

Unity of Bellevue Policy Manual

Revision 0

Approved October 17, 2023

TABLE OF CONTENTS

1.0	Policy Manual Guidance.....	7
1.1	Purpose	7
1.2	Scope.....	7
1.3	Intent.....	7
1.4	Framework for Policies.	7
1.4.1	Guiding Principles.....	7
1.4.2	Vision.....	7
1.4.3	Mission	7
1.4.4	Evolutionary Purpose	7
1.4.5	Strategies.	8
1.4.6	Core Values.	8
1.4.7	UWM Honoring Diversity Statement.	8
1.4.8	UWM Joint Statement for Peace.	9
1.4.9	UOB Indigenous Land Acknowledgement.....	9
2.0	Employment	9
2.1	General Employment Policies	9
2.1.1	Equal Opportunity Employment.	9
2.1.2	Nepotism.....	10
2.1.3	Americans with Disabilities Act Policy.	10
2.1.4	Drug and Alcohol Policy.	11
2.1.5	Open Door Policy.	11
2.1.6	Conflict Resolution & Grievance Policy.....	11
2.1.7	Harassment Policy.....	12
2.1.8	Safety and Health.....	13
2.2	Worker Classification and Eligibility.....	14
2.2.1	Proof of Work Eligibility	14
2.2.2	Classifications.....	14
2.3	Job Description.....	15
2.4	Hiring.....	15
2.4.1	Recruitment.	15
2.4.2	Interviewing.	15
2.4.3	Candidate Testing and Music Auditions.....	16
2.4.4	Reference Checks.....	16
2.4.5	Selection and Salary.	16
2.4.6	Employment Offers.....	16
2.4.7	Contracting.....	16
2.4.8	Introductory Period.....	17
2.5	Orientation.....	17
2.5.1	Paperwork.....	17
2.5.2	UWM Resources.....	17
2.5.3	W2 Revisions.	17
2.6	Compensation	17
2.6.1	Confidentiality.....	17

2.6.2	Pay Day.....	18
2.6.3	Timekeeping.....	18
2.6.4	Salary Reviews and Bonuses.....	18
2.7	Benefits.....	18
2.7.1	Medical Health Coverage.....	18
2.7.2	Workers Compensation.....	18
2.7.3	Unemployment Insurance.....	19
2.7.4	Paid Time off (PTO).....	19
2.8	Absences.....	21
2.8.1	Reporting Absences and Lateness.....	21
2.8.2	Excessive Absenteeism.....	21
2.8.3	Unpaid Absences.....	21
2.8.4	Paid Absences.....	21
2.8.5	Leave payout upon employment end.....	22
2.9	Conduct.....	22
2.10	Performance Management.....	23
2.10.1	Process.....	23
2.10.2	Promotions.....	24
2.10.3	Unsatisfactory Performance.....	24
2.10.4	Progressive Disciplinary Policies and Processes.....	24
2.11	Separation.....	26
2.12	Personal Development.....	27
2.13	Personnel Records.....	27
2.13.1	Content of Personnel Files.....	27
2.13.2	Updates.....	28
2.13.3	Maintenance of Personnel Files.....	28
2.12.4	Access to and Dissemination of Information.....	28
3.0	Operations.....	28
3.1	Facility and Grounds.....	28
3.1.1	Upkeep.....	28
3.1.2	Improvements / Alterations.....	29
3.1.3	Memorials / Monuments.....	29
3.1.4	Facility Equipment.....	29
3.2	Environmental Sustainability Policy.....	29
3.2.1	Error! Bookmark not defined.
3.3	Promotions.....	29
3.3.1	External Correspondence.....	30
3.3.2	Advertising.....	30
3.3.3	Editorial Policy.....	30
3.3.4	Radio & TV.....	30
3.3.5	Publications.....	30
3.4	Income.....	30
3.4.1	Rentals.....	30
3.4.2	Bookstore Operations.....	30
3.5	General Operations Policies.....	31
3.5.1	COVID policy.....	31

3.5.2	Center events.....	31
3.5.3	Counseling Services (on church premises).....	32
3.5.4	Marketing or Private Business Enterprises.....	32
3.5.5	Fundraising.....	32
3.5.6	Alcoholic beverages.....	32
3.5.7	Pets.....	32
3.5.8	Bulletin Boards.....	32
3.5.9	Solicitations.....	32
3.5.10	Parking Lot.....	32
4.0	Ministries & Spiritual Development	32
4.1	Spiritual Development	32
4.1.2	Licensed Unity Teacher.....	33
4.2	Ministries	33
4.2.1	Prayer Ministry.....	33
4.2.2	Small Group Ministry	33
4.2.3	Youth & Family Ministry.....	34
4.2.4	Music Ministry.....	34
4.2.5	Reiki Ministry	34
4.2.6	Sacred Service and Volunteer Ministry.....	34
5.0	Membership	36
5.1	What is Membership.....	36
5.2	New Member Requirements.....	37
5.3	New Member orientation / classes.....	37
5.4	Renewing Membership.....	37
5.5	Transferring Membership.....	38
6.0	Fellowship Groups	38
6.1	Men's Group.....	38
6.2	Sisters in Spirit.....	38
6.3	Women Connect.....	38
7.0	Committees	38
7.1	General Operation	38
7.1.1	Formation.....	38
7.1.2	Membership.....	39
7.1.3	Guideline for Effectiveness.....	39
7.1.4	Operations.....	39
7.2	Nomination Committee.....	39
7.2.1	General Information	40
7.2.2	Member Roles & Responsibilities	40
7.2.3	Committee Responsibilities	40
7.2.4	Eligibility for Board Service	41
7.2.5	General Requirements.....	41
7.2.6	Information to be considered by Nomination Committee.....	42
7.3	Ministerial Search Committee	42

7.4 Financial Review Team..... **Error! Bookmark not defined.**

8.0 Finance & Stewardship42

8.1 Annual Financial Plan..... 42

8.2 Budget..... 42

8.3 Financial Reporting..... 43

8.4 Independent CPA Examination..... 43

8.5 Investment policy..... 43

8.6 Funds..... 43

8.6.1 General Fund..... 43

8.6.2 Interest Bearing Accounts..... 43

8.6.3 Memorial Funds..... 43

8.6.4 Special Purpose Funds..... 44

8.6.5 Prudent Reserve Fund..... 44

8.7 Revenues and Income..... 44

8.7.1 Primary sources of revenue for Unity of Bellevue..... 44

8.7.2 Counting the Sunday offering..... 44

8.7.3 Designated Gifts..... 45

8.7.4 Bookstore..... 45

8.7.5 Record..... 45

8.7.6 Pledges..... 45

8.8 Expenditures and Methods for Payment..... 45

8.8.1 Blanket Approval for Operational Expenses..... 45

8.8.2 Authorization..... 45

8.8.3 Credit Card Usage..... 46

8.8.4 Cash Usage..... 46

8.8.5 Salary Advances..... 46

8.8.6 Classes and Workshops..... 46

8.8.7 Minister Expenses..... 47

8.9 Unity of Bellevue Tithing..... 47

8.10 Planned Giving Program..... 48

8.10.1 Authorization..... 48

8.10.2 Bequests..... 49

8.10.3 Gifts of Retirement Plan Assets..... 49

8.10.4 Charitable Remainder trusts..... 49

8.10.5 Charitable Lead Trusts..... 50

8.10.6 Life Insurance Gifts..... 50

8.10.7 Retained Life Estates..... 51

8.10.8 Bargain Sales..... 51

8.10.9 Gifts of Real Estate..... 51

8.10.10 Gifts of Closely Held Stock and Other Business Interests..... 52

9.0 Board of Trustee Operations52

9.1 Purpose..... 52

9.2 Structure and Membership..... 52

9.3 Ethics..... 52

9.3.1 Code of Ethics..... 53

9.3.2	Access to Personal Information of Members.....	53
9.3.3	Avoiding Conflict of Interest.	53
9.3.4	Solicitation.	53
9.4	Legal Aspect	53
9.4.1	Legal Entity.....	53
9.4.2	Liability Insurance	54
9.5	Member Onboarding & Exit	54
9.5.1	Board Member Selection.	54
9.5.2	Board Member Selection	54
9.5.3	Exiting Board Members.....	54
9.6	Member Accountabilities.....	55
9.6.1	Board Member Role Execution.	55
9.6.2	Board Member Requirements.	55
9.6.3	Board of Trustees’ Collective Responsibilities	55
9.7	Overseeing Minister Performance.	55
9.7.1	Minister Job Description.	55
9.7.2	Minister Performance.	55
9.7.3	Ministerial Transitions	56
9.8	Operations.....	56
9.8.1	Who has a voice in Board meetings.....	56
9.8.2	Board Guidance.....	56
9.8.3	Board Meeting Structure	56
9.8.4	Setting up the Meeting for Success	57
9.8.5	Board Meeting Agenda	57
9.8.6	Meeting Preparation.....	57
9.8.7	Meeting Conduct.	57
9.8.8	Meeting Minutes.....	57
9.8.9	Records.....	57
9.9	Relationships.....	57
9.9.1	Board and Other Leadership Alignment	57
9.9.2	Board and Minister	58
9.9.3	Board and Staff.	58
9.9.4	Board and Community.	59
9.9.5	Board and UWM	59

1.0 POLICY MANUAL GUIDANCE

1.1 Purpose. The purpose of this document is to provide policy governance for all activities at Unity of Bellevue. In this document there is also a high level of procedural “how-to” for clarity of policy in order to assure general understanding and effective coordination of personnel, administrative, and Board activities. The success of our ministry in serving the needs of our members and congregants is measured by how effectively we all work together. With an understanding of, and a commitment to, the principles that guide the policies in this manual, we are confident that we can maintain our high standards and excellence of service.

1.2 Scope. Our policies outline business policy relative to legal accountabilities, as well as alignment with Unity teachings and practices. These policies define business policy level expectations of employees, contractors, and volunteers. These policies do not constitute a legal commitment binding upon the ministry that would create a contractual right or obligation outside of a signed contract.

1.3 Intent. These policies and procedures are not intended to restrict or discourage individual or management initiative. Rather, they are designed to improve communication and provide a framework for making sound and equitable decisions.

1.4 Framework for Policies. This section provides the foundation by which all policies are recreated.

1.4.1 Guiding Principles. UOB ministry follows these general guiding principles:

- follows Unity Principles in finance-related business transactions.
- stays in integrity in all finance-related business transactions.
- has demonstrable control over the handling of all financial aspects of the spiritual center’s business by complying with Bylaws and Policies, and by following documented processes/procedures.
- complies with all applicable state and federal laws (both to the letter and in intent) for all finance-related business activities.
- avoids actual or apparent conflict of interest in finance-related business transactions.
- maintains transparency in how it uses financial resources.
- uses mission to drive budget allocations beyond normal operational expenses.
- includes checks and balances as possible and warranted (activities done by one are reviewed by another independent person) in all finance-related processes and procedures.
- protects the personal information of its congregants by carefully managing and restricting access to it (who and how).

1.4.2 Vision. Describes our preferred future. “Advancing spiritual awakening and transformation throughout the Puget Sound region and beyond.”

1.4.3 Mission. Describes why we exist, our purpose or reason for being, and why we are doing what we are doing. “Awakening people and transforming the world.”

1.4.4 Evolutionary Purpose. Describes our energy and sense of direction. “Transforming lives and inspiring people to make a positive difference in the world.”

1.4.5 **Strategies.** Describes how we get from today to our vision. To fulfill our mission and realize our vision we:

- Love God through celebration and worship, community, and outreach.
- Love others through sacred service and committee work.
- Deepen in spirit through education, classes, and spiritual practice.
- Provide fellowship through connection, inspiration, and each other.
- Steward our center with ethical, Spirit-centered conduct.

1.4.6 **Core Values.** The values that are behind all actions:

- Spirituality - The universe is infinite, all-inclusive, creative, living intelligence. It is known by many names; we call it God, the Christ Spirit in which all things exist and of which all things are made. Because humans exist in this universal body of God, our essential nature is spiritual; we are of God and therefore we are inherently good.
- Love – We are a welcoming and inclusive community, honoring God in ourselves and in others by expressing unconditional love for its creation. We are kind in our interactions in our community and in the world; we are warm in our acceptance of old friends and new; we are compassionate in the face of dis-ease; we are conscious and passionate for the love of God.
- Joy – We have fun with one another as we walk the spiritual path together. We walk in joy and cultivate life-affirmative feeling in our hearts as we know that God is good, and all is well. We do not deny feelings of pain or sorrow, and we affirm that the spiritual truth is infinite joy and comforts us in any situation.
- Service – In service to God as our spiritual community, we give freely of our ideas, our time, our expertise, our love, and our tithe, giving in the same way God has given to us, graciously and abundantly. We support our members in discovering and expressing their unique spiritual gifts by providing service leadership opportunities. We support others in their spiritual practice of giving by receiving freely and with grateful hearts.
- Integrity – We believe and practice unchanging principles of spiritual truth, and diligently cultivate congruence between our beliefs and our practice. We are truthful, trustworthy, self-aware, and wise in all our activities, knowing that action can only have as much faith in God as we have in ourselves.

1.4.7 **UWM Honoring Diversity Statement.** Unity of Bellevue shall support and align, to the greatest extent possible in all operations, with Unity Worldwide Ministry in its commitment to Honoring Diversity:

“We believe that all people are created with sacred worth. Therefore, we recognize the importance of serving all people within the Unity family in spiritually and emotionally caring ways. We strive for our ministries, publications and programs to reach out to all who seek Unity support and spiritual growth. It is imperative that our ministries and outreaches be free of discrimination on the basis of race, color, gender, age, creed, religion, national origin, ethnicity, physical disability, or sexual orientation or identity. Our sincere desire is to ensure that all Unity organizations are nondiscriminatory and support diversity.

In our effort to reach out to all people as did our Way-Shower, Jesus Christ, we support the modification of our facilities to make them accessible to all people, regardless of physical

challenges; the translation of our materials into Braille and other languages; and respect for the wonderful variety of human commitments and relationships.

We encourage ministers, teachers and others within Unity to honor the strength of diversity within their spiritual communities. It is with love and in celebration of our unity, in the midst of our wondrous diversity, that we affirm this position.”

- 1.4.8 UWM Joint Statement for Peace. Unity of Bellevue shall support and align in all operations, with Unity Worldwide Ministry in its commitment to peace as written in their published statement:

“Unity stands for peace in the presence of conflict; for love in the presence of hatred; for forgiveness in the presence of injury. Unity honors the many paths to God, the many ways to worship God, for there is only one power and presence of God and that God loves each one of us equally. It is therefore the position of Unity Worldwide Ministries and Unity World Headquarters at Unity Village to urge all nations, their leaders, and their people to turn to God by whatever the name for guidance during these challenging times and pursue peace, not war, for this is what honors the God of all our faith traditions. Unity stands for peace in our lifetime.”

- 1.4.9 UOB Indigenous Land Acknowledgement. We acknowledge that Unity of Bellevue resides on Indigenous land, the traditional territories of the Coast Salish people. This acknowledgement reminds us to strive for respectful partnerships with all people, as we search for collective healing.

2.0 EMPLOYMENT

2.1 General Employment Policies It is the intent of Unity of Bellevue that the work environment be one of informality, friendliness, and respect for others. It is our policy to maintain a safe, productive working environment free from sexual harassment, inappropriate and other disruptive behavior. Personal conduct that interferes with operations, creates safety hazards, brings discredit to the fellowship, or is offensive to members or fellow employees will not be tolerated.

- 2.1.1 Equal Opportunity Employment. In keeping with Unity Teachings, Unity of Bellevue’s Vision/Mission/Purpose/Values, and in accordance with applicable Federal Laws and Regulations, the employment policies and practices of Unity of Bellevue are administered without regard to race, color, age, national origin, gender, disability, marital status, veteran status, sexual orientation or ethnicity.

Although it is legal for religious corporations, associations, and educational institutions to discriminate on the basis of religion in the employment of any person in any position, Unity of Bellevue has chosen to utilize discretion in this matter. Unity of Bellevue discriminates based on religion in hiring for positions in which religious beliefs and/or credentials are essential to the performance of job duties. For example, Unity of Bellevue may require a Unity credential for the role of Sr. Minister rather than accepting any other ministerial credential.

Equal opportunity is ensured by:

- Requiring that individuals who make or recommend employment decisions and other personnel actions are fully aware of, and comply with, this policy and the principles of equal opportunity.

- Monitoring employment practices with respect to EEO objectives.
- Investigating employee complaints promptly and thoroughly.

This Equal Employment Opportunity Policy will have as its firm objective equal opportunity in recruitment, hiring, rates of pay, promotion, training, termination, benefit plans, compensation, conditions, and employment privileges for all employees and applicants.

