**SAMPLE PERSONNEL POLICY MANUAL**

**FOR UNITARIAN UNIVERSALIST ORGANIZATIONS**

The attached is a Sample Personnel Policy Manual intended to assist Unitarian Universalist congregations and other UUA-related organizations that are creating a Personnel Manual for the first time, or updating their current Personnel Manual. This Manual is an outgrowth of the work done by UUA Compensation Consultants, regionally-based volunteers, who work with congregations around issues of fair and equitable compensation. The attached contains recommendations grounded in the core of the UU commitment to social and economic justice. However, we recognize that each congregation will need to consider its financial circumstances and community standards in determining the level of benefits, including time off, provided.

In any work setting, employees should know what the congregation expects, how commonly occurring situations are handled, e.g. time-off and other benefits. A policy manual or handbook should address these issues. Without such a manual, decisions are *ad hoc* and the congregation will be open to claims of favoritism or unfair treatment, and even possible legal liability. Compliance with a policy manual will help to ensure that all employees are treated equitably.

**The UUA does not mandate any particular policy or procedure. Each congregation must decide for itself whether to have a manual and what content to include. In addition, each congregation using this Sample Manual must make appropriate modifications to comply with applicable state or local laws, and the facts and circumstances of the congregation.**

It is impossible to draft any manual that will address all of the myriad differences in our member congregations and the different state and local employment laws. Therefore, any congregation utilizing this Sample Manual must have the final manual reviewed by an attorney or other qualified professional familiar with applicable state and local employment laws.

For more information, please contact:

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Director, UUA Church Staff Finances

Please submit feedback on this resource

to help us improve it:

<https://www.surveymonkey.com/r/PersonnelPolfdbk>.

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**GENERAL INFORMATION WHEN PREPARING/REVISING A PERSONNEL POLICY MANUAL OR HANDBOOK**

# THE CONGREGATION AS EMPLOYER

This Sample Manual has been created for congregations in the United States. When a congregation hires one or more persons, it is considered an employer and must comply with various federal, state, and local laws. Although not required by law, it is a good idea to provide new employees with some basic information about the employer’s expectations and the type of benefits that the employer provides. Such information helps to ensure that all employees receive the same information and are treated equitably.

There are many legal requirements that govern the employment relationship and are applicable to all employers. Some laws apply only when an employer has a minimum number of employees. Also, as a religious body, a congregation may be exempt from certain legal obligations.

**As our member congregations are located throughout the country, the Sample Manual has been drafted to comply with federal laws that set the minimum standard that must be met. However, many States have passed laws that provide greater protections than federal laws. Each congregation that uses this Sample Manual should obtain legal advice regarding the laws applicable to the congregation in any particular state or locality.**

Compliance with the minimum required by federal and state law is advised to avoid unnecessary liability for back pay, fines or damages. However, in keeping with our Unitarian Universalist values, congregations should consider providing more than the minimum. For instance, although the federal minimum wage in 2019 is only $7.25 per hour with many states requiring a higher minimum wage, a congregation should consider not just the minimum, but the appropriate rate for compensating its staff. In addition, although the law does not generally require an employer to provide certain benefits, we urge each congregation to consider offering the benefits provided by the UUA’s Office of Church Staff Finances, which offers various employment benefits in which the congregation may participate.

 **A. Status as Employee not Independent Contractor**

Employers are required to maintain certain records and meet certain financial and legal obligations. Some employers try to avoid those requirements by classifying individuals as independent contractors. However, such a classification may violate the Internal Revenue Code if the individual works under the direction and control of the employer, who also controls the manner and means of the work. Under the IRS standard, an administrative assistant, administrator or custodian/sexton would be employees, not independent contractors. Some states, such as Massachusetts, also further restrict or limit the use of independent contractor status. When a person is in business for themselves or works for a company contracted to provide a particular service, such as accounting or construction services, then the individuals may be legitimate independent contractors. Ultimately, the determination of whether an individual qualifies for independent contractor status is one which will depend on the specific facts and circumstances of the situation. For more information go to: <https://www.irs.gov/newsroom/understanding-employee-vs-contractor-designation>.

 **B. Minister’s Contract**

Ministers are employees of the congregations to which they are providing services. Ministers generally have a written employment agreement with their congregation, and the terms of that agreement will supersede contrary provision in this Manual, but not the provisions of the various benefit plans. The same is true for other staff with employment agreements. In areas not addressed in a specific agreement, the terms of the Sample Manual would generally apply. Due to First Amendment issues, courts are very reluctant to intercede in disputes between congregations and their ordained clergy. Thus, some of the legal protections provided to lay employees by the language of the Manual may not be applicable to or enforceable by ministers against their congregations.

**II. SOME LEGAL ISSUES APPLICABLE TO EMPLOYERS**

**This summary is not intended to be comprehensive. There are many federal and state statutes that could impact a congregation's relationship with its employees that are not discussed in this summary.**

# A. Equal Employment or Anti Discrimination Laws

As Unitarian Universalist congregations, we value the inclusion of all individuals regardless of race, color, national origin, age, religion, sex, sexual orientation, gender identity, or disability. We also seek to treat everyone with respect and dignity without discrimination, harassment or retaliation. These values are reflected in laws which may or may not apply to a congregation. However, the standards set by these laws provide the legal minimum which all congregations should seek to exceed. Therefore, the laws are briefly summarized here for information.

There are three major federal statutes that prohibit discrimination in employment:

* Title VII of the Civil Rights Act of 1964 (Title VII) prohibits discrimination on the basis of race, color, religion, national origin, and sex by employers with 15 or more employees, including part-time employees. Although not specifically set forth in the statute, agency guidelines and case law make it clear that harassment on the basis of these protected classes is also prohibited. Title VII specifically exempts congregations and other religious organizations from the prohibition on religious discrimination. Thus, religious organizations may, but many do not, require affiliation with a particular faith as a requirement for employment.
* Age Discrimination in Employment Act (ADEA), prohibits discrimination in employment on the basis of age against persons who are 40 years of age or older. It only applies to employers with 20 or more full and part-time employees.
* Americans with Disabilities Act (ADA) prohibits discrimination in employment against qualified applicants and employees with disabilities. The terms "qualified" and "disability" are defined in the statute; not everyone with a physical or mental impairment is a qualified person with a disability. In addition to prohibiting discrimination against individuals with disabilities, the law requires employers to provide “reasonable accommodations” necessary to enable a disabled individual to perform essential functions of a job. The ADA only applies to employers with 15 or more employees, and part-time employees have to be counted.

Many states also have anti-discrimination statutes that may cover smaller employers. For example, Minnesota's Human Rights Act applies to any employer with one or more employee. In addition, state and some local laws provide protection to additional categories or groups which include, among others, sexual orientation, gender identity, marital status, status with regard to public assistance, and age discrimination at any age.

**B. Insurance, Retirement, and Benefits Laws**

Religious institutions are not necessarily subject to the federal Employee Retirement and Income Security Act (“ERISA”). The UUA Health Plan is a Qualified Church Plan, and it is operated in accordance with ERISA. The dental plan offered by the UUA Office of Church Staff Finances is also an ERISA plan. The UU Organizations Retirement Plan is a Qualified Church Plan, but not an ERISA plan.

The UUA also offers life and long-term disability insurance to congregations and other UUA-related organizations. A few states are now mandating short-term disability coverage, paid sick leave, or paid family and medical leave.

Some states obligate congregations to carry workers' compensation insurance; others do not. Such coverage provides replacement income and health benefits during a period when an employee is unable to work due to a workplace injury and paying for necessary medical treatment. Congregations should consider purchasing this coverage (if available), whether or not they are required by law to do so.

