

## September 2022 Board of Trustees Meeting Packet

### ***Covenant of First Parish Brewster UU Board of Trustees***

“Entrusted by the congregation, we recognize that ours is a sacred duty and we will bring our highest selves to all work on their behalf. We promise to arrive on time, come prepared, speak gently and respectfully with each other, and allow everyone time to speak. We will operate by majority vote, trying whenever possible to work toward consensus and support a decision once it has been made.

We pledge to use one-on-one communication to express concerns or resolve conflicts with each other. When communicating with the congregation and community at large, the Board speaks with one voice. Our primary commitment is to the long-range health of First Parish Brewster Unitarian Universalist congregation.”

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August Meeting Minutes

Minister’s Report

DLRE’s Report

President’s Report

Updated Year End Financial Reports & ERTC Update

Updated Personnel Policy Manual

**FPBUU Board of Trustees Meeting Agenda**  
**September 20, 2022, 6:30 PM, Hybrid Meeting at Winslow House**

- 6:30 Welcome Board, Staff, and Visitors - Carol
- 6:35 Chalice Lighting, Spiritual Opening and Focused Check-in - Rev. Jessica
- 6:55 Read Board Covenant - Liz
- 7:00 Membership Committee Request - Paula Lieb
- 7:05 Treasurer's Report - Karen
- 7:25 Financial Futures Report - Susan
- 7:35 Policy Committee Update - John
- 7:40 Board Book, Common Read, Timekeeper - Carol
- 7:50 Staffing Update - Rev. Jessica
- 8:00 Consent Agenda: August Minutes, Minister's Report, Lifespan Religious Education Director's Report, President's Report, July Financial Reports
- 8:10 Check out/Closing
- 8:20 Adjourn

# First Parish Brewster - Board of Trustees Meeting Minutes – August 16, 2022

## Welcome Board, Staff, and Visitors

Carol opened the meeting at 6:38 PM with a spiritual reading.

Board of Trustee members in attendance:

Carol Yerby, President  
Jim Lieb, President Elect  
Susan Smith, Past President  
Karen Witting, Treasurer  
John Kielb, Member at Large/Acting Clerk  
Liz Libby, Member at Large  
Tom O'Brien, Member at Large  
Diane Willcox, Member at Large

Board of Trustee members absent:

Rand Burkert, Clerk (Traveling)

Staff present:

Twinks Hastings (Director of Lifespan and Religious Education)

## Chalice Lighting, Spiritual Opening and Focused Check-in

Carol led a focused check-in with a recollection of how love has guided us the past month.

## Read Board Covenant

John read the Board Covenant.

## Building a Bigger Table: Addition to Authorizing Resolutions

Jim provided an update. Building a Bigger Table is set to move forward as part of FPB. They have decided to expand the mission to provide support from only asylum seekers to adding refugees and migrants. There is no additional liability to FPB with the expansion of the mission. As is the current practice, FPB will not be offering sanctuary.

## First Parish Brewster - Board of Trustees Meeting Minutes – August 16, 2022

The Board unanimously approved the proposed change to the resolutions as shown in red below.

BE IT FURTHER RESOLVED, that, unless otherwise authorized by a vote of the Board of Trustees, the Committee shall not offer to provide sanctuary to any immigrants, but shall limit its activities to Asylum Assistance as contemplated by the CAPAS (Congregational Accompaniment Project for Asylum Seekers) Handbook developed by the UU College of Social Justice, **such Assistance to be offered to refugees and migrants as well as asylum seekers;**

### Year End Financials

Karen reviewed the year end financials.

- Overall, we used \$26.6K less money from surplus than our budget projected. Our budget predicted using \$53.6K from surplus, and we actually used only \$27K. This still means the budget was deficit by \$27K. Next year's budget deficit is predicted to be \$73K.
- We did \$5,650 better than the April projection, so that money stays in surplus for use in the 23-24 budget year.
- Pledging and fundraising numbers are lower than the prior year. This is a concerning short term trend and below the budget amounts.
- Thrift shop shone, making \$24K more than budget. This is balanced by our very high amount for credit card fees, \$2,000 more than budget.
- Expenses were overall within budget. Some adjustments between categories continues.
- Due to open staff positions we saved \$14K in salary and benefits.

