

IV. A. Treatment of Staff and Volunteers
Executive Interpretation by Reverend Kent Hemmen Saleska
UU Church of Minnetonka

Written: September 2013

Revised: November 2013; January 2014; March 2014; July 2015

IV. UUCM Minister Limitations Policy

A. Treatment of Staff and Volunteers

With regard to treatment of paid staff and volunteers, the Minister may not cause or allow conditions which are inhumane, unfair, disrespectful, or otherwise contrary to Unitarian Universalist principles and values.

Accordingly, the Minister shall not:

1. Illegally discriminate (as defined by city, state and federal laws) among existing or potential staff or volunteers.
2. Subject staff or volunteers to unsafe or unhealthy conditions.
3. Withhold from staff or volunteers a due-process grievance procedure, able to be used without bias.
4. Prevent staff or volunteers from grieving to the board.
5. Neglect the staff and volunteers' need for effective supervision.
6. Fail to ensure that staff are provided and comply with updated employment policies.

TOOL 7.8 Key Points for Monitoring Executive Limitations Policies

From the Caroline Oliver book, *Getting Started with Policy Governance*

1. The CEO's interpretations of Executive Limitations policies should create justified operational definitions of each policy so that relevant data can be collected to answer the following questions:
 - a. What is so Now?
 - b. What is a reasonable overall expectation or compliance standard?
 - c. If necessary, what are reasonable interim compliance standards?
2. Interpretations must cover the whole policy.
3. To avoid unnecessary duplication, interpretations should be made for the most specific level of Limitations before proceeding to the next broadest level.
4. The CEO's work of interpretation and data collection should commence as soon as the board's policy is created.

Questions from Tool 7.8 in Caroline Oliver's book, *Getting Started with Policy Governance*:

The CEO's interpretations of Executive Limitations policies should create justified operational definitions of each policy so that relevant data can be collected to answer the following:

1. What is so now?

Let me begin this interpretation by providing some context of ministers in this congregation. This congregation has been doing some important work in moving the minister toward chief of staff...

- 2006-07 ministerial search
- 2007 Letter of Agreement
- 2011 move to policy governance

It is my hope that with this interpretation, and the accountability I'm demonstrating, will continue to enhance the trust and comfort this congregation is developing with minister as chief of staff...

Ministers and other paid staff have been charged with various leadership responsibilities, but there is also a strong history of lay leadership. If there is lack of clarity or definition between these roles, there can be a great amount of confusion and tension – and this has happened with ministers and staff in the past and present. The congregation, though, has gradually taken steps to become more clear and more professional in their approach to ministry. In 2007 they called their second full-time minister (me) and wanted this minister (for the first time in the congregation's history) to be the supervisor of paid staff. As the 2006-07 ministerial search committee articulated in the Congregational Record sent to prospective ministers:

“Currently the staff reports to the Board of Trustees. We are in the process of putting in place an administrative structure that calls upon the minister to supervise the paid staff. We believe this is an important step as we move from a pastoral to a program church... We believe there is work to be done in the areas of personnel policies, performance review of paid staff and staff training and enrichment. We would like the minister to take a very active role in these areas.”

In addition, in my 2007 Letter of Agreement (under “Expectations,” Section 2.7.1.a.), it says, “All paid staff members report to the Minister who will serve as chief of staff.”

In May 2011 the congregation voted to move to policy governance, which further clarifies the operational role of the minister while designating vision and governance to the board. In December 2011 the board wrote the first draft of Ends, and in 2013 the board revised the congregational mission and Ends, and completed the policy governance manual. This will make it easier in the future to carry out our respective responsibilities.

Nuts & Bolts of Paid staff and leadership

Staff: Currently there is one full-time called minister (Kent) and five staff: Director of Religious Education for Children and Youth (30 hrs/wk = 0.75 FTE); Church Administrator (20 hrs/wk = 0.50 FTE); Music Director (15 hrs/wk – or 0.375 FTE); Bookkeeper (5 hrs/wk); and Choir Director (contracted to lead choir to perform 1x/mo).