Finally, most, but not all, states exempt congregations from participating in the state’s unemployment benefits program. For instance, Oregon requires participation, while several states make participation by congregations optional. Because of this, congregations in states which exempt the congregation from participation or congregations which choose not to participate in unemployment insurance, are encouraged to include severance benefits to all employees not discharged for cause.

**C. Wage and Hour Laws**

The federal Fair Labor Standards Act (“FLSA”) and similar state statutes which exist in almost every state require employers to pay minimum wage and overtime for hours worked in excess of 40 in a work week unless the employee qualifies for an exemption based on criteria contained in the law. In March 2019, the federal minimum wage is $7.25 per hour. **A number of states and cities have established a higher minimum wage. Make sure your congregation is complying with the highest rate that applies to your locality.**

Unless exempt, employees are also entitled to be paid overtime, normally 1.5 times the regular hourly rate for all hours worked in excess of 40 hours in any one work week (not pay period). Some states have additional overtime requirements beyond the 1.5 times pay for hours over 40 in a week (see <https://www.dol.gov/whd/minwage/america.htm> for state by state minimum wage and overtime rules).

**Contrary to an often-prevailing practice, "compensatory time off" as a substitute for pay for more than 40 hours of work by a non-exempt employee is not allowed by federal law for private sector employees.** However, with careful scheduling, the employer may be able to relieve the employee of hours of work later in a workweek to reduce the total number of hours worked in the workweek.

Ministers, and other employees who perform “essential religious duties,” are exempt from FLSA requirements under the ministerial exception (sometimes called the ecclesiastical exemption). Under this exemption, other employees, such as religious educators or music directors, may be exempt. Please review the FAQ sheet available at: <https://www.uua.org/finance/compensation/program/fair-labor> to help you determine who can be considered exempt under this ecclesiastical exemption. When in doubt, the safest route is to determine whether an employee qualifies for the executive, administrative, or professional exemption applicable to non-ministers.

Although there are exceptions in the statute that might apply to certain congregations or certain individual employees, the Sample Manual is drafted to assume coverage. As with all other employment laws, it is important to check your state and local legal requirements as they may set different minimums and/or requirements.

For non-ministers to be exempt from the payment of minimum wage and overtime, an employee must perform the duties of a bona fide executive, administrative or professional employee which requires the exercise of discretion on matters of significance to the organization, pay on a salary basis and other specific requirements. The minimum salary level is $455 per week or $23,660 per year[[1]](#footnote-1) and must be paid on a salaried basis as defined by the law. The fact that an employee is paid a salary (versus hourly) is not alone sufficient to qualify the employees as exempt. Go to the UUA page on the FLSA at <https://www.uua.org/finance/compensation/program/fair-labor>. It is important to check your local and state laws as the requirements for an exemption and/or the extent of any exemption may be different from the federal requirements.

The FLSA does not require employers to give rest breaks or meal period breaks to employees during the workday. However, many states have statutes requiring that rest or meal breaks be given if an employee works more than a certain number of hours.

Wage and hour compliance is an area where an employer can incur significant financial liability if the employer does not classify employees correctly and/or fails to pay overtime as required. Accordingly, congregations should obtain legal guidance when there are questions or doubts.

**D. Leaves of Absence Laws**

Federal laws require that employees be given time off to serve in the military. In addition, some time off may be required as a reasonable accommodation if a Congregation is subject to the ADA or state laws prohibiting discrimination on the basis of disability. Further, although it is not likely that a congregation will employ the 50 or more employees required for coverage under the federal Family and Medical Leave Act (“FMLA”), an FMLA policy providing for 12 weeks of unpaid leave is included in this Sample Manual as an alternative. Even if a Congregation is not able to provide such a leave at this time, such a leave would be consistent with many UU goals.

It is important to note that many states have laws requiring employers to provide time off or leaves of absence to eligible employees for a variety of reasons. Those reasons can include time off for voting, jury duty, to address issues related to domestic violence, the birth or adoption of a child, or illness/injury of the employee or family member. An increasing number of states are enacting paid sick leave laws and some are developing paid family and medical leave laws. It is important that employers understand what time off and leaves of absence are required by law in their locality and state.

We urge congregations to not only meet the legally required minimums established for all employers, but to consider whether it is possible to exceed those minimum limits in the spirit of fair and just treatment of employees. For example, we encourage you to include a paid medical and parental leave benefit in your Manual even though it may not be required by law.

**CONCLUSION**

The process of creating and adopting a Personnel Policy Manual will provide an opportunity for the congregation to review its policies and procedures and help clarify its relationship as an employer with its employees. Once adopted, the Manual can serve as an important communication tool with employees and ensure that all employees get the same information. Ultimately, the Manual can help congregations be socially responsible employers.

The policies outlined in this manual must be understood in the order of legal and policy precedence as follows:

### Federal, state, and local employment laws.

### Rules governing UUA benefit plans in which the congregation participates.

### Employment agreements with specific employees, such as a minister.

### The policies in this Manual.

### The UUA compensation guidelines, which are recommendations from the

UUA to congregations on wages and benefits.

The UUA Office of Church Staff Finances encourages congregational leaders – both lay and staff – to collaborate on the adoption of a Personnel Manual. Many resources are available on our website including the Benefits Tune-up Workbook. In addition, OCSF staff and our regionally-based Compensation Consultants are available to answer questions.

**IMPORTANT NOTE ON**

**HOW TO USE THIS SAMPLE PERSONNEL MANUAL**

**This Sample Personnel Manual is a collection of common personnel or human resources policies and procedures for the consideration and possible use by UU congregations. This Sample Manual contains suggested language and various policies for your consideration.**

**If your Congregation does not have a Personnel Manual or Handbook, this Sample provides various policies and procedures that you may wish to include. This Sample Manual is only a starting point. Congregations must review and evaluate the policies and procedures that will work best for it based on its size, organization and resources. Congregations should not just copy and down load this sample and add their name. Based on the size of the congregation, the number of its employees, and its circumstances, the Congregation should select those policies it deems appropriate.**

**If your Congregation already has a Personnel Manual or Handbook, it should evaluate the policies and procedures contained and determine whether they should be continued or modified. This Sample may provide language that will assist with that process. In addition, there may be policies and procedures in this Sample that the Congregation may wish to consider adding.**

**Given the significant state-by-state variations in employment laws and regulations, and increasingly city-by-city variations in the same state; it is not possible to prepare a comprehensive Personnel Policy Manual or Handbook consistent with state laws in all fifty states, the District of Columbia, and other jurisdictions. Therefore, the contents selected from this Sample Manual and your final Manual require review by a lawyer knowledgeable about labor and employment laws to ensure compliance with any applicable state and/or local laws affecting the issues covered. Additionally, because the laws are constantly changing, employers should ave their Manual or Handbook checked for legal compliance every year.**

**It is not practical to explain all of the many laws and agency rules that govern each workplace policy. However, footnotes will alert to some legal and explanatory information about the policy or procedure. These footnotes are intended for the use of the Congregation decision-makers and are not intended to be part of the policies disseminated to employees as the actual Manual or Handbook.**

Please submit feedback on this resource

to help us improve it:

<https://www.surveymonkey.com/r/PersonnelPolfdbk>.

**Sample Personnel Policy Manual**

For

**[ ADD NAME OF CONGREGATION ]**

Street Address

City, State, Zip

**Date Adopted: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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Personnel Manual Acknowledgement

**WELCOME**

Welcome to the (name of congregation). We are glad to have you as a member of our staff and hope you will enjoy working for the congregation and contributing to our liberal religious community.

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

This Manual is not a contract and can be modified or changed at any time.

If you have any questions or suggestions concerning information in this Manual, please feel free to contact the Minister or their designee.

Again, welcome!

