _____ **Date of**

Request _____

Amount Requested _____ **Date Funds**

Needed _____

Event/Reason- *Please give a brief description of the event or reason for requesting the funds. In other words, how will the funds be used? Also tell us if you need the funds by a specific date.*

Which area does this impact? RE Ways/Means Programs Development

Other- *Please*

identify _____

If this is for an event, is it already on the church calendar? Yes No Not

applicable

Does this request represent "seed money", which you propose to repay? Yes No Not

applicable

Signature of requesting

person _____

Accounting Fund Information- *If possible, tell us from which account(s) you propose to withdraw the funds? Ask the treasurer or church administrator if you need help.*

Account Name _____ Account No. _____ Current

Balance _____

If requesting money from a Temporarily Restricted Account, what is the purpose of the account, as stated by donor or BOT?

Finance Committee Recommendation to the Board of Trustees

Approve Disapprove Date _____

Reason _____

Board of Trustees Final Dispensation

Approve Disapprove Date _____

Signature of Board President or

Secretary _____

Approved by the Board of Trustees on October 18, 2012.
Appendix 4: Expense & Reimbursement Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

Request to Withdraw Funds from a Temporarily Restricted Account

For assistance with this form, please contact the current Treasurer.

Account name and/or account number: _____

Total amount currently in this account: _____

Amount of withdrawal requested: _____

Reason for withdrawal request: _____

If withdrawal is for an event, is it on the church calendar? Yes _____ No _____

Print name of Requestor; _____

Requestor's church or event position: _____

Signature of Requestor: _____

Date of Request: _____

Updated: 10/16/2017

Approval: Vice President supporting request _____ Date: _____

Approval: Board President or Secretary _____ Date: _____

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

**Appendix 4: Expense & Reimbursement Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

CHURCH CREDIT CARD SIGN-OUT FORM

Date & time signed out: _____

Person signed out to _____

email _____

phone # _____

For purchase of _____

Church accounts(s) to be Charged _____

Authorized by: (VP, Committee Chair, etc) _____

(may be emailed or called in to Church Administrator ahead of time)

Latest Date & Time Credit Card will be Returned to Church Administrator _____

User Agrees to the following terms of use:

I will use the church's credit card only for what's indicated above. I will return the card to the church office on or before the date indicated above.

Signature of user _____

Date & Time Credit Card Returned to Church Office _____

Received by _____

(signature of Church Administrator or authorized representative)

Approved by the Board of Trustees on January 17, 2017.

**Appendix 4: Expense & Reimbursement Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

DIRECT PAYMENT FORM

Pay to _____
(how check should be made out)

Charge to _____
name of committee and/or church account, plus account # if available

For _____

*Speaker/Performer/Music
Support of a Cause
(Services (e.g., tech support, cleaning)*

OR

Purchase of _____
(Furnishings/Equipment, etc.)

Date submitted _____

Date payment needed _____

Signature of person submitting request _____

Signature of person authorizing request _____

Approved by the Board of Trustees on January 17, 2017

**Appendix 5: Building & Grounds Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

Facility Use Agreement

Unitarian Universalist Church of Chattanooga

Instructions: Groups or individuals that request use of facilities should determine their category of use (see facility use policy) with the concurrence of the administrator or the Facility Use Committee. Complete this form as appropriate.

Complete Appropriate Line with date(s) and time(s)

- 1) Request for one time use on _____
 - 2) Request for multiple, limited- term use on _____
 - 3) Request for multiple, indefinite-term use on _____
-

A deposit of \$_____ will be posted prior to the use of the facilities. Note: The deposit will be forfeited if the alarm is not properly armed or disarmed, or if key(s) not returned.

Note: *Committee chairpersons, conveners, etc., are responsible for checking the church calendar if they wish to alter an established meeting schedule!*

If reserved space becomes unavailable due to unplanned maintenance, every effort will be made to provide alternate accommodation.

UUCC reserves the right to revoke any space use agreement without cause.

(Facility Use Agreement Continued)

FOR INDIVIDUAL AND External Organizations and Groups:

The Unitarian Universalist Church of Chattanooga grants to _____ (user),
the use of _____ (rooms),
for the purpose of _____ (event),
on the following date(s) _____

The user agrees to pay the sum of \$ _____ to the Unitarian Universalist Church of Chattanooga (UUCC) prior to use of said facilities in appreciation of the privilege of using the facilities specified above. In addition a deposit of \$ _____ will be posted prior to the use of the facilities and to hold the date(s) and time(s) requested.

.....

.....