Meetings: Staff meet 1x per month for “all staff” meetings; weekly meetings with minister, DRE and Office Administrator; weekly one-hour supervisory meetings between minister and DRE, minister and intern, and minister and Music Director; weekly half-hour supervisory meeting between minister and Administrator; and always as available or needed at other times.

Definition of Terms in this Policy:

- “Inhumane” I define as working staff to the point of physical or mental exhaustion, or even working in the current building (which has no air conditioning) during the hottest and most humid summer days (so I allow and encourage staff to work from air-conditioned home or coffee shop if necessary).
- “Unfair” I define as giving one employee an evaluation but not others, or not providing evaluations at all, or not using an appropriate standard to calculate employee compensation. Though currently there is no “fair compensation” policy in the governance manual, it has been my operating policy since I arrived at UUCM to use the UUA compensation guidelines for all staff in order to determine a fair wage. So “unfair treatment” also means failing to use the UUA guidelines to determine staff salaries, or failing to equally apply goal-setting and supervision for all. As an additional note about “unfair,” I see a difference between an employee who is treated unfairly according to this policy, and an employee who does not like or who does not agree with supervisory direction or decisions.
- “Disrespectful” I define as yelling at, ignoring, or micro-managing staff, or failing to ask them how they handled a situation and why before passing a judgment, or asking them to do things at inappropriate times. In addition, I consider “respectful” treatment to include some of the wording in the UU Minister’s Association “Standards of Professional Practice” regarding staff which includes:
 - “Ministers should publicly and privately act with respect toward staff colleagues. Such behavior includes sharing of pertinent information and insights, providing programmatic support, honoring their professional abilities, respecting confidences, and giving public support although not necessarily agreement.”
 - “Ministers should encourage the staff to meet regularly to discuss and coordinate planning and administration.”
 - “Ministers need to recognize that inexperienced staff members will require additional time from them or other staff for training and development.”
- “Discrimination” is defined as the policy is written, that it is according to city, state and federal laws. In addition, and particularly following the June 2015 Supreme Court decision to make same-sex marriage legal in all 50 states, I will specifically include people who are gay, lesbian, bisexual, transgender, queer and questioning as part of the demographic of those against whom we will not discriminate.
- “Unsafe or unhealthy conditions” I define as including both physical and emotional safety – for instance, allowing an employee to work near an uninsulated power source or a chimney that may crumble and fall, or berating employees and engaging in sexual harassment.
- A “grievance process” I see as a structure that allows complaints to be heard and resolved, whether or not the resolution is to the complainant’s liking. It begins with direct communication face-to-face, and if not resolved, moves through accountable people as defined in the policy manual to the highest level, the board. If it is a policy issue, the board will address it, and if not, they will return the complaint to the minister, in the role of executive, to handle it as an operations issue.
- “Effective supervision” I define as supervision from me that provides the most valuable use of my experience, wisdom, insight and support for the employee to do their job most effectively and transformationally for the people they serve, and in alignment with the church’s mission and ends, and their own job description and goals. In general, I view supervision as “effective” when there is trust between the employee and me, which grows out of regular communication and mutual public and private support. This would also include a current contract for the employee.

2. What is a reasonable overall expectation or compliance standard?

Several measures are included in a “staff treatment” compliance standard:

- A. The first compliance standard includes employee contracts that are revised at least every two years, and signed by both the supervisor and employee, and volunteer job descriptions revised every two years.
- B. According to the mission, ends, contract, and job description, each employee will write goals each year, due in final form to the minister by August 31; these goals are written by the employee, in supervisory sessions with the minister or their supervisor.
- C. Annual completed staff evaluations, both the self-assessments completed by the employee, and the employee evaluations conducted by me. These evaluations include:
 - a. Job performance and reflection
 - b. Goal Assessment
 - c. Feedback for Supervisor
 - d. Vision (for future goals and work)
- D. An employee manual, updated or revised annually.
- E. A final compliance standard used to ensure that staff work conditions at UUCM are not “inhumane, unfair, disrespectful, or otherwise contrary to Unitarian Universalist principles and values” is the annual monitoring survey conducted by the board, which will be given to both paid staff and volunteer leaders (specifically the facilitators on the Church Council, the BIF team, leaders of the Spiritual Care team, the WAM team, and the leaders of the small group ministry Spiritual Journey Groups). This survey may evolve over time to get closer to reflecting the written policy, but in general, it is a survey in which the questions remain mostly the same from year to year as long as the policy remains the same. The monitoring survey will only address the limitations stated in the policy, and one measure of compliance is 100% negative (“no”) responses to these questions a-d below, and 100% positive (“yes”) responses to questions e-f below:
 - a. (IV.A.1.): “Have you personally been illegally discriminated against in this past year?”
 - b. (IV.A.2.): “Have you personally experienced unsafe or unhealthy working conditions this past year?”
 - c. (IV.A.3.): “Are you aware of UUCM’s established internal complaint procedure?”
 - d. (IV.A.4.): “Have you personally been prevented from using the established internal complaint procedures in the past year?”
 - e. (IV.A.5.): “If you report directly to the minister, have you personally received effective supervision from the minister?”
 - f. (IV.A.6.): “Have you personally been provided with the most recent and updated employment policies within the last year?”
 - g. In addition, an average score of “4” (agree) or better to the “work environment” words found in the opening sentence (IV.A.) of the policy: inhumane, unfair, disrespectful, or otherwise contrary to UU values (i.e., “Have you personally been treated fairly in the past year?”)
- F. As part of the Board survey, the Board would also ask these questions (in “f” above) of the most involved volunteers, specifically the facilitators on the Church Council, the BIF team, leaders of the Spiritual Care team, the WAM team, and the leaders of the small group ministry Spiritual Journey Groups.

IV. E. Financial Planning
Executive Interpretation by Reverend Kent Hemmen Saleska
UU Church of Minnetonka

Written: April 2014

Approved by the Board as a “good draft” in September 2014; minister will move forward with additional interpretation.

IV. UUCM Minister Limitations Policy

E. FINANCIAL PLANNING

With respect to fiscal planning, the Minister may not jeopardize either programmatic or fiscal integrity of the organization. The Board must review and approve the annual budget, with sufficient information to permit reasonable Board evaluation in the light of the Church’s policies, priorities, and resources, by the April Board meeting of each year. The Minister will present the draft budget to the finance committee for review and comment in March of each year. Accordingly, the Minister may not cause or allow fiscal projections that:

1. Contain too little detail to enable reasonably accurate projection of revenues and expenses, separation of capital and operational items, cash flow and subsequent trails, and disclosure of planning assumptions.
2. Plan the expenditure in any fiscal year of more funds than are conservatively projected to be received in that period.
3. Do not separately present a plan for capital expenditures and the means to pay for them. Capital expenditures are all repayments of debt and any building additions or equipment purchases over \$2,500.00 each.
4. Deviate materially from Board-stated priorities and requirements (see Ends policies) in its allocation among competing fiscal needs.

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- IV E – Financial Planning
 - Minister will seek bookkeeper and administrator input on this
 - Define “deviate materially” (reiterated in #6) from priorities
 - How do we project expenses? How will we account for it in budget?

- Salaries are reasonably stable, but how do we project/predict for variable expenses like chimney repair and tree removal, and heating and cooling in a bigger building?
- Replacement/maintenance schedule and expenses?
- How do we demonstrate that that budget is in alignment with the Board's Ends? (the "priorities" listed in the policy).
- How do we make sure any new initiatives won't damage existing programs (i.e., new coordinator position funded by grants, etc)
- Indicators:
 - Budget will balance
 - the budget will include information that pledge income projections are reliable
 - will include data that expense projections are reliable
 - Projections of pledge income are reasonable – based on historical trends, plan for shortfall, plan for cash flow (when are they likely to come in and when will they be short) – might include info from other congregations