2.1.2 Nepotism. Unity of Bellevue permits the employment of qualified relatives of employees, as long as such employment does not create a conflict of interest.

a) For the purposes of this policy “qualified relative” is defined as a spouse, domestic partner, child, parent, sibling, grandparent, grandchild, aunt, uncle, cousin, niece, nephew, corresponding in-law, adoptive relationship, step relationship, or any member of the employee’s household. The Ministry will use sound judgment in the placement of related employees in accordance with the following guidelines:

- Individuals who are related by blood, marriage, domestic partnership, adoption, or reside in the same household are permitted to work in the same department, provided no direct reporting or supervisor-to-subordinate relationship exists. That is, no employee is permitted to work within the “chain of command” when one relative’s work responsibilities, salary, hours, career progress, benefits, or other terms and conditions of employment could be influenced by the other relative.
- Related employees may have no influence over the wages, hours, benefits, career progress and other terms and conditions of the other related staff members.
- Employees who marry while employed, or become part of the same household, are treated in accordance with these guidelines.

b) Engaging the services of a relative of an employee through contract is not permitted as it presents a potential conflict of interest.

c) Engaging the services of a relative of a member of the Board of Trustees through contract is not permitted as it presents a potential conflict of interest.

d) Any exceptions will be reviewed and approved by the Board of Trustees.

2.1.3 Americans with Disabilities Act Policy. The Americans with Disabilities Act legislation, established in 1990, is intended to prohibit discrimination against individuals with disabilities in public areas. Title I of the ADA requires employers to provide reasonable accommodation to qualified employees with a disability unless the employer can demonstrate that doing so creates an undue hardship to the employer or poses a direct threat to the safety of the employee or others in the workplace. ADA defines “employer” as an organization with 15 or more employees.

Unity of Bellevue cannot grant reasonable accommodation under ADA as the ADA legislation does not apply to UOB under two exemptions: 1) UOB has less than 15 employees and 2) ADA does not apply to non-profit religious organizations as defined under 501(c) of Title 26 with the Internal Revenue Code of 1986.

Unity Ministries are committed to providing equal employment opportunities to otherwise qualified individuals with disabilities. Although Unity of Bellevue cannot grant a reasonable accommodation under ADA, reasonable accommodation requests will be accepted as appropriate. The employee is responsible for notifying their supervisor of the need for any such accommodations. In such cases, the employee may be asked for their input of the type of

accommodation necessary, or the functional limitations of the employee's disability. When appropriate, Unity of Bellevue may need permission to obtain further information from the employee's physician, or other medical or rehabilitation professionals.

- 2.1.4 **Drug and Alcohol Policy.** Unity of Bellevue recognizes that substances such as alcohol and drugs are used by individuals sometimes to an extent that their abilities and senses are impaired. Our position regarding substance abuse is the same whether alcohol, marijuana, illegal drugs, prescription drugs, or controlled substances are involved. This policy is implemented because Unity of Bellevue believes that the impairment of any employee due to his or her use of substances creates a risk of injury to other employees, the impaired employee, or to third parties.

The employee who begins work while impaired by drugs or alcohol, becomes impaired while at work, or who uses, possesses, transfers, or attempts to sell any illegal substance is subject to disciplinary action which may include suspension, dismissal, or release from employment.

Employees who are taking prescription drugs are under a duty to report this to their supervisor. This is for the protection of the employee and for safety purposes in case of an adverse reaction to the drug while at work.

- 2.1.5 **Open Door Policy.** Unity of Bellevue cannot successfully achieve its individual and collective mission without effective communication. UOB strives to provide a work environment that accomplishes this goal by encouraging dialogue. The most important working relationship occurs between an employee and their supervisor. In order for this relationship to remain effective, supervisors must be aware of employee concerns. It is therefore important for employees to discuss their ideas, concerns and suggestions.

- 2.1.6 **Grievance Policy.** Every person serving Unity of Bellevue (employee, contractor, volunteer) shall be treated with respect, in a fair manner, and not penalized or subject to harassment for raising concerns about behaviors or a suspected mistake in the administration of policy, practice, or work condition.

To file, or escalate a complaint this process shall be followed:

- a) Each person shall take individual accountability, in accordance with Unity teachings, to attempt resolution directly unless doing so will put them in danger.
- b) If direct resolution is unsuccessful then the Minister shall be informed so as to provide assistance. In cases involving the Minister, the Board of Trustees' President shall be informed. Members of a workgroup may inform the group leader or Board Advisor as a preliminary first step.
- c) All complaints shall be thoroughly investigated by someone with the experience necessary to determine how to properly handle the complaint.
- d) Results of the complaint investigation shall be provided to the person who registered the complaint, to the Minister, and to the Board of Trustees' President.
- e) The Minister or the Board President may contact the NW Regional Representative for help as needed. <https://www.unitynwregion.org/Regional-Representative>. The NW Regional Representative will determine if the concern can be addressed by NW Region or needs to be redirected to the UWM Member Support Representative.

- f) If there are significant differences between the Minister and Board then consideration may be given to contacting the Director of Peacemaking Services to discuss whether initiating a conflict transformation process might be appropriate.
- g) If a breach of ethics is thought to have occurred any person may go directly to Ethics Review System of UWM: <https://www.unityworldwideministries.org/accountability-and-ethics>

2.1.7 Harassment Policy. Unity of Bellevue is committed to maintaining a positive, constructive working environment where all staff and volunteers may pursue personal career satisfaction, spiritual growth, and fellowship. Unity of Bellevue will not tolerate harassment of any kind based on race, color, religion, ancestry, national origin, gender, age, disability, veteran status, sexual orientation, or political ideology. Harassment not only violates the spiritual center policy but also may be a violation of state and federal law. The entire Unity of Bellevue community (staff, volunteers, and congregation) is responsible and accountable for maintaining an environment free of harassment.

- a) Sexual harassment would include an instance when that employee's or volunteer's continued employment or advancement is conditioned on submission to unwelcome advances, and would also include sexually explicit language or touching, creating a hostile environment within which to work.

Harassment is any unwelcome or offensive conduct relating to an individual's race, color, religion, ancestry, national origin, sexual orientation, gender, age, disability, veteran status, or political ideology.

Discriminatory harassment includes verbal or physical conduct intended to threaten, intimidate, offend, demean, or coerce; and may impair an employee's ability to do his/her job. Harassment may take many forms, including:

- gestures, physical acts, slurs, or taunting
- verbal abuse, epithets, comments, or jokes
- displaying derogatory objects, cartoons, posters, drawings, or pictures.

Sexual harassment is a form of misconduct that undermines the integrity of the interpersonal relationship. It is also a violation of the law and will not be tolerated. Sexual harassment, as defined by the Equal Employment Opportunity Commission and stated below, is expressly prohibited:

"Unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature constitute sexual harassment when: (1) submission to such conduct is made either explicitly or implicitly a term or condition of the individual's employment; (2) submission to or rejection of such conduct by an individual is used as a basis for employment decisions affecting such individual; or (3) such conduct has the purpose or effect of unreasonable interfering with an individual's work performance or creating an intimidating, hostile or offensive working environment. (Equal Employment Opportunity Commission, 29CFR Part 1604.11 45FR25024, "Guidelines on Discrimination Because of Sex.")

Conduct that has the purpose or effect of substantially interfering with an individual's work performance or creates an intimidating, hostile or offensive working environment could also include the following:

- Sexual flirtation, touching, advances, or propositions

- Verbal abuse of a sexual nature
 - Graphic or suggestive comments about an individual's dress or body
 - Sexually degrading words to describe an individual
 - The display in the workplace of sexually suggestive objects or pictures.
- b) Any such incidents will not be tolerated, and will be the basis for immediate discipline, up to and including dismissal and/or membership status removal.
- c) Any employee who believes that they have been subject to, or have knowledge of harassment, as outlined in this policy should immediately notify their supervisor, the Minister, or the Board of Trustees' President. If the complaint is with the Minister, report the matter to the Board of Trustees' President.
- d) Any such report will be investigated promptly and thoroughly. The complaint will be kept confidential among parties necessary to investigate and adjudicate the complaint, at the request of the complainant. No employee submitting such a report will suffer any retaliation for filing that complaint. Investigating sexual harassment charges against or involving staff:
- Have the employee put into writing what was done and how they believe this was a form of sexual harassment. If they do not feel comfortable writing a complaint, then summarize in writing for them and have the employee sign the summary.
 - Discuss the complaint with the accused and ask them how they would like to respond. If the individual admits harassment, then disciplinary action should be taken. If they deny the allegation, then an investigation should be discreetly conducted.
 - An investigation, if necessary, should be conducted in confidence without using the names of the accuser or accused. A decision will be based upon the information attained in the investigation.
 - If charges are or are not substantiated and the accuser and accused work together, then a decision must be made as to creative scheduling or transfer of the accused in order to maintain a non-threatening work environment.
- e) Results. If the investigation substantiates the complaint, corrective action will be taken, up to and including discharge of the offender and/or revocation of membership status. The employee who registered the complaint will be advised of the determination of the investigation. Unity of Bellevue will not in any way retaliate against an employee who makes a report of discriminatory harassment in good faith, nor will it permit any manager or employee to do so. Retaliation is a serious violation of this policy that should be reported immediately.

2.1.8 Safety and Health Unity of Bellevue intends to provide a safe place of employment and maintain sound operating practices which result in safe working conditions and efficient operation.

Emergency Procedures. Emergency procedures describing the steps to be taken in case of fire, severe weather (e.g. tornado), medical emergencies, or evacuation are posted and available to all personnel.

Injury on the Job. Should an injury occur while working, employees are to immediately notify the Minister who will arrange for medical treatment. Worker's Compensation reports are to be filed immediately by the Minister or other designee. In case of serious injury or illness, employees are immediately taken to a hospital emergency room.

2.2 Worker Classification and Eligibility. This section contains both explanation and Unity of Bellevue policy for compliance with legal requirements for work eligibility as well as how to classify a new position.

2.2.1 Proof of Work Eligibility. As mandated by the Immigration Reform and Control Act, within three (3) days of employment, all new employees must complete the Bureau of Citizenship and Immigration (BCIS) Form I-9 and provide proof of identity and eligibility to work in the United States. The Form I-9 is maintained by the Unity of Bellevue business office. Employers must retain all I-9 forms for at least three (3) years after the date of hire or for one (1) year from the date an individual's employment is terminated, whichever is later.

2.2.2 Classifications. Those in an employment capacity with Unity of Bellevue may be classified as W2 employee or a 1099 contractor.

- a) A worker who performs services which the supervisor has the right to control what and how it will be done are classified as W2. By Internal Revenue Service definition this employment status requires Unity of Bellevue to withhold taxes, make payments, and report taxes to the IRS. Workers with regular or expected hours of working and whose work is ultimately under the auspices of the Senior Minister or delegate, shall be considered a common law employee (W2), per the IRS Tax Code as documented by the Internal Revenue Service. W2 employees may be any of the following:
- Permanent full-time employee. Paid by salary and work a standard forty (40) hour work week on a permanent, continuous basis. Employees in this category are paid via a regular payroll cycle, are eligible for all benefit programs and are considered "staff."
 - Permanent part-time employee. Paid hourly and work less than the standard forty (40) hour work week on a permanent, continuous basis. Employees in this category who work at least 20 hours per week are eligible for sick leave medical benefits and PTO on a prorated basis (e.g., a 20 hour per week regular employee receives medical benefits at a 50% rate; a 30 hour per week regular employee accrues PTO at a 75% rate) and are eligible for other benefits as required by Washington State law. These employees are paid via a regular payroll cycle and are considered staff.
 - Temporary full-time employee. Hired to perform a job or to work on a project that has a limited duration such as a special project, abnormal workload, or emergency. Employees in this category are not eligible for medical benefits, nor can they earn or accrue any leave, such as PTO or sick leave.
 - Temporary part-time employee. Hired to perform a job or to work on a project for a short period of time, normally not more than three (3) months. Employees in this category are not eligible for sick leave, nor can they earn or accrue any leave, such as PTO or sick leave, other than as required by Washington State law.
- b) A worker who conducts services under a verbal or written contract for a specific purpose and who does not meet the IRS definition of employee (therefore W2) may be classified as 1099. It is Unity of Bellevue's responsibility to classify a worker correctly. If a worker is classified as 1099, when they should have been classified as W2, then Unity of Bellevue may be liable for repayment of taxes back to the date of hire
- A worker may be classified 1099 if the supervisor has the right to control or direct the result of the work but NOT the means and methods of accomplishing the result.

- 1099 workers and suppliers are not to be treated as staff. They are to be given a desired outcome but are not to be directed on the details of providing the service.
- 1099 workers are not required to attend staff meetings nor are they to be invited to participate in staff activities such as new employee interviewing.

2.2.3 Exempt v. Non-Exempt Terminology. Certain employees perform work that is subject to the Fair Labor Standards Act (Wage and Hour Law) and are referred to as "non-exempt" employees. Employees exempt from certain major parts of the act are known as "exempt" employees. Non-exempt employees are paid a regular rate for the number of hours worked in a pay period and are eligible for overtime pay. Exempt employees are paid a regular salary, regardless of the hours worked. However, the first paycheck for the exempt employee will be paid with a prorated rate according to the employment starting date (number of working days for said pay period).

2.3 Job Description. A job description document shall be developed for each W2 full-time or part-time permanent employee which defines the duties, expectations, and responsibilities of the job. The employee shall perform duties in accordance with their written job description. Temporary employees and service providers (typically 1099 classified) perform work as overseen by staff and in accordance with their scope of services. Section 10.0 contains all approved job descriptions.

2.4 Hiring

2.4.1 Recruitment. Unity of Bellevue recruitment polices are as follows:

- Prior to recruitment, a job description must be developed. If it is a new job description then it, along with a proposed rate of pay based on market analysis, shall be approved by the Board of Trustees prior to any action for recruitment.
- Open positions shall be filled with candidates who best meet the requirements of the position.
- The Minister, or delegate, is accountable for ensuring that recruitment includes a number of qualified candidates from whom to choose.
- It is acceptable for recruitment to include referrals from current or past employees, walk-in applicants, newspaper advertisements or Internet postings.
- All advertisements shall
 - Contain the phrase "An Equal Opportunity Employer"
 - Use appropriate language which does not discriminate. For example, the ad shall not use gender specific terms (such as male or female)
 - Contain a job title that is exactly as per the approved job description.

2.4.2 Interviewing. Unity of Bellevue interviewing polices are as follows:

- Employment interviews must be conducted appropriately.
- A job opening may be discussed to gage interest but this shall not constitute an interview.
- Interviews shall be pre-planned with proper notice to all parties involved.
- Interviews shall be conducted in a business appropriate setting which is private and does not have interruptions.
- Interviews shall include a set of core questions. Additional questions may be asked of a specific candidate for clarification of the candidate's experience or qualifications. All interview questions shall be job-related, have a direct bearing on the tasks of the position, and standardized for all candidates.

- f) Questions that express either directly or indirectly any preference, limitation, or general reference to race, national origin, sex, age, physical handicap, or any protected class information as defined by law are prohibited.
- 2.4.3 **Candidate Testing and Music Auditions.** Skills testing and music auditions are allowed only if the test or audition is representative of actual job-related duties. If utilized, the testing / audition must be administered equally for all candidates.
- 2.4.4 **Reference Checks.** Section 10 contains tips for doing reference checks and also for being the recipient of reference checks.
- a) Reference checks shall be made only by the hiring authority, or delegate.
 - b) All credit or background verification checks shall be approved in advance by the Minister, or as delegated, and conducted only with written consent from the applicant.
 - c) All workers deemed integral to the operation of the church must have a background check.
 - d) Volunteers who work with ministry accounting or in any capacity with youth shall have a background check.
 - e) All credit or background verification checks shall be filed and maintained separate from personnel paperwork in confidential files.
- 2.4.5 **Selection and Salary.** Candidate selection shall be based on ability, experience, training, and interest in performing the duties of the position as outlined on the job description. After candidate selection the starting salary rate shall be determined and be consistent with the salary administration program of Unity of Bellevue.
- 2.4.6 **Employment Offers.** Unity of Bellevue employment offer polices are as follows:
- a) The Board of Trustees is the Hiring Authority for hiring a Minister. For all other positions the Hiring Authority is the Sr. Minister.
 - b) The hiring authority shall make the offer in writing and notify candidates not selected by mail after the job has been awarded.
 - c) All employment contracts shall be written in the Unity of Bellevue template format and include signature of both the Sr. Minister and the Board of Trustees President. In the case of a contract for Sr. Minister all Board Officers shall sign the contract.
- 2.4.7 **Contracting.** Unity of Bellevue employment offer polices are as follows:
- a) All contracts shall be written using standard Unity of Bellevue templates to ensure work is properly defined.
 - b) All spiritual leadership positions shall be hired under a contract.
 - c) No one at Unity of Bellevue is authorized to enter into any written (or verbal) employment contracts with any employee without the express consent of the Board of Trustees.
 - d) **Employment At-Will.** Except for those employees who have a written employment agreement signed by a member of the Board of Trustees, employment at Unity of Bellevue is "at-will." This means that either the employee or Unity of Bellevue may terminate the employment relationship at any time for no reason at all.

This policy will not be modified by any statements contained elsewhere in this manual, or in any employment applications, recruiting materials, memoranda, or other materials provided to employees in connection with their employment. Also, those documents will not create an expressed or implied contract of employment for any period of time.

2.4.8 Introductory Period. The first three months (90 days) of employment are considered a trial period for all new employees including those under contract. During this period, both the employee and Unity of Bellevue have the right and the responsibility to evaluate each other to determine whether to continue employment. The employee may terminate his or her employment for any reason, and Unity of Bellevue may dismiss the employee without notice or obligation within the 90-day period. Satisfactorily completing the 90-day introductory period does not confer on the employee any rights or expectations for continuing employment beyond the 90-day period, and the employment relationship remains “at will” or, for those employees hired under contract, as specified by the contract.