**CONGREGATION MISSION AND HISTORY**

**Congregations may wish to describe the mission and history of the congregation in this section. Otherwise, it may be deleted.**

**about this manual**

This Manual has been prepared to help you understand some of the policies and procedures of the [name of the congregation] (referred to herein as "Employer" or “Congregation”). You should familiarize yourself with the content of this Manual as it provides basic information about our expectations, policies, procedures and benefits. Nothing in this Manual is intended to create or creates an employment agreement, express or implied, or a contract that employment or any benefit will be continued for any period of time.

Since every situation cannot be anticipated, this Manual provides a general overview only. In applying the policies and procedures in this Manual, the Congregation will take into consideration the specific facts and circumstances of each situation.

All employees are hired on an *at-wil* basis unless stated otherwise in a written individual employment agreement signed by the President/Chair of the Congregation’s Board or prohibited by law.[[2]](#footnote-2) This means that the employee may terminate the employment relationship at any time, for any reason, with or without notice, and the Congregation retains the same right.

As a progressive and evolving organization which must respond to operating needs and other circumstances, changes and modifications in policies, procedures, and benefits will be made from time to time. This Manual replaces all previous personnel policy manuals or handbooks and any inconsistent policies.

If you have any questions or comments about this Manual, or if you need more information, please ask your Supervisor/Minister, or officer of the Board. Your comments and suggestions are encouraged.

**DIVERSITY AND INCLUSION**

**EQUAL EMPLOYMENT OPPORTUNITY**

Unitarian Universalist principles affirm the inherent worth of each human being, and commit to working towards justice, equity and compassion in human relations. The Congregation believes that policies advancing diversity, equity and inclusion are essential in creating social change which responds to historical and current practices of discrimination. Additionally, we believe that significant diversity among our staff makes for a richer, more dynamic organization. Our Congregation is committed to addressing the systemic prejudices and biases found within all parts of society by, among other things, working to ensure that all staff are trained to understand, welcome, and better serve a multiracial, multiethnic, increasingly diverse community and enhance the ability of each individual to live our values of justice, equity, and interdependence.

The Congregation affirms its commitment to inclusion and equal employment opportunity for all individuals. Decisions about recruiting, hiring, training, promotions, compensation, benefits, and all similar employment decisions will be made in compliance with all federal, state, and local laws and without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, genetic information, or any other classification protected by law. The Congregation may consider religion in the hiring and terms and conditions of employment of certain positions. Any discrimination in the workplace based upon any protected status/classification is illegal and against policy.

Retaliation against individuals who make a claim of discrimination or participate in the investigation of such a claim is prohibited and will not be tolerated. Prohibited retaliation includes shunning and avoiding an individual who reports harassment, discrimination or retaliation; express or implied threats or intimidation intended to prevent or inhibit an individual from reporting harassment, discrimination, retaliation; or denying employment benefits because an applicant or employee reported harassment, discrimination or retaliation or participating in the reporting and investigation process.

Employees who have questions about discrimination, harassment or retaliation in the workplace, or who believe this policy has been violated, should report their concerns immediately to their Supervisor/Minister, or a Board officer.

**HARASSMENT[[3]](#footnote-3)**

Harassment of any kind has no place in the workplace. The Congregation is committed to promoting an environment that is professional and respectful. Any harassment regarding race, color, religion, age, sex, sexual orientation, gender identity, national origin, disability or any other protected status will not be tolerated. Our Congregation expects all employees to conduct themselves in a professional manner with concern and respect for their colleagues, congregational members, and others served by the congregation. Similarly, we expect all employees to be free from harassment from congregational members and others encountered while serving our congregation. Harassment by anyone in the workplace is unlawful.

Harassment includes verbal or physical conduct which may offend, denigrate or belittle any person because of or due to any of the characteristics described above. Such conduct includes pictures, jokes, comments, epithets, innuendoes, name-calling or any other behavior which creates an environment that is derogatory, intimidating, hostile or offensive to anyone.

Conduct prohibited by these policies is unacceptable in the workplace, and in any work-related setting or event outside the workplace, such as congregation meetings, social events, and any other Congregation related activity. Any employee who believes that they have been harassed by another employee, Supervisor/Minister, a congregant, or any other person who the employee encounters in the course of employment should report that conduct immediately to their Supervisor/Minister or officer of the Board. If the report or complaint involves the Supervisor/Minister, or if the Supervisor/Minister is unavailable, the individual making the complaint or the individual receiving the report or complaint should immediately report the complaint to an officer of the Board. The UUA Ministries and Faith Development Staff Group is available to assist with complaints involving ministers.

**SEXUAL HARASSMENT[[4]](#footnote-4)**

While all types of harassment are prohibited, sexual harassment requires particular attention.

Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when:

* submission to the conduct is made either explicitly or implicitly a term or condition of employment;
* submission to or rejection of such conduct is used as a factor in employment decisions affecting an individual; or
* the conduct unreasonably interferes with an individual’s employment or creates an intimidating, hostile, or offensive employment environment.

Some examples of conduct which may constitute sexual harassment, depending on the circumstances, include but are not limited to, the following:

* Unwelcome sexual advances, whether or not it involves physical touching; sexual assault, or coerced sexual acts;
* Requests for sexual favors in exchange for actual or promised benefits such as a favorable review, salary increases, promotions, or other benefits;
* Unwelcome suggestions regarding, or invitations to, social engagements or social events;
* Any indication, expressed or implied, that any aspect of employment conditions, depends or may depend on the granting of sexual favors or on a willingness to accept or tolerate conduct or communication of a sexual nature;
* Unwelcome or coerced physical proximity or physical contact which is of a sexual nature or sexually motivated;
* Use of offensive or demeaning terms which have a sexual connotation;
* Inappropriate remarks of a sexual nature;
* Sexual gestures, suggestive comments, sexually insulting comments, epithets, jokes or name-calling; written or verbal references about sexual conduct;
* Communication or displaying sexually suggestive objects, pictures, cartoons or computer Web sites in writing, electronically or verbally;
* Sex stereotyping, such as when the conduct or traits are considered inappropriate simply because they may not conform to other people’s ideas or perceptions about how individuals of a particular sex should act or look; or
* Hostile actions taken against an individual because of that individual’s sex, sexual orientation, or gender identity, such as interfering with an individual’s work area, equipment, or ability to do their job, name-calling, etc.

Any employee who believes they have been sexually harassed by another employee, a Supervisor/Minister, or any other person encountered in the course of employment, including a congregant, should report that conduct immediately to their Supervisor/Minister or a Board officer. If the report or complaint involves the Supervisor/Minister, or if the Supervisor/Minister is unavailable, the individual receiving the report or complaint should immediately report it to an officer of the Board.

Every complaint or report of sexual harassment will be promptly investigated. Although investigations will be conducted with as much sensitivity and confidentiality as possible, investigative information will be communicated as appropriate to those with a need to know. If the investigation indicates that a violation of this policy may have occurred, timely and appropriate action will be taken.

Retaliation or reprisal against employees who report sexual harassment claims is prohibited and will not be tolerated. Any violation of this policy will be treated as a serious matter and will result in disciplinary action, up to and including termination.

**PROCEDURE/RESOLUTION OF EMPLOYEE COMPLAINTS[[5]](#footnote-5)**

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

* The employee should communicate immediately with their Supervisor/Minister. If the report or complaint involves your Supervisor/Minister, the individual receiving the report or complaint should immediately report it to an officer of the Board. You may be asked to put your complaint in writing.
* The Congregation may appoint an ad hoc committee to advise the employee and/or involve the personnel committee.
* An investigation will then be initiated and evidence will be gathered. The investigation will normally include an interview of the employee, the accused, and any relevant witnesses.
* The Minister or Congregation Board’s President shall then take appropriate action. The complainant should be notified that appropriate action has been taken.
* If either the complainant or the alleged harasser objects to the resolution, they may seek a review by the Congregation’s Board. The resolution recommended by the Board will be binding upon the Congregation and the employee.