Comments – Last year was a very difficult year, so even though we have financial challenges ahead of us, there is reason for optimism. There is energy and momentum to address our financial challenges.

### Choose Common Read

Carol led a discussion to have the BOT choose a common read between two books:

# First Parish Brewster - Board of Trustees

## Meeting Minutes – August 16, 2022

*Congregational Leadership in Anxious Times: Being Calm and Courageous No Matter What* by Peter L. Steinke

*Transforming Conflict* by Terasa Cooley

The BOT vote was tied and when Rand returns from his travels and adds his input.

### Board Notebooks & Hybrid Meetings

Carol has handed out the board notebooks since we are meeting remotely this month, and will continue to hand them out or use the replacement pages to update their binders.

Carol will work with Sue Weber to get a pdf to the BOT.

The website has a page that can be accessed by the BOT with a password.

Liz volunteered to be the person to run the hybrid meetings for the board. Both Susan and Karen also will work to be able to run the hybrid meetings as well.

### Consent Agenda

July Minutes, Minister's Report, Lifespan Religious Education Director's Report, President's Report, How to Run a Hybrid Meeting in the Winslow House, Year End Financial Reports

The consent agenda was approved without additions or changes unanimously.

### Check out/Closing

The meeting was adjourned at 8:09 PM.

Minutes respectfully submitted by John Kielb on August 16, 2022.

## Ministers Board Report September 2022 from Rev Jessica Clay

### **Overall thoughts:**

Our potluck planned by Twinks and I was a huge success. We had 60 people in attendance! Thank you to the board for all of your help.

Our search committee has formed for the Interim Music Director position, the search committee consists of Judy Jollett, Deb Selkow, Daniel Beltran, Tavia Ossola, Chris Morin and myself. We have had 5 applicants as of 9/15/22. We will be interviewing applicants that are qualified at the beginning of October.

### **Worship and Rites of Passage:**

Tavia Ossola, Paula Lieb, and I led a training for our ushers & greeters, we reviewed how to be more welcoming, our fire, medical emergency, and active shooter policies, and procedures for each position. It was recorded for those who were not able to attend.

Our Ingathering Sunday service was a big hit and there was a wonderful feeling in the air. We have some fabulous services coming up including guest musician/worship leader Matt Meyer on Oct 2. You do not want to miss that service!

I did a funeral for a local community member at the beginning of September.

### **Pastoral Care:**

The chair of the Caring Committee and I are going to hold a meeting at the beginning of October for all who are interested in joining the committee. I continue to meet with people in their homes and at the office to provide pastoral care.

### **Administration:**

We had a successful staff retreat at the beginning of September. We had worship, trauma training, worship planning/logistics check in, and we reviewed our fire, active shooter, and medical emergencies policies.

The Covid task force and I continue to meet monthly to review our recommendations for keeping the congregation safe.

I called together a meeting of the stewardship committee to come up with names for more people to join the committee. Our plan is to get a few more people on the committee and begin working with Barry Finkelstein in October.

### **Serves the Larger Unitarian Universalist Faith:**

I continue to attend the UUMA cluster meetings, the local interfaith women ministers' group, and UU Mass Action Board meetings.

In Sept I will be on study leave Sept 23-29 at a meditation retreat, Rev Joe Cherry will be covering pastoral care.

# Director of Lifespan Religious Education Twinks Hastings Board Report

September 2022

## Overview

September has been a busy month. I co-led open worship with Rev Jessica, ran teacher orientation, led CYM committee orientation, conducted opening day for CYM and the CYM backpack blessing, oversaw our annual parent meeting, and led start-up for our 5 children and youth RE programs, as well as opening registration for our adult programs and coordinating the all-church BBQ/Potluck with Rev Jessica. I also completed the Dimensions of Faith UUA Renaissance Module, along with taking care of the regular pastoral care and admin that comes with this position. I have two weeks of vacation booked at the end of October, to return to "the happiest place on earth".

## Dimensions of Faith Learnings.

This module was attended by ministers and DLREs and focused on where we are right now in our faith development stage in our congregations as we slowly emerge from the pandemic. This module was very timely and incredibly insightful about why some of the patterns that we are seeing in regards to attendance, lack of engagement/volunteers etc are happening. I hope to gather a small group of leadership to share this learning with and complete a congregational RE curriculum plan together, remembering that Religious Education is not just limited to what happens in the CYM program.