2.5 Orientation. The manner in which a new employees is assimilated into the ministry may well influence how long they stay with the ministry and how productive they are. For this reason, Unity of Bellevue policy is that the hiring authority shall make every effort to ensure that orientation of new employees is well planned, paced appropriately, and includes a clear picture of the ministry, a clear understanding of expectations, introductions to those who may provide detailed information, and identification of appropriate channels for problem solving.

2.5.1 Paperwork. During onboarding the Center Administrator provides the new employee with the following and explains each item, allowing the employee to ask questions as needed:

- Information about working hours, expectations for break and lunch times
- Onboarding checklist: what the employee must do initially after hire.
- Payroll forms (W-4, I-9, Time Off Request, Weekly Time Sheet, etc.) and payroll schedule (pay periods and pay out times)
- Insurance application forms (if applicable)
- Emergency Information Sheet
- Unity of Bellevue Policy Manual acknowledgement. Every worker is given a copy of the policy manual to read and required to sign off that they have read the manual within a reasonable timeframe of their hire date.
- Unity of Bellevue Bylaws acknowledgement.

2.5.2 UWM Resources. The following brochures are available from Unity Worldwide Ministries as resources for supervisors:

- *My First Unity Experience*
- *Twenty Questions About Unity*
- *Unity - A Ministry of Service*

2.5.3 W2 Revisions. A new W-4 will need to be filled out by any employee who experiences a change in address, marital status, or deductions. An I-9 form requires Xeroxed copies of the employee’s identification and used for employer verification, then attached to the I-9 form once the employee has completed the form. The use of weekly time sheets, overtime requests and time-off sheets should be explained to the employee.

2.6 Compensation

2.6.1 Confidentiality. Information concerning individual salaries and salary ranges is available to the Board of Trustees and those supervisors directly involved in and with authority over the control,

budgeting, or administration of salaries. Specific salary information is confidential, and the details of each individual's salary is not released to anyone other than the management, the employee involved, and the Board of Trustees if necessary.

2.6.2 Pay Day. All W2 employees are paid on a pre-determined payroll schedule. No employee checks are released to individuals other than the employee without the written consent of the employee.

2.6.3 Timekeeping.

- a) Employees are responsible for ensuring that time sheets are filled out properly and turned in to their supervisor for approval.
- b) Employees record their hours worked as well as any hours charged to sick leave, vacation, or holiday.
- c) Overtime is assigned as far in advance as possible. Employees assigned to work overtime are expected to fulfill the assignment. No employee may work overtime of their own accord; all overtime work must be authorized in advance by the employee's supervisor.
- d) Holidays, vacations and paid sick leave which fall within the regular work week will not be included as time worked for purposes of computing overtime hours.

2.6.4 Salary Reviews and Bonuses. A salary range is pre-established for each position at Unity of Bellevue, providing a means for salary progression in the position.

- a) Progress within the salary range is based on experience and merit. Salary-range benchmarking is based upon the employee's formally written job description and market analysis.
- b) Employees of Unity of Bellevue are not guaranteed a salary increase each year. Salaries are reviewed annually during the Center's annual budget development and increases are based on the employees performance and also on financial feasibility. During the review process the employee may be asked to give feedback on duties performed.
- c) All salary increases require Board of Trustee approval. This is requested during the annual budgeting cycle. Bonuses are established at the discretion of the Board of Trustees.

2.7 Benefits. Benefits provided by Unity of Bellevue are considered part of total compensation. This includes Worker's Compensation Insurance and Social Security (FICA for non-Minister employees, self-employment tax for Ministers) which is paid by the ministry and the employee. Employees are paid in accordance with the ministry's salary administration guidelines and in compliance with federal, state, and local regulations. Employee salary levels are considered confidential.

2.7.1 Medical Health Coverage. Unity of Bellevue does not have a group plan for medical/dental/vision coverage for full-time employees. However, Unity of Bellevue will provide a health insurance stipend to subsidize employees' costs based on the employee obtaining insurance through the general marketplace. Employees understand that they may be required to pay a portion of their medical coverage premium.

2.7.2 Workers Compensation. If you suffer from illness or injury that is related to your work, you may be eligible for workers' compensation benefits. If you are injured or become ill through work, please inform the Senior Minister or Center Administrator immediately. For more information regarding eligibility and coverage, contact the State of Washington Department of Labor and Industries.

2.7.3 **Unemployment Insurance.** For information regarding the unemployment claim process, including eligibility and coverage, contact the State of Washington Employment Security Department.

2.7.4 **Paid Time off (PTO).** After 90 days of full-time employment, full-time employees and some part-time employees are entitled to Paid Time Off which is either Annual Leave, Sick Leave, Holidays, or Personal Leave. Paid vacation is intended to provide the employee with time away to temporarily put aside the demands of the job and enjoy periods of rest and relaxation. Employees are encouraged to take all earned vacation during the year in which it is earned. Vacation pay will not be given in lieu of time off.

a) **Annual Leave.** This is computed from the date of full-time employment, in accordance with the following schedule:

- 12 days of Annual Leave after 1 year
- 13 days of Annual Leave after 2 years
- 14 days of Annual Leave after 4 years
- 15 days of Annual Leave after 5 years
- 20 days of Annual Leave after 10 years
- 25 days of Annual Leave after 15 years or more

Part-time employees who work 20 hours per week or more are entitled to annual leave prorated based on the number of hours worked per week.

All Annual Leave, regardless of when it is scheduled, must be requested from and approved in advance by the employee's supervisor. Annual Leave may be taken on a weekly, daily, or hourly basis as long as it does not conflict with overall scheduling requirements.

As much as possible, Annual Leave will be scheduled in advance in accordance with the employee's wishes; however, operating requirements and Annual Leave requests from other employees must also be considered. Generally, Annual Leave requests from employees with longer service will be given preference.

Unity of Bellevue encourages employees to use all of their Annual Leave each year. Unused Annual Leave carries forward into the next year to a maximum of the equivalent of two years earned leave (for example, a two-year employee can carry over no more than 39 total days leave), and may be reimbursed at the time an employee leaves employment with Unity of Bellevue. Based on the schedule above, the maximum a departing employee would be compensated for would be for two-years of un-used Annual Leave (i.e. if you work here for two entire years [24-months] without taking any Annual Leave, you can be compensated for 21 days of unused Annual Leave).

Compensation for Annual Leave is calculated at the employee's hourly rate in effect at the time of payment, subject to applicable taxes and deductions.

Compensation for vacation time is calculated at the hourly rate in effect at the time of payment, subject to applicable taxes and deductions. Vacation checks are distributed on the regularly scheduled payday.

- b) Sick Leave. The following are examples of what sick leave can be used for:
- *Personal Illness*: The number of hours missed during a regularly scheduled work day by an employee for sickness or accident is deducted from accrued paid absence leave.
 - *Illness in Immediate Family*: Absence due to family illness requiring the employee's presence.
 - *Medical or Dental Appointments*: For employee or members of the immediate family when such appointments cannot be scheduled outside of working hours.
 - *Paternity or Maternity Leave*: Male employees are granted time off for the birth of a child or to attend to important matters resulting from the birth of a child. Approval for paternity leave is obtained in advance and is limited to one (1) week of work.

Full-time employees are eligible for and will accrue sick leave (computed from the date of full-time employment) at a rate of eight (8) hours per month. Sick Leave may accrue to a total of 720 hours over any employee's tenure.

Part-time employees are entitled to sick leave prorated based on the number of hours worked per week as defined by Washington state minimums published on Labor and Industries website.

Employees may use Sick Leave when they are unable to work due to illness or injury or when they must care for an ill or injured family member. Sick Leave is not intended as additional time off and cannot be used as such. Unused Sick Leave is not reimbursed at the time an employee leaves employment with Unity of Bellevue. Sick Leave must be taken in hour increments.

- c) Holidays. Unity of Bellevue observes the following holidays:

- New Year's Day
- Martin Luther King, Jr. Day
- President's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day & Thanksgiving Friday
- Christmas Day

If the holiday falls on an employee's unscheduled workday, the employee and their supervisor will work out an acceptable substitution.

If a vacation day or personal day is scheduled in advance on the workday before or after the holiday, the holiday is paid.

If the holiday falls on Saturday or Sunday, observance is on the workday closest to the holiday.

Regular full-time employees receive full holiday pay. Part-time employees do not get paid for holidays.

- d) **Personal Days.** Full-time employees will receive three (3) Personal Days per year to be used for things such as moving, bereavement, etc. These days cannot be carried forward into another calendar year.

Personal Days. In addition to the above holidays, regular full-time employees receive three personal holidays each year, eligible for use after 90 days of employment. Personal holidays are for the regular full-time employee to use at their discretion. Personal holidays may not be carried over into the next anniversary year, nor will payment be given in lieu of time off.

2.8 Absences. Regular attendance and punctuality of employees during scheduled hours of work is essential for the ministry to meet operational demands. All employees are expected to report for work regularly, on time, and remain at work until the end of the workday.

2.8.1 Reporting Absences and Lateness. If an employee is unable to report to work or will be late for work, the employee must notify the Senior Minister or Center Administrator at least fifteen (15) minutes before the beginning of his or her workday, or as soon as possible. An employee who is absent from work for two (2) or more consecutive working days and has not notified the Sr. Minister or Center Administrator may be subject to immediate termination.

2.8.2 Excessive Absenteeism. Unsatisfactory attendance or excessive absenteeism, including frequently reporting late or quitting early, will be cause for disciplinary action. Employees who are absent or late for more than six (6) days in six (6) months (except for long-term or chronic illnesses) will be counseled by the Minister. Being absent from work for one or more consecutive days for the same reason is considered to be one incident of absence. Absences or tardiness of twelve (12) or more days in one year will be given a written Performance Improvement Plan. If timeliness/attendance does not improve in the required period of time as outlined in the Performance Improvement Plan, the employee will be dismissed.

2.8.3 Unpaid Absences. Absences caused by personal emergency or personal illness that extend beyond accrued paid absence leave are taken without pay or charged against vacation time.

2.8.4 Paid Absences. An employee may be eligible for paid absence leave (see section XXX). Paid absence is intended for employees so use for illnesses or emergencies. The following defines policy for paid absences (other than annual leave):

- a) *Death in the Family:* Covered by personal days or FMLA (as applicable).
- b) *Court Duty:*
 - To qualify the worker must be subpoenaed as witness, or called for jury duty
 - Pay will be the difference between fees received (excluding expenses) and regular pay.
 - Worker must retain court pay stub, parking receipts, etc. to provide to the supervisor.
- c) *Inclement Weather:* Safety of Unity of Bellevue workers is paramount.
 - When Unity of Bellevue closes notification shall be made as quickly as possible by the Supervisor via email or telephone.
 - If Unity of Bellevue is open but a worker cannot get to work they are to only to come into work only if they can make it safely. In this case,
 - Salaried full-time employees, with supervisor approval, will receive their full salary for their normal hours worked remotely.

- Hourly and part-time hourly workers are not paid for unworked hours. It is acceptable, with supervisor approval, to make up lost hours when Unity reopens or the emergency passes, to a maximum of the regular hours they would have worked during the inclement weather period. These employees may opt to take accrued available leave.
 - No pressure is to be extended from Unity supervisor, at any time, that would encourage employees to take unsafe chances to attend work.
- d) *Sick Leave.*
- May accrue to a total of 720 hours for full time employees
 - Is not to be used as additional time off. This leave is to be used for illness related time off: doctors appointments, illness, or an approved leave of absence associated with medical condition.
- e) *Extended Leave of absence.*
- All extended leave must be approved by Supervisor.
 - Paid absence time will not accrue to an employee while he/she is on an extended leave of absence (pregnancy, family/medical leave, worker's compensation, prolonged sick leave, etc.). If an employee is absent for less than a full day, their paid absence accrual account is charged for the hours of absence.
- f) *Medical Statements.* Written medical statements, signed by a Physician, shall be filed in the employee's personnel file and are required for these conditions:
- Frequent and prolonged use of sick leave policy
 - An employee's return from an extended medical leave (such as FMLA).
- g) *Medical Leave of Absence.* A medical leave of absence could utilize either sick leave or regular employee Paid Time Off accrual or, if qualified, time off under the Family Medical Leave Act (FMLA). FMLA is a type of medical leave. The employee should confer with their supervisor on the requirements of FMLA and how to apply for this type of leave. In general, since Washington State has a state level FMLA, the employee's request needs to first be submitted on a state level. If not granted at state level the employee may be able to submit at Federal level. When an employee returns from FMLA leave Unity of Bellevue is required to reinstate the employee in the same, or equivalent, position.

2.8.5 **Leave payout upon employment end.** When an employee quits, or is released, the employee will be given compensation for PTO days accrued but not used. No other leave time is paid. Specifically, unused sick leave, holidays, and personal days are not reimbursed to a departing employee.

2.9 Conduct. All workers are expected to act in accordance with Unity teachings, respect for each other, and respect for the property. This includes practicing personal cleanliness and conservative good taste in dress and appearance. Casual clothes such as shorts, undershirts, tank tops, or similar items are not considered appropriate for office area, or when visiting members.

- a) **Work area.** Personal items such as magazines, posters, "message" t-shirts, etc., which might by their nature offend others, should not be displayed or visible.
- b) **Misconduct.** The following list of violations is provided as example of behavior which is prohibited and will subject the involved person(s) to disciplinary action up to and including termination:
 - Theft or unauthorized use of Unity of Bellevue property or other employee's personal property.
 - Willful destruction of Unity of Bellevue property.
 - Falsification of personnel, operational, or Unity of Bellevue records.

- Unauthorized release of any confidential information regarding Unity of Bellevue, its employees (past or present), or its members.
- Insubordination, including refusal to perform assigned work, refusal to obey safety rules when warned, or repeated failure to cooperate with policies.
- Failure to improve performance or attendance when an employee has been made aware of a deficiency.
- Serious breach of Unity of Bellevue practice or conduct.

2.10 Performance Management. The overall accomplishments of individuals including their performance, progress, career interests, and other areas of importance are evaluated on an annual basis targeted for the first three months of the calendar year.

- Each W2 full-time or part-time regular employee (not temporary) shall formally receive a written performance review and evaluation, based on the written job description once per year.
- In the case where the employee job performance is identified as being less than satisfactory, more frequent evaluations and discussions shall be conducted and documented identifying areas of needed improvement, a plan for corrective action, and a discussion of potential consequences if the deficiencies are not corrected in a timely manner.
- 1099 workers and suppliers are not subject to performance reviews. If services are not satisfactory the situation will be managed as deemed appropriate by the W2 staff employee which oversees the 1099 contractor.
- The primary objectives for a Performance Review are to:
 - Establish performance objectives so those employees know the standards by which performance of job tasks are measured.
 - Provide uniform methods for evaluating and measuring individual performance.
 - Provide a basis for determining developmental needs and career interests.
 - Provide information to Minister, or other supervisor, for decisions on job assignments, compensation, and other personnel actions.

2.10.1 Process. The following process is to be followed for performance reviews

- Write the review. Hearsay is not to be part of a documented performance review. Reviews should be based upon measurable tasks that the employee performs as part of their job description and/or behavioral expectations based on Unity teachings. When documenting performance use the Unity of Bellevue standard template and document only what you have personally witnessed or can verify.
- Schedule time. The performance review meeting should be pre-planned and not “on the fly”. Schedule a time that is free from other interruptions.
- Meeting. The meeting should be conducted in a quiet place where both parties can speak freely. The employee should be allowed time to read through the review before the review starts. Once the review starts the Supervisor will read through the review and allow time for questions to be asked. After the review is complete the next year's goals should be discussed and documented.
- Results of review are to be in writing and summarized by the Supervisor. Notes are to be included in the employee's file.
- Once the review is concluded, the Minister or other designee, and the employee signs the form. The employee receives a copy of the review, and a copy is filed in the employee's personnel file. The employee's signature only signifies acknowledgement; not agreement.

Employees may refuse to sign. This is OK. When this occurs simply write “refused to sign” in the space where the employee signature is required.

2.10.2 Promotions. The intent of Unity of Bellevue is to offer promotional opportunities when available to employees who have demonstrated above average skills in their current position, and interest and willingness to assume higher levels of responsibility. There are few opportunities for promotion within the ministry. Therefore, employee recognition may come by way of verbal encouragement, increased responsibility, offering educational programs, and/or providing salary increases.

- a) All promotions or transfers are based solely on the individual's ability, experience, training, and interest in performing the work, and is not influenced by race, age, sex, national origin, religion, or physical handicap, except where such handicap prevents the employee from adequately performing the job duties.
- b) Employees are eligible for a promotion or transfer after one year in their present position. Exceptions are granted only with the approval of the Minister and/or the employee's supervisor. Performance and attendance on the current job must be satisfactory to be considered for promotion.

2.10.3 Unsatisfactory Performance. Unity of Bellevue supervisors shall provide all workers reasonable opportunity to satisfactorily perform their duties including on-the-job training, proper equipment and supplies, periodic performance appraisals, and sufficient guidance. If these conditions are met and employee performance, attendance, or personal conduct is not acceptable then written reprimands and/or a written performance improvement plan shall be issued and comply with the following.