**ACCOMMODATIONS OF DISABILITY**

The Congregation provides reasonable accommodations to enable an individual with a disability to perform the essential functions of their job in compliance with state and federal law. If an employee is unable, or finds it difficult, to perform all the functions of their job due to a disability, they should inform their Supervisor/Minister about the disability and discuss the type and nature of any assistance or adjustment that would enable the employee to perform the essential functions of the job.

In most cases, the Congregation will need medical documentation of the disability and of possible accommodations. The Congregation may also need regular discussions with the employee to determine what, if any, accommodations are appropriate, the employee’s continuing need for accommodations and the effectiveness of the accommodations provided. The Congregation may also ask to speak to the employee’s physician or health care provider to help the Congregation assess the need for and the appropriateness of the proposed accommodations and to ensure that the employee can safely perform the essential functions of the job with the accommodations. The Congregation may also ask the employee to submit to an independent medical or other appropriate examination, at the Congregation’s expense.

**CATEGORIES OF EMPLOYMENT**

**[Note: The definition of full and part-time employment normally has various implications in employment policies and in benefit eligibility and should be defined.]**

**Full-Time**: An employee who regularly works the Congregational year or 12 months of continuous full-time service at 40 hours or more per week is considered a full-time employee.

**Part-Time**: An employee who regularly works for the Congregational year or 12 months is considered a part-time employee. Part-time employees scheduled to work at least 10 hours but less than 40 hours per week are eligible for benefits according to the benefit plan descriptions in this Manual.

**Casual/Temporary Employee**: An employee who works full or part-time for a specific time period, including during peak or seasonal periods, for specific projects, to fill in for an absent regular employee, or for other reasons for a limited period of time is considered a casual/temporary employee. Regardless of whether an employee is scheduled to work for a limited period of time the employee will be considered “at-will.” Casual/Temporary employees are entitled to benefits consistent with the provisions of benefit plans offered by the Congregation or as required by law.

**FLSA DEFINITIONS**

**[See the explanation of wage and hour laws on page 4 of the introductory section for an explanation of how FLSA categories are defined]**

Employees are also categorized as either **Non-Exempt** or **Exempt** for purposes of the minimum wage and overtime provisions of the Fair Labor Standards Act (“FLSA”).

**Non-Exempt Employees** are compensated based on the number of hours worked each workweek and are entitled to be paid the minimum wage and overtime for hours worked over 40 in a workweek.

**Exempt Employees,** who are employed in an executive, administrative, or professional position which meet certain requirements, are paid on a salary basis, and are exempt from the minimum wage and overtime provisions of the FLSA.

**Ministerial Exception:** Ministers, and other employees who perform “essential religious duties,” are exempt from FLSA requirements under the ministerial exception (sometimes called the ecclesiastical exemption). Under this exemption, other employees, such as religious educators or music directors, might be classified as exempt depending upon their specific responsibilities. Unlike the FLSA exemptions, the ministerial exception is dependent only on responsibilities, not salary.

**WORK SCHEDULES AND PAY**

**ORIENTATION[[6]](#footnote-6)**

Your Supervisor/Minister or a designated congregational leader will introduce you to your co-workers and orient you to your work area and job responsibilities. In some cases, a written job description has been prepared that contains a summary of duties and responsibilities. Of course, it is impossible to list or to describe all of the duties of a particular job. Moreover, from time to time, changes in jobs will occur to reflect temporary or long-term changes in staffing or operational needs. Please keep in mind that your Supervisor/Minister has the authority to assign duties, responsibilities, or functions to you even though the duties have not been yours in the past or are not specifically mentioned in your job description.

**EMPLOYMENT AUTHORIZATION**

Federal law requires that prospective employees must show proof of eligibility to work in the United States by completing Form I-9 within 3 days of time of hire. When applicable, employees must provide an original document or documents to the employee’s Supervisor/Minister that establishes identity and employment eligibility from the date employment begins.

**HOURS OF WORK**

Normal office hours are Monday through Friday from  a.m. to  p.m. The office is also open on Sunday from \_\_\_ a.m. to  p.m., and some employees may be scheduled for work on weekends and evenings.

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

**MEAL AND BREAK PERIODS[[7]](#footnote-7)**

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

**TIMEKEEPING AND OVERTIME[[8]](#footnote-8)**

Non-exempt employees must submit a written record of their time worked on a weekly basis, consistent with the recordkeeping provisions of the Fair Labor Standards Act (“FLSA”) and state law.

From time to time, employees may be required to work in excess of their regularly scheduled hours. Any time worked by a non-exempt employee in excess of 40 hours in a workweek will be overtime which must be approved in advance. Paid holidays, sick days, vacation days, or any other paid time off does not count as time worked for purposes of calculating overtime. Non-exempt employees will be paid time and one half for all hours over 40 in a workweek. Exempt employees do not receive overtime pay when working in excess of 40 hours.

**PAY AND PAYROLL DEDUCTIONS[[9]](#footnote-9)**

The Congregation strives to offer its employees equitable and competitive wages and salaries commensurate with its ability, resources, and sound policy. Pay adjustments generally will be considered for all employees once a year, with any adjustments effective at the beginning of the fiscal year. There is no guarantee of an annual pay adjustment. Pay adjustments are usually based upon such factors as individual performance, job responsibilities, and other appropriate factors, such as increases in the cost-of-living as well as changes to UUA salary recommendations.

Deductions made from employees’ wages are reflected on a pay stub. Federal law requires deductions from pay for income tax, Social Security, and Medicare. Other deductions may include state and/or local taxes or wage garnishments. Some deductions, such as voluntary retirement contributions, or medical or other benefit cost-sharing, are optional and are made only if the employee has authorized the deduction. Paychecks and pay stubs should be reviewed when they are received. If an employee believes a mistake has occurred, or if there are any questions, the employee’s Supervisor/Minister should be contacted immediately.

Employees are paid [Specify: weekly, bi-weekly, semi-monthly, at the end of the month].[[10]](#footnote-10) Your pay will be paid by check and available on payday. [If the Congregation has direct deposit, that option may be added as follows: You may have your pay electronically deposited into your checking account each pay period by authorizing direct deposition and providing required information to your Supervisor/Minister.]

**CORRECTIONS OF ERRORS IN PAY**

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

**PERSONNEL INFORMATION AND FILES[[11]](#footnote-11)**

It is very important that employees keep up-to-date all the information provided to the Congregation at the time of hire and as requested from time to time. This information is essential for many purposes, including benefit administration, mailing information to the employee’s home, and contacting friends or family in case of emergency. Please notify the Congregation administrator promptly of any changes in:

* Address and telephone number;
* Marital status (including legal separation);
* Legal change in employee’s name;
* Changes to hours or salary;
* Dependents;
* Changes in beneficiaries;
* Person to notify in case of emergency; and
* Any relevant changes in licensing or education.

The Congregation maintains a personnel file for each employee that contains new hire paperwork, performance reviews, and other documents related to the Employee’s employment. An employee is allowed to write their response to any document added to the file. Employees may review the contents of their file in the presence of a Congregation’s representative at a mutually agreed upon time.

**POLICIES APPLICABLE TO EMPLOYMENT**

##### **ABSENTEEISM AND TARDINESS**

Each employee is expected to maintain good attendance and to report to work on time. Absence and lateness hinder the effectiveness of our work and must be kept to a minimum. Excessive absenteeism or repeated tardiness may result in discipline up to and including termination of employment.

Personal appointments should be scheduled before or after work hours, if possible. All scheduled absences must be approved in advance by the Supervisor/Minister. Employees who are unable to report to work at their scheduled time must call their Supervisor/Minister as soon as possible to report the absence and the expected time of return to work. Employees must call in each day they are absent, unless otherwise authorized by their Supervisor/Minister. The Supervisor/Minister must approve an employee’s absence or late arrival, however, the notification and approval of a particular absence by a Supervisor/Minister does not insulate an employee from a review of the total number of absences or late arrivals in any given period of time.