One of the biggest take-aways was how as faith communities the pandemic has brought most congregations back to early stages of Faith Development (there are many models for what this looks like) but essentially the takeaway is that trust building and community building are really important to folks in these stages. My read is that our community is in that place, and events like the BBQ/Potluck/Open mic are essential to our community continuing to thrive (I will say, as I've said before, comparatively to my colleagues we are leaps and bounds ahead of many congregations on where we are coming out of the pandemic). In the past the CYM committee has taken on running some community events like this because anything multigenerational was equated with fun and thusly CYM. This year there is no bandwidth in the committee for these kinds of all-church events, and I wonder if we might look at trying to form a "Fun" committee or similar.

## Pew moving

The building committee emailed me with several questions regarding this project, I stated it was fully approved by the board, both pre and post pandemic. I hope that we are able to move forward and make worship more accessible to our children this program year.

## Conclusion

We are off and running. I am continuing to do my best to make this year a marathon and not a constant sprint for my own spiritual wellness, and it's a struggle for me; by Wednesday of last week I had hit my 40 hours - with the teacher training, worship and parent meeting still to come. I hope September is the anomaly - it is always an extra full month. I continue to deeply appreciate Rev Jessica's supervision and support. It was noted to me by many congregants after Ingathering that our co-worships are some of their favorites. I attest my growing confidence in the pulpit to her coaching and pushing me out of my comfort zone in the pulpit.

## President's Report for September 2022

When my daughters were ages two and four, my mother was facing the end of her life. She asked me to please have my children baptized, a wish that I knew I could not fulfill. Kris and I had been married for seven years and we hadn't felt like we needed to belong to a church or even claim a religion. Kris, a lifelong UU, encouraged me to attend a service at First Parish in Concord. I went by myself one Sunday to check it out. The sanctuary was beautiful, the pews were filled, and it felt like the minister was speaking directly to me. I left the church in tears, hopeful that I could honor my mother's dying wish in a way that felt authentic to me. I never had my children baptized, but they grew up with a meaningful, spiritual grounding and a wonderful faith community. I taught my children's Sunday School classes in a cooperative religious education program, which enabled me to learn about my faith by teaching it to my children and their peers. I also made friends with the parents with whom I taught and the families that I met at our annual church retreat in Maine. I learned that belonging to a church offered not only a faith community, but it provided an important component of my family's culture. Now that Kris and I are retired and are living our dream on Cape Cod, belonging to a church has taken on new meaning. We're not fulfilling a promise to my mom anymore. We're making our lives meaningful by making new connections in our new faith community, and contributing to the life of the church in ways that are important to us. What gives me a sense of belonging to FPB is volunteering at Faith Family Kitchen, writing letters and postcards to encourage people to vote, meeting with a wonderful covenant group, serving on the Board of Trustees, and dreaming about the future of our cherished congregation.

The Board's Common Read for this year is [Congregational Leadership in Anxious Times](#) by Peter L. Steinke. Rev. Jessica will lead the discussions. We will read one chapter each month.

Our new Treasurer and President Elect have reviewed the Board Book and have some recommendations for edits. If you would like to serve on a "tiger team" to evaluate the changes and present them to the Board, please let me know.

Our meetings for July and August were held via Zoom due to summer vacations and limited availability. I am recommending that we move to a Hybrid model for now to enable people to choose. If the majority of members prefers to meet on Zoom, we will change over.

It was recommended that we have a Timekeeper at our meetings to help us stay on track. If you would like to volunteer for this role, please let me know. Thank you!

Sincerely,  
Carol Yerby



## Financial Reports - June 2022

### Reconciled

Submitted by Karen Witting, Treasurer

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Tab 2 (pages 2-4) - *Operating Fund* Profit & Loss Budget vs. Actual

Tab 3 (pages 5-7) - *Operating Fund* Profit & Loss Previous Year Comparison

Tab 4 (page 8) - *Operating Fund* Balance Sheet Previous Year Comparison

**% of budget should typically be at 100%**

### Points of Interest

**Total Income** is at 103% of budget

Total Pledge Payments received 99% of budget

Offertory is at 86% of budget

Thrift Store Income is at 127% of budget

**Total Expenses** are at 97% of budget

Please note that starting this fiscal year I have separated the long term disability from the staff salaries on the reports. It now has its own line (line 49, page 2). This should be considered when comparing salaries and benefits to prior years.

