

Unity of Bellevue Policy Manual

**Revision 1
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1.0 POLICY MANUAL OVERVIEW

1.1 Governance Structure Unity of Bellevue exists as a legal non-profit entity by virtue of two legal instruments: the Articles of Incorporation (or charter) and the Bylaws. Unity of Bellevue has developed subordinate governance documents to ensure good practices, standardized operations, and compliance with federal, state, and local laws in all aspects of the organization.

1.1.1 Intention. Unity of Bellevue intent and policy for each governance document is explained below:

- a) *Charter.* Registers Unity of Bellevue with Washington (WA) state as a religious corporate body classified 501(c). Issued by WA state.
- b) *Bylaws.* Required by the charter. Written by Unity of Bellevue, administered by the Board of Trustees, and approved by Membership. Is the legal instrument by which the ministry functions as an organization under the law.
 - Subordinate to, and written in accordance with, the Charter.
 - Includes, in high level terms:
 - A description of the overall purpose and function of the ministry.
 - The rights and expectations of the Board of Trustees, Sr. Minister, and membership.
 - Stipulation that changes to the Bylaws must be presented by the Board of Trustees and voted on by the membership.
- c) *Policies and Procedures.* Written by Unity of Bellevue, revised and approved by the Board of Trustees. Defines Board of Trustee approved operational expectations and includes enough procedural details to define how to achieve, or align with, a policy.
 - Subordinate to, and written in accordance with, the Bylaws.
 - All staff and Board members shall sign a receipt acknowledgment signifying they have received, read, and agree to abide by requirements in the policy manual for all Ministry decisions and activities.
- d) *Work instructions.* Written, as needed, by Unity of Bellevue employees to provide specific instruction for executing a specific desktop task. Sanctioned or approved by the Sr. Minister but not required to be approved by the Board of Trustees or membership.
 - Subordinate to, and written in accordance with, the bylaws and policy manual.
 - Developed optionally, as needed, with primary intent being to standardize a specific task or activity.

1.1.2 Accessibility All UOB governance documents shall be visible to and easily accessible for the congregation and staff both electronically and in hard copy.

1.2 Policy Manual

1.2.1 Purpose. The success of the UOB ministry is measured by how effectively everyone works together to implement all aspects of governance while keeping spiritual acumen in mind.

- a) *Applies to all.* This Policy Manual defines requirements for all activities at Unity of Bellevue (UOB) second only to the Articles of Incorporation (or charter) and the Bylaws with the intent of creating high standards and excellence of service in daily operations.

- b) *Provides Requirements.* The contents herein apply to all facets of the Ministry and stipulations herein are to be followed as written (as opposed to a guideline) unless otherwise indicated by the collective Board of Trustees.
- c) *No legal commitment.* This document is not intended to constitute a legal commitment binding upon the ministry that would create a contractual right or obligation outside of a signed contract.
- d) *Inequities.* Content found to be inequitable should elicit healthy discussion and discernment by the Board of Trustees so as to recognize and encourage individual perspectives and overall spiritual growth within the ministry.

1.3 General Practices and Core Policies This section provides the core framework by which all governance documents are created and operations are implemented.

1.3.1 Vision. Describes our preferred future. “Healed, spiritually awakened people living in harmony in a world that works for all.”

1.3.2 Mission. Describes why we exist, our purpose or reason for being, and why we are doing what we are doing. “We are an inclusive spiritual community that restores wholeness, practices peace, and promotes equity.”

1.3.3 Core Values. The values that are behind all actions:

- Love – We are a welcoming community who recognizes and honors God in ourselves and in others by expressing unconditional Love.
- Connection – We foster deep connection with ourselves, each other, and the community.
- Service – We give love, time, and treasure freely giving in the same way God has given to us, graciously and abundantly.
- Wellness – We hold a positive affirmative commitment to physical, emotional, mental and spiritual well-being and growth with restoration from dis-ease.

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

- Love – Teach and practice love for self, church, community, nation, and planet.
- Connection – Create spiritual groups, ministries, committees, and classes that foster friendship, connection, and support.
- Service – Provide service opportunities for all, fostering meaningful engagement that inspires, strengthens, and creates a lasting impact in the lives of those serving and those we serve.
- Wellness – Promote the life-affirming, healing message of the Fillmores, Unity Founders, updated for today’s world.
- Foundation – Base everything on the teachings of Jesus and the power of affirmative prayer.

1.3.5 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."

1.3.6 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."

1.3.7 UOB Indigenous Land Acknowledgement. Unity of Bellevue acknowledges that our facility 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.

1.3.8 General Practices Unity of Bellevue ministry shall follow these guiding principles:

- Comply with the Unity of Bellevue Charter, Bylaws, Policy Manual and all applicable state and federal laws for all business activities.
- Follow the five Unity Principles in all business transactions.
- Stay in integrity in all finance-related business transactions.
- Avoid actual or apparent conflicts of interest.
- Maintain transparency in how resources, particularly financial, are used.
- Budget allocations are ultimately driven by the vision and mission.
- Include checks and balances (activities done by one are reviewed by another independent person) as much as possible and as warranted in finance-related processes and procedures.
- Protect the personal information of congregants by carefully managing and restricting access to such information (who and how).

1.3.9 Leadership Policy. All individuals (Board, Minister, staff, and volunteers) who serve in leadership positions at Unity of Bellevue shall work together in Christ consciousness and alignment with the Vision and Mission Statements. The following are Unity of Bellevue policies:

- a) All leadership positions shall be filled by individuals openly communicating with the Minister, Board President, and Board Advisors.
- b) 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.

- c) When a personal conflict is brought forward to a Board member, the Board Member shall listen then direct the individual to the person with whom they have the issue. Only the Minister or Board President shall attempt to resolve conflicts.
- d) Leaders who choose not to participate in conflict resolution or who allow issues to prevent the full functioning of the Church may be released from leadership roles.

1.3.10 Unacceptable Personal Conduct. Personal conduct that interferes with operations, creates safety hazards, brings discredit to the fellowship, or is offensive to anyone in the community will not be tolerated.

1.3.11 Open Door Policy. Unity of Bellevue cannot successfully achieve its individual and collective mission without effective communication. UOB encourages dialogue. In order for relationships to remain effective, all UOB leaders and supervisors must be aware of individual concerns and all individuals engaging in activities at UOB are expected to openly and respectfully discuss their ideas, concerns, and suggestions.

1.3.12 Grievance Policy. Every person serving Unity of Bellevue (employee, contractor, or volunteer) shall be treated with respect, fairness, 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) The individual shall attempt resolution directly with the person they have issue with unless they believe that doing so will put them in danger.
- b) If direct resolution is unsuccessful, the Minister shall be informed and assist. 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) Investigation results shall be provided to the complainant, the Minister, and the Board of Trustees' President.
- e) The Northwest Regional Representative (NRR) may be contacted by the Minister or the Board President for help as needed. <https://www.unitynwregion.org/Regional-Representative>. The NRR 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>

1.3.13 Safety and Health. Unity of Bellevue is a safe place for all and our policy is to maintain operating practices which result in safe working conditions and efficient operation. The following are specific policies:

- a) 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.
- b) Injury on the Job. Should an injury occur while at Unity of Bellevue, the individual must immediately notify the Minister or Center Administrator who will take appropriate action. For employee injury, a Workers' Compensation report is to be filed immediately.

c) Inclement Weather:

- 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.

1.3.14 Harassment Policy and Response. Harassment is defined as any unwelcome or offensive conduct. This can come with particular regard toward an individual's race, color, religion, ancestry, national origin, sexual orientation, gender, age, disability, veteran status, or political ideology. Unity of Bellevue is committed to maintaining a positive, constructive working environment where all individuals may pursue personal satisfaction, spiritual growth, and fellowship. Unity of Bellevue does not tolerate harassment of any kind and expects

a) *Responsibility.* All individuals in the Unity of Bellevue community are responsible for maintaining a harassment free environment.

b) *Defining a Few Types of Harassment:*

- *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.* As defined by the Equal Employment Opportunity Commission, sexual harassment is:

"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.")
- *Interference and Intimidation.* 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.

- c) *What to do.* Any person who believes they have been subject to, or has knowledge of harassment, is to immediately notify the Sr. Minister, or the Board of Trustees' President. No employee submitting such a report will suffer retaliation for filing that complaint.
- d) *Process.* Investigating sexual harassment charges against or involving employees shall be conducted by a qualified individual, complaint documented and signed by the individual making the complaint, and the situation kept confidential and discretely discussed with the accused. Next steps shall be defined after investigation which may include actions 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.

1.3.15 Drug and Alcohol Policy. Substances such as alcohol and drugs may not be used by individuals to an extent that impairs their abilities and senses. The impairment of any employee, contractor, or volunteer, due to his or her use of substances, may create a risk of injury to other individuals the impaired individual, or to third parties. Unity of Bellevue's policy is as follows:

- a) Substance abuse is defined as when alcohol, marijuana, illegal drugs, prescription drugs, or controlled substances are involved.
- b) The employee, contractor, or volunteer 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 or the volunteer activity.
- c) Employees, contractors, or volunteers who are taking prescription drugs are under a duty to report any effect or limitations of using the drug that may harm them or others to their group lead or supervisor. This is for the protection of the individual and for safety purposes in case of an adverse reaction to the drug while working or volunteering at Unity of Bellevue.

1.3.16 Liability Insurance. Unity of Bellevue will carry Comprehensive Liability Coverage Insurance for members of the Board, staff and volunteers.

2.0 EMPLOYMENT

2.1 General Employment Policies Unity of Bellevue's work environment shall be one of informality, friendliness, and respect for others while maintaining a safe and productive space free from sexual harassment, inappropriate, or other disruptive behavior.

2.1.1 Equal Employment Opportunities. In keeping with Unity Worldwide Ministry teachings, Unity of Bellevue's core policies, and adherence to applicable Federal Laws and Regulations, hiring 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. While it is legal for religious organizations 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. The following are Unity of Bellevue's policies on this subject:

- a) Unity of Bellevue may discriminate based on religion only 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.
- b) Equal opportunity is ensured at Unity of Bellevue by:

- Requiring that individuals who make or recommend decisions and other personnel actions are fully aware of, and comply with, the principles of equal opportunity.
 - Monitoring all practices with respect to Equal Employment Opportunities Commission (EEOC) guidelines.
 - Investigating all complaints promptly and thoroughly.
- c) This policy will have as its firm objective equal opportunity in recruitment, hiring, rates of pay, promotion, training, termination, benefit plans, compensation, conditions, and privileges for all hired workers and applicants.