- All workers must be made aware of policies, bylaws, and best practices and provided opportunity to comply before corrective action is taken.
- All unsatisfactory performance is to be thoroughly investigated to understand cause or motivation before action is taken.
- Disciplinary action shall be consistent for all workers.
- When delivering disciplinary action the message must speak to the worker's behavior or action (not personality).
- All disciplinary reviews, and action taken, shall be documented.
- The supervisor has the right to determine if an immediate dismissal is warranted but such action shall be discussed – even if briefly – with the Board President (or delegate) before action is taken.

2.10.4 Progressive Disciplinary Policies and Processes. Once it is determined that disciplinary action must be taken then it must follow this process:

- a) **Verbal Warning** Verbal warnings are informal discussions intended to advise employees of undesirable behavior. For verbal warnings to be effective, the following conditions are met:
 - Tell the employee what is expected and why you expect it.
 - Discussions are held in private. Employees are to never be reprimanded in the presence of others.
 - Verbal Warnings take place as soon as possible following undesired behavior. Bringing up month-old incidents or saving verbal reprimands for periodic performance reviews is unfair and unproductive.

- Undesirable behaviors are specific and directed toward the behaviors, not the persons themselves. A so-called "bad attitude" does not state what specific behaviors are undesirable and threatens the "intrinsic worth" of the person.
- The employee should participate in the discussion of the undesirable behavior was, and what should the outcome have been. Allow the employee to formulate a plan of how to attain the desirable actions in the future.
- Set a follow-up date no later than thirty (30) days after the verbal warning to discuss results since the verbal warning. At this time either praise the employee for corrected behavior, or follow-up with a written performance improvement plan.

The Supervisor will document the verbal warning for the employee's record. The documentation will include the date the undesirable behavior occurred, specify what the undesirable behavior was, the date of the verbal warning, and what was covered during the discussion. Include also an action plan of how the employee agrees to correct the behavior and a follow-up meeting date. Depending on severity of the issue discussed, the Minister may want to review the verbal warning with the Board President. Documentation of the verbal warning is placed in the employee's personnel file.

Should the Minister's performance necessitate a verbal warning, the Board of Trustees will follow the above procedure, through the direction of the Board President.

- b) Written Performance Improvement Plan. If after the verbal warning, the undesirable behaviors continue, or performance does not improve, the Supervisor initiates a written performance improvement plan. The objective of the written performance improvement plan is to help the employee meet expected performance levels. To accomplish this objective, the following conditions are met:
- Mutual understanding of job duties and standards of performance.
 - Clear indications of performance deficiencies in the past thirty (30) days are outlined, include original undesirable behavior discussed in verbal warning.
 - Specific goals to be accomplished by a pre-determined date. Allow the employee to participate in setting the goals.
 - Weekly documented follow-up discussions with the employee.
 - Alternatives at the end of the plan: objectives met, no further action needed at this time; continue plan for a pre-determined amount of time; or termination. These alternatives should be documented in the performance improvement plan.
 - Consistent and fair applications are followed with all written performance improvement plans.
 - A copy of the written performance improvement plan is given to the employee and a copy placed in the employee's personnel file.

The Supervisor prepares a written performance improvement plan. Preparation should include: specific dates of deficiencies, expected performance levels, and a time period for improvement and follow-up. The length of time allotted for the performance improvement plan is dependent upon the employment position and the difficulty of the job tasks. In most cases a thirty (30) day plan is appropriate. It may be necessary to extend the duration to sixty (60) days if performance shows improvement, but still does not meet desired standards.

- c) Follow up. If after execution of the plan the employee performance improved satisfactorily, it is so noted by the Supervisor in the follow-up meeting, listing specific desired behavior attained. If performance does not meet specific goals set in the pre-determined time, the following alternatives are considered:

1. Extending the performance improvement plan.
2. Terminating the employee.

The Minister never terminates employees for unsatisfactory performance without full written knowledge and consideration of the facts and equity of the situation. Copies of the performance improvement plan and follow-up summary meetings are filed in the employee's personnel file with a copy going to the employee.

- d) **Written Warning.** A written warning is given as a last effort to notify an employee that they have not met expectations and line out any other options and put the employee on notice for impending termination should performance not be met within a short window of time.

2.11 Separation. Employees who leave Unity of Bellevue, whether voluntarily or involuntarily, are treated fairly and equitably with a minimum of interruption to ministry activities. Every assistance is provided to individuals with regard to matters of importance to them. The Minister does not dismiss employees without full knowledge and consideration of the facts and equity of the situation.

a) Types of separation:

- **Voluntary Resignation.** Employee voluntarily quits. In this case, employees are expected to provide at least ten (10) working days' written notice. The written notice is placed in the employee's personnel file.
- **Lay-off or Reduction in Force.** This occurs when Unity of Bellevue chooses to reorganize or eliminate the employee's job either due to financial hardship or reorganization for better effectiveness of operations.
- **Involuntary Termination.** Action taken by Unity of Bellevue to sever employment. Reasons for this may be, but not limited to:
 - Employee misconduct
 - Failure to maintain appropriate performance standards
 - Absence without notice
 - Violation of policy
 - Thefts, unauthorized use, or willful destruction of ministry or other employee's property
 - Falsification of personnel, operational, or other ministry records
 - Unauthorized release of any confidential information regarding the ministry, its employees (past or present), or its members.
 - Insubordination, including refusal to perform assigned work, refusal to obey safety rules when warned, or repeated failure to cooperate with policies.
- **Permanent disability.** When an employee is unable to perform their duties due to physical or mental disabilities, as determined by a qualified medical professional. If, after six (6) months the employee does not return to work, the Ministry may initiate separation procedures.

b) Tips to keep in mind prior to terminating an employee:

- Was there a written policy or bylaw for which you are considering terminating the employee for non-compliance?
- Was the employee informed about the policy or bylaws?
- Have you been thorough in your investigation of the policy violation and have you offered the employee an opportunity to discuss their side of the violation?
- Have you been consistent in disciplinary action taken with other employees who may have violated the same policy or bylaw?
- Do you have written documentation (including verbal disciplinary action taken) of the reason for termination?

- Have you given consideration to the employee's employment history and length of service to the ministry?
- c) **Exit Interview.** An exit interview is appropriate with voluntary resignations, lay-offs, reduction in force, or disability but is not appropriate for involuntary separations (termination, release). No exit interview shall be granted for involuntary separations. The exit interview shall include the Minister, the employee, and a member of the Board (at either the employee or Minister's request) and shall be focused on the following:
- Ensure the employee's obligations to Unity of Bellevue have been satisfied
 - Explain benefits or compensations available or due to the employee
 - Clarify the reasons for separation
 - Collect data for purposes of improving selection, placement, training, and development needs.
- d) **Pay Procedures.** Depending upon the employee's wishes, final paychecks are mailed or picked up by the employee. Final checks contain pay for:
- Time worked through date of separation
 - Earned vacation days, available only after one year of continuous, full-time employment
 - Reimbursable expenses, if any

Accumulated sick leave is not paid upon separation. Severance pay may be granted in rare cases, if approved by the Board of Trustees, but only applicable to full-time employees with greater than one year of full-time, continuous employment.

2.12 Personal Development. The ministry encourages employees to improve their capabilities and knowledge to assist both themselves and the ministry toward increased performance and growth. While responsibility for personal development is primarily that of the employee, the ministry may share in financial expense through fee reimbursement. All reimbursements must be preapproved by the Minister and within the approved budget. If conditions are placed upon reimbursements (such as a required grade for the course) that information is to be shared with the recipient at time of pre-approval.

2.13 Personnel Records. Unity of Bellevue shall establish personnel records for each employee and maintain within that file the documents and records relevant to the employee's employment and performance. This policy sets forth the type of information collected, how it is maintained, and what information is disclosed and to whom.

2.13.1 Content of Personnel Files. A personnel file is maintained on every employee and contains:

- Employment application and resume
- Emergency contact information
- Required tax information, benefit enrollment and change forms
- Payroll information
- I-9 Form (with copy of identification)
- Policy manual receipt acknowledgement
- Any other information relevant to the employee's relationship with the ministry (i.e.: test results, acknowledgements, disciplinary action documentation, medical statements, injury reports, etc.)
- Performance appraisals and documentation

An employee who has a change in the number of dependents or marital status must complete a new W-4 Form for federal income tax withholding.

2.13.2 **Updates.** In order to maintain accurate and timely employee records, employees must provide information if any of the following changes:

- Name
- Address
- Home telephone number
- Education Record
- Department
- Payroll deductions
- Emergency contacts

2.13.3 **Maintenance of Personnel Files.** Personnel files are maintained and updated by the Minister or designee, and kept in a locked file in the Center Administrator's office.

Files for background checks, including credit checks, must be maintained separate from the employee's personnel file and kept in a secured area. I-9 forms must be kept in a separate file. Emergency information cards must also be kept in a separate file.

2.12.4 **Access to and Dissemination of Information.** Unless required by law, information regarding an employee will not be released to any public or private agencies and/or persons without prior written authorization from the employee in accordance with the Privacy Act.

However, request of a third party, the employee's supervisor may verify dates of employment, positions held, and salary information as shown in company records, without written authorization.

The Minister will provide requested information in compliance with requests from governmental and law enforcement agencies, if they have furnished proper identification, and proven their legal authority and right to access the requested information.

All employee records are confidential. Access to the files is limited to the Minister and those with a valid business, regulatory, or legal reason to view. Current employees may review their own personnel records. A request to do so should be directed to the Minister who will schedule a time for review. Records may not be removed from the area where they are kept, but copies of portions of those records may be made with permission from the Minister.

Employees should refer all external requests for personnel information concerning applicants, employees, or past employees to the Minister or Center Administrator.

Confidential information regarding the employee's home address or telephone number is released only with the employee's written permission.

3.0 OPERATIONS

3.1 Facility and Grounds

3.1.1 **Upkeep.** Decisions on day-to-day repairs, maintenance, and purchase of supplies are authorized by the Minister or other designee in accordance with the budget. Non-recurring, non-budgeted

expenses over \$500.00 are referred to the Board of Trustees or sub-committee for review, research, or recommendations.

3.1.2 Improvements / Alterations. Recommendations for alterations or additions to the building or interior decoration affecting the aesthetic value of the property are referred to the Board of Trustees or sub-committee for review, research, or recommendations.

3.1.3 Memorials / Monuments. Any physical addition to the Church property is considered a physical change to the property and, as such, must be approved by the Board of Trustees. In the decision-making process, the Board shall determine maintenance responsibility.

3.1.4 Facility Equipment

Use: Lawnmowers, shampooers, snow blowers, office equipment, sound equipment or any other equipment is used only by persons authorized and approved by the Minister or designee. All Unity of Bellevue-owned equipment is to remain on the premises, unless otherwise approved by the Minister or designee.

Training: The Minister will ascertain a person's qualifications for operating ministry equipment before allowing an individual to operate equipment. If required, further training will be given.

Maintenance: A maintenance schedule will be kept for all equipment requiring periodic servicing. Records will be maintained assuring the schedule is adhered to.

Inventory: An inventory of ministry furnishings and equipment is maintained and updated on a six (6) month basis, or as items are changed and/or replaced.

3.2 Environmental Sustainability Policy

It is the Board-approved policy of Unity of Bellevue that all areas of operation strive to demonstrate ecological stewardship by making decisions and choices in ways that promote environmental sustainability.

- As a result of this policy, Unity of Bellevue will continually look for ways to reduce hazards and protect the environment, as well as direct financial resources toward more environmentally responsible alternatives.
- The policy encourages such efforts as reducing waste, increasing recycling, conserving energy and water, using green building techniques and practicing environmentally preferable purchasing.
- The policy goal is to have Unity of Bellevue lead by example and improve operations while inspiring others to do the same. The policy is implemented in all staff and volunteer areas, as well as informing those who use Unity of Bellevue property.
- Sustainability means using natural, financial and human resources in a responsible manner that meets existing needs without compromising the ability of future generations to meet their own needs.

3.3 Promotions

- 3.3.1 **External Correspondence.** All external correspondence related to church business shall originate through the Unity of Bellevue Center Administrator, Board of Trustees Secretary, or Board of Trustees' President.
- 3.3.2 **Advertising.** It is the policy of Unity of Bellevue that advertising is conducted in accordance with Minister approval and the budget approved annually by the Board.
- 3.3.3 **Editorial Policy.** All copy for advertising and publication (printed, website, or social media) should be submitted to the Center Administrator and may require final approval by the Minister before publication. The Minister reserves the editorial right to ensure that copy is in conformity with Unity teachings and the principles of fairness and non-discrimination.
- 3.3.4 **Radio & TV.** Radio and television programs are part of the spiritual outreach of the Center, and remain the responsibility of the Minister, unless he/she determines otherwise.
- 3.3.5 **Publications.** All publications and mailings are to be in concert with current programs, tone of the ministry, and within budget. Publications include but are not limited to the following:
- Newsletter which may include listings and promotions of activities of the ministry, inspirational content (articles, poems, etc.), and financial position of the ministry.
 - Sunday handout with schedule at the discretion of the Minister.
 - Ministry brochure highlighting the mission, vision, and purpose statements of the ministry.

3.4 Income

- 3.4.1 **Rentals.** The facilities of Unity of Bellevue, including its parking lot, may be rented or otherwise used by groups or individuals approved of by the Minister and/or the Board.
- a) Rental fees, are subject to occasional revision or waiver, and shall be set by the Minister and/or the Board, in co-operation with any program management which may be in place at the time.
 - b) Security issues must be resolved before use of facilities is allowed.
 - c) Facilities are not to be used by political groups or special interest or lobby groups, whose agendas may be controversial. However, the premises may serve as an official polling place or emergency winter shelter, if so designated by the city, county or state.
 - d) All arrangements pertaining to financial remuneration must be in compliance with Washington Department of State rulings and federal not-for-profit requirements.
 - e) Rental of the premises for a fee, e.g. concerts, weddings, receptions, workshops, etc. shall require the renter to sign a rental agreement. Included in the rental fee will be the cost of the additional premium, if any, charged by Unity of Bellevue's liability insurance carrier.
 - f) Rental of the premises to another organization for a fee shall require the renter to sign a rental agreement. Such organization shall be further required to deliver to Unity of Bellevue a certificate of insurance in an amount as shall be proscribed in the rental agreement. Such certificate of insurance shall name Unity of Bellevue as an additional insured.
 - g) Fees for rental of the premises of Unity of Bellevue shall include a security charge, rental monitor and a clean-up charge. These charges shall not be waived.
- 3.4.2 **Bookstore Operations** Anyone working in the bookstore must receive a background check.

3.5 General Operations Policies

3.5.1 COVID policy. Effective 10/01/22.

- a) Intent. This policy applies to Sunday service hours (approximately 8:00 am – 6:00 pm) and is crafted primarily for purposes of ensuring a consistent approach to COVID protection for those attending in-person Sunday meditation and services.
- b) Masking. Masks are optional for all areas except individual staff offices. UOB will continue to provide masks and will make them available just inside the front entry doors. Staff members may still require masks in their office at their discretion.
- c) Symptoms & Exposures. If a Congregant has symptoms, or has been exposed to COVID in the last 14 days, they must take a Rapid Test the morning before the Sunday service you wish to attend. UOB will continue to make COVID-19 tests available until we run out of stock or they become expired. Based on CDC data, COVID-19 symptoms may appear 2-14 days after exposure and can be any of the following. Find latest info [here](#).
 - Fever or chills
 - Fatigue
 - New loss of taste or smell
 - Nausea or vomiting
 - Cough
 - Muscle/body aches
 - Sore throat
 - Diarrhea
 - Shortness of breath
 - Headache
 - Congestion or runny nose
- d) Controls. This policy change is intended to place ownership on the individual based on their individual comfort level. The following controls apply:
 - Individuals are responsible for
 - self-masking as requested (individual offices) or as desired (all other areas).
 - self-testing if exposed or if experiencing symptoms within 14 days of entry.
 - Policy to be posted, in summary, on exterior doors.
 - Airflow. Prior to Sunday service, the building exhaust vent in the Sanctuary will be turned on to circulate the air and will remain on until approximately 12:00 pm. Also, between 10:00 am – 12:00 pm each Sunday, the windows in the Friendship room will be opened to the extent possible permitted by the weather and the building exhaust vent will be on.
 - Tags. Green/Blue (Hugs OK!), yellow (ask first), and red (no contact) stickers will continue to be available to help you communicate your physical contact comfort level to others.
 - Unvaccinated. No special requirements.

3.5.2 Center events. The building is used by other non-profit groups only after being approved by the Minister, or designee, in accordance with policies, and such use shall be closely monitored.

- a) Cost for use of building by other groups will be set by the Sr. Minister in collaboration with the Board of Trustees.
- b) Classes are to be scheduled with consultation and/or approval of the Sr. Minister. No individual or organization may use the building for any activity contrary to Unity principles.
- c) Center Use Rules:
 - No smoking in the Center.
 - No food in the sanctuary.
 - Refreshments are allowed in the Kitchen/Fellowship room. The sponsoring group is responsible for serving and cleanup.
 - If refreshments are served in other areas, the sponsoring group is responsible for serving, cleaning, and the repair or removal of any stains, spills, or damage to facilities.
 - No adhesives to be used on painted walls or surfaces.