IV. F. Financial Condition
Executive Interpretation by Reverend Kent Hemmen Saleska
UU Church of Minnetonka

Written: April 2014

Revised and Approved with 60/40 rule: September 11, 2014; July 2015

IV. UUCM Minister Limitations Policy

F. FINANCIAL CONDITION

With respect to the actual, ongoing condition of the organization's financial health, the Minister may not cause or allow the development of fiscal jeopardy, loss of allocation integrity, or a material deviation of actual expenditures from board priorities established in Ends policies. Accordingly, the Minister may not:

1. Expend more funds than have been received in the fiscal year to date unless the debt guideline (next item) is met.
2. Indebt the organization in an amount greater than can be repaid by certain, otherwise unencumbered revenues within 90 days.
3. Allow cash to drop below the amount needed to settle payroll and debts in a timely manner.
4. Expend any endowment or designated funds other than for the purposes determined at time of receipt or designation.
5. Conduct inter-fund shifting in amounts greater than can be restored to a condition of discrete fund balances by certain, otherwise unencumbered revenues within 30 days or make unbudgeted transfers or "loan" between the general funds and the endowment funds without congregational approval.
6. Allow actual allocations to deviate materially from Board priorities in Ends policies.

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Questions from Tool 7.8 in Caroline Oliver's book, *Getting Started with Policy Governance*:

The CEO's interpretations of Executive Limitations policies should create justified operational definitions of each policy so that relevant data can be collected to answer the following:

1. What is so now?

It is important to know a little background regarding finances at UUCM in order to be able to move forward better. Prior to the implementation of Policy Governance at UUCM, almost all financial issues did not cross the minister's desk, and certainly did not need ministerial vision or approval. The Finance Ministry made almost all the financial decisions and would meet with the treasurer, and then the board and treasurer would hash out the micro-details of the annual budget, which they would then present to the congregation. Even having the minister know what the pledge amounts are has caused mixed feelings in congregants, treasurers, and past boards. With the advent of Policy Governance, however, and in order for the minister to be effective within the framework of policy governance, the attitude of the congregation and board toward money, and the minister's involvement in it, will need to change significantly. On a preliminary level, financial issues often tied to pastoral care/spiritual care issues. But more significantly, if the minister is expected to manage or oversee financial matters, then the minister will need to know where the money is coming from and where it is going – and where it needs to go. Some good things are in place now with Tom Lindquist (Treasurer) and Fred Hulting (Finance Ministry facilitator), but this ongoing shift in finance attitude and structure will require a greater support structure for the minister than exists now, and a willingness of the Board and congregations to provide that support structure.

Definition of Terms in this Policy:

- “Fiscal jeopardy” does not necessarily mean “not in debt,” but that Income and Expenses match on an ongoing basis, or that there won't be a deficit budget without approval from the board, or without a plan to replenish funds
- “Loss of allocation integrity” is generally defined by #5 in this policy: shifting funds from one line item to another (or more broadly, from one program area to another) greater than can be restored to a condition of discrete fund balances. This includes not taking money from the endowment to pay for operations unless approved by the congregation.
- “Material deviation of actual expenditures” broadly means spending money on things that were not budgeted, or on things that were not budgeted for each program area – for example, using worship funds to pay for a social justice expense. Nothing in this definition will be interpreted to mean taking funds from the endowment to pay for operational expenses unless approved by the congregation.

2. What is a reasonable overall expectation or compliance standard?

To finalize this item, I will still need to share this document with the administrator and bookkeeper (in order to hear what bookkeeping practices and what the guidelines of their UUA professional organizations may say about this topic), but this is what I have for now:

- A. Though a primary main financial charge to the Ministerial Executive is to keep the books balanced and to not overspend, the Executive still has the authority to shift funds from one area to another, as long as the overall amount of expenses does not exceed the amount approved by the congregation. Though the minister has that authority, it also needs to be exercised with discretion. Therefore, one “reasonable” compliance standard would be that the Executive will limit the transfer of funds from one program to another to a cap of 2% of the total budget. That means for \$260,000 annual budget, the Executive shall not transfer more than \$5,200 from one program area to another.
- B. Regarding #2 of the policy, it is self-explanatory, except the need to prove that the Executive hasn't taken on any debt, and the best way to prove that (a compliance standard) is to show that by the end of the year, revenue equals expenses; and the monthly financial report will demonstrate a trajectory that will lead to that outcome.
- C. Regarding #3 of the policy, one of the best ways to demonstrate compliance with having enough cash on hand to pay bills and payroll are the monthly reports showing that revenue covers expenses.
- D. Regarding #4 of the policy, the Executive will create an annual report for the board, showing how the endowment and designated funds have been spent during the previous fiscal year.

IV. H. Emergency Succession
Executive Interpretation by Reverend Kent Hemmen Saleska
UU Church of Minnetonka

Written: October 9, 2013

Revised: October 10, 2013; January 2014; March 2014

Approved with 60/40 rule: September 2014

IV. UUCM Minister Limitations Policy

H. Emergency Succession

In order to protect the church from sudden loss of the Minister's services, the Minister may not: Fail to have a plan in place for the continuation of full ministerial services in the event of the Minister's absence.

Minister's Interpretation

Interpreting this policy includes at least two levels of "sudden loss of the Minister's services": short-term absence and long-term absence. A short-term absence I define as a week or less, and a long-term absence I define as anywhere between two weeks and three months. Three months was agreed upon jointly by the minister and board president in October 2013 as a random time frame to begin this work of interpretation. For now, we may estimate that this is a reasonable length of time for recovery after a serious injury or illness, after which an additional assessment would probably be made about the future of the ministerial position.

Definitions

"Sudden loss" means an unanticipated absence due to illness, accident or injury.

"Full ministerial services" includes staff supervision, pastoral care, worship, oversight of committees and groups, and anything else that is delegated to me by policy or that I do to keep the church running

"Continuation" means that each of the functions listed above will have an identified point person who is prepared to carry these functions forward, in both the short term or long term. The plan will enable the continuation of these services for three months.

Metrics and Indicators:

The plan I present to the board will include all of the services listed above, and identify who is prepared to carry these functions forward, both short-term and long-term.

Rationale:

This plan addresses all the key services the Minister provides to our congregation and will enable the church to continue functioning.

Narrative about future work plan

The work on the first page of this document is the minister's executive interpretation of the policy. The narrative below is the initial work on the emergency plan itself, which would be presented to the board in full during the annual review time when the board is assessing compliance with the policy. The full plan will take time to create, but as a way to be transparent with the board on the work, I thought it would be good to share below some of the highlights of what that plan will look like.

Notification

In the event of an absence longer than two weeks, the minister will notify (at minimum) the Board President and Vice President, and through necessity as laid out in the "more than two weeks absence" items below, would also notify the staff and appropriate lay leaders.

Worship (Up to two week absence)

Worship associates and the ministerial intern are prepared to take over if I need to suddenly miss a Sunday. They know who is in charge of deciding what approach to use and have ready access to several alternatives (read the sermon I've written, or pull one of my old sermons off the website, or read the sermon from another minister, or give one of their own if they have one prepared, or quickly find a guest speaker – for which we have funds set aside).

Worship (More than two weeks up to a three month absence)

The members of WAM are prepared and able to plan services in the event of my absence according to a three-year calendar of monthly themes for 2013-14, 2014-15 and 2015-16;

Staff supervision (up to two week absence)

The staff are able to direct itself during this time. If something of a truly substantial nature arises, they know they should... (and here is one “go to” piece I will need to identify)

Staff supervision (More than two weeks up to a three month absence)

I need to do more research to determine the best approach. If the board assesses compliance with this policy before I've completed this part, then that would mean I'd need to report non-compliance with this limitation until I've completed this research and put the plan in place.

Pastoral care (up to a three month absence)

The Spiritual Care Associates will provide care for those who share their need. Judy in the office would take calls of pastoral need and send them on to the Spiritual Care Associate (in addition to posting the contact information of the lead Pastoral Care Associate).