2.1.2 Nepotism. Nepotism is the act of granting an advantage, privilege or position to relatives or friends. Unity of Bellevue permits nepotism in employment as long as such employment does not create a conflict of interest or otherwise disrupt the Ministry in the eyes of the Sr. Minister or the Board of Trustees. The Ministry will use sound judgment in the placement of related employee or contractors in accordance with the following guidelines:

- a) Individuals who are related, or reside in the same household (either prior to or during the course of employment), are permitted to work in the same department, provided no direct reporting or supervisor-to-subordinate relationship exists.
- b) Related employees or contractors may have no influence over the wages, hours, benefits, career progress and other terms and conditions of the other related staff members.

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 policy with regard to ADA is as follows:

- a) 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.
- b) 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.

2.2 Worker Classification and Eligibility Unity of Bellevue policy is to comply with legal requirements for work eligibility and IRS classification of all paid positions as defined in this section.

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 (USCIS) Form I-9 and provide proof of identity and eligibility to work in the United

States. The Form I-9, once completed, is maintained by the Center Administrator and retained 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 Employee and Contractor Classifications. All persons receiving compensation from Unity of Bellevue must be classified, by IRS definition, as employee (W2) or contractor (1099). If misclassified as a contractor, when they should have been classified as an employee, Unity of Bellevue may be held liable for repayment of taxes back to the date of hire. Policy requires:

- a) **Employee:** Defined as an individual who performs services where the supervisor controls what and how the work will be done. This classification is referred to as W2 and requires Unity of Bellevue withhold taxes, make payments, and report taxes to the IRS.
 - W2 employees may be full or part-time and may, or may not, receive benefits depending on hours worked. If salaried, they are considered exempt (from overtime compensation) and, if hourly, they are considered non-exempt (from overtime).
 - All W2 employees shall be provided a job description and an Offer Letter using the UOB Offer Letter Template (See Section 10.5) at hire which defines their pay rate and scope. In some cases, an additional contract may be drafted (typical for Minister hire) that goes beyond or makes exception to common policy (see Section 10.5 for Sr. Minister Contract Template).
 - Where a formal contract is created, the contract takes precedence for any differences from standard UOB policy – particularly for compensation and time off.
- b) **Contractor:** Defined as an individual who conducts services under a verbal or written contract for a specific purpose and who does not meet the IRS definition of employee. This classification is commonly referred to as 1099 and in this case the worker pays their own taxes and does not receive UOB benefits.
 - 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 to be given a desired outcome but are not to be directed on the details of providing the service.
 - Contractors work on the basis of a work scope. If the scope has not been done at UOB at all, or for a long enough time where precedence cannot be easily shown, then an Employment Agreement must be drafted and signed using the Unity of Bellevue approved template.

2.3 Job Description. A job description, in the UOB standard format, shall be developed and maintained for each full-time or part-time permanent employee and 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.

2.4 Hiring

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

- a) **Job Description.** If it is new, then the job description, along with a proposed rate of pay based on market analysis, shall be submitted to the Board of Trustees for approval prior to any action for recruitment. If utilizing an existing job description, then the Board of Trustees must be notified of intent to hire.

- b) The Sr. Minister shall ensure that recruitment includes multiple qualified candidates.
- c) Open positions shall be filled with candidates who best meet the requirements of the position regardless of intended hiring timeline.

2.4.2 Interviewing. Unity of Bellevue's policy is to conduct interviews within these parameters:

- a) Pre-planned. A meeting specific to the interview shall be conducted with proper notice given to all parties involved. A job opening may be discussed prior to the interview but the discussion does not constitute an interview.
- b) Conducted professionally. A business appropriate setting which is private and without interruption.
- c) Core Questions. A set of core questions shall be asked of all candidates. Additional questions may be used to clarify a specific candidate's experience or qualifications.
- d) Appropriate Questions. Those that express (directly or indirectly) any preference, limitation, or reference to race, national origin, sex, age, physical handicap, or other protected class information as defined by law are prohibited.

2.4.3 Candidate Skills Testing. 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 Employment Verification and Reference Checks. Employment reference checks shall be handled only by the Sr. Minister, Center Administrator, or their delegate.

2.4.5 Background Checks. Background checks shall be conducted, to ensure the safety and security of the community, for all employees plus any all volunteers or contractors who work with youth, serve on the Board, or handle cash in the bookstore. All such investigations shall be facilitated by the Center Administrator and results kept confidential.

2.4.6 Selection and Salary. Candidate selection shall be based on ability, experience, training, and interest in performing the duties of the position as outlined in the job description. After candidate selection the starting salary rate shall be consistent and equitable with other positions within Unity of Bellevue.

2.4.7 Employment Offers. Unity of Bellevue employment offer policies are as follows:

- a) The Board of Trustees shall hire the Sr. Minister. The Sr. Minister shall hire all other positions which may, at time of hire, require Board notification and/or approval.
- b) All individuals hired by UOB as W2 employees or non-standard 1099 employees (one time service contract) shall receive an employment offer letter using the offer template found in section 10.5.
- c) Contracts for W2 employees shall be written using the UOB template and include signature of both the Sr. Minister and the Board of Trustees President. Contracts for Sr. Minister require that all Board Officers sign the contract. Contractors (1099) hired for non-standard (for UOB) work shall have an Employment Agreement which requires only the signature of the Sr. Minister. The Board President, or delegate, retains the right to review such agreements at any time.
- d) Candidates not selected shall be notified after the job has been awarded but before announcements are made within the community. If unable to reach a candidate verbally then e-mail is an acceptable option.

2.4.8 Contracting. Unity of Bellevue requires the following. Note that the policies in this section shall not be modified by any statements contained elsewhere in this manual, or in any employment applications, recruiting materials, memoranda, or other materials provided to employee or contractors in connection with their employment.

- a) All contracts shall be written using standard Unity of Bellevue templates.
- b) All spiritual leadership positions shall be hired under contract.
- c) No one at Unity of Bellevue is authorized to enter into any written (or verbal) employment contracts with any employee or contractor without the express consent of the Board of Trustees.
- d) Employment At-Will. Except for those employee or contractors 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 contractor or Unity of Bellevue may terminate the employment relationship at any time for no reason at all.

2.4.9 W2 Employment Trial Period. The first three months (90 days) of W2 employment are considered a trial period where both parties evaluate each other to determine whether to continue employment. The employee or contractor may terminate the employment relationship for any reason, as may Unity of Bellevue, without notice or obligation unless otherwise specified by the employee or contractor's contract (as applicable). Satisfactorily completing the 90-day introductory period does not confer on the employee or contractor any rights or expectations for continuing employment beyond the 90-day period, and the employment relationship remains "at will" or, for those employee or contractors hired under contract, as specified by the contract. Note: The trial period does not apply to contractors.

2.5 Orientation. The manner in which a new employee or contractor is assimilated into the ministry may well influence how long they stay and how productive they are. Orientation of new workers shall be well planned and paced appropriately. It shall include a clear picture of the ministry, a clear understanding of expectations, introductions, governance documentation overview, and identification of appropriate channels for problem solving.

2.5.1 Onboarding Paperwork. During onboarding the Center Administrator shall provide, and explain, the following to the new employee or contractor:

- 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.).
- Payroll schedule (pay periods and pay out times).
- Insurance application forms (if applicable).
- Emergency Information.
- Unity of Bellevue Policy Manual acknowledgement.
- Unity of Bellevue Bylaws acknowledgement.

2.5.2 Revisions. Changes to employee address, marital status, or deductions require that a new W-4 be completed.

2.6 Compensation

- 2.6.1 Confidentiality.** Information concerning individual pay rate ranges is strictly confidential and available only to the employee supervisor, Center Administrator, Bookkeeper, and Board of Trustees. The details of an individual's salary shall not be released to anyone without Board of Trustees' President's approval.
- 2.6.2 Pay Day.** All employee and contractors are paid on a pre-determined payroll schedule. No payroll checks are to be released to individuals other than the employee or contractor without the specific consent of the individual being paid.
- 2.6.3 Timekeeping.** The individual is responsible to ensure time sheets are completed, accurate, and submitted in a timely manner.
- a) The timesheet shall include hours worked and, as taken, sick leave, vacation, and holiday.
 - b) All overtime work must be authorized in advance by the employee or contractor's supervisor.
 - c) 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 and Wages.** Rate of pay, within a pre-determined compensation range, is established at the time of hire for both employees and contractors. The initial compensation amount is based on the duties required as per job description.
- a) A salary range is pre-established for each position at Unity of Bellevue, providing a means for salary progression in the position.
 - b) Compensation benchmarking for initial hire is based upon the job description and market analysis.
 - c) Compensation increases after hire are not on a schedule nor guaranteed. Compensation rates are periodically reviewed during the annual budget development process.
 - d) Compensation increases, if given, are based on the employee's performance and also on financial feasibility. Both salary increases and bonuses require Board of Trustees' approval.

2.7 Benefits

- 2.7.1 Applicability.** W2 employees may be eligible for benefits (see 2.7.6). Contractors and volunteers are not eligible.
- 2.7.2 General.** Employees are paid in accordance with federal, state, and local regulations. Rate of pay is considered confidential. Benefits provided by Unity of Bellevue are considered part of total compensation.
- 2.7.3 Medical Health Coverage.** For full time employees, in lieu of a group plan, UOB will provide a health insurance stipend to subsidize the employees' costs based on the employee obtaining insurance through the general marketplace. This is not applicable to part-time employees.
- 2.7.4 Workers Compensation.** Employees who suffer from work related illness or injury may be eligible for workers' compensation benefits. Employees who are injured or become ill through work, shall inform the Senior Minister or Center Administrator immediately. Workers compensation is not applicable to contractors or volunteers.

2.7.5 Unemployment Insurance. Unity of Bellevue, as a nonprofit defined by Federal Tax law 501(C)(3), is exempt from requirement to contribute to Washington State Unemployment insurance. However, Unity of Bellevue voluntarily contributes to such a fund in order to provide protection for employees. To qualify for unemployment insurance the employee needs to meet a minimum number of hours in the qualification period as defined by Washington state.

2.7.6 Time off Benefits Summary. The following chart outlines the basic information about time off for all employees without an employment contract. All leave, regardless of when it is scheduled, must be requested from, and approved in advance by, the employee's supervisor.

Type of Time off	Applies to	Used for	How Received	Amount	Annual Roll-over	Paid at separation?
Paid Personal Days	Full-time employees only	No restriction	Full allotment – Beginning of each calendar year	3 days per year	No. Must use in the same year.	No
Paid Time Off – PTO	Full-time employees only	Anything except defined sick time (see 2.7.5)	Accrued; accrues from date of hire; can use after 90 days.	Based on tenure	Yes. Up to 2 years worth.	Yes
Paid Sick Leave	All employees	See 2.7.5	Accrued; accrues from date of hire; can use after 90 days.	Up to 40 hours per year.	Yes. 80 hours.	No
Paid FMLA (by WA state)	Employees who meet WA state requirements	Extended sick leave	Must apply to WA state	Per individual	No	No
Holiday	Full-time employees only	UOB designated holidays or closures	During payroll period.	Standard pay	No	No
Court / Jury Duty	Full-time employees only	Court/Jury Duty	See Section 2.7.12	See Section 2.7.12	No	No
Leave without Pay	All employees	No restriction	Non-paid. Must have pre-approval	n/a	n/a	n/a

2.7.7 Personal Days. Full-time employees, who are not under contract, will receive three (3) Personal Days per year to be used as they like after 90 days of employment. The amount of personal days may be different for an employee under contract. Personal days cannot be carried forward into another calendar year and are not paid at separation. Part-time employees are not eligible for this benefit.