### From Capital Expense Fund

	<u>Budget</u>	<u>Spent</u>	
Steeple	\$18,000	\$0	
Winslow House Renovations	\$1,500	\$1,500	**shows on BS

### From Emergency Reserve Fund

*Minister- Bereavment Leave Coverage	\$5,000	\$5,325	**Will be reflected on BS in May
*\$2,000 of total expense is from Worship Support budget			

### From Surplus FY21

Partial Year Salary Increases	\$6,200	\$6,200	
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**Approved by the BOT** without adjusting budget (it is included in the Office Expenses line)

Network Solutions initial eval	\$750	\$750	
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**Operating Funds**  
**Profit & Loss Budget vs. Actual**  
July 2021 through June 2022

1	June 22	Budget	\$ Over Budget	% of Budget
2	<b>Ordinary Income/Expense</b>			
3	<b>Income</b>			
4	<b>Pledges</b>			
5	357,770.18	364,117.00	-6,346.82	98.26%
6	13,257.67	10,000.00	3,257.67	132.58%
7	900.00			
8	371,927.85	374,117.00	-2,189.15	99.42%
9	17,191.33	20,000.00	-2,808.67	85.96%
10	<b>Fund Raising</b>			
11	101,698.41	80,000.00	21,698.41	127.12%
12	<b>Church Fundraisers</b>			
13	1,043.74			
14	500.00			
15	10,462.58	10,000.00	462.58	104.63%
16	6,520.06			
17	-303.00	9,000.00	-9,303.00	-3.37%
18	18,223.38	19,000.00	-776.62	95.91%
19	963.75	1,500.00	-536.25	64.25%
20	0.00	2,000.00	-2,000.00	0.0%
21	120,885.54	102,500.00	18,385.54	117.94%
22	<b>BldgUse</b>			
23	3,748.46	2,500.00	1,248.46	149.94%
24	1,738.27	1,500.00	238.27	115.89%
25	5,486.73	4,000.00	1,486.73	137.17%
26	<b>Investment,Interest, MiscIncome</b>			
27	297.05	300.00	-2.95	99.02%
28	<b>Investment Income</b>			
29	3,102.64	2,800.00	302.64	110.81%
30	1,728.32	1,000.00	728.32	172.83%
31	1,431.35	1,200.00	231.35	119.28%
32	6,262.31	5,000.00	1,262.31	125.25%
33	121.04	250.00	-128.96	48.42%
34	6,680.40	5,550.00	1,130.40	120.37%
35	522,171.85	506,167.00	16,004.85	103.16%
36	<b>Gross Profit</b>			
37	<b>Expense</b>			
38	<b>Staff Salaries</b>			
39	96,175.08	96,175.00	0.08	100.0%
40	45,944.94	45,945.00	-0.06	100.0%
41	45,858.12	45,858.00	0.12	100.0%
42	35,528.33	37,073.00	-1,544.67	95.83%
43	32,432.52	32,415.00	17.52	100.05%
44	10,665.24	20,698.00	-10,032.76	51.53%
45	15,637.07	15,638.00	-0.93	99.99%
46	8,037.50	10,920.00	-2,882.50	73.6%
47	4,904.71	0.00	4,904.71	100.0%
48	810.00	2,208.00	-1,398.00	36.69%
49	295,993.51	306,930.00	-10,936.49	96.44%
50	<b>Staff Benefits/Payroll Expenses</b>			
51	34,514.88	35,267.00	-752.12	97.87%
52	26,522.97	27,818.00	-1,295.03	95.35%
53	15,117.46	16,123.00	-1,005.54	93.76%
54	7,297.92	7,357.00	-59.08	99.2%
55	833.16	734.00	99.16	113.51%
56	3,109.00	2,910.00	199.00	106.84%
57	3,370.41	3,525.00	-154.59	95.61%
58	862.67	900.00	-37.33	95.85%
59	2,500.00	2,500.00	0.00	100.0%
60	94,128.47	97,134.00	-3,005.53	96.91%