Unscheduled absences (such as returning late from lunch or leaving work before the end of the workday) must be approved by the employee's Supervisor/Minister. If the employee expects to be absent the following day, they should inform the Supervisor/Minister of that fact at the same time. Any employee who fails to report to work without notice for three or more consecutive days will be considered to have voluntarily terminated employment, effective immediately.

**PROFESSIONAL ATTIRE AND CONDUCT**

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

##### **ALCOHOL AND ILLEGAL DRUGS**

The Congregation maintains a drug-free workplace. The use, possession or distribution of any illegal drug (or prescription drugs not being taken or possessed according to medical direction) on Congregation premises or property is prohibited. Under no circumstances may an employee appear at work while intoxicated or under the influence of illegal non-prescription drugs or alcohol or smelling of alcohol. Improper use of prescription drugs is also prohibited. A violation of this policy may be grounds for immediate disciplinary action up to and including termination.

The Congregation recognizes that responsible consumption of alcohol might be acceptable at occasional functions, but generally, the workplace is alcohol-free. On such an occasion, all employees are expected to uphold an atmosphere of professionalism and respect for those who choose not to participate. Any staff function at which alcohol is served must first be cleared with the Supervisor/Minister. It is expected that employees consuming alcohol on the premises do so in moderation and in the spirit of maintaining a safe and comfortable environment for all.

**SMOKING**

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

**CONFIDENTIALITY**

Employees may have access to confidential information about the Congregation, including but not limited to information about members, friends, or other staff members. Such information must remain confidential and may not be released, removed from the Congregation’s premises, copied, transmitted or in any other way used for any purpose by employees outside the scope of their employment. Employees have the right to use and share information about their personal wages and benefits. All requests for information concerning past or present employees received from organizations or individuals should be directed to the Supervisor/Minister.

**COMPUTERS, INTERNET, EMAIL AND OTHER RESOURCES**

The Congregation provides a wide variety of communication tools and resources to employees for use in running day-to-day business activities. Whether it is the telephone, voice mail, fax, scanner, internet, intranet, e-mail, text messaging, or any other Congregation provided technology, use should be reserved for legitimate business use and not for more than incidental personal use.

All communication using tools provided by the Congregation or used for Congregation related business should be handled in a professional and respectful manner. Inappropriate use includes, but is not limited to:

* transmitting obscene, harassing, offensive or unprofessional messages;
* accessing, displaying, downloading, “liking” or distributing any offensive or inappropriate messages including those containing racial slurs, sexual connotations or offensive comments about race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability or any other classification protected by law;
* transmitting any of the Congregation's confidential or proprietary information, including member/friend data or other materials covered by the Congregation's confidentiality policy.

The Congregation reserves the right to monitor and review the content of employee e-mails or the use of the Internet at any time. Employees should not consider their Internet usage or e-mail communications to be private. Personal passwords are not an assurance of confidentiality, and the Internet itself is not secure.

All materials, information and software created, transmitted, downloaded or stored on the Congregation’s computer system are the property of the Congregation and may be reviewed and inspected at the Congregation’s discretion.

Any software or other material downloaded onto the Congregation's computers may be used only in ways consistent with the licenses and copyrights of the vendors, authors or owners of the material. Prior written authorization from the Supervisor/Minister is required before introducing any software into the Congregation’s computer system.

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

With prior authorization, employees may use their own personal electronic devices (computers, tablets, phones, etc.) for work related purposes provided the devices have appropriate security software and the employee agrees to follow appropriate data protection and back up practices. Any files or software belonging to the Congregation may only be downloaded and used for Congregation related work provided the employee is given express written permission from the Congregation, and proper documentation is maintained regarding the files downloaded in the event that future retrieval is required. In addition, upon employment termination for any reason, the employee agrees to give the Congregation access to any personal electronic devices and passwords, to allow the Congregation to retrieve and/or delete all Congregation files and documents from them. In the event that the Congregation does not request such access, then the employee agrees promptly to return, to the extent practicable, and to delete any and all Congregation related documents and copies thereof from any such devices or back ups.[[12]](#footnote-12)

The employee is responsible for any maintenance, repair, or replacement of a personal device required or used, irrespective of the amount of work usage or the cause of the damage unless agreed to in writing by the Congregation. However, the employee must provide the Congregation with immediate notice should a personal device containing Congregation software or files be lost or stolen.

##### **CONFLICT OF INTEREST/OUTSIDE EMPLOYMENT**

Employees shall not engage in any other employment or business activity that is incompatible or in conflict with their duties, functions, or responsibilities as an employee. Activities that may constitute a conflict include use of the Congregation’s time, facilities, equipment or supplies, or the use of the title, prestige, or influence of the congregation for private gain or advantage. An employee must obtain the prior approval of their Supervisor/Minister before engaging in any other such employment or activity.

An employee shall not engage in any outside activity which, by its nature, hours, or physical demands, would impair the employee's performance of Congregation duties; reflect negatively on the Congregation; or tend to increase the Congregation's obligations or costs for benefits such as sick leave or long-term disability benefits.

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

**EMPLOYMENT OF RELATIVES AND MEMBERS[[13]](#footnote-13)**

Members of an employee’s family may be considered for employment; however, relatives may not supervise one another. “Relative” means a spouse, domestic partner, parent, sibling, child, grandparent, grandchild or person in a close personal relationship with the employee

As a general policy, employment of members of the congregation will be avoided because a member who becomes staff will necessarily forfeit certain benefits of membership to appropriately perform the staff role. For some positions, hiring a member may add significant enough value to counteract the potential risks associated with employment of a member. Positions open to members of the congregation are so designated by the appropriate governing body.

##### **MEDICAL DOCUMENTATION**

From time-to-time, employees may be required, as a condition of employment, to undergo a medical examination or otherwise to provide the Congregation with requested documentation, such as evidence of the existence or duration of medically required absence, ability to return to work, etc.

**VEHICLE USAGE AND EXPENSE REIMBURSEMENT**

Employees using their own cars for congregation-related business may be paid mileage at the current business rate per mile as established by the Internal Revenue Service. Mileage will be reimbursed monthly upon request by the employee and approval by the Supervisor/Minister. Trips must be authorized by the employee's Supervisor/Minister. Employees must have a current and valid driver's license and proof of insurance. Employees may not take unauthorized passengers on such trips. All tickets for parking and traffic violations are the responsibility of the employee. The employee must pay all fines promptly and will not be reimbursed by the Congregation. The use of hand-held cell phones or texting is strictly forbidden when driving on congregation-related business.

Other approved expenses incurred by an employee on behalf of the Congregation will be reimbursed according to the Congregation’s expense reimbursement policy.

**sAFETY AND ACCIDENTS**

The safety of employees, as well as members and visitors, is of paramount concern. All employees are expected to abide by accepted safety standards and any other congregation policy regarding safety of children and youth, disruptive conduct or any other safety related policies at all times. They should know the whereabouts of fire extinguishers, first aid kits, and defibrillators.

Any unsafe condition, equipment or practice observed by an employee should be reported immediately to the Supervisor/Minister. All on-the-job accidents or injuries to employees, no matter how minor, should be reported immediately to the Supervisor/Minister and workers compensation insurance carrier. In the event of a fire or other emergency, the fire department and/or other emergency services should be called immediately, and all staff and members of the congregation should leave the premises.

**PERSONAL PROPERTY**

The Employer cannot be responsible for damage to or loss of personal property, including loss or damage to vehicles or other property in or on congregation property. Employees should report any lost items to the Supervisor/Minister so that the item can be returned if it is found. If an employee finds an item, it should be immediately turned in to the Supervisor/Minister.