- 3.5.3 **Counseling Services (on church premises).** Spiritual counseling services are conducted by the Minister. Members conducting counseling services not under the direction of Unity of Bellevue must provide Unity of Bellevue a certificate of professional liability insurance naming Unity of Bellevue as an additional insured. Non-members, such as guest speakers, may, under the direction of Unity of Bellevue, provide private counseling services limited to their specific area of expertise and provide a certificate of professional liability.
- 3.5.4 **Marketing or Private Business Enterprises.** Unity of Bellevue shall not engage in multi-level direct marketing enterprises or private business enterprises (except as noted in 3.3.2). The Center further restricts all workers, Board members, community groups, and congregants from using the Center mailing list for the distribution of such literature and the Center as a venue for such activities.
- 3.5.5 **Fundraising.** Fundraising activities on or off site require approval by the Minister.
- 3.5.6 **Alcoholic beverages.** Any event on Unity of Bellevue property whether hosted by Unity of Bellevue or a renter, which includes service of alcohol, requires a license and adherence to WA state liquor laws.
- 3.5.7 **Pets.** No animals except certified seeing-eye dogs or other service animals will be allowed in the Center. Pet Blessings are an exception.
- 3.5.8 **Bulletin Boards.** All bulletin boards are reserved for ministry and community information, activities, and programs. Content posted is subject to review and approval by the Minister. Board of Trustees may post communication information and Board Meeting Minutes on bulletin board without Minister approval.
- 3.5.9 **Solicitations.** No soliciting or panhandling is allowed in the church building and surrounding property without prior authorization from the Minister.
- 3.5.10 **Parking Lot.** No unauthorized overnight parking or camping on Center property will be allowed. Unauthorized vehicles will be towed at the owner's expense.

4.0 MINISTRIES & SPIRITUAL DEVELOPMENT

4.1 Spiritual Development

- 4.1.1 **Spiritual education.** All classes taught at Unity of Bellevue incorporate and/or reflect the Truth principles taught by Unity, and are compatible with the programs and tone of the ministry.
- a) The Sr. Minister, or other designee, shall select speakers, seminars, and/or workshops. Persons or groups desiring to teach classes must coordinate with and obtain approval from the Minister.
 - b) All arrangements, financial and otherwise, shall be in compliance with the Washington State Department of Revenue ruling.

- c) An evaluation of each speaker, seminar, and/or workshop is maintained. The evaluation may include information regarding spiritual and educational value, financial arrangements and results, attendance, and any other information that may be pertinent.
- d) Tuition waivers or scholarships may be offered at the discretion of the Minister.

4.1.2 **Licensed Unity Teacher.** Unity of Bellevue policy is to encourage interested members to become Licensed Unity Teachers under the Unity Worldwide Ministries Licensed Unity Teacher Program and Unity World Headquarters at Unity Village's Spiritual Education and Enrichment Program.

- Licensed Teachers report to the Minister and serve under the Minister's direction.
- Compensation for class attendance and travel expense will be as per annual approved budget or as approved by the Board of Trustees if not included in the budget.

For more detailed information regarding programs contact Unity Worldwide Ministries Education Department at (816) 524-7414 or write to the Licensed Teacher Coordinator, Association of Unity Churches, P.O. Box 610, Lee's Summit, Missouri 64063. You can also view information regarding the program on the Internet at www.unity.org.

4.2 Ministries

4.2.1 **Prayer Ministry.** In support of our mission and vision, we are committed to reaching out in prayer, comfort and support to the congregation through our Prayer Chaplains. Being a Prayer Chaplain is a service opportunity for congregants who are seeking the next step in the development of their spiritual maturity and level of commitment in personal spiritual growth. Completing the Prayer Chaplain training and "being" a Prayer Chaplain is transformational soul work.

- a) The Prayer Ministry reports to the Minister.
- b) The Prayer Chaplain Trainer/Coordinator is a volunteer position.
- c) The Prayer Chaplain Trainer/Coordinator must have attended a Light and Love Trainers Workshop and be licensed to train the material for Prayer Chaplains.
- d) All prayer chaplains must attend a Unity Prayer Class before attending the Prayer Chaplain Training.
- e) Prayer Chaplains make a one-year commitment. To fulfill responsibilities Prayer Chaplains:
 - Conduct Wellness Calling to all members twice a year
 - Lead the Sunday meditation services
 - Lead the Sunday prayer circles
 - Pray for others in response to prayer requests
 - Attend monthly meetings for communication and training
 - Conduct visits for pastoral care when requested
- f) Prayer requests are sent to all Prayer Chaplains by the Prayer Chaplain Trainer/Coordinator or delegate for inclusion in their daily prayer practice. When requested an email is sent to the prayer requestor in a timely fashion. After two weeks all prayer requests are sent to Silent Unity for an additional 30 days of prayer.
- g) A Monthly report of Prayer Chaplain team activities is developed by the Prayer Chaplain Trainer/Coordinator or delegate and sent to the Minister.
- h) Everyone on the Prayer Chaplain team must sign the Prayer Chaplain Code of Conduct.

4.2.2 **Small Group Ministry.** The Small Group ministry creates fellowship, connection, a sense of belonging, and spiritual growth through participation in Spirit Groups and other small groups.

- a) The Small Group Ministry reports to the Minister.
- b) The Small Group Ministry Leader/Coordinator is a volunteer position.
- c) The Leader/Coordinator must be credentialed as a Spirit Group Program Leader through UWSI to gain access to Spirit Groups Curriculum and to use the Spirit Groups brand as a part of the Small Group Ministry.
- d) Hosts and Leaders of Spirit Groups must be trained by a credentialed Spirit Group Program Leader.
- e) A Monthly report of Small Group Ministry activities is developed by the Leader/Coordinator or delegate and sent to the Minister.
- f) All Spirit Group Hosts and Leaders must sign the Spirit Group Code of Conduct.

4.2.3 Youth & Family Ministry

- a) All volunteers and paid workers involved with the Youth Education Department shall complete an application form which will include youth work qualifications and references, and will disclose any previous criminal or sexual misconduct history. Background checks are also required.
- b) No person with a history of criminal or sexual misconduct shall serve in any capacity in the Youth Education Department.
- c) It is the responsibility of the department or appropriate church staff to check submitted references and recent youth work experience, and secure background checks.
- d) Any accident, however minor, which involves a child or young person must be duly recorded and brought to the prompt attention of the Minister.
- e) It is the policy of this Board that any reported incident of criminal activity or sexual molestation of a minor must be reported to the appropriate authorities.
- f) At no time shall a child or young person (except YOUers) be allowed to leave the premises unless by prior arrangement or in the company of a recognized parent, guardian, or approved and responsible older sibling.
- g) Every effort should be made to secure emergency contact information for every child or young person left in the care of Youth Education personnel.
- h) Releases signed by the parents or legal guardians are required for a minor person's participation in any and all fieldtrip activities.

4.2.4 Music Ministry To be developed in later revision of this policy manual.

4.2.5 Reiki Ministry All Reiki Treatments, Circles, and Blessings will be done with practitioners remaining silent and will be conducted with 3 or more Reiki practitioners present.

- a) If a woman or woman-identified person is receiving a Reiki Treatment, at least 2 of the practitioners shall be women or woman-identified.
- b) All Reiki Treatments, Circles, and Blessings will be done with hands off the body, unless the person receiving requests hands on.
- c) All Reiki students, practitioners, and teachers will abide by the code of ethics published in training manuals by the International Center for Reiki Training.

4.2.6 Sacred Service and Volunteer Ministry A strong, smoothly operating core of Sacred Service teams and volunteers is invaluable to the successful organization and operation of Unity of Bellevue. In either role, Unity of Bellevue strives to provide opportunities for volunteers can find self-fulfillment in serving the ministry while providing necessary assistance in areas of need.

- a) Sacred Service. Consists of on-going teams, with specific roles, intended to both support the Ministry in achieving its stated Mission and Vision and to support the individual in their personal journey and personal growth. Examples of the various Sacred Service teams are included in section 10.
- b) Volunteer service. An unpaid volunteer activity that typically consists of short-term assignments in support of very specific needs that arise from time to time. Such short-term assignments may, or may not be linked to the individual's unique growth and spiritual path but are, nonetheless, important to the smooth running of the church and its operation. Typical examples of Volunteer Service are noted in Section 10.
- c) Oversight. Sacred Service teams and volunteer assignments are created and overseen by the Minister or a Volunteer Coordinator (staff position). This leader provides direction and support to the various teams, including clarifying roles and responsibilities, recruiting and training team members, and coordinating the various team schedules and efforts as may be needed to ensure a consistent effort in the conduct of UOB activities.
- d) Expectations. Unity of Bellevue expects all individuals participating in voluntary activities to do so in a professional and heart-centered manner. The Volunteer Protection Act of 1997, immunizes individuals who do volunteer work for nonprofit organizations or governmental entities from liability for ordinary negligence in the course of their volunteer work. Unity of Bellevue's insurance policy further provides coverage for any injury incurred by a volunteer in the conduct of their volunteer activities just as it does for paid staff.
- e) Background Checks. For certain volunteer activities, Unity of Bellevue requires that a background check be conducted and reviewed by the Ministry before that volunteer is approved. This is always the case for any volunteers who may interface with Youth and may be necessary for certain other positions as determined by the Ministry. The applicant is to provide all the necessary personal information to conduct the background check and the costs incurred for doing so will be paid by Unity of Bellevue.
- f) Training. Training as may be needed for any volunteer duties will be provided by the individual leading that group or activity or by the Volunteer Coordinator. The same person(s) are also available for further clarification and any follow-up instruction as may be needed.

4.2.7 UWM EarthCare Ministry. The following outlines the structure of EarthCare ministry at Unity of Bellevue.

- a) Structure
 - Overview. The Unity movement is guided by a vision of sacredness and the interconnectedness of all, the interdependence of all life. It is a journey of spiritual relationships with Earth and its creatures. It is through awakened consciousness that we see everything as the presence of God. The EarthCare Ministry promotes active care of all creation by cultivating a comprehensive earth-oriented spirituality that touches Unity ministries both spiritually and in practical actions.
 - Purpose. The EarthCare Ministry rose from the grassroots of the Unity movement, coming from the deep desire to express Unity's belief in our oneness with all divine life in ways that directly impact our planet home. As in so many areas in Unity, we saw the importance of walking the talk. As stated in our vision statement, "All humanity lives in a spiritual consciousness that manifests as loving coexistence with all creation and care for our Earth home." The purpose of EarthCare is to support Unity Worldwide Ministries in fostering the awareness of our spiritual oneness with our Earth home and to promote active care of creation. We do this through a number of services and resources, including the Path to EarthCare.

- Vision. All humanity lives in a spiritual consciousness that manifests as loving co-existence with all creation and care for our Earth home. By empowering Unity congregations, EarthCare envisions Unity Worldwide Ministries as a powerful force and global leader in addressing the climate change emergency and moving society towards environmental justice in order to create a world that works for all. In so doing, it will vitalize and expand our Unity movement.
 - Mission. To foster awareness of our spiritual oneness with the Earth, to promote active care of all creation, and to assist congregations in integrating an earth-oriented spirituality into their ministry.
- b) Unity Covenant. The Unity first principle states that there is only one presence and one power pervading the entire Universe. Unity Worldwide Ministries, and, in turn, Unity of Bellevue, is committed to embodying this principle and honoring our Oneness with the earth. Recognizing that we live in a web of interconnectedness, and our actions affect the whole, we endeavor to touch the earth lightly and with reverence. And we encourage our members to do the same.
 - c) 12 Powers for Our Planet Initiative. Unity EarthCare ministry's mission is to foster awareness of spiritual oneness with the Earth, to promote active care of all creation, and to assist congregations in integrating an Earth-oriented spirituality into their ministries. By empowering Unity ministries, the EarthCare movement envisions Unity Worldwide Ministries as a powerful force and global leader in addressing climate change and moving society towards environmental justice in order to create a world that works for all beings. The initiative includes monthly resources to use in ministry based on the 12 Powers.
 - d) Climate Change Resolution. On October 14, 2015, Unity Worldwide Ministries Board of Trustees acknowledged, in part, that climate change is real and that human activity is a significant cause of climate change. UWM also acknowledged that climate change is an issue resulting in both environmental degradation and social injustice. As such, we commit to serve, as our faith leads us, to take steps in healing the planet. Read the complete resolution [here](#). In a separate resolution in April of 2019, the Board of Trustees affirmed its power to restore balance to the planet and all life forms, and engage this power through our conscious and compassionate choices.
 - e) Sustainability Team/Going Green Group. This Group has been committed to increasing awareness of the importance of sustainability to the individual and the community. Over the years the Team/Group has recommended ways in which Unity of Bellevue can practice sustainability, has conducted events to raise awareness, participated in the city-wide sustainability alliance, and has helped to implement sustainable practices such as the use of rainwater collection, lighting, and sustainable landscaping.
 - f) UWM and NW Region EarthCare Ministry (see Ministry section): Interest in taking responsibility for sustainability is not only a Unity of Bellevue local focus. The Unity Worldwide Ministry EarthCare program assists congregations in integrating an earth-oriented spirituality in their ministry. There is also a regional focus on ecological stewardship through Unity Northwest EarthCare.

5.0 MEMBERSHIP

5.1 What is Membership. Membership is a step which brings a person closer to the Unity community in thought and feeling, and indicates a willingness to continue one's spiritual growth and development in loving fellowship with other like-minded individuals. Anyone desiring a closer relationship

with the church and its ministry may become a member by attending classes and services in accordance with established policy. Membership is subject to approval by the Minister.

5.2 New Member Requirements. Those seeking membership are urged to include the following activities in confirmation of their status:

- Adopt a prayer consciousness in accord with the Unity teachings of positive, affirmative prayer, as explained and advocated in Unity publications and the Minister's teachings.
- Be present, whenever possible, at services, classes, and special events sponsored by Unity of Bellevue.
- Share time, talents, and resources with the church whenever able, and to support the church to whatever degree seems desirable during any fundraising efforts.

All sections of the Unity of Bellevue Bylaws applicable to membership shall apply. Qualification of Members states, "A Member of Unity of Bellevue shall endeavor to live in accord with the Jesus Christ principles of Love and Truth as taught by Unity. A member shall further the work of this Ministry through his/her active interest, love and support".

5.3 New Member orientation / classes. Qualified for membership (Bylaws, Sections 3.01 and 3.02), a prospective new member will be scheduled for an orientation meeting with the Minister. New Member Orientation will be offered at the discretion of the Minister.

- a) Classes required for membership will be determined by the Minister in pursuit of his/her mandate to provide appropriate spiritual instruction.
- b) The church office will keep a record of any classes attended by the congregant.
- c) If a congregant has been a former member of Unity of Bellevue, but has been away for many years and there is no record of membership, then that member will be asked to "reaffirm" membership by attending any class or orientation session recommended by the Minister. Re-affirmation of membership is only complete if/when the applicant chooses to embrace the current membership responsibilities (Section I above).
- d) All new and transfer members will have their names and dates of joining included in the official copies of the Church and Board records.
- e) Photos of each new and transfer member will be taken, with agreement, on or before Membership Sunday and mounted in the church membership records.
- f) New and transfer members will receive a certificate of membership and a membership card signed by the Minister.
- g) Membership in Unity confirms one's status as a voting member of Unity of Bellevue, a publicly chartered, not for profit religious organization, recognized as such in the State of Washington, and any privileges attendant thereupon.

5.4 Renewing Membership. Reference: Bylaws Section 3.03(b). Members must indicate their intention to remain members of UOB bi-annually by filling out a membership renewal form and submitting it to the center office. The membership renewal form, mailed each odd numbered calendar year, shall specify that the completed form must be received in the church office by the Friday, one week prior to the Annual Membership Meeting (Friday date to be specified). The renewal form shall also specify that a member failing to return their form by that date will be placed on Inactive status and will not be eligible to vote at the meeting. A member may later return to Active status by filing a completed renewal form with the church office.

5.5 Transferring Membership. If a congregant is a member of another Unity Worldwide Ministries Church and wishes to transfer that membership to Unity of Bellevue, the congregant will contact that church and ask them to send to Unity of Bellevue a transfer of membership letter or present a membership card or certificate from that church. The congregant will then be required to attend a new member class that is specific to Unity of Bellevue. Transfer of membership is only complete if/when the applicant chooses to embrace the current membership responsibilities.

6.0 FELLOWSHIP GROUPS

All persons wishing to form a club or group under the auspices of Unity of Bellevue include consciousness-raising and service activities, and may include social functions in their purpose. All clubs require Minister approval and Board of Trustee notification (by Minister).

6.1 Men's Group. On the second Saturday of each month from 8:30 to 10 am, the men gather for breakfast, meditation, and discussion. This is a hybrid group.

6.2 Sisters in Spirit. We are women supporting women on the spiritual journey. If you are a woman or are woman-identified, you are welcome. We meet online on the first Monday of every month from 6:30 - 8:30 pm to explore topics. We're real, and we're all about making our spirituality real.