**Operating Funds**  
**Profit & Loss Budget vs. Actual**  
July 2021 through June 2022

	June 22	Budget	\$ Over Budget	% of Budget	
1					
61	<b>Staff Professional Expenses</b>				
62	Minister's Professional Exp	9,442.05	9,618.00	-175.95	98.17%
63	Admin&FinanceDirProf Ex	2,526.94	2,757.00	-230.06	91.66%
64	LRE Director Professional Exp	2,556.73	2,752.00	-195.27	92.9%
65	Music Director Prof Exp	1,508.99	2,224.00	-715.01	67.85%
66	<b>Total Staff Professional Expenses</b>	<b>16,034.71</b>	<b>17,351.00</b>	<b>-1,316.29</b>	<b>92.41%</b>
67	<b>BldgGrounds</b>				
68	Property-Supplies	3,254.35	4,200.00	-945.65	77.49%
69	Property-Maintenance	13,905.91	13,800.00	105.91	100.77%
70	Groundskeeping	11,477.50	12,000.00	-522.50	95.65%
71	Liability/Property Insurance	16,463.00	14,200.00	2,263.00	115.94%
72	Housekeeping	9,920.00	5,700.00	4,220.00	174.04%
73	Electric	4,037.03	5,000.00	-962.97	80.74%
74	Gas	6,459.11	5,000.00	1,459.11	129.18%
75	Phone & Internet	7,046.22	5,000.00	2,046.22	140.92%
76	Water	1,485.98	1,500.00	-14.02	99.07%
77	<b>Total BldgGrounds</b>	<b>74,049.10</b>	<b>66,400.00</b>	<b>7,649.10</b>	<b>111.52%</b>
78	<b>Office Expenses</b>				
79	Advertising	1,511.02	1,500.00	11.02	100.74%
80	Credit Card/Bank/PayPal Fees	5,195.54	3,000.00	2,195.54	173.19%
81	Financial Audit	2,000.00	2,500.00	-500.00	80.0%
82	Office Expense/Supplies	3,468.28	4,000.00	-531.72	86.71%
83	OfficeEquip/Maint	6,088.89	6,200.00	-111.11	98.21%
84	Payroll Software Expenses	644.83	900.00	-255.17	71.65%
85	Software Expense	2,249.21	1,800.00	449.21	124.96%
86	<b>Total Office Expenses</b>	<b>21,157.77</b>	<b>19,900.00</b>	<b>1,257.77</b>	<b>106.32%</b>
87	<b>Total Loan &amp; Mortgage Payments</b>	<b>7,387.32</b>	<b>7,600.00</b>	<b>-212.68</b>	<b>97.2%</b>
88	<b>Denominational Dues</b>				
89	UUA-NER	25,000.00	25,000.00	0.00	100.0%
90	<b>Total Denominational Dues</b>	<b>25,000.00</b>	<b>25,000.00</b>	<b>0.00</b>	<b>100.0%</b>
91	<b>Committees</b>				
92	Board of Trustees	627.06	450.00	177.06	139.35%
93	HelpingHands	0.00	100.00	-100.00	0.0%
94	Landscape Committee	200.75	700.00	-499.25	28.68%
95	Membership	364.00	750.00	-386.00	48.53%
96	Reparations	198.00	295.00	-97.00	67.12%
97	Stewardship	400.78	500.00	-99.22	80.16%
98	UU Connections	422.00	560.00	-138.00	75.36%
99	<b>Total Committees</b>	<b>2,212.59</b>	<b>3,355.00</b>	<b>-1,142.41</b>	<b>65.95%</b>
100	<b>Lifespan Religious Education Ministries</b>				
101	Special Programing/Multigen	1,804.64	1,500.00	304.64	120.31%
102	Pre K-Grade 6/7	597.37	1,300.00	-702.63	45.95%
103	High School Youth Program	1,128.38	800.00	328.38	141.05%
104	Pathways/AdultFaithDevelopment	136.66	600.00	-463.34	22.78%
105	Contract Childcare	110.00	400.00	-290.00	27.5%
106	Child Care Supplies	219.25	300.00	-80.75	73.08%
107	Office/Library	329.20	300.00	29.20	109.73%
108	Child Abuse Prevention Training	0.00	200.00	-200.00	0.0%
109	<b>Total CYM</b>	<b>4,325.50</b>	<b>5,400.00</b>	<b>-1,074.50</b>	<b>80.1%</b>
110	<b>Music</b>				
111	Guest Musicians	2,815.00	2,900.00	-85.00	97.07%
112	Music Scores	1,481.43	600.00	881.43	246.91%
113	Music Support/Supplies	35.54	700.00	-664.46	5.08%
114	PianoOrgan	150.00	700.00	-550.00	21.43%
115	<b>Total Music</b>	<b>4,481.97</b>	<b>4,900.00</b>	<b>-418.03</b>	<b>91.47%</b>
116	<b>Worship</b>				
117	Hospitality	492.28	650.00	-157.72	75.74%
118	Materials/Supplies	1,039.21	1,000.00	39.21	103.92%
119	Pulpit Support	3,500.00	3,600.00	-100.00	97.22%