**WORKPLACE THREATS AND VIOLENCE**

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

Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts on congregation property may be removed and must remain off congregation property pending the outcome of an investigation. If the Congregation determines that a staff member has violated this policy, the Congregation may take appropriate disciplinary action that may include, but is not limited to, suspension and/or termination of employment, and/or legal action as appropriate.

All employees shall inform their Supervisor/Minister of any behavior which they have witnessed or experienced, which they regard as threatening or violent.

**INSPECTION RIGHTS**

Congregations, like other organizations, are sometimes the victims of theft. The congregation has on its premises storage facilities such as desks, file cabinets, closets and storage areas for the use of employees. The storage of any unauthorized alcohol, weapons, explosives, or illegal drugs or drug-related paraphernalia is prohibited on congregation premises. Therefore, the Congregation reserves the right to open and inspect any desk, file cabinet, storage closet, or storage area at any time and without prior notice or consent. Employees may not use personal locks on congregation owned desks, cabinets, closets or storage areas.

**MEDIA INQUIRIES**

All requests for information on behalf of or regarding the Congregation from newspapers, television and radio media should be directed to the Supervisor/Minister. An appropriate response to a media inquiry would be, “I’m not the best person to answer that question. May I contact the appropriate person and have that individual get back to you?”

**PERFORMANCE AND CONDUCT EXPECTATIONS**

**[Note: this manual uses the term Supervisor/Minister, recognizing that different congregations have different supervisory structures. You should modify these terms as you see fit to customize the manual.]**

**SUPERVISION AND PERFORMANCE REVIEWS** *(Section updated 2022-10.)*

Supervisors/Ministers assist employees in learning their jobs and identifying priorities and goals. On a regular basis, Supervisors/Ministers usually meet with employees who report to them, reviewing job performance, goals and priorities, assessing needs, and working through challenges. Any employee performance concerns should be discussed with the employee and documented. To complement ongoing performance feedback, a formal written performance review will also be conducted on a regular basis. [If you are supervised by the Board of Trustees or designated committee, the term Supervisor/Minister in this manual refers to your supervising entity.]

Supervisors must treat those they supervise with dignity.

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

**DIFFICULTIES ON THE JOB**

In every organization, there are situations where an employee's performance does not measure up to the standards of the job established by the Church, or where they do not conform to work or conduct expectations. In such cases, the Congregation will strive to help employees succeed in their work. However, continued employment depends on the Congregation’s needs and the employee’s ability to satisfy performance and conduct standards.

We hope problems will be resolved at an early stage with open communication between the employee and the Supervisor/Minister. When improvements are necessary in the conduct or performance of an employee, the Congregation will attempt to give the employee written advance notice of the problem and that their job is in jeopardy if satisfactory improvement is not made. However, because of the circumstances or the nature and seriousness of the conduct or performance deficiencies involved, the Minister or Board Chair/President may immediately terminate an employee’s employment without prior notice.

##### **STANDARDS OF CONDUCT [NOTE: Two alternative options are provided for this provision.]**

**Option 1: STANDARDS OF CONDUCT**

The Congregation expects that all employees will conduct themselves in a manner consistent with the highest standards of professional conduct and that is conducive to creating a harmonious and pleasant work environment. This includes courtesy, respect, and working collaboratively and cooperatively, demonstrating the characteristics of high performing team members. As a staff of professionals in whom trust and power have been placed, all staff are called to be faithful both morally and legally to upholding professional relationships.  Staff must never abuse the authority of their position by manipulating others to satisfy personal needs, or engage in any exploitative relationship that abuses the power and damages the trust that has been placed in a staff member.

The Congregation seeks to provide the highest quality of service and support to its members. Thus, poor work habits, such as careless work, failure to complete assignments on time, or a failure to follow instructions, are unacceptable.

Conduct that does not meet the Congregation’s standards, such as violations of Congregation policies, a lack of respect or courtesy to a fellow employee or member, disruptive or disorderly conduct, etc., will not be tolerated and will be grounds for immediate disciplinary action and may result in termination of employment. In addition, any breach of trust or conduct which shows a serious lack of dependability or good judgment, such as theft, falsification of Congregation records, destruction of Congregation property, conflict of interest, insubordination, etc., may be grounds for immediate discipline, up to and including termination from employment.

Option 2: **WORK AND DISCIPLINARY GUIDELINES**

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

Engaging in any of the following examples of unacceptable conduct may result in disciplinary actions. These examples are intended only as a guide and are not all-inclusive.

* Failure to perform work in a manner acceptable to the Congregation.
* Absenteeism or tardiness.
* Leaving work without permission.
* Failure to report absences as required.
* Discrimination, harassment or retaliation described in this Manual.
* Unauthorized possession of weapons.
* Disclosure of confidential information.
* Smoking in unauthorized areas.
* Failure to report-on-the job injuries.
* Working another job while absent.
* Failure to accurately complete or permitting another person to complete the employee’s timecard.
* Theft or dishonesty.
* Falsifying records or information (or misuse or unauthorized manipulation of any computer or electronic data processing equipment or system).
* Discourteous or disrespectful treatment of others.
* Taking Congregation property without paying for it or without written permission.
* Reckless, careless or unauthorized use of Congregation property, equipment or materials.
* Improper or profane language.
* Violation of any other Congregation policy or the standards of conduct generally applicable to a professional and respectful workplace.

**SEPARATION PAY[[14]](#footnote-14)**

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

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

**RESIGNATION/RETIREMENT**

Resignations and Retirements are voluntary terminations of employment initiated by the employee. Employees resigning from the Congregation are requested to provide at least one month’s notice to allow for adequate planning and a smooth transition without undue strain on other staff. If covered by health benefits, resigning staff members may be eligible to continue their health insurance under the provisions of COBRA (Consolidated Budget Reconciliation Act of 1985) . Accrued, but unused vacation time is paid at the end of employment. Sick leave and personal time are not subject to payment at the end of employment.

**BENEFITS**

**[NOTE: In determining whether to offer a particular benefit or the amount of that benefit, it is important for each Congregation to consider what makes sense for their congregation. The benefits section of the manual is written to reflect UUA Compensation Guidelines (**[**https://www.uua.org/finance/compensation/program**](https://www.uua.org/finance/compensation/program)**), which are recommended for all congregations. In determining the amount of benefits, the Congregation should consider the standards in the community as well as UU principles. In describing any particular benefit, it is important to clearly articulate eligibility criteria which specifies eligibility/applicability for part-time employees.]**

**TIME OFF POLICIES**

**[NOTE: The Church year schedule will impact the nature and amount of time off benefits provided by a congregation. For example, where the Church year is 10 months, certain time off benefits such as vacation may not be provided or may be limited in time.]**

**HOLIDAYS[[15]](#footnote-15)**

The following are holidays for which an employee is paid:

New Year’s Day

Martin Luther King Jr. Day

Presidents’ Day

Memorial Day

Fourth of July

Labor Day

Indigenous Peoples’ Day

Veterans’ Day

Thanksgiving Day

Christmas Day

New Year’s Eve

If a paid holiday falls on a Saturday, the preceding Friday generally will be observed as the holiday. If a paid holiday falls on a Sunday, the following Monday generally will be observed as the holiday.