2.7.8 Paid Time off (PTO). After 90 days of full-time employment, full-time employees are entitled to time off. Employees are encouraged to take all earned vacation during the year in which it is earned. Pay will not be given in lieu of time off.

- a) Payment Schedule - computed from the date of full-time employment. Whether an employee is under contract or not this schedule applies.

After	Receive PTO
1 year	12 days
2 year	13 days
4 year	14 days

After	Receive PTO
5 year	15 days
10 year	20 days
15 + year	25 days

- b) Unity of Bellevue encourages employees to use all of their PTO each year. This type of may be taken on a weekly, daily, or hourly basis as long as it does not conflict with overall scheduling requirements.
- c) At separation, unused PTO is paid to the departing employee and calculated at the employee's hourly rate in effect at the time of payment, subject to applicable taxes and deductions.

2.7.9 Paid Sick Leave. This type of leave is accrued from day of hire but cannot be used until the 90 day probationary period is over. After 90 days of full-time employment, employees may use accrued sick leave.

- a) The following are examples of what Unity of Bellevue observes as applicable for sick leave:
 - *Personal illness or injury*
 - *Caring for illness or injury in Immediate Family*
 - *Medical or Dental Appointments for employee or their family.*
 - *Paternity or Maternity Leave.*
- b) 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 up to a total of 80 hours.
- c) 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.
- d) Sick Leave is not intended as additional time off and cannot be used as such.
- e) Unused Sick Leave is not reimbursed at the time an employee leaves employment with Unity of Bellevue.
- f) Sick Leave must be taken in full hour increments.
- g) Approval for paternity leave is obtained in advance and is limited to one (1) week of work.

2.7.10 Holidays. Unity of Bellevue observes the following Federal holidays:

<ul style="list-style-type: none"> • New Year's Day • Martin Luther King, Jr. Day • President's Day 	<ul style="list-style-type: none"> • Memorial Day • Independence Day • Labor Day 	<ul style="list-style-type: none"> • Thanksgiving Day • Thanksgiving Friday • Christmas Day
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- a) If the holiday falls on an employee's unscheduled workday, the employee and their supervisor will work out an acceptable substitution.
- b) If a PTO or personal day is scheduled in advance on the workday before or after the holiday, the holiday is paid.
- c) If the holiday falls on Saturday or Sunday, observance is on the workday closest to the holiday.
- d) Regular full-time employees receive full holiday pay. Part-time employees do not get paid for holidays.

2.7.11 Family Medical Leave Act (FMLA). To be eligible for paid FML the UOB employee must meet WA state requirements which is to have worked a minimum of 820 hours (16 hours a week) in Washington in the last year.

- a) FMLA leave is intended to be used as extended or longer term personal illness or injury.
- b) 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.

- c) The employee is to confer with their supervisor about FMLA requirements and how to apply. Washington State has a state level FMLA so 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.
- d) When an employee returns from FMLA leave the employee is required to provide a medical release stipulating restrictions and Unity of Bellevue is required to reinstate the employee in the same, or equivalent, position. The employee will be allowed back into the same position only if it aligns with the medical release stipulations.

2.7.12 Jury / Court Duty. UOB policy is compensate employees on the day they serve for jury or court duty as per the following:

- a) To qualify the worker must be subpoenaed as witness, or called for jury duty.
- b) Pay will be the difference between fees received (excluding expenses) and regular pay.
- c) Worker must retain court pay stub, parking receipts, etc. to provide to the supervisor.

2.7.13 Time Off Without Pay. Employees are eligible for time off without pay with approval of their supervisor. Each situation shall be evaluated individually for eligibility.

2.8 Absences. All employees, contractors, and volunteers are expected to report for work duties regularly, on time, and remain working until the end of the workday as regular attendance and punctuality is essential for the ministry to meet operational demands.

2.8.1 General. The following is Unity of Bellevue's absence policies:

- a) Unsatisfactory attendance or excessive absenteeism will be cause for disciplinary action (for employee) or potentially terminating a work agreement (for contractors).
- b) Employee or contractors who are absent or late for more than six (6) days in six (6) months (except for long-term or chronic illnesses) will receive counseling by the Minister.
- c) Being absent from work for one or more consecutive days for the same reason is considered to be one incident of absence.
- d) Absences or tardiness of twelve (12) or more days in one year will be given a written Performance Improvement Plan.
- e) If timeliness/attendance does not improve in the required period of time as outlined in the Performance Improvement Plan (or employees) or discussions (for contractors), the employment relationship may end.

2.8.2 Medical Absences. A medical leave of absence beyond short term illness could utilize either accrued sick leave, accrued Paid Time Off or, if qualified, time off under the Family Medical Leave Act (FMLA). In some cases, for extended leave or FMLA type leave, it may be necessary for the employee to obtain a medical statement from the doctor.

- a) *Medical Statements.* This is a written statement, signed by a Physician, which includes information about the injury/illness and may also include restrictions the employee must abide by when returning to work.
- b) *When Required.* A medical statement may be required in the following circumstances:
 - Frequent and/or prolonged use of sick leave policy.
 - An employee's return from an extended medical leave.

- An employee's return from an FMLA leave.
- c) *Records.* Written medical statements shall be filed in the employee's personnel file and are considered confidential information.

2.8.3 Reporting Absences and Lateness. Policy for reporting:

- a) If an employee or contractor is unable to report to work or will be late for work, the employee or contractor must notify the Senior Minister or Center Administrator at least fifteen (15) minutes before the beginning of his or her workday.
- b) An employee or contractor 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 employment separation and/or contract termination.

2.9 Conduct. All employee, contractors, and volunteers are expected to act in accordance with Unity teachings, respect for each other, and respect for the property. Misconduct is not tolerated and may be met with disciplinary action. Examples of misconduct:

- Theft or unauthorized use of Unity of Bellevue property or other employee's personal property.
- Consistent uncleanness or inappropriate dress or appearance.
- Willful destruction of Unity of Bellevue property.
- Falsification of personnel, operational, or Unity of Bellevue records.
- Unauthorized release of confidential information (past or present employees, contractors, volunteers, or 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 made aware of a deficiency.

2.10 Performance Management. UOB's policy is to actively and openly manage performance in alignment with the following requirements:

2.10.1 Employee Performance Reviews (not contractor or volunteer). A formal performance review establishes performance objectives so that employees are aware of the standards by which their performance is measured, provides uniform methods for evaluation, and is a means for identifying developmental needs and career interests.

- a) Only employees (not contractor or volunteer) receive a formal performance review.
- b) All reviews shall be conducted annually for the year prior's performance. Information gathering starts in January and delivery to the employee shall be no later than end of March.
- c) All performance reviews shall be documented on the standard UOB performance review form which can only be revised with Board of Trustee agreement prior to use.
- d) Performance assessment shall be based on written job description requirements and include all aspects of the employee's performance – both good and needing improvement.

2.10.2 Contractors and Volunteers. If an individual working on a Celebration Service Support Team or Ministry is not meeting expectations then the Sr. Minister, or delegate, shall discuss performance issues with them. On a Committee, the discussion shall be facilitated by the Board Advisor (or in lieu of, the Board President). Further steps to be defined after the discussion takes place.

2.10.3 Progressive Disciplinary Policy and Process. If the employee's performance, attendance, or personal conduct is not acceptable then the following actions shall take place:

- a) *Defining Expectation:* A verbal discussion shall take place to ensure the employee is aware of policies, bylaws, and expectations in order to provide an opportunity for the employee to comply before corrective action is taken. This meeting is light and informal; intended to support and educate the employee about why their behavior is not acceptable.
- b) *Investigation:* Unsatisfactory performance after the verbal discussion is to be thoroughly investigated in order for the Supervisor to understand cause or motivation before further action is taken.
- c) *Formal Warning:* If investigation shows that employee behavior has not changed then a formal disciplinary action document shall be created by the Supervisor which defines expectation, employee behavior, and expected improvements. This and all future disciplinary reviews, and action taken, shall be documented and added to the employee's personnel file.
- d) *Delivery:* After creation of the document the Supervisor will meet with employee to review the document, explain that they are now under a progressive disciplinary policy, and discuss how the employee may have done things more aligned with expectations. A timeline will be agreed upon for the employee to improve behavior. A follow-up check-in date will be established.
- e) *Recording in HR file:* The Supervisor is responsible for taking notes of the meeting and ensuring they are put in the employee's HR file. Notes should include the date of the meeting, expectations, actions required, employee behavior, next steps defined, and any observations of employee behavior during the meeting.
- f) *Additional Warning or Dismissal:* More meetings may be held with the employee to check in on performance. Each time a timeline should be established for the next check-in, specific actions should be identified for the employee to do, and all meetings should be documented in the employee's HR file.
- g) *Dismissal:* If performance has not improved within a reasonable timeframe the employee may be dismissed from employment. All employee dismissals require Board of Trustee concurrence before action is taken.

2.10.4 Immediate Dismissals. The Sr. Minister may determine that an immediate dismissal is warranted but, in all cases, must seek concurrence from the Board before separation action is taken. Depending on the timing of the next Board meeting the President may act on behalf of the Board to assist resolution of the situation in partnership with the Minister.

2.11 Separation. This section applies to employees but not contractors or volunteers. Employees who leave Unity of Bellevue, whether voluntarily or involuntarily, are treated fairly and equitably with a minimum of interruption to ministry activities.

a) *Types of separation:*

- Voluntary Resignation. Employee voluntarily quits. In this case, employees are expected to provide at least ten (10) working days' notice.
- Lay-off or Reduction in Force. Unity of Bellevue chooses to eliminate the employee's job either due to financial hardship or a reorganization for greater operational effectiveness.
- Involuntary Separation. Unity of Bellevue severs employment due to employee performance or misalignment with cultural expectations.

- 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.
- b) *Exit Interview.* An exit interview may be conducted for voluntary resignations, lay-offs, reduction in force, or disability but will not be granted for involuntary separations. When conducted the exit interview will be to
- 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.
- c) *Payout.* 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 PTO, 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 Personnel Records. Unity of Bellevue shall establish personnel records for each employee. For contractors the only employment records that need be kept are as required by IRS for record of 1099 status (which may include a documented employment agreement in some cases). For employees, recordkeeping must comply with the Fair Labor Standards Act (FLSA). What's listed in this section is summary and FLSA current requirements should be periodically checked to ensure compliance.