6.3 Women Connect. Women Connect meets monthly to share individual and community interests and concerns, creating a supportive network that builds connections and understanding through our activities and programs. We include the arts and health, sustainability and the environment, and diversity, social justice and family support through EISCC (Eastside Interfaith Social Concerns Council) and Unity Cares. On the fourth Saturday of each month from 10:30 am to noon, we gather for a Potluck Brunch (bring a dish to share) followed by a program.

7.0 COMMITTEES

7.1 General Operation

7.1.1 Formation. All committees are accountable to the Board of Trustees and must follow the following set up policies.

- Any individual wishing to see a committee formed shall bring it to the President of the Board. A committee may be formed for any of the following reasons:
 - To subdivide Board work into manageable pieces.
 - To investigate and help clarify policy.
 - To carry out special functions that do not require the time and attention of the full Board or may to pre-work before full Board participation.
 - To establish clear ownership and establish a path for future leadership.
 - To speed up decision making.
- Committees are formed by a proposal from the President of the Board and ratified by a Board of Trustee vote. The following, unless otherwise specified in the Bylaws, shall be identified by the President of the Board and included in the proposal to the Board which forms the committee:

- Committee Chair
- Board Advisor
- Committee purpose
- Duration – permanent or temporary. If temporary, the specific duration.
- Committee power and authority
- Initial membership
- The Board minutes where the vote is taken shall reflect purpose, duration, and authority of the committee.
- For ongoing membership changes the Committee Chairs may aid in the appointment but final decision is made by the Board of Trustees' President unless otherwise defined within the bylaws or this policy manual.

7.1.2 Membership. The following are standard committee roles and Unity of Bellevue policy is that those in these role must execute the role in accordance with these statements:

- *Chair.* This role oversees committee activities and reports to the Board Advisor on all activities.
- *Member.* Serves on the committee and carries out actions in a responsible and timely manner. Members are expected to conduct activities with Christ consciousness and respect for each other.
- *Board Advisor.* A formally assigned Board member who actively participates in a committee, or other Unity of Bellevue functional area, to act primarily in the capacity of consultant. The person who fills a Board Advisor role is an individual who contributes specific expertise to the committee or area. Board Advisors, when associated with a committee, are responsible for reporting to the Chairpersons of their respective committees any actions of the Board that affect their committee and for reporting to the Board on relevant committee findings and activities.

7.1.3 Guideline for Effectiveness. To be effective, committee members should be able to attend meetings regularly, seek to understand the committee assignment and work to complete it, participate in the deliberations and discussions and should share the responsibility of sticking to the subject and trying to understand and use the ideas of other members. Members should help in reaching committee decisions, in committee action and in following the final disposition of its work. Committee members should also evaluate their own contributions to the committee and share the responsibility for evaluating the work of the committee as a whole.

7.1.4 Operations. The following applies to all committees except as defined elsewhere in Section 7.0

- Chairpersons are appointed by the Board of Trustees' President and, whenever possible, will be selected from amongst current committee members.
- Committees which lack a Board Advisor will have the Committee Chair report to the Board President (or delegate) about progress, recommendations, or attention needed.
- The Board President, on behalf of the Board, has the right to recommend and/or place additional members on a Committee.

7.2 Nomination Committee. This committee is temporary and formed each year (Oct – Jan) to collectively identify, vet, and select nominees for open Board of Trustees seats. Recommendations made by the Nomination Committee to the Board of Trustees will be considered by the Board of Trustees for

open seats. The Board of Trustees picks candidates from the committee list to put before the membership for vote.

7.2.1 General Information

- a) A Nominating Committee is classified as a temporary committee, formed at least three (3) months prior to the Annual Membership Meeting and active until the annual meeting is complete – a 3-4 month duration.
- b) It is expected that within the 3-4 month window of active work the committee shall meet, at minimum, twice per month with recruitment activities occurring between meetings.
- c) The selection process for the Nominating Committee is defined by the UOB bylaws. In summary:
 - Chairperson / Alternate: Elected by the membership at the annual meeting for the following year's committee.
 - Board Representative: Selected by the Board of Trustees President and ratified by Board vote. Whenever possible, the Board Representative shall be a Board member who will be departing the Board, either due to term limit or by volunteer decision.
 - Member Representative: Collectively selected from the membership by the Committee Lead/Alternate, Board Representative, and Minister.
 - Minister. Is a member, in an advisory capacity, by virtue of their role.
- d) Membership. The President is not allowed to serve on the Nomination Committee nor is any Board member seeking re-election. Also, if the intended Member Representative, Chair, or Alternate Chair wish to be eligible to be nominated for Board Service she/he must relinquish her/his position on the Nomination Committee on or before the start of the process.

7.2.2 Member Roles & Responsibilities. Each individual on the Committee has a specific role to fill as follows:

- Chairperson. Sets up and facilitates committee meetings, oversees all committee activities, and is accountable for adherence with the timeline. Reports to membership at the annual meeting who the Board nominees are.
- Chairperson Alternate. Serves in the same capacity as the Chairperson, and in the place of, when the Chairperson is not available. May attend all meetings at the discretion of the Chairperson.
- Board Representative. Represent the Board's voice on the Committee – offering information about what candidate skills are needed. Accountable for making reports to the Board about committee progress at the President's request and for keeping the President informed of committee progress, between Board meetings. Notifies the President of any announcements, USPS, or e-mail notices to congregation at least three days in advance along with providing a general understanding of content.
- Member Representative. Represents the membership voice on the Committee – offering feedback about candidates.
- Minister. Attends meetings as invited by the Chair. Conducts final review of all committee selections with view of prosperity consciousness and spiritual acumen/education. Provides feedback to committee on all selections. Feedback from Minister is also given to the Board for all candidates who progress as a Nominee.

7.2.3 Committee Responsibilities. The Nominating Committee is accountable for the following:

- Receives input from the Board of Trustees' (provided by the President through the Board Representative) regarding the performance and qualifications of incumbent Board Members who wish to be candidates for re-election, and the skills/talents and capabilities needed on the board at the time, as well as, requirements and expectations for Board service.
- Selecting candidates who can make a real contribution to the success of the ministry
- Reviewing annually the Nomination Committee procedures for Board recruitment.
- Sending to membership a "canvas letter" seeking interested candidates.
- Verbally reporting to the membership at the annual meeting addressing nominating procedures.
- Following policies set by the ministry's Bylaws and policy manual regarding nominating procedures.

7.2.4 Eligibility for Board Service. A board member may serve two terms (three year duration each).

- 1st three year term. Nominating Committee obtain initial candidate list from the board.
 - Prior to the commencement of the committee any active member who wishes to be considered for Board service need only express their intent to the Board President. It is the President's responsibility to pass along this information to the Nominating Committee Board Representative once identified.
 - No formal preview by the Board is required for the first three-year term.
- 2nd three year term. If Board Members wish to be re-elected then the Nomination Committee is to consider Board Member Eligibility. Eligibility is determined by the current Board of Trustees (other than the candidate). To be eligible for a 2nd term the candidate must have met these requirements:
 - Has met, and continues to meet, all requirements as defined UOB bylaws
 - Regularly, as near 100% as possible, attends Sunday services.
 - Consistently adheres to all meeting conduct agreements, presents with respect and humility, supports Board decisions, and works well with other Board members.
 - Participates in Spiritual education and leadership classes.
 - Actively participating on at least one committee as participant or Board Advisor and meets action item deadlines.
 - Abides by UWM ten commitments of Board service as agreed to by UOB.
 - Has attended all Board retreats (except as medically excused).
 - Is actively demonstrating prosperity consciousness pledging, understands Board Member financial responsibility, promotes prosperity consciousness within the community, and is willing to financially support UOB should the need arise.
 - Board members vote to advance the current member as a candidate.

7.2.5 General Requirements. The following are requirements that must be followed by those involved in the Nomination Committee process.

- All Nomination Committee activities shall follow the timeline found in section 10.0
- In early September the Board of Trustees' President shall have discussion with Board members ending their 1st term to determine their desire to run for a 2nd term and provide such information to the Committee Chair.
- In the September Board meeting the Nomination Committee Chair shall be selected then ratified and the Board will develop a skills needed list for the committee.
- The Board of Trustees' President shall formally convene the committee by notifying the Chair and, at that same time, informing the Chair who the Board Representative will be.

- e) The Board Representative shall convey the skills needed to the Nomination Committee at the start of the process. The President and/or Board Representative may have discussion with the Chair to provide clarity of skills needed.
- f) The Board Representative shall keep the President informed of any announcements via USPS mail or in front of congregation.
- g) Candidates shall be submitted to the Board of Trustees in a rank order with comments indicating strengths and weaknesses.
- h) All candidates to complete a Board application. Any Board members seeking a 2nd term may opt to update their initial application or may complete new.
- i) The Board of Trustees will select candidates from the list provided by the Nomination Committee but does not necessarily need to select the same candidates recommended by the committee for the limited number of open seats.
- j) The Nomination Committee is to review the process at the end of each cycle and make recommendations for improvement, as applicable.

7.2.6 Information to be considered by Nomination Committee. The following information is to be considered as each candidate is reviewed:

- Does the candidate meet Board member qualifications (see section 10.0)
- Is the candidate willing and able to complete all Board member duties as defined by Unity of Bellevue bylaws section 4.04(b)?
- Has the candidate seen the Board member job description and can they agree to the content?

7.3 Ministerial Search Committee This committee is temporary and only active if the Ministry needs to hire a new Minister.

- *Formation:* The Board of Trustees, at the time of the vacancy, shall establish the committee with proper cross-functional membership.
- *Process:* The Ministerial Search process is defined by UWM. Select links below for information. If greater clarity is needed contact UWM Employment Services.
 - [Employment Process](#)
 - [Employment Policies](#)
 - [Related Fillable Forms](#)
- *Board Advisor:* The Board of Trustee President shall act as Advisor for this committee.

8.0 FINANCE & STEWARDSHIP

8.1 Annual Financial Plan. The annual financial plan for Unity of Bellevue is researched and prepared by an Ad Hoc Committee consisting of members of the Finance Committee and the Board of Trustees. This recommended financial plan is then submitted to the Board of Trustees for review and approval. The approved financial plan is then submitted to the congregation at the Annual Meeting for ratification.

8.2 Budget. Each year a new budget is formulated by the Minister and approved by the Board of Trustees.

- a) Unity of Bellevue's fiscal year aligns with the calendar year of January 1 to December 31.

- b) The Sr. Minister develops a detailed operational budget in the 4th quarter of each year based on feedback from all areas (staff, Board of Trustees, Financial Review Team, Congregation, etc.).
- c) The draft budget is presented to the Board of Trustees then updated as needed to gain Board approval prior to January 1.
- d) Budget for the next fiscal year is approved by Board of Trustees no later than the end of the current fiscal year December 31.
- e) The Board of Trustees is accountable to approve the budget annually, as well as, any revisions throughout the year, and is accountable for being familiar with the budget on an ongoing basis.
- f) The Treasurer presents the budget at the annual Membership meeting each year.
- g) Revises the budget if the revenue during the year changes more than 10% of the annual budget revenue, updating as needed to gain Board approval.

8.3 Financial Reporting. The Board of Trustees' Treasurer identifies the details required for financial reports based on input from the Board of Trustees. The Unity of Bellevue bookkeeper is accountable for providing financial reports to the Board Treasurer. The Board Treasurer, in turn analyzes the reports and provides a financial summary, along with tithing report, to the Board of Trustees on a monthly basis. The Board of Trustees' Treasurer also works closely with the Financial Review team to keep them informed. In the Board meeting guests may be provided with a collapsed version of the financials (all information except salary details) by the Board of Trustees' President.

8.4 Independent Accounting Review. Following the close of the fiscal year, the church financial records for the fiscal year are examined and compiled by an independent CPA. A reasonable effort is made to have the resulting formal report available for the Annual Meeting (see Bylaw Section 3.05). A simple compilation is sufficient to meet requirements. The Minister and/or the Board of Trustees may decide whether there is need for additional work.

8.5 Investment policy. The Unity of Bellevue investment policy is that the money will be invested with a well-established investment institution where the money will be invested in a fund that offers long term growth and stability, has balanced allocation between stocks, bonds and short term instruments resulting in a highly diversified fund balancing risk and capital appreciation.

8.6 Funds

- 8.6.1 General Fund.** The General Fund is used to support the day-to-day operation of the Ministry.
- 8.6.2 Interest Bearing Accounts.** It is at the discretion of the Board whether interest is accrued to each individual account, or to the general fund taking into consideration the needs of the general fund and the size of the fund in question.
- 8.6.3 Memorial Funds.** Memorial funds may be designated or non-designated and handled as follows. Regardless of whether designed or undesignated a record shall be kept so that appropriate acknowledgments can be made.
 - Designated: Designation is by approval / acceptance of the Board and such funds are deposited to a high interest bearing account until "designation" is completed. Final payment for a designated project is by approval of the Board, after acceptance of the finished project. Any remainder not necessary to fund "designation" reverts to "undesignated" category. In the

event a benefactor donates moneys to the church which are not designated for a specific purpose, the amount shall be deposited in the appropriate fund to be used at a later date in accordance with the wishes of the Board and Minister.

- Undesignated: Such funds are placed in the general fund tagged as memorial donation.

8.6.4 Special Purpose Funds. Such funds are established by approval of the Board of Trustees for special, short-term projects. On completion of the project, said fund is closed and any residual amount accrues to the general fund.

8.6.5 Prudent Reserve Fund. This fund provides a source of funds to help keep payables current when cash-flow problems prevent timely payment of required budgeted/board-approved expenditures or during a natural disaster, or other emergency, which may severely impact normal church operations and cash flow.

- a) Revenues in excess of anticipated near-term expenses are transferred to the Prudent Reserve.
- b) Contributions to the Prudent Reserve continue until it is a minimum of 15% of current fiscal year budgeted expenses.
- c) The Prudent Reserve is kept in a money-market account, or similar investment instrument, that generates more interest than a saving account but is still easily accessible as needed.
- d) The current balance in the Prudent Reserve is reported to the Board and Financial Review Team (monthly)

8.7 Revenues and Income

8.7.1 Primary sources of revenue for Unity of Bellevue are:

- a) Pledges (on line or in person)
- b) Love Offerings not defined by pledge (on line or in person)
- c) Bookstore sales
- d) Classes and workshops
- e) Facility rentals
- f) Rental property
- g) Interest on bank accounts and investments
- h) Fundraising events
- i) Memorial gifts
- j) Alternative revenue streams (i.e. eScrip, web-site donations, web click-throughs).

8.7.2 Counting the Sunday offering

- a) The Board Treasurer is responsible for ensuring that the Sunday offering is counted within these guidelines:
 - At least two people are present when the offering is counted.
 - One counter (preferably both) is a Board member.
 - If a second Board member is not available to help count, the second counter can be the usher leader or a former Board member.
 - If the counting cannot occur immediately after receipt, the offering is kept in a secure location until it can be counted.
 - The Minister(s) is not involved.

- b) A staff member then recounts the Sunday offering plus revenue from other sources as part of the weekly deposit. Any exception to the practice must be specifically approved and authorized by the Board.
- c) Any data revealed during this process is held in strict confidence, not to be disclosed.

8.7.3 Designated Gifts

- a) Gifts received for a designated purpose are used for that purpose. Records are kept to demonstrate that. These records are available for review, if requested by the donor or for audit purposes.
- b) When using a gift for its designated purpose presents a problem, the Minister, or designee, meets with the donor (or executor for memorial gift) in a timely manner to arrange to do one of the following:
 - Designate the gift for another purpose.
 - Remove the designation and place the gift in the General Fund.
 - Return the gift to the donor.

8.7.4 **Bookstore.** The Unity of Bellevue bookstore operates as a taxable entity and thereby pays property taxes. The rest of the ministry continues to operate as a tax-exempt entity. The Bookstore is functionally operated by the Center Administrator who provides financial information to the Minister and who is responsible for training any volunteer who wishes to work in the bookstore, such as taking payments, record keeping and inventory. Anyone working in the Bookstore must have a background check on file.

8.7.5 Record-Keeping and Acknowledgement of Gifts (Offerings, Donations, Legacies) Received

- a) Detailed records are kept of all gifts received from identified givers.
- b) In January, a report of gifts received in the previous calendar year is provided to identified givers as required by IRS regulations.

8.7.6 Pledges

- a) Each received pledge is acknowledged in writing, confirming the total pledge, payment frequency/amount, and the payment time period.
- b) Detailed records are kept to track received payments versus pledged total.
- c) A report showing status of received payments versus the pledged total is provided to each pledging congregant quarterly.
- d) Pledge cards must be held for the duration of the pledge year in a secure location in the office as they can be considered “accounts due” by a financial institution.
- e) Access to congregant financial contribution details is strictly controlled, and limited to those who need access in order to perform the duties prescribed by these policies and general business accounting practices.

8.8 Expenditures and Methods for Payment

8.8.1 **Blanket Approval for Operational Expenses.** The Sr. Minister and/or other designee are authorized to spend up to \$500 on a single item provided the line item is within budget. Such expenses are submitted in a report to the Board of Trustees at its next regular meeting

8.8.2 **Authorization.** Expenditures are paid only after authorization.