IMPORTANT NOTES: *Deposits are promptly returned to the user provided the facilities are left in the same condition and they are found and the key(s) returned to the church office. Any charges incurred for cleaning/repairs will be deducted from deposit.*

External individuals or groups request for rental agreement must also include details of the nature of the group and its activities, and disclosing reason for the request. What type of event is planned, the number of individuals expected, and what amenities additional to the space will be required, such as audio-visual equipment, child care arrangements (which require two adults in supervision).

Complete contact information for person/s responsible for event/s:

If reserved space becomes unavailable due to unplanned maintenance, every effort will be made to provide alternate accommodation.

UUCC reserves the right to revoke any space use agreement without cause.

Approved by the Board of Trustees on August 20, 2015.

Appendix 5: Building & Grounds Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

Non-Rental Church Event

This Form should be used when a church member, committee, or other group wishes to schedule a non-routine event (such as one requiring special arrangements for childcare, a sexton, audio-visual equipment, transportation, and/or income/expenses).

UU Church of Chattanooga
Non-Rental Church Event
Person-in-Charge (PIC) Form

BE SURE TO COMPLETELY FILL OUT (THREE PAGES) AND SIGN:

Thank you for planning a church event! This form is intended to provide information on steps that will lead to a successful event and approval of that event from the church's Board of Trustees. This form must be submitted to the Church Administrator for approval no later than ONE MONTH PRIOR to the event, so there is sufficient time to obtain approval, post it online and print it in the church bulletin. Entries preceded by a * must be completed.

*Name of Event _____

*Date _____ *Starting Time _____
of Event _____ *Ending Time _____

When first submitting this form, if you are unsure of the exact time of day but know the part of the day (i.e. morning, afternoon, evening, morning through early afternoon, etc.) please state this. The BOT will need a specific timeframe when your form is returned to you for either approval or clarification in the event of other approved events on the same day.

*Person in Charge (PIC) _____ *Email _____

*Home Phone _____ * Cell Phone _____

Backup (PIC) _____ Email _____

Home Phone _____ Cell Phone _____

*Event Plan (Purpose of Event)

Before answering the remaining questions, please read the UUCC Facility Use Policy (available on the church's website or from the church administrator). Specifically, those sections on: General Policy; Facility Use Priorities, Alcohol Policies and Procedures; as they contain important information for those planning an event.

*Is this event being sponsored by a UUCC committee? ___ Yes ___ No

*If yes, the sponsoring committee is _____

If yes, the chair of the sponsoring committee must sign this form below. The chair's signature signifies that the committee is sponsoring this event and approves all details of the event plan presented on this PIC form.

*Does this event impact any other church activities or groups? (Please review the church calendar)

_____ Yes _____ No

* If yes, please have the persons responsible for these activities or groups sign this form below and indicate whether they support or do not support this event, including all the details of the event plan presented in this PIC form.

For example: A church committee is sponsoring a nonmember to present an evening concert at the church. The committee also wishes this musician to perform during Sunday service. In this case, the Minister and the Director of Music should sign this form below and indicate whether they support or do not support the musician performing during a church service.

*Will event require childcare? _____ *If yes, have you contacted the approved church caregivers and had the expense approved? _____ Yes _____ No

* Will the event require a sexton (overseer of the maintenance of the church)? _____ Yes _____ No

*If yes, has the sexton been arranged through the church administrator? _____ Yes _____ No

*Will you need audiovisual equipment? _____ Yes _____ No

If yes, describe _____

*Is transportation required? _____ Yes _____ No If yes, please supply details below.

For a successful and productive event, it is important to remember that the PIC is responsible for full coverage and oversight of the entire event. This includes cleaning and locking the church and providing for the needs of those who are scheduled to attend the event. You will be informed when the proposed event is approved and officially placed on the calendar. We suggest you fill in and submit your reservation as soon as possible. Even as much as one year in advance is not unreasonable.

If you need help answering the following, ask the Treasurer. She/He will be glad to help.

*Are there expenses and/or income involved in this event? _____ Yes _____ No

*If you checked yes, you must answer the following questions:

*What is your best estimate of the cost for this event? _____

* To what account do you plan to charge the costs? _____

*Is there enough money in that account to readily fund the event? _____ Yes _____ No
(If you answered no here, you will need to approach the BOT before proceeding)

Please note that an invoice or bill for goods or services will be required for payment directly by the church or receipts or cash register tickets for payment, if reimbursing you.