2.12.1 Content of Employee Personnel Files.

- Employment application and resume
- Emergency contact information
- Benefit enrollment and change forms, as applicable
- Tax and 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.

2.12.2 Updates to Employee Personnel Files. In order to maintain accurate and timely employee records, employees shall provide updated information if any of the following changes:

- Name
- Address

- Home telephone number
- Education Record
- Payroll deductions
- Emergency contacts

2.12.3 Maintenance. Employee personnel files are maintained and updated by the Center Administrator, kept in a locked file in their office, and maintained for a minimum of three years.

2.12.4 Files for background and credit checks. These files 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.

2.12.5 Access to and Dissemination of Information.

- a) Privacy Act. 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.
- b) Employment Verifications. Upon request of a third party, the employee's supervisor may verify dates of employment and positions held without written authorization. Confidential information regarding the employee's home address or telephone number is released only with the employee's written permission. Information about the employee's salary or performance is not to be disclosed.
- c) Requests from Law Enforcement. 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.
- d) Access. All employee records are confidential and held under restricted access limited to those with a valid business, regulatory, or legal reason to view which is typically defined as 1) the Sr. Minister, 2) Center Administrator, 3) Board President, or 4) the employee themselves (schedules a time to review with Minister or delegate).
- e) Employees should refer all external requests for personnel information concerning applicants, employees, or past employees to the Sr. Minister or Center Administrator.

3.0 OPERATIONS

3.1 UOB Owned Property

3.1.1 Facility. Decisions on non-urgent day-to-day repairs, maintenance, and purchase of supplies are authorized by the Minister, or delegate, in accordance with the approved budget.

- a) *Over Budget Spending.* With the exception of emergencies (as defined herein), expenses which are outside of the approved budget are to be presented to the Board of Trustees for approval prior to spending.
- b) *Emergencies.* The only exception is for spending beyond budget is for emergency or critical facility systems failure. In this case, the Sr. Minister has inherent authorization to take immediate action even if the item is not budgeted. The Sr. Minister shall immediately notify all Board Officers of the situation before actions are taken and obtain the Board of Trustees' President concurrence if the item cannot wait until the next scheduled Board meeting. Impacts are to reviewed in the next Board meeting. Note: An example of emergency or

critical systems failure is furnace going out in the winter, pipes bursting, a tree falling and creating a hole in the roof, etc. It is not applicable to air conditioning failure (even if in summer), appliance failures, sprinkler system failures, or other similar important, but not necessarily urgent, events.

- c) *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 designated Board Committee for review and approval.

3.1.2 Physical Changes to the Property. All physical changes to the property require Board of Trustees' approval. During the approval and decision-making process, the Board of Trustees shall determine maintenance responsibility for changes. Any of the following are considered a physical change to the property:

- Memorials / Monuments (stone, plaque, etc.)
- New structure (shed, etc.)
- New fixtures (fountain, post, lights, etc.)
- Anything that significantly changes the aesthetics of the building or grounds
- Anything this is to be permanently mounted on the Building that is not part of building maintenance/upgrade
- Removal of large trees and shrubs (Landscaping Committee Board Advisor to review and determine if Board of Trustee approval is required)
- Any type of signage

3.1.3 Property Easements. The Sr. Minister, or delegate, shall review all requests for property use in accordance with "Guidelines for Response to Easement Requests" (see section 10.6). Long term easement requests must be Board approved.

3.1.4 Facility and Landscaping Equipment

- a) *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.
- b) *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.
- c) *Maintenance:* A maintenance schedule will be kept for all equipment requiring periodic servicing. Records will be maintained assuring the schedule is adhered to.
- d) *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. All areas of Unity of Bellevue operation shall strive to demonstrate ecological stewardship by making decisions and choices in ways that promote environmental sustainability. All operational areas shall do the following:

- Continually look for ways to reduce hazards and protect the environment, as well as direct financial resources toward more environmentally responsible alternatives.
- Encourage waste reduction, increasing recycling, conservation of energy and water, while using green building techniques and practicing environmentally preferable purchasing.

- Lead by example and improve operations while inspiring others to do the same in all employee, contractor, and volunteer areas as well as informing those who use Unity of Bellevue property.
- Think in terms of sustainability which 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. Unity of Bellevue shall ensure effective and efficient promotional efforts to include, but not limited to, the following:

- a) *External Correspondence.* All external correspondence shall originate through the Unity of Bellevue Center Administrator, Board of Trustees Secretary, or Board of Trustees' President.
- b) *Advertising.* Advertising shall be approved by the Sr. Minister, or delegate, and within the approved budget.
- c) *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 Sr. 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.
- d) *Radio & TV.* Radio and television programs are part of the spiritual outreach of the Center, and remain the responsibility of the Sr. Minister, unless he/she determines otherwise.
- e) *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 Sr. Minister, or delegate.
 - Ministry brochure highlighting the mission, vision, and core values 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 Sr. Minister and/or the Board of Trustees.

- a) Rental fees, are subject to occasional revision or waiver, and shall be set by the Sr. Minister and/or the Board, in co-operation with any program management which may be in place at the time.
- b) 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.
- c) Rental of the premises for a fee, e.g. concerts, weddings, receptions, workshops, etc. shall require the renter to sign a rental agreement.
- d) Long term rentals of the premises to another organization for a fee shall require the renter to sign a rental agreement and 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.

3.4.2 Bookstore Operations Anyone working in the bookstore must receive a background check.

3.5 General Operations

3.5.1 Communications Guideline. See Section 10.6 for a high level matrix of what is communicated and how.

3.5.2 Community Health Policy. This policy applies to in-person programs and events conducted in UOB facilities at a time of serious communicable disease presence and is crafted primarily for purposes of ensuring a consistent approach to protection for attendees. Examples of such communicable diseases include COVID-19, Respiratory Syncytial Virus (RSV), Avian Flu, and influenza.

- a) Unity of Bellevue will follow the guidelines and recommendations of the U.S. Center for Disease Control and the Washington Department of Health. This may include suspension of in-person programs and activities, masking mandate, spatial separation, and others.
- b) The following are considerations which UOB may address specific to the situation
 - When masking is mandated, UOB will provide masks at all points of entry. UOB staff may require anyone entering their office don a mask at their discretion.
 - Hospitality may be suspended.
 - Sunday services and classes may revert to on-line only.
 - Where CDC approved testing is available, UOB may require testing for anyone who may have been exposed, or is experiencing, any symptoms.
 - Room ventilation and inflow of outside air will be increased to the extent feasible in the building.
 - Color-coded stickers (or equivalent) will be provided for individual attendees to signify their level of comfort with close personal contact.
- c) Notification will be made to all participants via hard copy or e-mail bulletin. In-service announcements and/or other special communications of any and all restrictions and policies.
- d) The Board of Trustees may mandate, in certain cases, specific health policies if needed to ensure the safety of the UOB community.

3.5.3 Center events. Use of the building by other non-profit groups must be pre-approved by the Sr. 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) Unity of Bellevue facility and property use rules:
 - No smoking in facilities.
 - 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.

3.5.4 Counseling Services (on church premises). Unity of Bellevue spiritual counseling services are conducted by the Sr. Minister or delegate. All other parties providing counseling services from the Unity of Bellevue facility must be pre-approved by the Sr. Minister to do so and provide Unity of Bellevue a certificate of professional liability insurance.

- 3.5.5 Marketing or Private Business Enterprises.** Unity of Bellevue shall not engage in multi-level direct marketing enterprises or private business enterprises . 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.
- 3.5.6 Fundraising.** Fundraising for UOB activities on or off site is administered by the Fundraising committee under the Board of Trustee’s oversight. Any event for personal or non-UOB business fundraising requires approval by the Minister.
- 3.5.7 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 (issued per event) and adherence to WA state liquor laws. To obtain an event license: <https://lcb.wa.gov/licensing/permits>.
- 3.5.8 Pets.** No animals except “service animals” will be allowed in the Center. Service animals are defined by Revised Code of Washington 49.60.040 as “an animal that is trained for the purpose of assisting or accommodating a disabled person’s sensory, mental, or physical disability.” This is distinct and different from “support animals” who, may be beneficial to the owner but are not trained to provide a specific service. Pet Blessings are an exception.
- 3.5.9 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 Sr. Minister or delegate. Board of Trustees may post Board related communication on bulletin boards without Minister approval.
- 3.5.10 Solicitations.** No soliciting or panhandling is allowed in the building and surrounding property without prior authorization from the Sr. Minister.
- 3.5.11 Parking Lot.** No unauthorized overnight parking or camping on the property will be allowed. Unauthorized vehicles will be towed at the owner’s expense.
- 3.5.12 Suggestions for Improvement.** Any congregant may make suggestions for improvement by sending an e-mail to board@unityofbellevue.org. All suggestions will be considered. Feedback will be provided to the submitter.
- 3.5.13 Board of Trustees’ Notification and/or Approval.** Unity of Bellevue staff are required to submit these items to the Board of Trustees before any action is taken or funds spent:
- a) Requires approval.
 - Any expenditure outside of the approved budget. Exception: Emergencies as defined by 3.1.1(b).
 - Physical changes to the property (see section 3.1.2)
 - Use of Capital Funds (see section 8.6.5)
 - Employment actions (job descriptions – new or changes, hiring, release) as defined by the supervisor’s Job Description or contract.
 - b) Requires Notification.

- Formation of a new ministry group. This ensures the activities and function of the new ministry group does not conflict with existing Board committees.

4.0 MINISTRIES & SPIRITUAL DEVELOPMENT

4.1 Spiritual Development

- 4.1.1 Spiritual education.** All classes taught at Unity of Bellevue shall incorporate and/or reflect the Truth principles taught by Unity and/or be compatible with the programs and tone of the ministry.
- a) The Sr. Minister, or other designee, shall select speakers, seminars, and/or workshops and shall also pre-approve all classes taught by others.
 - b) All arrangements, financial and otherwise, shall be compliant with Washington State Department of Revenue stipulations.
 - c) 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 (LUT) under the Unity Worldwide Ministries Licensed Unity Teacher Program and Unity World Headquarters at Unity Village's Spiritual Education and Enrichment Program.
- a) Licensed Teachers serve under the Minister's direction.
 - b) Compensation for class attendance and travel expenses will be as per annual approved budget or as approved by the Board of Trustees if not included in the budget.
 - c) Detailed information regarding LUT 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.** Unity of Bellevue, in support of the mission and vision is committed to reaching out in prayer, comfort, and support to the congregation through Prayer Chaplains. UOB policies and practices for the Prayer Ministry are as follows:
- a) The Prayer Chaplain Trainer/Coordinator (volunteer) must attend a Light and Love Trainers Workshop and be licensed to train the material for Prayer Chaplains.
 - b) Prayer Chaplains must attend a Unity Prayer Class before attending the Prayer Chaplain Training.
 - c) Prayer Chaplains make a one-year commitment. To fulfill responsibilities Prayer Chaplains shall
 - 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
 - d) 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.