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

**VACATION[[16]](#footnote-16) [NOTE: There are a number of decision points a congregation needs to make about vacation, including:**

* 1. **Consideration of the length of the church year**
	2. **Eligibility of part-time employees for vacation – often pro-rated for employees working at least 20 hours per week**
	3. **Annual bank of vacation hours or monthly accrual**
	4. **Accrual rates for different lengths of service**
	5. **How much vacation can be accrued**
	6. **Whether it can be carried over from year to year**
	7. **The process for resolving conflicting vacation requests**
	8. **Whether summer time vacations are preferred**
	9. **Whether employees who terminate employment will receive payment for the accrued but unused portion of their vacation and whether only employees who give a certain amount of notice will receive such a payment (Note: many states consider vacation part of wages and require payment for accrued, but unused vacation regardless of the reason for employment termination.)**
	10. **Whether employees can borrow from future vacation**
	11. **Whether to offer vacation benefits as part of a paid-time-off (PTO) plan[[17]](#footnote-17)]**

The Congregation grants paid vacation to regular employees scheduled to work at least 10 hours per week at their regular rate of pay based on their length of service with the Congregation according to the schedule below.

|  |  |
| --- | --- |
| Length of Service | Annual Amount of Vacation |
| 0-4 years | 2 x employee’s regularly scheduled weekly hours |
| 5-9 years | 3 x employee’s regularly scheduled weekly hours |
| 10 + years | 4 x employee’s regularly scheduled weekly hours |

Vacation accrues each pay period and employees may not use more than the amount accrued without approval of the Supervisor/Minister. Increases in vacation accrual rate will be made on the first day of the month following the anniversary date of the year in which an employee completes their 5th or 10th year of employment.

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

Employees may carry over from one year to the next no more than 50 percent of the employee’s annual accrual amount. Upon termination, employees will be paid for accrued, but unused, vacation time.

**SICK LEAVE[[18]](#footnote-18)**

All employees are eligible for Sick Leave. Sick leave is earned upon hire.

* Employees who work more than \_\_\_ hours per week will accrue sick leave at the rate of \_\_\_\_\_\_\_ per year up to a maximum of \_\_\_\_\_\_\_. Sick leave may be carried over from year to year up to a maximum of \_\_\_\_\_\_\_\_ hours.[[19]](#footnote-19)
* Employees working less than \_\_\_\_\_\_ hours per week shall earn at least 1 hour of sick leave with pay for every 30 hours worked up to a maximum of 4 times their weekly hours.

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

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

**PERSONAL DAYS**[[20]](#footnote-20)

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

FUNERAL OR BEREAVEMENT LEAVE[[21]](#footnote-21)

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

JURY DUTY

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

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

[The Congregation needs to select from the following leave of absence provisions that are required by state or local law and are appropriate based on its size, market competitiveness, and resources.]

**LEAVES OF ABSENCE[[22]](#footnote-22)**

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

**FAMILY AND MEDICAL LEAVE[[23]](#footnote-23)**

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

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

PARENTAL LEAVE (Choose one of the following options)[[24]](#footnote-24)

**PAID LEAVE:** After \_\_\_\_\_\_months, employees who work \_\_\_\_ or more hours per year and who become natural or adoptive parents are eligible for up to 12 weeks of paid parental leave. Parental leave must begin within six weeks of the birth or adoption. The rate of pay for weeks of paid parental leave is based on wages for the employee’s regularly-scheduled workweek. Rather than taking twelve consecutive weeks of leave, the equivalent number of days may be spread out over up to a year, at the discretion of the Supervisor/Minister. Such intermittent parental leave must be used within one year of birth, placement, or whenever the leave begins, whichever is first. Parental Leave benefits apply only to adoptions in which the child is new to the parent(s).

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

**UNPAID PARENTAL LEAVE:** After successful completion of 90 days of employment, as a full-time employee, an employee will be provided 8 weeks of unpaid leave for the birth or adoption of a child under the age of 18 years or 23 if mentally or physically disabled. The employee must give 2 weeks’ notice of anticipated date of departure and notice of intent to return to work.

**EXTENDED MEDICAL LEAVE[[25]](#footnote-25)**

Employees, who work a minimum of 10 hours per week, have been diagnosed with a serious illness or disabling condition by a physician and have exhausted their vacation, sick and personal leave benefits, may be paid extended sick benefits at 75 percent of their regular pay until the earlier of release to return to work by the physician, approval for long-term disability payments, or 90 days whichever occurs first.. Vacation and other time off with pay benefits do not accrue during this period. Extended medical leave goes into effect after all other leave (sick and vacation) has been used. If the employee recovers and is able to return to their normal schedule before the earlier of the 90-day period or when long-term disability insurance takes over, the congregation will retroactively pay the employee at 100 percent of pay.

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

MILITARY LEAVE[[26]](#footnote-26)

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

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

**SABBATICAL LEAVE[[27]](#footnote-27)**

The Congregation believes that employees in certain positions benefit from time spent in study, reflection, spiritual renewal, continuing education, or community service. This program is a privilege applicable to only certain positions, is completely discretionary, and may be suspended, terminated, or altered at any time.

To be eligible to apply for a sabbatical leave, the employee must work half-time or more hours per week, demonstrated a good work record of at least 7 years of continuous employment, and currently be in good standing with the Congregation. Normally, sabbaticals may not exceed \_\_\_ weeks. Other requirements may also apply. Information about sabbatical leaves may be obtained from the Minister or Chair/President of the Board.

**insurANCE and retirement EMPLOYEE BENEFITS**

**[Note: Benefit information will obviously vary from congregation to congregation. Because benefits may change more rapidly than this manual, information describing these benefits should be general and the first paragraph of the benefits section should be retained. The benefits section of this Sample Manual is written to reflect UUA Compensation Guidelines (**[**https://www.uua.org/finance/compensation/program**](https://www.uua.org/finance/compensation/program)**), which are recommended for all congregations. However, each congregation will need to determine what level of benefits are right for your congregation, keeping in mind fairness, market competitiveness, good management practices, and ability to pay.]**

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

**[Note: The following describes insurance benefits and pension plan obtained through the UUA. If the Congregation has its own policy from a different source, it is important to ensure that the description accurately briefly describes the eligibility and basic terms of the benefit and insurance plans.]**

# HEALTH INSURANCE BENEFITS

Employees who are expected to work at least 750 hours per year may enroll in the group health insurance plan sponsored by the congregation. The Congregation currently pays 80% of the premium for full-time employees for the standard PPO plan offered by the UUA. Part-time staff working 750 hours or more receive a pro-rated payment of the premium toward coverage of health insurance benefits. Eligible employee dependents may also be enrolled and the Employer pays 50% of the additional premium for dependents, again pro-rated for part-time staff according to the following schedule:

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| 1820 hours per year (35 per week) or more | 80% of employee/50% of dependent premium |
| 1560 - 1819 hours per year (30 - 34 per week) | 65% of employee/40% of dependent premium |
| 1040 - 1559 hours per year (20 - 29 per week) | 50% of employee/30% of dependent premium |
| 750 - 1039 hours per year (14 - 19 per week) | 40% of employee/25% of dependent premium |

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

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

# GROUP DENTAL, TERM LIFE, AND LONG TERM DISABILITY INSURANCE[[28]](#footnote-28)

Employees who are expected to work 750 hours per year are enrolled in term life insurance and long-term disability insurance through the group plan sponsored by the UUA. The congregation pays 100% of the cost of Long-term Disability insurance and term life insurance. Employees who work 750 hours per year may also enroll in group dental insurance. The congregation pays the premium cost for dental coverage according to the same schedule as health insurance (see A.1. above). Employees will be required to make their required contribution Further information concerning these policies is available from the Supervisor/Minister or by going to <https://www.uua.org/finance/compensation/uua-insurance-plans>

**WORKERS’ COMPENSATION INSURANCE[[29]](#footnote-29)**

The Congregation carries workers’ compensation insurance that pays for certain medical expenses and provides partial income protection in the event of illness or injury arising out of or in the course of employment.