Religious Education (up to a two week absence)

The Religious Education Director can direct the program during this time.

Religious Education (More than two weeks up to a three month absence)

Financial Affairs (up to a two week absence)

During my absence, the point person during that time would be the Facilitator of the Finance Ministry, and they would work in collaboration with the Treasurer and Bookkeeper.

Financial Affairs (More than two weeks up to a three month absence)

If the absence corresponds with the Fall Auction or the canvas, the Finance Ministry is capable to run both in my absence. The Facilitator of the Finance Ministry (in collaboration with the Treasurer) is able to direct and oversee the bookkeeper to continue other payments, including paychecks.

IV. I. Treatment of Members, Friends and Visitors
Executive Interpretation by Reverend Kent Hemmen Saleska
UU Church of Minnetonka

Written: February 2016
Revised: March 2016
Approved: March 2016

IV. UUCM Minister Limitations Policy

I. Treatment of Members, Friends, and Visitors

In interactions with members, friends and visitors the Minister shall not cause or allow conditions, procedures or decisions that are unsafe, unfair, disrespectful, unnecessarily intrusive, that fail to provide appropriate confidentiality or privacy or are otherwise contrary to UU principles and values. Accordingly, the Minister shall not:

1. Use methods of collecting, reviewing, transmitting or storing personal information that fails to protect against improper access to the material elicited.
2. Fail to operate facilities with appropriate safety.
3. Operate without a clear plan to communicate membership expectations and benefits.
4. Fail to provide a grievance process and inform members accordingly.
5. Fail to effectively and respectfully communicate with members.
6. Operate without appropriate child abuse and sexual harassment policies.

(Approved November 2015)

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Questions from Tool 7.8 in Caroline Oliver's book, *Getting Started with Policy Governance*:

The CEO's interpretations of Executive Limitations policies should create justified operational definitions of each policy so that relevant data can be collected to answer the following:

3. What is so now?

This is one policy that already has much in place, because big chunks of it already fall under either ministerial/professional ethical obligations or practices, or are proscribed by legal guidance. Our database is protected, with only the minister and two staff having access; we have the UU 101 class that communicates membership expectations and benefits; we have a grievance process in place for members and staff who have a grievance related to policy issues; we have a multitude of communication avenues (website, monthly newsletter, Friday Update, Facebook page, Twitter, written Order of Service, hard copy signs posted around the North Room, and verbal announcements on Sunday mornings, among others), and our RE Director has in place policies around treatment of children that are specifically designed to prevent child abuse.

Definition of Terms in this Policy:

- **Unsafe:** Safety includes both physical and emotional safety; for instance, not allowing people to sit near a broken window and not yelling at or belittling someone.
- **Unfair:** Fair treatment includes using a variety of agreements, promises and policies currently in place. These include but are not limited to things like our seven UU principles, our UUCM Covenant of Right Relations, and ministerial ethics. As a specific “fair” practice, if a leadership position opens, I would both announce it publicly as well as seek out specific people I think could do the job well, so that I am both making room for people to come forward themselves as well as actively pursuing leadership development.
- **Disrespectful:** This includes many behaviors, like yelling, ignoring, or passing quick judgement with minimal information or experience. It may also include behaviors like lack of response or consistent delayed communication.
- **Unnecessarily intrusive:** This would include behaviors like making private members’ information public without their knowing or consent. An “unnecessarily intrusive” behavior would NOT include doing background checks on people who want to work with children, since that is both a common sense safety practice as well as legally mandated.
- **Confidential and private:** I understand a difference between things that “confidential and private” and things that are “secret.” In a positive sense, secrets can be kept between children or best friends in personal relationships; in a worst-case scenario, secrets can lead to or allow space for abuse between people who have power differences: for example, between a child an adult or an employee and a supervisor. Privacy and confidentiality I see differently. Any conversation I have with a congregant is confidential, but it is not secret. As a professional, there are certain things I will not be able to keep secret because I will need to report it to a legal authority (child abuse, for instance). As a minister though, it is part of my job to hold things in confidence, which means not telling anyone the specifics, or sometimes even the generalities, about another person’s struggles. So that means I may be able to be trusted with personal information or struggles, except where it interferes with legal requirements or safety concerns.