- e) A monthly report of Prayer Chaplain team activities is developed by the Prayer Chaplain Trainer/Coordinator or delegate and sent to the Sr. Minister.
- f) Prayer Chaplains 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. Unity of Bellevue policies associated with Small Group Ministry is as follows:

- a) The Leader/Coordinator is a volunteer position.
- b) The Leader/Coordinator must be credentialed as a Spirit Group Program Leader through UWSI (Unity Worldwide Spiritual Institute) to gain access to Spirit Groups Curriculum and to use the Spirit Groups brand as a part of the Small Group Ministry.
- c) Hosts and Leaders of Spirit Groups must be trained by a credentialed Spirit Group Program Leader.
- d) A monthly report of Small Group Ministry activities is developed by the Leader/Coordinator or delegate and sent to the Sr. Minister.
- e) All Spirit Group Hosts and Leaders must sign the Spirit Group Host Sacred Service Covenant.

4.2.3 Youth & Family Ministry. Unity of Bellevue policy is to provide an inclusive environment that includes youth as an important element in order to encourage young families to participate in services and programs by not only providing a program for their children but also to instill in the five principles of Unity.

- a) All employees, contractors, and volunteers working with Youth shall 1) complete an application form which will include youth work qualifications and references, 2) disclose any previous criminal or sexual misconduct history, 3) provide authorization for a background check, and 4) sign a standard Code of Ethics form.
- 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 Youth Leader to check submitted references, 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 Sr. Minister.
- e) Any reported incident of criminal activity or sexual molestation of a minor shall 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. An energetic and uplifting Music Ministry is a key element in creating positive and engaging Sunday Service serving to set a positive and joyful tone. The following are UOB's Music Ministry policies:

- a) Selection and hiring of guest artists is the responsibility of the Music Director subject to a budget approved by the Board of Trustees and administered by the Sr. Minister.

- b) Music selection is made by the Music Director in consultation with the Sr. Minister in order to complement the theme of the Celebration Service message.
- c) Any member of the community who wishes to participate in the Music Ministry needs to discuss, and possibly audition, with the Music Director.

4.2.5 Reiki Ministry. Unity of Bellevue’s Reiki program has been established as a supportive and healing modality for promotion of relaxation, stress reduction, and healing.

- a) Reiki Treatments, Circles, and Blessings shall be conducted by practitioners remaining silent and will be conducted with three or more Reiki practitioners present.
- b) If a woman or woman-identified person is receiving a Reiki Treatment, at least two of the practitioners shall be women or woman-identified.
- c) All Reiki Treatments, Circles, and Blessings will be done with hands off the body, unless the person receiving requests hands on.
- d) 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 Ministry. Sacred service is a ministry which is directed toward a desire to focus on divine love through service to others by utilizing one’s own spiritual gifts. Unity of Bellevue strives to provide opportunities for individual self-fulfillment in serving the ministry while providing necessary assistance in areas of need.

- a) *Type of.* Sacred service at Unity of Bellevue shall be categorized as follows:
 - *Celebration Service Support Teams* – Groups under the auspices of the Sr. Minister which support UOB in delivering all aspects of weekly service and after-service hospitality. Examples: Welcome Team (Greeters and Ushers), Audio / Video production, and Hospitality.
 - *Committee* – Formed in accordance with Bylaws requirements, under the auspices of the Board of Trustees, to support and expand the Board’s work. May be either planning or standing in nature and include a Board member in an advisory role. Examples: Nominating, Ministerial Search, Fundraising, Facilities, Marketing, and Landscaping. See 7.0 for more info.
 - *Ministry* – Groups under the auspices of the Sr. Minister which foster the spiritual foundation of Unity of Bellevue. Examples: Prayer Ministry, Music, Reiki and Small Group. See 4.2 for more info.
- b) *Leadership.* All Sacred Service groups shall have an assigned Leader who administers the activities of the group.
- c) *Expectations.* All individuals participating in Sacred Service shall do so in a professional and heart-centered manner.
- d) *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.* Unity of Bellevue requires that a background check be conducted, at Unity of Bellevue’s cost and reviewed by the Ministry, before that volunteer is approved for work with Youth, in the bookstore, or as a Board Member. The applicant is to provide all the necessary personal information to conduct the background check.

- f) Training. Training as may be needed for any Sacred Service activity shall be provided by the individual leading that group or activity or as otherwise determined by the Sr. Minister (Celebration Service Support Teams and Ministries) or the Board Advisor (committees).

4.2.7 UWM EarthCare Ministry. All areas of operation shall strive to demonstrate ecological stewardship through decision making that promotes environmental sustainability. This includes:

- a) Promoting, through training and education, an Earth Care stewardship addressing sustainability and appreciation for all creations both plant and animal.
- b) Implementing requirements to reduce waste, increase recycling, and conserve resources such as electricity and water.
- c) Providing input and recommendations of programs and purchases that best support environmental sustainability.
- d) Actively work with other Unity of Bellevue groups to ensure that best practices for environmental sustainability are followed.

4.2.8 Safety and Security Ministry. Unity of Bellevue strives to provide an environment where everyone takes comfort in feeling, not only accepted and welcome, but also safe and secure. To that end, the Safety and Security Ministry does the following:

- a) Drafts holistic policies and procedures, specifically related to safety or security concerns, for the Governance Committee's consideration.
- b) Brings any immediate concerns to the attention of the Sr. Minister or Center Administrator.
- c) Ensures that any needed Safety and Security training is provided to employees, contractors, and volunteers.
- d) Examples of situations addressed by this ministry include, but are not limited to, weather related (e.g winds, flood, lightning), fire, and intruders.

5.0 MEMBERSHIP

5.1 What is Membership. Becoming a Member of Unity of Bellevue 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 in the same Unity community. Anyone may apply for membership by attending a membership class as defined in the bylaws.

5.1.1 Multi-membership. It is acceptable to be a member of more than one Unity church. However, to be a member of the Unity of Bellevue Board of Trustees the member must be an active member of only Unity of Bellevue and not a member of any other church.

5.2 New Member Requirements. Requirements of membership are defined in the bylaws which 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." 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 Sr. Minister's teachings.
- Be present, whenever possible, at services, classes, and special events sponsored by Unity of Bellevue.

- Share time, talents, and resources with Unity of Bellevue whenever able, and to support the church to whatever degree seems desirable during fundraising efforts.

5.3 New Member Classes & Orientation. Congregants desiring to become members shall complete a Membership Class, and other actions, as defined in the Bylaws. Classes required for membership will be determined by the Minister in alignment with his/her mandate to provide appropriate spiritual instruction.

- a) The church office will keep a record of all new member classes and attendees, as well as, names and dates joined for any transfer or reaffirming member.
- b) If a congregant is a former member but there isn't a record of membership, then the member shall be asked to "reaffirm" membership by the Minister. Reaffirmation may require class attendance.
- c) The Sr. Minister, at their discretion, may provide an orientation in addition to the membership class.

5.4 Renewing Membership. As defined in the Bylaws members must indicate their intention to remain members of UOB bi-annually (each odd numbered year) by filling out a membership renewal form and submitting it to the Center Administrator. Members who do not return their form by that deadline will be placed on inactive status and will not be eligible to vote in Membership meetings. A member may later return to Active status by filing a completed renewal form with the Center Administrator.

5.5 Transferring Membership. If a congregant is a member of another Unity Worldwide Ministries field ministry 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 the portion of new member class that is specific to Unity of Bellevue.

6.0 FELLOWSHIP GROUPS These groups exist to provide social functions, consciousness-raising, spiritual growth/education, and service activities. New Fellowship groups may be formed with Sr. Minister approval and Board of Trustee notification (by Minister). A schedule of activities for any of these groups may be obtained from the Center Administrator. The following are existing groups at the time of this manual's publishing and a brief description of each:

- a) *Men's Group.* Consists of men, or male identified, who regularly gather socially for breakfast, meditation, retreats and discussion.
- b) *Sisters in Spirit.* Consists of women, or female identified, who gather to support each other on their spiritual journey. They focus on being real and making spirituality real.
- c) *Women Connect.* Consists of women, or female identified, who meet monthly to share individual and community interests and concerns, creating a supportive network that builds connections and understanding through activities and programs. Subjects 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.

7.0 COMMITTEES. Unity of Bellevue Board of Trustees shall form and oversee committees as needed to support the ministry. Formation of such committees shall be in accordance with bylaws requirements. The information provided herein is intended to supplement what is in the bylaws.

7.1 Structure All committee structure shall comply with the following policies:

- a) *Oversight:* All committees fall under the auspices of the Board of Trustees.
- b) *Formation.* As per Bylaws requirements.
- c) *Charter.* Committee function shall be defined by a BoT approved committee specific charter. All committees shall have a Board Advisor (unless the Lead is a Board member). Committees which lack a Board Advisor will have the Lead report to the Board President (or delegate) about progress, recommendations, or attention needed. Ongoing membership changes are managed by the Lead with assistance from the Board Advisor if needed
- d) *Composition.* All committees shall be comprised of the following:
 - *Lead.* 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, attend meetings regularly, engage in discussion seek to understand others, do work as needed and share responsibility for a well-run meeting or activity – seeking to understand and be accepting of others. Committee members shall evaluate their own contributions and share the responsibility for evaluating the work of the committee as a whole.
 - *Board Advisor.* A Board member who serves on the committee to provide governance guidance, ensure the committee stays within the scope of what they were formed to do and operates in accordance with Unity teachings, and who may contribute specific expertise to the committee. This role reports to committee activities to the Board of Trustees.

7.2 Temporary Committees. The Board of Trustees may form temporary subcommittees to complete a specific short term assignment. Generally, these committees consist of Board members themselves and only meet 2-3 times; thus, do not require a charter.

7.3 Permanent Committees. The following committees shall be considered permanently active at Unity of Bellevue with operational details defined by individual charter:

- a) *Governance:* Permanent, meets as needed. Formed at least once every three years to review existing and, if needed, develop new governance documents such as the Bylaws (reviewed for alignment with UWM template every 3-5 years) and policy manual. Recommends changes to the Board of Trustees. Is disbanded once governance reviews are complete. Ideally, consists of a Leader, Board Advisor, and 2-3 UOB members meeting twice a month.

Reference for UWM bylaws template: <https://www.unityuwm.org/bylaws>

Reference for UWM Policies: <https://www.unityuwm.org/policies>

- b) *Fundraising:* Permanent, meets monthly, active all year. Responsible for coordinating and tracking income/expenses from all fundraising events at Unity of Bellevue. Maintains a fundraising calendar establishing one fundraising event per month with a quantified budgetarily defined income goal and one annual fundraising event with a larger budgetarily

defined income goal. Ideally, consists of a Leader, Board Advisor and 2-3 UOB members meeting once a month or as often as needed to keep the calendar filled.