*Do you require a check for payment of a performer on the day of the event? _____ Yes _____ No

*Are you anticipating income from the event? _____ Yes _____ No

*If yes, to what account should this income be entered? _____

Non-Rental Church Event Person-in-Charge (PIC) Form

*If you anticipate income, will it be "in and out" (to cover expenses), sheer profit (no expenses), or a mix of the two (income exceeds expenses)?

_____ In & Out _____ Profit Only _____ Both In & Out and Profit

Signature of PIC (Person in Charge) _____ *Date* _____

Signature of Chair of Sponsoring Committee _____ *Date* _____

Signature(s) of Impacted Church Activities or Groups _____ *Date* _____

Signature of Vice President with Bookkeeping Account Affected by this Activity _____ *Date* _____

If reserved space becomes unavailable due to unplanned maintenance, every effort will be made to provide alternate accommodations.

UUCU reserves the right to revoke any space use agreement without cause

<p><i>This section is for OFFICE USE only.</i></p> <p>Event has been cleared and noted on the church calendar. _____ Yes _____ No, there is a conflict</p> <p>What budget accounts are involved in this event? _____</p> <p>Has the PIC been informed? _____ Yes, by (circle one) Phone Person Email _____ No</p> <p>Has the _____ Minister, _____ BOT, or _____ appropriate Board Member been informed of the event?</p> <p>Do they need a check on the day of performance? _____ Yes _____ No</p> <p>Does the event need a Sexton? _____ Yes _____ No Has a sexton been arranged? _____ Yes _____ No</p> <p>Does the event need a Sound Tech? _____ Yes _____ No Has a tech been arranged? _____ Yes _____ No</p>
--

Approved by the Board of Trustees on January 28, 2016.

**Appendix 5: Building & Grounds Forms
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA
Calendar Request for Church Activity**

This Form should be used when a church member, committee, or other group wishes to schedule a routine event (such as a committee meeting that requires use of a room or space in the church on a certain date/time but not any out of the ordinary arrangements).

**UU Church of Chattanooga
Calendar Request for Church Activity**

BE SURE TO COMPLETELY FILL OUT AND SIGN:

*Thank you for planning a church activity! This form is intended to provide information needed to place your activity on the Church Calendar. This form must be submitted to the Church Administrator for approval – preferably at least ONE MONTH PRIOR to the event, so there is sufficient time to obtain approval, post it online and print it in the church bulletin. Entries preceded by * must be completed.*

*Name of Activity/Committee _____

*Date of Activity _____ *Starting Time _____
*Ending Time _____

When first submitting this form, if you are unsure of the exact time of day but know the part of day (i.e., morning, afternoon, evening, morning through early afternoon, etc.), please state this. The Administrator will need a specific timeframe when your form is returned to you for either approval or clarification in the event of other approved events on the same day.

If this will be a recurring activity, what is the schedule? (For example, 2nd Thurs of each month)

Request for particular room/space _____

*Will event require childcare? Yes _____ No _____ *If yes, have you contacted the approved church caregivers and had the expense approved? Yes _____ No _____

*Person in Charge (PIC) _____ *Email _____
*Home Phone _____ *Cell Phone _____
.....

Backup PIC _____ Email _____
Home Phone _____ Cell Phone _____
.....

Signature of PIC (Person in Charge) _____ *Date* _____

This section is for OFFICE USE only.

Event has been cleared and noted on the church calendar ___ Yes ___ No, there is a conflict.

Has the PIC been informed ___ No ___ Yes, by (circle one) Phone Person Email

Approved January 28, 2016

**Appendix 6: Policy Revision Template
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

Policy Revision Request

Policy Title or Description:

Current Effective Date (*indicate "NEW" if policy area is not currently covered*)

Proposed Revised or New Policy Language (*attach pages if policy is lengthy*)

Purpose of revision:

Submit suggested policy to one or more board members for discussion and approval. You may be asked to attend a meeting to present back up information.

Presented By.

Date:

Approved by:

Date

Approved by the Board of Trustees prior to the September 2012 policy manual revision.