4. What is a reasonable overall expectation or compliance standard?

Several measures are included in a “treatment of members, friends and visitors” compliance standard:

- G. The first compliance standard includes documentation on the confidential nature of our membership software, and what the processes are around its use.
- H. The minister, in collaboration with the Office Administrator, will include information on building facilities in the “How it Works” manual, and will have separate policies on building operations.
- I. Our plan to communicate membership expectations and benefits is to conduct at least two UU 101 classes each year (one in fall and one in spring) that includes this information in both verbal and written form – i.e., giving a copy of the “How it Works” manual to each new member; this plan may be modified to include sessions during “First Hour” throughout the year.
- J. A grievance process exists in the Policy Governance manual (II.H.) regarding complaints someone may have against the minister or regarding issues that pertain to violating church policy – which are addressed by the Board (though the Board may determine that a complaint is not a policy violation, and is in fact an issue related to operations; they will then direct the complaint to the minister).
- K. A second grievance process is related to complaints or issues between two members. Measurements include: the existence of a Covenant of Right relations; an operations policy (similar to the “Disruptive Behavior Policy” described in “F” below) where the minister, will create an *ad hoc* committee to address the grievance; and a question, or questions, on the congregational survey that asks people if they 1) are aware of the Covenant of Right Relations, and 2) if they are aware of the operational policy to address it.

- L. A third issue of safety addresses disruptive behavior, whether in worship, in a class, or any other location dealing with members or non-members who interact with our members, friends or staff. This is addressed in our “Disruptive Behavior Policy” we put in place in the fall of 2015 as part of our Operations Policies. Measurements will include: having this document posted on our website; announcing it at least once each year from the pulpit; and a question on the congregational survey that asks people if they are aware of it – with an 80% response rate of “yes.”
- M. As stated above in the “Where are we now?” section, we already have a multitude of ways we communicate to congregants, including: website, newsletter, Friday Update, Order of Service written announcements on Sunday, verbal announcements on Sunday, hard copy ads/announcements hung up in the North Room, Facebook, and Twitter. “Effective” and “respectful” communication to and with the congregation and individual members will be/could be measured in a few ways: in the congregational survey, ask respondents to list as many modes of UUCM communication as they are aware; a question to the effect of “how often to you read the entire newsletter or Friday Update?”; and a question like, “I receive timely responses from UUCM staff” followed by a rating from 1-5. If the Board wanted to make that more specific, they could ask on the “Treatment of Staff and Volunteers” survey a similar question related specifically to the minister.
- N. Appropriate child abuse and sexual harassment policies are already in place – in the RE program material, staff manual...perhaps put something explicitly about this in the “How it Works” manual?
- O. A final compliance standard used to ensure respectful and fair interaction with members, friends, and visitors is the annual survey that goes out each spring, asking about these policies according to the wording in policy IV.I. The monitoring survey will only address the limitations stated in the policy, and one measure of compliance is 80% positive (“yes”) responses to these questions below:
- a. (IV.I.1) Has your personal information been stored and protected against improper access?
 - b. (IV.I.3) Were you informed or given a sheet of paper that communicated to you membership expectations and benefits at UUCM?
 - c. (IV.I.4.): “Are you aware of UUCM’s established internal complaint procedure?”
 - d. (IV.I.5): “Has communication from UUCM to you been effective and respectful?”
 - e. (IV.I.5a): “Are you able to name at least four different forms of communication UUCM uses?”
 - f. (IV.I.6): “Are you aware of UUCM’s established child abuse prevention and sexual harassment prevention policies?”
- P. As part of the Board survey, the Board could ask these questions (in “G” above) of the general congregational population, or could limit some of them to specific groups (i.e., “b” above only to new members).