- c) *Facilities*. Permanent, meets monthly, active all year. Responsible for overseeing and maintaining the building structure (roof, paint, walls, etc.) and building systems (HVAC) and as defined in the Reserve Plan, addressing building maintenance needs and/or coordinating with others to meet that end. May also assist the Center Administrator with expertise for specific inspections or upgrades. Operates within approved budget. Ideally, consists of a Leader, Board Advisor and 2-3 UOB members meeting at least once a month.
- d) *Landscaping*. Permanent, meets monthly, active all year. Responsible for overseeing and maintaining the health of the grounds and property in accordance with EarthCare priorities, ensuring all Sacred Service volunteers are properly trained, and plots are maintained. Ideally, consists of a Leader, Board Advisor and 3-5 UOB members meeting at least once a month.
- e) *Marketing*. Permanent, meets monthly, active all year. Responsible for ensuring that marketing and advertising materials are focused on the vision and mission and that the property is attracting the same. Ideally, consists of a Leader, Board Advisor and 3-5 UOB members meeting at least once a month.
- f) *Property Planning*. Permanent, meets at least annually for a few months at a time or may meet monthly and be active all year if needs dictate. Responsible for strategic planning of the building and grounds to ensure focus on the ministry vision and membership growth. Ideally, consists of a Leader, Board Advisor and 3-5 UOB members.

7.4 Nomination Committee (annual). This committee is temporary, activated each October and disbanded after the annual meeting in March, Unity of Bellevue's policies associated with the Nomination committee are as follows:

- a) *Purpose*. Exists to recruit UOB members for Board of Trustee service with the goal of identifying three or more candidates for consideration each year. The committee's results are submitted to the Board of Trustees who then incorporate the committee recommendations and Minister input into their selection decision to put before the membership for approval.
- b) *Formation*. In accordance with, and as per timeline, identified in the bylaws.
- c) *Membership*. Defined by Bylaws. Committee Members who wish to be eligible for Board Service must relinquish his/her/their position on the Nomination Committee before the start of the process. The Board, in consultation with the remaining committee members, shall then identify a replacement. The following are not allowed to serve on the Nomination Committee:
 - President of the Board
 - Board members seeking re-election.
 - Members who want to serve on the Board starting with the next annual meeting.
- d) *Operation*. Operations are defined by the Nomination Committee Handbook, approved by the Board of Trustees.
- e) *Committee Member Roles*. Each individual on the Committee has a specific role to fill. UOB Bylaws section 4.05(b) defines highest level accountability. Detailed responsibilities are defined in the Nomination Committee handbook.
- f) *Board of Trustee's Role During Recruitment*. Board Members shall not actively engage in detailed conversation with potential applicants. Board members are to refer all potential

applicants to the President (if committee is not active) or Nomination Committee Board Advisor (when the committee is active).

- g) *Board of Trustee Terms of Service.* Per the Bylaws, a board member may serve two terms of three-years each. Board members desiring re-election for a 2nd term (or who may be a serving a mid-term Board appointment) are to express their interest to the Board President who will, in turn, provide a list of interested persons to the Nominating Committee once formed. To be eligible the Board Member must meet these requirements:
- During the time served, has demonstrated understanding of Board service, good meeting conduct, and met all requirements of Board service as defined by the UOB Board Member job description, UOB bylaws, and this policy manual.
 - Communicate a desire to continue Board service to the Board President before September Board meeting and be willing to receive feedback on performance thus far.
 - The Board shall discuss the Board Member's desire and majority must collectively agree to present the Board member to membership for a 2nd term.

7.5 Ministerial Search Committee (ad hoc) This committee is temporary and only active if the Ministry needs to hire a new Minister.

- a) *Purpose:* Exists to recruit Sr. Minister candidates for Board consideration.
- b) *Formation:* Formed as soon as possible after a Sr. Minister vacancy is known. Disbanded once a Sr. Minister is hired.
- c) *Membership:* Shall consist of a Leader (who is not a Board Member, a Board Advisor, and 4-6 UOB members.
- d) *Operation:* The Ministerial Search process is defined by UWM. Reference this website to learn more and get a Ministry Vacancy Packet: <https://www.unityuwm.org/openings>

8.0 FINANCE & STEWARDSHIP

8.1 Compliance. All arrangements pertaining to financial remuneration must be in compliance with Washington Department of State rulings and federal not-for-profit requirements.

8.2 Budget. The budget is formulated by applying these policies:

- a) Unity of Bellevue's fiscal year shall with the calendar year of January 1 to December 31.
- b) The Treasurer and/or Minister lead the creation of a detailed budget, the effort of which starts in September by obtaining feedback from all areas (staff, Board of Trustees, Congregation, etc.).
- c) The draft budget is presented to the Board of Trustees before the end of October so that the Stewardship campaign can start in early November.
- d) Budget for the next fiscal year is ratified by Board of Trustees' vote no later than December 31 of the current year.
- e) The Board of Trustees are accountable for being conversant in the budget at all times and collectively accountable for budget approval annually or at any time throughout the year when revisions take place.
- f) The Treasurer presents the budget at the annual Membership meeting each year.

8.3 Financial Reporting. Unity of Bellevue shall have a structured method for reviewing financial reports in accordance with these policies:

- a) Reports needed shall be determined by the Board of Trustees.
- b) The Unity of Bellevue Bookkeeper shall provide financial reports, based on what the Board of Trustees have determined necessary, to the Board Treasurer.
- c) The Board Treasurer is responsible to provide a financial summary, along with a titling report, to the Board of Trustees on a monthly basis.
- d) Board meeting guests shall be prohibited from receiving financials which define compensation (expanded budget v. actual) or transactional (P&L) details. Board meeting guests will be provided with a collapsed (no compensation) version of the financials that excludes P&L information.

8.4 Independent Accounting Review. For purposes of financial integrity Unity of Bellevue Board of Trustees shall ensure that an external review is conducted of accounting and financial records at least every five years in accordance with the following policies:

- a) Review shall take place after the close of the fiscal year
- b) Shall be conducted by an independent financial professional.
- c) Shall result in a simple summary assessment report submitted to the Board of Trustees.
- d) The Board of Trustees shall ensure that a summary of findings is included in the Annual Meeting (see Bylaws).
- e) The Board of Trustees may take further action based on content of report.

8.5 Investments. Unity of Bellevue shall ensure that all monies invested are done in accordance with the following:

- a) Investment firm is well-established.
- b) Money will be invested in funds which offer long term growth and stability, have balanced allocation between stocks, bonds and short term instruments and result in a highly diversified fund balancing risk and capital appreciation.

8.6 Fund Types

8.6.1 General Fund (a.k.a. Operating Fund). Used to support the day-to-day operation of the Ministry.

8.6.2 Interest Bearing Accounts. These may be checking, savings, or investment related. The Ministry shall always strive to open accounts which can provide an interest return.

8.6.3 Financial Gifts Received by UOB. Funds, other than Celebration Service love offerings or pledges, may be received by Unity of Bellevue through Memorial or special donation. All such funds shall be identified as designated or non-designated upon receipt and handled in accordance with the following policies:

- a) *Recordkeeping.* A record of agreements and/or transactions is to be kept in order to ensure appropriate acknowledgments and appropriate use of funds.
- b) *Acknowledgment.* Upon receipt of funds received (other than pledge or Celebration Service plate) a thank you letter shall be sent to the donor with an explicit statement that, if the donation is designated for a specific use Unity of Bellevue will use the funds as specified and anything left over will be transferred to the operating fund. If the Board of Trustees

wish to use the funds differently every effort will be made to contact the Donor to request agreement. If, after reasonable due diligence effort, Unity of Bellevue is unable to contact the Donor (for example, donor has left the community) then the funds shall be moved to the operating fund.

- c) *Designated.* Funds received which are contingent on being used for a specific use or purpose.
 - Must be formally approved / accepted by the Board of Trustees.
 - If the Board wishes to use the funds for a different purpose the Donor shall be contacted and the new use discussed in advance of reallocation.
 - Funds must be deposited into a high interest-bearing account until "designation" is completed.
 - After acceptance of the finished project any remainder not necessary to fund "designation" reverts to "undesignated" category.
 - If the Donor has left the UOB community then the gift may be reallocated by the Board of Trustees to arrange for 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.
- d) *Undesignated.* Fund received that are not contingent on being used for a specific use or purpose. Such funds are placed in the general fund and tagged to define receipt explanation.

8.6.4 Prudent Reserve Fund. Prudent Reserve monies are used as a supplemental funding source to keep payables current when cash-flow problems, or unexpected circumstances, prevent timely payment of required expenditures and shall comply with the following policy statements:

- a) Revenues in excess of anticipated near-term expenses are transferred to the Prudent Reserve using a method identified by the Board of Trustees.
- b) Prudent Reserve monies are kept in an account that generates more interest than a saving account but is still easily accessible as needed.
- c) The current balance in the Prudent Reserve is reported to the Board of Trustees and membership in standard financial report.
- d) Prudent Reserve is defined as a minimum of three months operating expenses kept in reserve (25% of annual operating expenses).
- e) The status of Prudent Reserves shall be reported monthly in the Treasurer's report.

8.6.5 Capital Expenditure Fund. To be in accordance with IRS rules, capital fund monies must be used only for the purchase, upgrade, or life extension of the building. These funds can be used for building repairs or improvements but not for routine maintenance. Use of capital funds requires a specific use be identified and approval by the Board of Trustees.

8.7 Revenues and Income

8.7.1 Primary Revenue. Primary sources of revenue for Unity of Bellevue are:

- a) Pledges (online or in person)
- b) Love Offerings not defined by pledge (online 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) Special Donations (Memorial gifts, special purpose or use donations, etc.)
- j) Alternative revenue streams (i.e. eScrip, web-site donations, web click-throughs).

8.7.2 Celebration Service Offering

- a) The Celebration Service collection shall be counted in accordance with the Offering Steward Procedure (subpart of section 10.3) which includes a prayer for abundance and prosperity.
- b) A staff member recounts the Sunday offering plus revenue from other sources as part of the weekly deposit.
- c) Any data revealed during this process is held in strict confidence, not to be disclosed.

8.7.3 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.

- a) The Bookstore shall be functionally operated by the Center Administrator who provides financial information to the Minister
- b) The Center Administrator shall train all volunteers who wishes to work in the bookstore, such as taking payments, record keeping and inventory.
- c) Anyone working in the Bookstore must have a background check on file.

8.7.4 Gifts Received

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

8.7.5 Pledges

- a) When a pledge is first made the pledge is acknowledged in writing, confirming the total amount pledged, 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 Financial Expenditure Transactions. The following policies shall apply to transactional spending:

- a) The Board of Trustees shall approve an annual budget which shall dictate all transactional spending throughout the year. Each month the Board of Trustees shall review a P&L report which defines transactional spending.