**Operating Funds**  
**Profit & Loss Budget vs. Actual**  
 July 2021 through June 2022

1	June 22	Budget	\$ Over Budget	% of Budget
120	0.00	600.00	-600.00	0.0%
	<b>Substitute Sexton</b>			
121	5,031.49	5,850.00	-818.51	86.01%
	<b>Total Worship</b>			
122	549,802.43	559,820.00	-10,017.57	98.21%
	<b>Total Expense</b>			
123	-27,630.58	-53,653.00	26,022.42	51.5%
	<b>Net Ordinary Income</b>			
124	<b>Other Income/Expense</b>			
125	<b>Other Income</b>			
126	<b>Other Income and Expenses</b>			
127	0.00	53,653.00	-53,653.00	0.0%
	<b>Surplus from prior year</b>			
128	0.00	53,653.00	-53,653.00	0.0%
	<b>Total Other Income and Expenses</b>			
129	0.00	53,653.00	-53,653.00	0.0%
	<b>Total Other Income</b>			
130	0.00	53,653.00	-53,653.00	0.0%
	<b>Net Other Income</b>			
131	<b>-27,630.58</b>	<b>0.00</b>	<b>-27,630.58</b>	<b>100.0%</b>

## Operating Funds Profit & Loss Prev Year Comparison July 2021 through June 2022

1	June 22	June 21	\$ Change	% Change
2 <b>Ordinary Income/Expense</b>				
3 <b>Income</b>				
4 <b>Pledges</b>				
5     2021-2022 Pledges	357,770.18	0.00	357,770.18	100.0%
6     2020-2021 Pledges	13,257.67	344,678.05	-331,420.38	-96.15%
7     2019-2020 Pledges	900.00	27,877.24	-26,977.24	-96.77%
8     2018-2019 Pledges	0.00	150.00	-150.00	-100.0%
9 <b>Total Pledges</b>	<u>371,927.85</u>	<u>372,705.29</u>	-777.44	-0.21%
10 <b>Offertory</b>	17,191.33	16,816.00	375.33	2.23%
11 <b>Fund Raising</b>				
12 <b>Thrift Store/Annex Income</b>	101,698.41	77,582.78	24,115.63	31.08%
13 <b>Church Fundraisers</b>				
14        Fall Fundraiser	1,043.74	0.00	1,043.74	100.0%
15        Garden Tours	0.00	2,182.00	-2,182.00	-100.0%
16        Small Group Fundraisers	500.00	313.18	186.82	59.65%
17        Spring Auction	10,462.58	9,147.00	1,315.58	14.38%
18        Summer Auction	0.00	6,018.00	-6,018.00	-100.0%
19        Holiday Fair	6,520.06	3,322.82	3,197.24	96.22%
20        Church Fundraisers - Other	-303.00	0.00	-303.00	-100.0%
21 <b>Total Church Fundraisers</b>	<u>18,223.38</u>	<u>20,983.00</u>	-2,759.62	-13.15%
22 <b>Food Certificate Sales</b>	963.75	1,100.00	-136.25	-12.39%
23 <b>Welcoming Congregation-Income</b>	0.00	2,000.00	-2,000.00	-100.0%
24 <b>Total Fund Raising</b>	<u>120,885.54</u>	<u>101,665.78</u>	19,219.76	18.91%
25 <b>BldgUse</b>				
26        Space Rentals	3,748.46	0.00	3,748.46	100.0%
27        Weddings/Memorials	1,738.27	500.00	1,238.27	247.65%
28 <b>Total BldgUse</b>	<u>5,486.73</u>	<u>500.00</u>	4,986.73	997.35%
29 <b>Investment,Interest, MiscIncome</b>				
30        Misc Contributions	297.05	658.50	-361.45	-54.89%
31 <b>Investment Income</b>				
32          UUA GIF Distribution	3,102.64	2,950.25	152.39	5.17%
33          Alton Smith Char Trust	1,728.32	1,162.22	566.10	48.71%
34          Alton Smith Irrev Trust	1,431.35	1,111.25	320.10	28.81%
35 <b>Total Investment Income</b>	<u>6,262.31</u>	<u>5,223.72</u>	1,038.59	19.88%
36        Interest Income	121.04	312.24	-191.20	-61.24%
37 <b>Total Investment,Interest, MiscIncome</b>	<u>6,680.40</u>	<u>6,194.46</u>	485.94	7.85%
38 <b>Total Income</b>	<u>522,171.85</u>	<u>497,881.53</u>	24,290.32	4.88%
39 <b>Gross Profit</b>	522,171.85	497,881.53	24,290.32	4.88%
40 <b>Expense</b>				
41 <b>Staff Salaries</b>				
42        Minister	96,175.08	91,080.00	5,095.08	5.59%
43        Admin&FinanceDir	45,944.94	43,098.96	2,845.98	6.6%
44        LRE Director	45,858.12	42,101.28	3,756.84	8.92%
45        Music Director	35,528.33	35,307.60	220.73	0.63%
46        ThriftStoreManager	32,432.52	31,200.00	1,232.52	3.95%
47        Sexton	10,665.24	19,615.38	-8,950.14	-45.63%
48        Bookkeeper	15,637.07	14,463.60	1,173.47	8.11%
49        Pianist	8,037.50	5,121.55	2,915.95	56.94%
50        Tech Support	4,904.71	3,410.00	1,494.71	43.83%
51        CYM-Childcare	810.00	270.00	540.00	200.0%
52 <b>Total Staff Salaries</b>	<u>295,993.51</u>	<u>285,668.37</u>	10,325.14	3.61%
53 <b>Staff Benefits/Payroll Expenses</b>				
54        Employee Health Insurance	34,514.88	30,523.20	3,991.68	13.08%
55        Retirement	26,522.97	23,766.72	2,756.25	11.6%