- a) The Minister authorizes operational expenditures except the following which must be approved by the Board of Trustees:
 - A new staff salary
 - An increase in staff salary
 - All unbudgeted expenses
- b) In the absence of the Minister, the Board President or Board Treasurer can authorize such expenditures.
- c) Check Signatures. Two signatures are mandatory on all checks; normally:
 - At least one signature must be a Board Officer.
 - The other signature can be the Minister, Center Administrator, or another Board officer.A proxy may be given to a designated Board or staff member in place of the Minister or Board officer.
- d) All checks are supported with proper documentation, i.e., a bill, invoice or voucher, and include documented authorization (initials).
- e) Authorization must be formally obtained, in writing (e-mail), by the person providing the authorization.
- f) When signatures are pre-printed on payroll checks, a payroll details report is provided to the Board Treasurer for each payroll.

8.8.3 Credit Card Usage. Only the Minister and Center Administrator are issued credit cards.

- a) The Minister's limit is \$1,000 and must be used for items within budget. The Center Administrator is also limited to purchases within budget but may have a higher limit.
- a) Credit cards are to be kept in a secure location at all times.
- b) Credit cards are to be used only for Unity of Bellevue related expenses.
- c) Credit card limits are to be no more than \$10,000.
- d) Credit card purchases are to be for no more than \$5,000 in any given month; exceptions must be approved by the Board of Trustees' Treasurer.
- e) All Church credit card expenditures are documented with a receipt showing the amount, the purpose of the expenditure, the individuals/group involved, and the individual(s) who authorized the expenditure. This documentation is reconciled by staff monthly against the latest credit card billing statement, and any discrepancies are reported to the Board Treasurer. A copy of the monthly statement is provided to the Board Treasurer.
- f) The credit card balance is to be completely paid monthly; any exception must be approved by the Board Treasurer.

8.8.4 Cash Usage

- a) Most church-related expenses are paid with checks, credit card or direct via ACH, not with cash.
- b) Personal expenses incurred on behalf of the church shall be promptly repaid upon request and with appropriate documentation of the expense (receipt).

8.8.5 Salary Advances. Emergency salary advances must be authorized by the Minister and the Board Treasurer, made only by check, and deducted in total from the person's next paycheck.

8.8.6 Classes and Workshops. Contracts with teachers, facilitators, and workshop presenters include the stipulation that expenses are deducted before the percentage split is applied. Expenses may include, but are not limited to publicity, copier costs, audio/visual technology services, duplicating services, extraordinary staff time.

8.8.7 **Minister Expenses.** The Minister's travel expenses to Unity Worldwide Ministries' annual conference, pre-conference, regional conference, and to Minister/Board/Lay Person Workshops are to be paid in accordance with the Minister's contract and the center's approved budget.

8.9 Unity of Bellevue Tithing. (Approved by Board of Trustees, 08-18-23). A tithe is the giving of 10% of all **unrestricted** Love Offerings/Pledges received by Unity of Bellevue (UOB) to ministries, organizations or individuals who are aligned with our vision, mission, and core values and who provide inspiration and/or support to the church or who would directly benefit from our blessing. We tithe to and as Source, which demonstrates our knowledge that abundance and prosperity are ours and as abundance flows to us, our tithes continue the flow of abundance to others.

- a) Tithe giving is not a substitute for the purchase of goods or services, nor are tithes to be distributed to legislative and/or advocacy organizations.
- b) UOB will tithe ten percent (10%) of all **unrestricted** Love Offerings/Pledges which are received from church services, pledges, mail-in gifts, credit card/electronic payment gifts, stock gifts and memorial gifts, in accordance with the Unity Worldwide Ministry guidance. This does not include payments for use of church property by ongoing or occasional groups, organizations, clubs and/or classes, which are classified as rental income.
- c) A Tithe Committee will be established whose sole responsibility is to meet regularly to affirm the designated tithe recipients and determine the recipient of the discretionary tithe for the coming 2-3 months. The Tithe Committee will be comprised of the Minister, the Office Administrator, the Treasurer and a UOB member in good standing selected by the Board. The UOB member shall serve one year after which a new member shall be selected. The Tithe Committee will include input from the UOB membership to determine the recipient(s) of the discretionary tithe(s).
- d) UOB is intentional in its giving. Our Tithes will be disbursed to the national organizations of the Unity movement and local ministries, organizations or individuals that inspire and/or support the ministries of UOB, or who will benefit from our tithes as determined by the Committee. The Treasurer will provide the prior month's Tithe Report to the Board at the monthly Board meeting (ex: May tithe recipients and amounts will be reported at June board meeting).
- e) The Bookkeeper will be responsible for tracking total tithes in accordance with this policy and will provide to the Treasurer the monthly tithe report. The format of tracking and the monthly report will be the discretion of the Bookkeeper.
- f) Each month the total amount to be tithed shall be distributed as follows:
 - One third (33%) to Unity Worldwide Ministries
 - One third (33%) to Unity World Headquarters at Unity Village/Silent Unity
 - The remaining third (33%) will be distributed equally as follows:
 - Half (50%) to the Unity Northwest Region
 - Half (50%) is a discretionary tithe to a ministry, individual or organization that has recently provided spiritual inspiration/support to UoB or to other recipients the Committee recognizes as aligned with our vision, mission and core values.
 - Monthly tithes will be distributed after review by the Board of Trustees.
- g) In the unlikely event that there are insufficient funds to make immediate payment, the expense of tithes will be recorded as "Tithes Payable" and tracked as a liability on the Balance Sheet. However, at least 1/3 of the monthly tithe will be disbursed during the month it is presented to the Board. Tithes Payable balances will be a top priority for distribution when funds become available. Tithe payments less than 10% for 3 months in a row shall be considered cause for a Board review and possible revision of the current fiscal year budget.

8.10 Planned Giving Program

8.10.1 Authorization. Unity of Bellevue welcomes both current and deferred gifts of assets. The types of gifts to be encouraged include outright contributions; bequests; gifts of retirement plan assets; charitable remainder trusts; charitable lead trusts; gifts of life insurance policies and proceeds; gifts of residences and farms subject to retained life estates; bargain sales; and such other gift arrangements as the Board of Trustees (hereinafter “the Board”) may from time to time approve. All programs, solicitation plans, and activities shall be subject to the oversight of the Financial Review Team of the Board and ultimately of the entire Board.

8.10.2 General Policies. Unity of Bellevue polices with regard to planned giving are as follows:

- a) We shall inform, serve, guide or otherwise assist donors who wish to support Unity of Bellevue's activities, but never under any circumstances to pressure or unduly persuade. In particular, whenever a gift involving an irrevocable transfer of assets is under consideration, every effort should be made to insure that completing the gift would not jeopardize the donor's personal or financial security.
- b) We shall advise each donor to discuss the proposed gift with independent legal counsel, as well as with other professional advisors of the donor's choice, so as to ensure that the donor receives a full and accurate explanation of all aspects of a proposed charitable gift.
- c) The Minister and any person(s) designated by the Board are authorized to negotiate planned gift agreements with prospective donors, following program guidelines approved by the Board.
- d) Prototypes of all planned giving agreements requiring execution by Unity of Bellevue shall first be reviewed and approved as to form by Unity of Bellevue's legal counsel. However, each particular agreement need not be reviewed by legal counsel, provided it is based on a prototype agreement that has been reviewed and approved.
- e) Gifts of the following types of property must be reviewed and approved by the Board, as established by the Bylaws (5.01). When required by the Bylaws of Unity of Bellevue, acceptance of gifts of certain types of property may also need to be approved at a Membership meeting. Before acceptance, relevant information about the property shall be ascertained, including a copy of any appraisal secured by the donor. Unity of Bellevue also reserves the right to secure its own appraisal.
 - real estate
 - closely held stock
 - tangible personal property
 - partnership interests
 - any other property interest which is not readily negotiable
- f) Unity of Bellevue shall not serve as trustee of charitable remainder trusts and charitable lead trusts. Donors to such trusts may select from among potential trustees identified by the donors themselves or – in the case of donors who would like to receive suggestions as to suitable potential trustees – by Unity of Bellevue.
- g) The following Guidelines are established to assure that planned gifts accepted by Unity of Bellevue will be cost effective.

8.10.3 Outright Gifts. An outright gift refers to a contribution of cash or property in which the donor retains no interest and which can be used currently by Unity of Bellevue. Securing outright

gifts is Unity of Bellevue's highest priority, and donors who are able to make an outright gift will be encouraged to do so.

- a) Unity of Bellevue will accept an outright gift of any amount, though gifts to establish a named endowment must meet the minimum funding requirements set by the Board.
- b) Unity of Bellevue welcomes outright gifts of property as well as cash, but all property, other than publicly-traded securities and life insurance policies, must be approved by the Board before it can be received.
- c) A donor may complete a gift in a single transaction or make a pledge to be paid over

8.10.2 Bequests. A bequest is generally understood to be any gift made upon death pursuant to a provision in the donor's will or revocable living trust. Bequests have historically been the most important kind of deferred gift, and they have contributed significantly to the building of institutional endowments. The encouragement of bequests will be one of the highest priorities of Unity of Bellevue.

- a) Each bequest donor will also be invited to provide a confidential copy of that section of his or her will naming Unity of Bellevue as a beneficiary or some other written documentation confirming the bequest provision.
- b) The Minister is authorized to accept bequests on behalf of Unity of Bellevue, except that bequests of property that entail potential expense, liability, or inconvenience on the part of Unity of Bellevue or bequests subject to restrictions with which it may be difficult for Unity of Bellevue to comply shall require approval of the Board.
- c) During the probate of estates containing a bequest to Unity of Bellevue and during the post-death administration of revocable trusts containing dispositive provisions benefiting Unity of Bellevue, the Minister and others designated by the Minister, in consultation with legal counsel for Unity of Bellevue, shall represent Unity of Bellevue in all dealings with the attorney and personal representatives of the estate.

8.10.3 Gifts of Retirement Plan Assets. Many potential supporters of Unity of Bellevue likely have IRAs or qualified retirement plans, and the value of the assets involved can be considerably more than the donor would ever need during retirement. In some cases it can be appropriate for donors to use these assets to make current outright gifts, whereas in other cases it may be preferable to have retirement plan assets contributed upon death.

- a) Unity of Bellevue shall encourage current outright gifts of assets distributed from retirement plans, provided that donors, in consultation with their advisors, determine they are able to part with such assets without compromising the financial security of their retirement years and determine as well that the gift will not result in tax disadvantages.
- b) Prospective donors of retirement plan assets upon death shall be encouraged, in consultation with their advisors, to consider structuring gifts of such assets either through an outright transfer to Unity of Bellevue by means of a beneficiary designation or through a charitable remainder trust designed to provide life payments to one or more beneficiaries of the donor's estate.

8.10.4 Charitable Remainder trusts. There are multiple types:

- Charitable remainder trust is a separately administered trust established by the donor. It provides for payments to the donor and/or other named beneficiary(ies) either for life or a term of years (not exceeding 20), whereupon the remaining trust assets are distributed to one or more charities.

- Charitable remainder annuity trust pays a fixed amount, which must be at least 5 percent and no more than 50 percent of the fair market value of the assets initially contributed to the trust. This amount does not change, and no additional gifts may be made to the annuity trust after its creation. In addition, the present value of the remainder interest at the time of creation must be at least 10 percent of the value of the assets used to create the trust, and there cannot be a greater than 5-percent likelihood at the time of creation that the trust's assets will be exhausted before the trust ends.
 - Charitable remainder unitrust pays a fixed percentage (at least 5 percent but no more than 50 percent) of the fair market value of trust assets, as valued annually. Because the value of assets can be expected to change from year to year, the unitrust payment will vary in amount each year. Additional contributions may be made to the trust after it is established. Also, the present value of the remainder interest associated with any contribution of assets to the trust must be at least 10 percent of the value of those assets.
 - Several variations of the unitrust are possible. A "standard" or "straight" unitrust pays the stipulated amount, even if it is necessary to invade principal to do so. A "net-income" unitrust pays the lesser of the stipulated amount or the actual net income, so principal would not be invaded. A "net-income with make-up-provision" unitrust is like the net income unitrust except that excess earnings can be applied to cover accrued deficiencies resulting from the net income being less than the stipulated amount. A fourth variation is the "flip" unitrust, which functions initially as either a net-income unitrust or a net-income with make-up provision unitrust but then becomes a standard unitrust at a later point in the trust's existence.
- a) The terms of each trust are settled upon by the donor and the trustee. Nevertheless, in certain circumstances it may be appropriate for Unity of Bellevue to offer suggestions as to aspects such as the payout rate, the number of income beneficiaries, or the duration of the trust.

8.10.5 Charitable Lead Trusts. A charitable lead trust is a trust in which the income, or "lead" interest, is paid to Unity of Bellevue, and the "remainder" interest is given to one or more non-charitable beneficiaries, who could be either the donor or family members. The amount paid to Unity of Bellevue may be either a fixed sum (an "annuity trust" interest) or a percentage of trust assets as valued each year (a "unitrust" interest).

- a) The terms of each trust are settled upon by the donor and the trustee. Nevertheless, in certain circumstances it may be appropriate for Unity of Bellevue to offer suggestions as to aspects such as the payout rate, the number of income beneficiaries, or the duration of the trust.

8.10.6 Life Insurance Gifts. There are various methods by which a life insurance policy may be contributed to Unity of Bellevue. A donor may:

- Assign irrevocably a paid-up policy to Unity of Bellevue;
- Assign irrevocably a life insurance policy on which premiums remain to be paid; or
- Name Unity of Bellevue as a primary or successor beneficiary of the proceeds.

- a) Any of these types of life insurance gifts are acceptable to Unity of Bellevue. In the event a policy is contributed on which premiums remain to be paid, Unity of Bellevue may elect to pay the premiums, provided the donor makes equivalent contributions for that purpose.
- b) For any policy of which it is the owner, Unity of Bellevue reserves the right to continue paying premiums (if any), surrender the policy for cash, or elect a paid-up policy for a reduced amount.

8.10.7 Retained Life Estates. An individual may transfer to Unity of Bellevue title to a personal residence or farm, with the donor or another person retaining use of the property for a term of years or for the life of the donor and/or another person.

- a) The donor or other person(s) for whose benefit the life estate has been retained shall continue to be responsible for real estate taxes, insurance, utilities and maintenance after title to the property is transferred unless Unity of Bellevue, upon prior approval of the Board, agrees to assume responsibility for any of these items. In any event, Unity of Bellevue shall enter into a retained life estate arrangement only if it is also party to an agreement that specifies the respective rights and responsibilities of Unity of Bellevue and of the person(s) for whose benefit the life estate has been retained.

8.10.8 Bargain Sales. This is a sale of property to Unity of Bellevue for an amount less than the property's current fair market value. The excess of the value over the sales price represents a contribution. The bargain sale price may be paid either in a lump sum or in installments.

- a) Unity of Bellevue, upon approval of the Board and legal counsel, may purchase real estate, securities, or other property on a bargain sale basis. The price paid for the property should result in a gift significantly large to make the transaction worthwhile for Unity of Bellevue.

8.10.9 Gifts of Real Estate. Gifts of real estate may be made in various ways: outright or through a charitable remainder trust, a charitable lead trust, a retained life estate or a bargain sale. These guidelines pertain to gifts of real estate in general.

- a) In determining whether to accept a particular piece of property, Unity of Bellevue shall take into account the nature of the proposed gift arrangement, the usefulness of the property for purposes of programs operated by Unity of Bellevue; the marketability of the property; and carrying costs related to the property, such as property owners association dues, taxes, insurance premiums (taking into account coverage provided), and maintenance expenses.
- b) The donor shall secure a qualified appraisal of the property. The cost of the appraisal shall be borne by the donor.
- c) Unity of Bellevue (or the trustee in case of a charitable remainder trust or charitable lead trust) shall determine if the donor has clear title to the property. The costs associated with such determination may, in the discretion of the Board, be borne by Unity of Bellevue.
- d) An environmental audit shall be required unless the Board decides the requirement can be waived for a particular property, such as a single-family residence. The costs associated with such an audit determination may, in the discretion of the Board, be borne by Unity of Bellevue. No property containing toxic wastes shall be accepted prior to their removal or other remedies assuring that Unity of Bellevue assumes no liability whatsoever in connection with such toxic wastes.
- e) Unity of Bellevue may accept property subject to a mortgage, provided the property has sufficient equity, available cash flow will service the mortgage, and the property is marketable.

- f) A donor should be encouraged not to transfer mortgaged property to a charitable remainder trust unless the trust would not be disqualified and unless the income from the property is sufficient to cover all liabilities.
- g) If a donor wants to give real estate and retain income, a “flip” charitable remainder unitrust is the preferred instrument (although either a “net-income” unitrust or “net-income with make-up-provision” unitrust would also be acceptable).

8.10.10 Gifts of Closely Held Stock and Other Business Interests. Donors may make gifts of closely held stock, limited partnership units, and similar interests in businesses. These can be accepted by Unity of Bellevue so long as Unity of Bellevue either assumes no liability or considers the amount of liability to be acceptable, and so long as the property can be sold within a reasonable period of time. In the case of closely held stock, the corporation may be willing to redeem the stock or other stockholders may be willing to purchase it.