- b) Spending within the approved budget shall be overseen by the Sr. Minister and does not require Board of Trustee review or approval.
- c) No expense transactions shall take place without the Sr. Minister, or delegate, knowledge.
- d) The Minister shall ensure that spending aligns with budget cost allocation category amount and intent.

8.8.2 Financial Authorizations.

- a) *Approval for standard operations.* The Minister, or delegate, approves operational expenditures that are within the approved budget. In the absence of the Minister, the Board President or Board Treasurer can authorize such expenditures. Anything outside of the approved budget requires Board of Trustees' approval.
- b) *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.
- c) *Records.* All checks are supported with proper documentation, i.e., a bill, invoice or voucher, and include documented authorization (initials).
- d) *Method.* Outside of standard operations, authorization for financial expenditures must be formally obtained, in writing (e-mail), by the person providing the authorization.
- e) *Payroll.* 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. Credit cards are to be used in accordance with the following policies:

- a) Only the Minister and Center Administrator are issued credit cards.
- b) Credit cards are to be kept in a secure location, or in the possession of the card holder, at all times.
- c) Credit cards are to be used only for Unity of Bellevue related expenses.
- d) Credit card limits are to be no more than \$4,000.
- e) Credit card purchases are to be for no more than \$4,000 in any given month; exceptions must be pre-approved by the Board of Trustees' Treasurer.
- f) All Church credit card expenditures are documented with a receipt showing the amount and the purpose of 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.
- g) A copy of the monthly credit card statement is to be provided to the Board Treasurer.
- h) 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 Unity of Bellevue's approved budget.

8.9 Tithing. Unity of Bellevue shall practice tithing in accordance with the following policies:

- a) *Definition.* A tithe is defined as ten percent (10%) of all **unrestricted** Love Offerings/Pledges.
- b) *Approach.* Unity of Bellevue tithes to and as Source, which demonstrates knowledge that abundance and prosperity are ours and as abundance flows to us, our tithes continue the flow of abundance to others.
- c) *Distribution,* on a monthly basis, the tithe distribution shall follow this schedule:
 - One third (33.5%) to Unity Worldwide Ministries
 - One third (33.5%) to Unity World Headquarters at Unity Village/Silent Unity
 - One third (33%) equally distributed as follows:
 - Half (50%) to the Unity Northwest Region
 - Half (50%) is a discretionary tithe whose recipient is determined by the Tithe Committee.
- d) *Discretionary Tithe Recipients:*
 - Shall be determined by the Tithe Committee
 - Shall be aligned with Unity of Bellevue's vision and mission.
 - Shall not be providers of goods or services (tithe used in order to pay them).
 - Shall not be distributed to legislative/political advocacy organizations or to the political advocacy arm of non-profit organizations.
- e) *Tithe Committee.* Comprised of the Sr. Minister, Center Administrator, Treasurer, and a UOB member in good standing selected by the remaining committee members.
 - The UOB member shall serve one year coinciding with Board Officer elections.
 - Tithe Committee does not need Board pre-approval for tithing.
- f) *Reporting.* The Bookkeeper shall provide information needed to the Treasurer. The Treasurer will provide a tithe report to the Board of Trustees as notification.
- g) *Insufficient Funds.* 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. 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. Unity of Bellevue welcomes, and actively encourages, individuals to consider making provision for the current and future financial stability of Unity of Bellevue beyond what may be possible through current on-going pledge, tithe and love offerings. Most commonly, such gifts are provided either through retirement planning (Qualified Charitable Distributions) or as part of the donor's estate planning. The following are policies with regard to this program:

- a) *Definition.* Planned Giving covers methods wherein an individual can make provision for a larger gift, one time or on-going, than they could make from ordinary income. Such giving may consist of cash or cash equivalent contributions or more structured vehicles.
- b) *Cash or Cash Equivalent.* Cash or cash equivalent giving may consist of such things as;
 - Qualified Charitable Distributions from one's Individual Retirement Account
 - Bequests
 - Life insurance benefits
 - Outright gifts of assets
 - Life Insurance Benefits
 - Such gifts are readily accepted and require no advance notice nor assessment.
- c) *Non-Cash or Cash Equivalent.* Non-cash, or cash equivalent gifts, are often referred to as "structured giving vehicles" and are more complex ways of providing financial support, and, while always welcome, may require more advance planning. Such gifts might include things like;
 - Real estate
 - personal property
 - Annuities
 - Charitable Remainder Trusts
 - Charitable Lead Trusts
 - Retained Life Estates
 - "Bargain Sales" of real estates
 - Business Interests

Donors of such assets are encouraged to engage the consultation services of tax advisors and legal services before making such a commitment and to notify the Unity of Bellevue Board of Trustees in advance of such proposal for evaluation. Because of the variety and different nature of such gifts, each would need to be evaluated and addressed on a case-by-case basis.

9.0 BOARD OF TRUSTEES

9.1 Purpose. Unity of Bellevue must have a Board of Trustees to operate as a non-profit in the state of WA. In addition to the legal purpose, the Board of Trustees also exists to grow the ministry in prosperity consciousness, provide leadership by example, and take action in accordance with Unity Truth principles to best steward Unity of Bellevue's vision and mission.

9.2 Ethics. All Board Members are required to abide by the following ethics and conduct related policies:

9.2.1 Code of Ethics. All Board members are required to sign a Code of Ethics statement on an annual basis (see Section 10.5b). Signed statements shall be retained in the Board of Trustee files.

9.2.2 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 their delegates.

9.2.3 Conflicts of Interest. It is the responsibility of every member of the Board of Trustees to avoid the appearance of conflict of interest relative to their volunteer work at Unity of Bellevue in accordance with these policies:

- a) *Compensation.* No Board Member (other than the Sr. Minister) can be compensated for the labor of work or services done for Unity of Bellevue.
- b) *Disqualification.* A board member cannot be:
 - Someone who receives money from the Church such as an employee or contractor (other than the minister who is a member of the board by default of position)
 - Someone who makes a profit from their work with Unity of Bellevue.
 - Licensed Unity Teachers if paid by any ministry including Unity of Bellevue.
 - The spouse, parent, or child of another active Board Member, permanent employee or person receiving money from the Church, or the Minister.
- 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) *Disclosure:* During Board meetings, members must disclose any conflict of interest involving an issue before the Board and abstain from discussion or voting on such issue.
- e) *Personal Beliefs:* A Trustees' personal beliefs, values, and commitments are considered a conflict of interest if they prevent the Trustee from carrying out Board responsibilities OR if the Trustee attempts to use the church and facilities for furthering them OR if the Trustee attempts 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 Relationship:* Trustees cannot use ministry's staff, services, equipment, materials, or property for their personal need or gain.

9.2.4 Solicitation. No solicitation or fundraising drive shall be introduced or supported which solely benefits an individual member (other than spiritual growth). Other than Fundraising committee activities, no materials are distributed, or outside fundraising projects permitted, without the approval of the Minister.

9.3 Member Selection

- a) Board members are recruited by the Nomination Committee, agreed upon by the Board, and elected by the membership as defined by the Bylaws.
- b) The Board President and those current Board members who are currently serving a first term appointment or who wish to be re-elected to the Board shall not serve as members on the Nomination Committee.
- c) Board seats vacated mid-term shall be filled by Board appointment, active for the duration of the term, and do not require membership vote.

9.4 Member Accountabilities. Unity of Bellevue Bylaws contains high level explanation of Board of Trustee members and Officer accountabilities. Responsibilities are defined by the Board of Trustee Member Job Description and Officer Job Description which are written to align the bylaws requirements. Responsibilities and procedural details are defined in the Board of Trustees' Handbook.

9.5 Minister Employment. 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.

9.5.1 Minister Performance Review. A formal performance review of the Minister's performance shall be conducted by the Board of Trustees on at least an annual basis. Details of how to conduct the review, including resolution and separation process if needed, is contained in the Board of Trustees handbook.

9.5.2 Ministerial Transitions. Within seven days of knowing there will be a Sr. Minister vacancy, the Board of Trustees' President shall notify the UWM Member Support Team, hold a Board meeting to form a Ministerial Search committee, and upon formation will provide the Ministerial Search committee Lead with UWM contacts and information about the search process.

a) Administration. During transition between Ministers

- The Board of Trustees' President shall oversee operational administration and bring any need for employment action (recruitment, hiring, release, etc.) before the Board for consensus prior to action being taken.
- The Center Administrator shall functionally report to the Board of Trustees' President, oversee all 1099 service contractors, and act as direct supervisor to all W2 staff throughout the transition.

b) Vacancy Package and Job Posting. The Ministerial Search committee shall

- Complete a UWM Minister vacancy package without delay. The process may require community visioning, prayer, and time for discernment. All should be completed within 45 days.
- Forward the completed vacancy application to the Board President who will, in turn, facilitate a Board review then send to UWM for posting.

c) Recruitment.

- The Ministerial committee shall find candidates, interview them, and complete a standardized scoresheet for each candidate. Those found to be acceptable shall be forwarded to the Board, by the Ministerial Search Committee Chair, along with 1) resume, 2) interview recording, 3) copy of scoresheets (individual or summarized), 4) any Ministerial Search Committee comments.
- The Board of Trustees shall conduct a separate panel interview of each candidate received.
- The Ministerial Search Committee shall remain active until a new Sr. Minister is hired and offer accepted.

9.6 Operations. Operational details for all Board of Trustees activities, including board meetings, can be found in the Board of Trustees Handbook. Board of Trustees records are maintained by the Secretary. All meetings and Board activities are administered by the President. The Vice-President shall step-in in the event that the President is not available or leaves their role before the end of their term. Budget and other financial questions may be directed to the Treasurer or, in their absence, the President.

9.7 Interconnectivity and Relationships. Board members shall conduct activities in accordance with the Board of Trustees' handbook, the Leadership Policy found in Section 1.4.2, and with these policies:

- a) *Board and Minister.* All Board members shall work together for the highest good of Unity of Bellevue. The Minister is a voting Board member on all items except those which impact his/her/their employment. The Board of Trustee's President and Minister work in close partnership between Board meetings.
 - The Board collectively creates and approves policy (vision, mission, and governance requirements) whereas the Minister, as Administrative Trustee, creates pathways for execution and acts as advocate for the policies approved by majority vote.
 - The Board collectively sets salary ranges and oversees employment actions (new hires, separations, etc.) whereas the Minister determines level of staffing, oversees staff performance, and seeks concurrence from the collective Board for disciplinary actions and potential separation events prior to the event occurring.
 - The President facilitates a performance review of the Minister whereas the Minister conducts performance reviews of staff.
- b) *Board and Staff.* The Minister directly supervises all Unity of Bellevue staff and involves the Board in employment actions (hire, release, compensation changes). All employees and contractors are obligated to support the direction of the Board.
 - Board members interact with staff members but staff work direction comes from the Minister.
 - The Board President may directly make occasional requests of the Center Administrator to support Board operations, policy development, or the annual meeting.
- d) *Board and Community.* Board decisions are communicated to the membership in meeting minutes and/or other setting facilitated by the Board President. 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.).
- e) *Board and UWM.* Unity of Bellevue is a member church to Unity Worldwide Ministries; therefore. Should a conflict arise that adversely affects the ministry, the Board and Minister may contact Unity Worldwide Ministries for assistance.