**Operating Funds**  
**Profit & Loss Prev Year Comparison**  
July 2021 through June 2022

1		June 22	June 21	\$ Change	% Change
56	<b>FICA Taxes</b>	15,117.46	13,643.92	1,473.54	10.8%
57	<b>Minister's FICA</b>	7,297.92	6,888.00	409.92	5.95%
58	<b>Minister's Term Life</b>	833.16	819.00	14.16	1.73%
59	<b>WorkCompInsurance</b>	3,109.00	2,806.00	303.00	10.8%
60	<b>Long Term Disability</b>	3,370.41	0.00	3,370.41	100.0%
61	<b>Staff Appreciation</b>	862.67	0.00	862.67	100.0%
62	<b>Moving Expenses</b>	2,500.00	0.00	2,500.00	100.0%
63	<b>Total Staff Benefits/Payroll Expenses</b>	94,128.47	78,446.84	15,681.63	19.99%
64	<b>Staff Professional Expenses</b>				
65	<b>Minister's Professional Exp</b>	9,442.05	9,000.00	442.05	4.91%
66	<b>Admin&amp;FinanceDirProf Ex</b>	2,526.94	1,704.00	822.94	48.3%
67	<b>LRE Director Professional Exp</b>	2,556.73	1,664.00	892.73	53.65%
68	<b>Music Director Prof Exp</b>	1,508.99	1,396.00	112.99	8.09%
69	<b>Total Staff Professional Expenses</b>	16,034.71	13,764.00	2,270.71	16.5%
70	<b>BldgGrounds</b>				
71	<b>Property-Supplies</b>	3,254.35	2,157.47	1,096.88	50.84%
72	<b>Property-Maintenance</b>	13,905.91	14,126.32	-220.41	-1.56%
73	<b>Groundskeeping</b>	11,477.50	7,372.08	4,105.42	55.69%
74	<b>Liability/Property Insurance</b>	16,463.00	14,329.00	2,134.00	14.89%
75	<b>Housekeeping</b>	9,920.00	4,160.00	5,760.00	138.46%
76	<b>Electric</b>	4,037.03	4,129.42	-92.39	-2.24%
77	<b>Gas</b>	6,459.11	5,088.96	1,370.15	26.92%
78	<b>Phone &amp; Internet</b>	7,046.22	5,443.91	1,602.31	29.43%
79	<b>Water</b>	1,485.98	1,448.95	37.03	2.56%
80	<b>Total BldgGrounds</b>	74,049.10	58,256.11	15,792.99	27.11%
81	<b>Office Expenses</b>				
82	<b>Advertising</b>	1,511.02	1,380.00	131.02	9.49%
83	<b>Credit Card/Bank/PayPal Fees</b>	5,195.54	5,637.13	-441.59	-7.83%
84	<b>Financial Audit</b>	2,000.00	0.00	2,000.00	100.0%
85	<b>Office Expense/Supplies</b>	3,468.28	2,582.28	886.00	34.31%
86	<b>OfficeEquip/Maint</b>	6,088.89	6,904.17	-815.28	-11.81%