Appendix 7: Organizational Chart
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA

**Appendix 8: Policy Changes
UNITARIAN UNIVERSALIST CHURCH OF CHATTANOOGA**

Policies/Forms/Job Descriptions Created or Updated
Since September 2012 Policy Manual Revision

Policy/Form/ Job Description Name	Date Approved & Group Approving	Created or Updated By	Rationale for Change
*UUCS Affiliation with UUA	Approved 10/16/17 by Policy Manual Committee	Policy Manual Committee	Updated to reflect UUA change in its policy on how congregations provide financial support to UUA & its districts
*Endowment Committee Charter	Approved at 2015 Annual Meeting	Endowment Committee	Endowment Committee agreed with recommendation to add Minister & Board President as advisory members of Endowment Committee
*Endowment Fund Distribution Policy	Approved 11/20/17 by Endowment Committee	Endowment Committee	Endowment Committee wished to clarify when it would make Normal Fund Awards to UUCS
*Benevolence Fund (including Benevolence Fund Application Form)	Approved 6/1/17 by Board of Trustees	Finance Committee	Minister & Treasurer believed changes needed in administering Benevolence Fund
*Accountable Reimbursement Plan (including Request for Reimbursement Form)	Approved 10/14/14 by Board of Trustees	Finance Committee	Finance Committee wished to eliminate existing confusion about reimbursable expenses and how to request reimbursement
*Budget & Spending Policy	Approved 10/18/12 by board of Trustees	Finance Committee	Finance Committee saw need to clarify budgeting & spending procedures

*Committee Spending	Approved 1/17/17 by Board of Trustees	Finance Committee	Finance Committee saw need to clarify committee spending procedures
*Request for Unbudgeted Expenditure Form	Approved 10/18/12 by Board of Trustees	Finance Committee	Finance Committee saw need for form to request unbudgeted expenditure
*Credit Card Request Form	Approved 1/17/17 by board of Trustees	Finance Committee	Finance Committee saw need for form committees could use to request use of church's credit card
*Direct Payment Form	Approved 1/17/17 by board of Trustees	Finance Committee	Finance Committee saw need for form committees could use to request direct payments to outside organizations
*Policy on Soliciting, Selling, & Promotion of Merchandise & Services at Church	Approved 7/24/14 by board of Trustees	Finance Committee	Finance Committee believed that policy was needed to regulate these practices
*Sales Tax Reimbursements	Approved May 2016 by Finance Committee	Finance Committee	Updated to reflect change in Georgia law
*Sunday Collections	Approved 2/7/18 by VP for Resources	Policy Manual Committee	Updated to reflect current practice for counting Sunday offertory
*Church Income from credit cards	Approved 2/7/18 by VP for Resources	Policy Manual Committee	Updated to reflect current practice of accepting credit card payments of pledges, donations, & event registrations
*Communications Administration	Approved 2/8/18 by VP for Outreach	Policy Manual Committee	Updated to reflect current practices related to the Nuusletter & preparation of Sunday Order of Service

*Child Care Policy	Approved 8/16/16 by Board of Trustees	RE Director & RE Committee	Need seen to provide parents with information on Nursery services, policies, & procedures
*Facility Use Policy (including Facility Use Agreement & Non-Rental Church Event Form)	Approved 8/20/15 by Board of Trustees	Finance Committee	Finance Committee saw need for comprehensive policy governing use of church building by both members & outside groups
*General Facility Use Restrictions	Approved 2/22/18 by VP for Outreach	Policy Manual Committee	Updated to reflect current practice of requiring Communications Committee's approval of publicity for church events
*Calendar Request for Church Activity	Approved 2/28/16 by Board of Trustees	Finance Committee	Finance Committee saw need to create Form short form members could use to request that routine activities (such as committee meetings) be placed on the church calendar
*Records Retention & Purge Policy	Approved 5/16/13 by Board of Trustees	Finance Committee	Finance Committee saw need to create policy governing how long to retain church records & when to purge them
*Disruptive Behavior Policy	Approved 7/18/17 by Board of Trustees	Minister & Transition Team	Minister & Transition Team saw need for policy promoting a safe church environment & dealing with instances of disruptive behavior
*Pathway to Membership Policy	Approved 11/20/13 by Board of Trustees	Ad-Hoc Committee	Committee saw need to establish policy and procedures for becoming a member of the church

*Administrative Assistant Job Description	Approved Summer 2017 by Ad-Hoc Personnel Committee working under the general supervision of the Board of Trustees	Ad-Hoc HR Committee	Committee and Board of Trustees saw need to update this job description in preparation for hiring new Administrative Assistant
*Book Keeper Job Description	Approved Summer 2017 by Ad-Hoc Personnel Committee working under the general supervision of the Board of Trustees	Ad-Hoc HR Committee	Committee and Board of Trustees saw need to develop this job description in preparation for hiring Book Keeper
*DRE Job Description	Approved Oct 2017 by Board of Trustees	RE Committee	RE Committee saw need to update this Job description to reflect 30 hour work Week
*Board Representative Job Description	Approved 9/23/17 by Board of Trustees	Board of Trustees	Board saw need to update this job description to reflect current practice