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

**RETIREMENT BENEFITS**

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

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

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

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

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

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

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

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

***The Acknowledgment is not required by law but is helpful to have in the event of a dispute about the terms of the Manual or of employment. It should be maintained by the Congregation in a file with a copy of the Personnel Manual. Any new employee hired should be given a copy of the manual and asked to sign this confirmation that it has been delivered.***

## PERSONNEL MANUAL ACKNOWLEDGMENT

## By signing below, I acknowledge that I have received a copy of the Personnel Policy Manual of [Name of congregation]. I understand that it is my responsibility to read the Manual and to comply with the policies, practices and rules of the Congregation as outlined therein.

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1. In March 2019, the U.S. Department of Labor proposed raising the minimum salary level from $455 per week to $679 per week or $35,308. Following a public comment period, the USDOL may issue a revised standard in late 2019. [↑](#footnote-ref-1)
2. At-Will: Montana is the only state that is not employment-at-will. [↑](#footnote-ref-2)
3. Harassment Policies: Several states have laws that require employers to include specific language and information in sexual harassment policies. [↑](#footnote-ref-3)
4. **Sexual Harassment**: Here is a link to an article on sexual harassment and what to do about it in the workplace - <http://employment.findlaw.com/employment-discrimination/sexual-harassment-at-work.html>. [↑](#footnote-ref-4)
5. Some congregations have a grievance procedure or policy for dealing with inappropriate behavior among congregants or between congregants and staff apart from personnel policy. It is important that the two policies not be in conflict. [↑](#footnote-ref-5)
6. **Orientation:** For assistance in setting up an effective orientation, go to https://www.uua.org/sites/live-new.uua.org/files/welcoming\_onboarding\_checklist\_beta\_060117.pdf [↑](#footnote-ref-6)
7. **Meal and Break Periods:** There may be different requirements under state or local laws which must be considered. [↑](#footnote-ref-7)
8. **Overtime:** There may be different requirements under state or local laws regarding overtime that must be considered.For a review of overtime requirements, go to <https://www.dol.gov/whd/minwage/america.htm> [↑](#footnote-ref-8)
9. **Payroll:** There may be different requirements under state or local laws regarding the frequency of pay and whether an employer may require employees to be paid by direct deposit. [↑](#footnote-ref-9)
10. **Paydays**: For a state by state pay date requirements, go to <https://www.dol.gov/whd/state/payday.htm>**.** [↑](#footnote-ref-10)
11. **Personnel Files:** Some states have requirements regarding documents that should be maintained in an employee’s personnel file and procedural requirements regarding adding new records and the employee’s right to file a rebuttal to documents added to their file. [↑](#footnote-ref-11)
12. For more information on policy issues related to the use of personal electronic devices for work purposes, go to <https://www.shrm.org/hr-today/news/hr-magazine/pages/0216-byod-policies.aspx>. [↑](#footnote-ref-12)
13. **Members as Staff**: There is a great deal of debate in congregational leadership circles about the pitfalls and benefits of hiring members as staff. There clearly are risks associated with hiring members and the member’s relationship with their religious community has to change as well. However, in some cases, the benefits of commitment to and knowledge of the congregation associated with membership can outweigh the risks. See this article for a more complete review of the pros and cons of hiring members: <http://danhotchkiss.com/becoming-staff/> [↑](#footnote-ref-13)
14. **Unemployment Insurance:** Congregations are not required to participate in state unemployment programs in most states. However, please check your state’s requirements to confirm the rules in your state. Oregon and New York are particular exceptions to this rule. If participation in unemployment is required, you may want to amend the suggested severance policy in this Manual. [↑](#footnote-ref-14)
15. **Holidays:** Unless required by state or local law or an employee works on a holiday, employers are not required to pay for holidays. The UUA provides the Day after Thanksgiving Day and the days between Christmas Day and New Year’s Eve as a holiday. Scheduling flexibility is encouraged regarding the observance of religious holidays. [↑](#footnote-ref-15)
16. **Vacation Policies:** The sample policy outlined in this Sample Manual is a common approach to vacation benefits, but each congregation will want to consider what makes sense in their context. Within reason, there are no legal constraints on whether employers offer vacation or what the policy looks like. Courts will, however, generally expect employers to follow their vacation policies. [↑](#footnote-ref-16)
17. **Personal Time Off:** Some employers choose to combine vacation, sick and personal days in one paid time off bank (“PTO”) with the total time available being more than the amount for just vacation but less than it would be if vacation, sick and personal accrue separately. There are pros and cons of such a policy choice. See <https://www.thebalance.com/paid-time-off-policy-pto-1918232> for a review of the pros and cons of a PTO plan. [↑](#footnote-ref-17)
18. **Sick Leave:** Many states and cities have paid sick time requirements and employers must provide covered employees with all of the specific benefits as required by those laws. [↑](#footnote-ref-18)
19. **Sick Leave Calculation:** For instance, if full-time employment is 40 hours/week, then full time employees would earn 80 hours of sick leave annually, no more than 160 hours can be retained, and no more than 80 hours can be carried over to the next year. [↑](#footnote-ref-19)
20. **Personal Days:** In addition to holidays, vacations and sick leave, employers may provide additional Personal Days. Frequently, 3 to 5 days of personal leave are provided per year as outlined in the following policy. [↑](#footnote-ref-20)
21. Bereavement Leave: Frequently, employers made a distinction between the number of paid leave days provided for death based on the relationship between the employee and the deceased. [↑](#footnote-ref-21)
22. **Leaves of Absence**: Under the Family and Medical Leave Act (“FMLA”), employers with 50 or more employees are required to provide eligible employees with up to 12 weeks of unpaid leave for certain conditions and situations. Some states also require certain leaves for school related activities, domestic violence related absences, and other situations. [↑](#footnote-ref-22)
23. **Family and Medical Leave**: Some states have begun to enact paid leave statutes. [↑](#footnote-ref-23)
24. Parental Leave: Although not required by law, the UUA encourages consistent with UU Principles that congregations consider providing employees with paid leave. The following is a sample policy. However, care must be taken to determine whether a Congregation is required to participate in any legally mandated paid leave programs. [↑](#footnote-ref-24)
25. **Extended Medical Leave**: While providing an extended medical leave is consistent with UU principles, this policy provides pay to bridge the period between the end of an employee’s vacation and sick time and the beginning of long term disability insurance. [↑](#footnote-ref-25)
26. **National Guard/Reserve Service**: For more information, see the “Guidelines for Reserve and Guard Chaplain Support” at: <https://www.uua.org/sites/live-new.uua.org/files/uua-approved-reserve-guidelines-20160616.pdf>. [↑](#footnote-ref-26)
27. **Sabbatical Leave:** Although not required by law, most congregations provide sabbatical leave for the minister with some providing it to other religious and/or administrative staff. [↑](#footnote-ref-27)
28. #  Group Insurance: There are tax implications for certain benefit payments. For example, the standard UUA life insurance benefit is 2 x the employee’s annual wages, which is reduced when the employee reaches age 65. The Congregation will be required to impute the premium paid for life insurance in excess of $50,000 to the employee on their W-2. In addition, employees can choose to pay long-term disability (LTD) premiums from after tax earnings or have the Employer pay the premiums. If LTD premiums are paid out of after-tax earnings, any benefits received are exempt from federal income tax. If the premiums are paid by the congregation, LTD benefit payments, which are less than the employee’s prior pay, will be treated as taxable income. Congregations may pay the premium and add or impute the cost on the employee’s W-2 and any LTD benefit payments will be tax free.  Proof of premium payment and tax status is required by the insurer during the claim approval process.

 [↑](#footnote-ref-28)
29. **Workers’ Compensation:** Not all states require congregations to carry workers' compensation insurance. Congregations should be familiar with the laws in their state. In some states, if workers' compensation insurance is not required, a congregation may choose to purchase it anyway in order to limit the congregation’s financial exposure in the event of a job-related accident or illness. If insurance is not required or is not carried, this policy should not be included. [↑](#footnote-ref-29)