10.0 APPENDICES. This section defines the documents that work in concert with the policy manual. The specific documents called out in this section are to be considered an extension of the policy manual and used as policy / requirements for ministry operations. These documents require Board of Trustee approval for changes but may be used and versioned separately from the policy manual.

10.1 Sacred Service Handbook. Designed to assist the Sacred Service trainer with policies and requirements for ensuring the Sacred Service program operates effectively for the best purposes of the ministry in accordance with the ministry's vision and mission.

10.2 Nomination Committee Handbook. Provides additional information and a holistic guide for a new Nomination Committee lead. It includes a process description, timeline, Board member application, a canvas letter example, and list of Board member qualifications and duties.

10.3 Board of Trustee Handbook. Designed to assist a new Board President understand Board operation, calendar of activities, parliamentary procedures. Also includes

- A sample script and presentation for running the annual membership meeting

- Offering Steward Procedure which governs how funds are counted and verified each Celebration Service.
- Board self-assessment template and instructions.

10.4 Job Descriptions. The following are job descriptions that are utilized for Unity of Bellevue positions. This is provided openly to increase understanding of what the staff or volunteer role may be.

- 10.4.1 Standard for Job Description Creation at Unity of Bellevue
- 10.4.2 Board of Trustees' Member
- 10.4.3 Board of Trustees' President
- 10.4.4 Board of Trustees' Vice-President
- 10.4.5 Board of Trustees' Treasurer
- 10.4.6 Board of Trustees' Secretary
- 10.4.7 Sr. Minister
- 10.4.8 Center Administrator
- 10.4.9 Music Director
- 10.4.10 Youth & Family Ministry Director
- 10.4.11 AV Lead
- 10.4.12 Prayer Chaplain Coordinator – Trainer
- 10.4.13 Prayer Chaplain

10.5 Forms and Templates. Unity of Bellevue uses many forms and templates in the course of business as a non-profit. The following is policy relative to form/template changes:

- a) *State/Federal Agency forms.* Some forms and templates are defined by state / federal agencies. These must not be changed and are to be used as-is. For example: W2, I-9, etc.
- b) *Unity Worldwide Ministries Codes of Ethics or Conduct.* Depending on the nature of the role of the individual be they staff, contractor, or volunteer there may be a different form to sign. The following Codes have been adopted by Unity of Bellevue:
 - UWM – Staff and Board
 - Licensed Unity Teachers
 - Prayer Ministers – Prayer Chaplain Commitment
 - Prayer Chaplain – Code of Conduct
 - Small Group Leaders – Spirit Group Sacred Service Covenant
- c) *Unity of Bellevue Standardized Forms.* The following is a list of Unity of Bellevue forms and templates which have been standardized and are not to be changed without Board of Trustee approval (which may come through Governance Committee).
 - Employee Performance Review form
 - Sr. Minister contract template
 - Employment offer letter template
 - Policy Manual / Bylaws Acknowledgement form
- d) *All others.* All other forms and templates, if not defined in this section or by state/federal agencies, may be changed as needed.

10.6 Guidelines and Reference information. The following documents have been developed to provide guidance for specific topics. These are not considered policies but do contain information that may be helpful in decision making.

- Guideline for granting easement rights
- Communications Guideline
- UOB Organization Chart

10.7 Glossary / Definitions. The following explains acronyms and abbreviations used in this policy manual or which may be commonplace but not explained elsewhere. This is intended to be a reference which provides more context than may be found elsewhere.

Ad Hoc Support Group. A temporary working group which is formed to accomplish a particular task. Examples include such things as

- Administration Support – Helping the Center Administrator with mailings, filings and organization.
- Holiday and special event decorations
- Community support projects such as food and clothing collections, back-to-school supply drives, holiday gift collections and distributions.

Board Advisor – A member of the Board of Trustees’ who actively participates in the committee, or other Unity of Bellevue functional area, and acts as consultant. This 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.

BoT – Board of Trustees. A group of members, elected by the membership, for purposes of church stewardship. The BoT’s accountability is to the vision and mission of the church. For details on what BoT members do see the Board Of Trustee job description.

Celebration Service Support Teams - Groups created by, and reporting to the minister ,to support UOB in delivering all aspects of weekly service and after-service hospitality. Examples include the Welcome Team (greeters and ushers, Audio and Video production, and Hospitality

Committee – A group created and chartered by the Board of Trustees to support and expand the Board’s work. May be either planning or standing in nature and include a Board member in an advisory role. Examples include Nominating, Ministerial Search, Fundraising, Facilities, Property Planning, Landscaping.

Congregation – Assembly of persons who meet to worship together.

Congregant – Person who attends a service to worship and participate in UoB activities. May or may not be a “Member.”

Contractor – A person being paid a specific fee to perform a specific role as defined by a contract. Income received is reported to the IRS via form 1099.

COVID-19 – One of a number of airborne and highly contagious respiratory viruses which can cause a mild to severe respiratory illness that is caused by a corona virus; is transmitted chiefly by contact with infectious individuals, such as respiratory droplets

EEOC – Equal Employment Opportunity Commission. An independent agency of the Federal government charged with enforcing and administering laws that cover discrimination in employment. The EEOC

works to prevent discrimination based on race, color, national origin, religion, sex, disability or genetic information, or age in hiring, promoting, firing, setting wages, testing, training, and other terms and conditions of employment.

Employee – A person being paid at a specific rate per unit of time (\$/hour, \$/week, etc.) to perform a specific role as defined by a written job description. Pay is typically reported to the IRS via form W-2.EOE

Equal Opportunity Employer (EOE) is a company that does not discriminate against employees or job applicants based on their race, color, religion, national origin, sex, age, disability, or genetic information. This includes discrimination in hiring, firing, promotions, pay, breaks, leave, workstations, and other employment terms. Follows the guidelines and regulations defined by the Equal Employment Opportunity Commission.

Governance - The system by which an organization is controlled and operates, and the mechanisms by which it, and its people, are held to account. At UoB these primarily include our Corporate Charter, Bylaws, Policy Manual,

Grievance - A real or imagined wrong or other cause or complaint especially unfair treatment.

Member – Person who completed all of the defined membership requirements, complies with rules of membership, and has been accepted as such by the Minister; has privilege of voting

Ministry - Groups formed by, and specifically supporting, the minister in fostering the spiritual foundation of UoB. Examples include Prayer Ministry, Music, Reiki and Small Group.

Nepotism - The act of granting an advantage, privilege, or position to relatives or friends in an occupation or field

Paid Worker – Term used to refer to a person who is either an employee or contractor of Unity of Bellevue.

Pledge – A commitment of a specific monetary amount to be freely given on a regular basis. Could be weekly, monthly, quarterly or annually.

Policy – A statement or explanation defining a specific and required course of action. Explains how business will be done at Unity of Bellevue.

Procedure – A systematic sequence of steps necessary to achieve an active policy. Procedures are to align with existing policies. If a policy is not in place for which a procedure is required then the policy will be established by the Board of Trustees prior to development of the procedure by Operations.

Reiki - A Japanese energy healing practice for stress reduction and relaxation that also promotes healing. It is based on the idea that life force energy flows through us and impacts our well-being: physically, emotionally, mentally, and spiritually. Treatment is channeled by a trained Reiki practitioner.

Sacred Service – Specific unpaid roles in service and support of Unity of Bellevue, 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.

Stewardship – The careful and responsible management of something entrusted to one’s care. At UoB, it most frequently refers to financial resources.

Tithe - A pledge equal to 10% of one’s income.

UOB (or UoB) - Unity of Bellevue

UPNWR – Unity Pacific Northwest Region. The regional organization dealing with Unity issues and policies specifically related to the Northwest states of Washington, Oregon, Idaho, Alaska Montana and Utah,

UWM– Unity Worldwide Ministries. The home organization for all Unity ministries worldwide.

Volunteer – Any person who, of their own volition, agrees to perform a task or function without compensation, strictly for the benefit of the organization or membership. At UoB, this can be part of Sacred Service or of an ad hoc nature.

Volunteer service – Refers to unpaid 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.

10.8 Policy Manual Revision History

Rev.	Effective Date	Changes
1	mm/dd/25	Refined all sections and rewrote for a focus on policy statements eliminating peripheral explanation.
0	01/01/24	Complete rewrite and change in approach. Prior to this time the policy manual was geared fully toward Board operation with just a few exceptions. This version, Rev. 0, January 1, 2024, changed UOB's approach to a holistic operational policy approach and includes both Board operation and all ministry operations. A governance committee was formed to review policies and UWM templates were utilized for the basis of creation for this document. All parts of the prior "BoT Policy manual" which were accurate were incorporated.

The following is a history of changes to this document before the major rewrite.

The document historically had been geared toward Board of Trustee operation.

July 15, 2019	Changes not recorded – unknown.
January 2016	Section II.II.B.i.b, replaced "Business Director" with "Board Officer", modified the proxy statement and removed second bullet item.
January 2016	Section II.II.C., modified statements related to credit card authority to use, expenditures, and limits.
January 2016	Section II.II.D, removed statement related to petty cash and modified statements related to personal expense reimbursement.
January 2016	Section II.IV.B.ii, removed statement. Section II.IV.E.i, modified statement to remove "Audit"; Section II.IV.E.ii, removed section.
January 2016	Section II.VIII, modified entire section for clarity of reporting requirements and structure.
January 2016	Section III.IV.B, removed section.
January 2016	Section III.V and Section III.VI, removed sections.
January 2016	Section III.VIII.A, rewrote entire section.
January 2016	Section IV.II and Section IV.III, sections rewritten.
January 2016	Section V, Communications. Added new Sections II, III, and IV.
January 2016	Section VII, Personnel. Added new Section III.
January 2016	Section VIII and Section IX moved to Appendix I and II, respectively.
June 2015	Added Revision History Table and Removed Revision comments from text
June 2015	Section II.III, Finances Tithing; Corrected typos Sections IV.XIII.F and G.
June 2015	Added Section IX, Endowment Fund Team Policies and Guidelines
July 2013	Added Section VII.V, Personnel, Employment Practices
April 2011	Section I.IV, Board of Trustees, Elections
March 2011	Section III, Church Activities
February 2011	Section IV.XIII, Church Membership, New Member Requirements
August 2010	Section VII, Personnel
September 2009	Section V, Communication

This whole section reads like "motherhood and rambling history and not really policy. I would greatly reduce this area (IMO).

Compare with Bylaws. If consistent need only mention titles here.