- a) To be considered for acceptance, limited partnership units and similar interests in businesses must not subject Unity of Bellevue to cash calls or other liability and must not have adverse tax consequences for Unity of Bellevue.
- b) Closely held stock may be accepted if the probability exists of selling it within a reasonable period of time to the corporation, other stockholders, or others interested in acquiring the corporation. If a potential gift involves Subchapter S stock, Unity of Bellevue may accept the gift if the income tax liability associated with owning and selling the stock appears to be reasonable in proportion to the income that Unity of Bellevue would actually receive.

9.0 BOARD OF TRUSTEE OPERATIONS

9.1 Purpose. The collective purpose of the Board of Trustees of Unity is to grow in consciousness and provide leadership by example and action in accordance with Unity Truth principles. The function of the Board is to represent the membership while holding the long-term vision of the ministry. In this context, different viewpoints are encouraged until a consensus is reached and a Board decision is made. Wisdom evolves from the resolution of differing viewpoints. Therefore, it is usually possible to resolve differences for the best interest of all concerned without violating personal convictions.

9.2 Structure and Membership. Structure and membership of the Board of Trustees is defined by the Unity of Bellevue Bylaws.

- a) Members are recruited by the Nomination Committee annually then presented to the Board of Trustees by the Board Representative to the Nomination Committee.
- b) The Board then selects Nominees for presentation to the membership.
- c) The membership elects Board members on an annual basis.
- d) Board seats vacated mid-term can be filled by the Board of Trustees without a membership vote for the remainder of the term.
- e) Bylaws, Section 4.04(a) concerning eligibility of an incumbent Board Member to be re-elected who has not served a full three-year term shall be interpreted to mean: “a Board Member who has not served a full three-year term is eligible to serve two more consecutive three year terms”

9.3 Ethics

- 9.3.1 **Code of Ethics.** All Board members are required to sign a Code of Ethics statement on an annual basis (see Section 10).
- 9.3.2 **Access to Personal Information of Members.** Neither the membership list nor the mailing list is ever sold or otherwise provided to unauthorized persons and/or organizations. Those authorized to use this list are Minister, Board of Trustees, and designated Committee Chairpersons.
- 9.3.3 **Avoiding Conflict of Interest.** It is the responsibility of every member of the Board of Trustees to avoid the appearance of conflict of interest with regard to being compensated for performing work at the church.
- a) It is the policy of Unity of Bellevue that Board Members will not be compensated for work performed for the church.
 - b) No employee or anyone receiving money from the Church shall serve on the Board of Trustees; also, no Board Member shall be the spouse, parent, or child of another Board Member, permanent employee or person receiving money from the Church, the Minister. Licensed Unity Teachers may not serve on the Board.
 - c) **Gifts, Gratuities:** Trustees are not to accept gifts, gratuities, free tips, personal property of any item of value from an outside person or organization as an inducement to do business or provide services.
 - d) **Outside Business or Professional Interests:** Obviously Trustees have outside business or professional interests. However, Trustees may not make a profit in any way in their outside employment or business interests from their work with the church. During Board meetings, members must disclose any conflict of interest involving an issue before the Board and abstain from discussion or voting on this issue.
 - e) **Personal Beliefs:** Trustees may hold a wide range of personal beliefs, values, and commitments. These beliefs, values, and commitments are a conflict of interest if they prevent Trustees from carrying out their job responsibilities; if Trustees attempt to use the church and facilities for furthering them; or if Trustees attempt to convince other Trustees, the Minister, or church staff members of their personal beliefs after these individuals have asked them to stop.
 - f) **Abuse of the Board Relationship:** Trustees should not abuse their Board membership by using the ministry's staff, services, equipment, materials, or property for their personal gain.
- 9.3.4 **Solicitation.** No solicitation or fundraising drive is introduced or supported which directly benefits an individual member of the ministry. No materials are distributed, or outside fundraising projects permitted, without the approval of the Minister. Requests for approval must be made in writing.

9.4 Legal Aspect

- 9.4.1 **Legal Entity.** From a legal standpoint, a Unity ministry exists as a legal entity by virtue of two legal instruments: the Articles of Incorporation (or charter) and the Bylaws document.
- a) The charter registers Unity of Bellevue with Washington state as a religious corporate body.
 - b) Bylaws are the legal instrument by which the ministry functions as an organization.
 - They set forth the overall purpose and functioning of the ministry and generally state the rights and responsibilities of the Board of Trustees, Minister, and membership.
 - They are subject to amendment as presented by the Board to the membership for approval upon proper notice, typically at the annual meeting.

- As a membership organization authority is derived from the membership.
- The ministry's bylaws outline the high-level responsibilities and duties of the Board.
- Board members are under obligation to perform their duties in "good faith", to uphold the best interest of the corporation as a prudent person under similar circumstances and position would do.
- Trustees and Officers have a fiduciary relationship with the members' that requires them to follow the corporate Charter and Bylaws.
- If individuals make agreements on behalf of the church, outside the context of a Board meeting, that individual's personal assets could be at risk should a problem arise.

9.4.2 **Liability Insurance.** Unity of Bellevue will carry Comprehensive Liability Coverage Insurance for members of the Board.

9.5 Member Onboarding & Exit

9.5.1 **Board Member Selection.** Board members are recruited by the Nomination Committee and elected by the membership (see section 7.2). Licensed Unity Teachers, the Board President, and those wishing to be re-elected to the Board shall not serve as members on the Board of Trustees. The Minister is considered an Advisory member of the Nomination Committee.

9.5.2 **Board Member Selection.** The elected member of the Board of Trustees of a Unity ministry is, first and last, a Truth student. They represent the membership but vote in accordance with the vision and mission. A candidate for Board membership shall

- receive copies of the Bylaws, policy manual.
- agree to these ten commitments of Board service.
 1. Further advancement self in spiritual transformation.
 2. Promote principle and practice of prosperity consciousness and commit to give to Unity of Bellevue.
 3. Make participation in Board activities the highest volunteer priority during terms of service.
 4. Attend scheduled Board meetings on time, prepared, enthusiastic and with all action items completed that have been agreed to within the time committed.
 5. Express full thoughts and feelings, as well as, allow others to express theirs by actively and compassionately listening.
 6. Test my words, and have them tested by my colleagues, for consistency with Unity principles.
 7. Expand conscious expression of Unity principles through class work, reading, discussion, and prayer.
 8. Fully support Board decisions, even if there is personal disagreement, in all contacts within the ministry.
 9. Identify and assist with development of talented new participants for Board and/or Committee work.
 10. Be personally accountable, and also ask Board colleagues, paid staff, and volunteers to be accountable for commitments and assignments.

9.5.3 **Exiting Board Members.** The Board President will perform an exit interview for each departing Board Member.

9.6 Member Accountabilities

- 9.6.1 **Board Member Role Execution.** All Board members execute their role in accordance with the Board Member job description. The President, Vice-President, Treasurer, and Secretary are considered Officers and each have an additional job description they must follow. See section 10 for full job descriptions.
- 9.6.2 **Board Member Requirements.** All Board members shall comply with Board member qualification requirements at all times (see section 10.4.3). This includes dedicating two days per year to attending a Board retreat, attending Sunday service on a regular basis, being willing to do public speaking, and also attend Board training sessions as requested.
- 9.6.3 **Board of Trustees' Collective Responsibilities.** The following are the primary responsibilities of the Board of Trustees.
- a) Set policy and act as observer, interpreter, and evaluator of how effectively policy is being carried out.
 - b) Hire a Minister and evaluate their performance.
 - c) Advocate for Unity of Bellevue's mission and vision.
 - d) Be a Financial Steward and participate in fundraising
 - e) Monitor Financial status
 - f) Monitoring and evaluating, on an ongoing basis, whether activities of the Center are in alignment with the ministry's mission and vision.
 - g) Plan for the Future. To be effective, planning also involves an organizational assessment, particularly of the skills, weaknesses, opportunities and threats both internal and external to the organization.

9.7 **Overseeing Minister Performance.** It is the responsibility of the Board of Trustees to employ a licensed or ordained Unity minister, or a person serving under special dispensation approved by Unity Worldwide Ministries, for the church through cooperation with the employment management procedures of Unity Worldwide Ministries.

9.7.1 **Minister Job Description.** See Section 10.

9.7.2 **Minister Performance.** A formal review shall be conducted of the Minister's performance on an at least an annual basis. The review shall be conducted by the Board (as facilitated by the President) and presented by the President together with another Board member.

In the event of an unfavorable review, the Board will work with the Minister to define a plan of improvement, addressing the perceived areas of deficiency and scheduling more frequent periodic reviews to assess progress.

In the event that the minister is unable or unwilling to take appropriate corrective action, as agreed upon with the Board, or if a conflict should arise between the Board and the Minister on this issue, either party may request the intervention of the Ministry Skills and Peace Process, or the current equivalent as provided by Unity Worldwide Ministries.

If none of the above processes should prove successful in providing resolution and positive forward movement, and/or if the Board determines that it is in the best interests of the ministry as a whole that a change in leadership be initiated, the employment contract with the Minister may be terminated at any time by a 2/3rd vote of the Board in favor of such action, and Unity Worldwide Ministries shall be informed without delay that such action has been taken.

Any termination shall take place with due regard to provisions stipulated within the Minister's contract of employment, but shall in no way mitigate or in any other way alter the Board's right to act with the authority granted it under the current bylaws.

- 9.7.3 Ministerial Transitions.** During times of ministerial transitions the Board of Trustees' President shall temporarily coordinate operational administration.
- a) All W2 staff shall report to the Center Administrator who will also oversee all 1099 service contractors.
 - b) Administratively, the Center Administrator shall report to the Board of Trustees' President. This shall remain the case even if an Interim Minister is hired.
 - c) Any need for employment action (recruitment, hiring, release, etc.) shall be brought to the Board by the President for consensus prior to action being taken.

9.8 Operations

- 9.8.1 Who has a voice in Board meetings.** Legally, only duly elected members of the Board may be heard in the vote. The Board has the right and responsibility to determine who should attend, except where specific stipulations are set out in the bylaws. The Minister is a voting member of the Board. The Minister has the right to be notified of and attend all meetings, except those having to do with his/hers own employment, compensation, award, or that of the Minister's successor.

- 9.8.2 Board Guidance.** All members of the Board of Trustees will receive and be guided by the following:
- UOB Bylaws
 - UOB Policy Manual
 - Previous Board Minutes
 - State and Federal employment law as it applies to 501(c) status
 - Rulings, applicable to this ministry, of the Washington State Department of Revenue

9.8.3 Board Meeting Structure

- a) If a Board member is going to miss a meeting and there is an issue on which they wish to vote, they must submit a letter stating their vote. The letter will be attached to the Board minutes.
- b) The Unity of Bellevue Board of Trustees meetings shall be open to the congregation with limited participation by non-board members. The policy shall be implemented as follows:
 - Meeting day and time to be publicized
 - Non-board members may speak to any issue for up to three (3) minutes after approval of the minutes of the previous meeting OR by invitation of the Board President.
- c) Anyone may attend, unless a congregant has specific contribution and invited to speak on a board topic agenda.
- d) The approved meeting minutes shall be posted on the bulletin board, with exceptions of items discussed during closed meetings or closed sessions.

- e) Board meetings shall be held in an appropriately sized room or via Zoom conferencing or hybrid.
- f) Closed meetings or sessions shall be held for personnel, legal, salary, or other matters at the discretion of the President and/or Board, or at the discretion of the Minister.

9.8.4 Setting up the Meeting for Success. Board meetings shall be conducted in accordance with the information found in section 10.5.

9.8.5 Board Meeting Agenda. The President is accountable to create a draft agenda and coordinate with the Minister prior to the meeting to review and adjust as needed. Board members are to be allowed opportunity to input into the agenda before it's finalized. Board meeting topics should

- Promote the mission
- Establish Board policy
- Fit with the long-range plan
- Deal with major financial or legal interests of the church

9.8.6 Meeting Preparation. Before the meeting all board members shall do the following:

- Send the Board President agenda topics ahead of time.
- Read and understand the minutes, Minister Report, Treasurer Report, and any other information sent prior to the meeting for review.

9.8.7 Meeting Conduct. The following applies to meeting execution:

- Model for 90-Minute Meeting – See Appendix Board Meeting
- If it isn't on the agenda, it should not be discussed.
- If it doesn't make the cut off, add it to the next meeting's agenda.
- Use Roberts Rules of Order procedurally during a meeting. See Section 10, RRO Application - Parliamentary Procedures at a Glance – See Section 10.

9.8.8 Meeting Minutes. The book of minutes shall be available at Unity of Bellevue. Check with Center Administrator for specific location.

9.8.9 Records. Access to financial records pertaining to contributions shall limited to the Minister, Treasurer, and/or other designee. The combination to the safe will be given to the Minister and Treasurer, or other designee.

9.9 Relationships

9.9.1 Board and Other Leadership Alignment. Individuals serving in leadership positions at Unity of Bellevue (including Minister, Board, staff, and volunteers) shall work together in Christ consciousness and alignment with the Mission Statement. All leadership positions shall be filled by individuals openly communicating with the Minister and, as applicable, the Board President or Board Advisor.

- a) Should a situation arise which negatively impacts the ability of Unity of Bellevue to function efficiently or in accord with the Mission Statement, the situation will be addressed in a timely and caring manner.
- b) When a conflict is brought to any member of the Board's attention, the Board listens to issues and directs the individual to the person with whom they have a breakdown. Other

than the Minister or Board President no Board member should attempt to resolve the conflict. If conflict resolution seems needed the situation is to be deferred.

- c) Anyone in a leadership position who chooses not to participate in resolution of the conflict, or who continues to allow issues to prevent the full functioning of the Church may be released from his/her leadership position(s).

9.9.2 Board and Minister. The Minister is the spiritual leader and administrative lead of the ministry who is a member of the Board, and reportable to the Board, but who acts in close partnership with the Board of Trustee’s President for day to day partnership. The Minister and Board work together for the highest good of Unity of Bellevue.

BOARD	MINISTER
Establishes policy.	Carries out policy.
Gives input to the church's vision.	Has primary responsibility for the church's vision.
Creates policy for financial management and approves the financial plan (budget).	Makes sure bills are paid, handles day-to-day expenditures, has input into the financial plan (budget)
Approves a bid for major purchases.	Researches, makes recommendation, and carries out the actual purchase; small purchases are usually made by the Minister without Board approval.
Approves general funding for staff salaries, including salary ranges, and establishes new positions.	Determines scope of personnel activities, sets individual salaries, and determines amount of raises in accordance with approved budget.
Sets personnel policies; is apprised of disciplinary actions and potential discharges.	Determines level of staffing, writes job descriptions, hires, disciplines, promotes, or fires in accordance with Minister’s employment contract.
Collectively creates a performance evaluation of the Minister that is given by the Board President and one other member. Evaluates Board performance and operational performance (how well the Center is fulfilling its mission/vision and execution of core values).	Gives performance reviews on all staff positions in the first quarter of each calendar year.

9.9.3 Board and Staff. The Board interacts with staff in partnership with the Minister.

- It is the responsibility of the Board of Trustees to approve new employment positions and establish/approve salary ranges.
- It is the Minister’s responsibility to select an individual to fulfill a position as well as oversee day-to-day supervision of workers in accordance with the Minister’s employment contract.
- Board members shall bring forth worker observations to the Minister (or delegate) rather than directly to the worker.

BOARD	STAFF
Is reimbursed for expenses.	Receives compensation for services rendered.
Makes Policy.	Has input into and implements policy under the Minister's direction.

Works as a team with the Minister. Conducts performance feedback through annual review.	Is supervised by the Minister; job performance is evaluated by the Minister; serves at the discretion of the Minister.
Establishes new positions and sets and approves salary ranges; is informed of personnel problems if it moves to progressive discipline.	Is hired by the Minister for a salary, the amount of which is confidential, which falls within the range set by the Board.
May have friendly/social relationship with staff members but is careful to not use this relationship to solicit information inappropriately or promote triangulation.	Maintains friendly relationship while using caution about topics of employment issues, salaries, and ministry management.
Appoints and supervises committees.	Serves on committees if asked.
Discusses personnel performance, positive or negative, with the Minister only.	Accepts assignments and performance evaluations from the Minister; receives discipline from the Minister.
Serves as an unpaid volunteer - <u>cannot</u> be both Board and staff.	Works for pay.
Reviews financial condition through financial statements and approves annual budget.	Proposes budget with rationale and complete financial picture for review.
Communicates Board decisions to the congregation.	Assists with communication and supports Board decision.
May disagree among selves at the Board meeting; obligated to support the decision once it is made.	Is obliged to support the decision of the Board;

9.9.4 Board and Community. The content of Board meetings is considered confidential. Once a Board decision has been made, it is to be communicated to the membership in a setting facilitated by the Board President or as otherwise agreed upon by the Board. The Board is accountable for obtaining community consensus for self-assessment and on key policies which may heavily impact the community (such as infectious disease, tithing, etc.).

9.9.5 Board and UWM. Although the Minister is the official legal representative, Unity of Bellevue is a member church to Unity Worldwide Ministries; therefore, the entire Board is a part of the organizational structure of Unity Worldwide Ministries. Should a conflict arise that adversely affects the ministry, particularly between the Board and Minister, it is the responsibility of both the Board and Minister to contact Unity Worldwide Ministries for assistance in managing the conflict. Unity Worldwide Ministries has trained Ministers who, as neutral third parties, can help identify issues and points of disagreement, and make recommendations for resolution.