87	<b>Payroll Software Expenses</b>	644.83	1,079.50	-434.67	-40.27%
88	<b>Software Expense</b>	2,249.21	3,114.76	-865.55	-27.79%
89	<b>Total Office Expenses</b>	21,157.77	20,697.84	459.93	2.22%
90	<b>Total Loan &amp; Mortgage Payments</b>	7,387.32	7,387.32	0.00	0.0%
91	<b>Denominational Dues</b>				
92	<b>UUA-NER</b>	25,000.00	21,408.00	3,592.00	16.78%
93	<b>Total Denominational Dues</b>	25,000.00	21,408.00	3,592.00	16.78%
94	<b>Committees</b>				
95	<b>Board of Trustees</b>	627.06	1,315.43	-688.37	-52.33%
96	<b>Landscape Committee</b>	200.75	353.00	-152.25	-43.13%
97	<b>Membership</b>	364.00	739.32	-375.32	-50.77%
98	<b>Reparations</b>	198.00	292.95	-94.95	-32.41%
99	<b>Stewardship</b>	400.78	0.00	400.78	100.0%
100	<b>UU Connections</b>	422.00	0.00	422.00	100.0%
101	<b>Total Committees</b>	2,212.59	2,700.70	-488.11	-18.07%
102	<b>Lifespan Religious Education Ministries</b>				
103	<b>Special Proqraming/Multigen</b>	1,804.64	1,252.94	551.70	44.03%
104	<b>Pre K-Grade 6/7</b>	597.37	677.83	-80.46	-11.87%
105	<b>High School Youth Program</b>	1,128.38	434.45	693.93	159.73%
106	<b>OWL/COA</b>	0.00	-349.70	349.70	100.0%
107	<b>Adult Faith Development</b>	136.66	0.00	136.66	100.0%
108	<b>Contract Childcare</b>	110.00	0.00	110.00	100.0%
109	<b>Child Care Supplies</b>	219.25	0.00	219.25	100.0%

**Operating Funds**  
**Profit & Loss Prev Year Comparison**  
 July 2021 through June 2022

1		June 22	June 21	\$ Change	% Change
110	Office/Library	329.20	262.63	66.57	25.35%
111	<b>Total CYM</b>	<b>4,325.50</b>	<b>2,278.15</b>	<b>2,047.35</b>	<b>89.87%</b>
112	<b>Music</b>				
113	<b>Guest Musicians</b>	2,815.00	1,150.00	1,665.00	144.78%
114	<b>Music Scores</b>	1,481.43	564.75	916.68	162.32%
115	<b>Music Support/Supplies</b>	35.54	711.22	-675.68	-95.0%
116	<b>PianoOrgan</b>	150.00	49.99	100.01	200.06%
117	<b>Total Music</b>	<b>4,481.97</b>	<b>2,475.96</b>	<b>2,006.01</b>	<b>81.02%</b>
118	<b>Worship</b>				
119	<b>Hospitality</b>	492.28	196.90	295.38	150.02%
120	<b>Materials/Supplies</b>	1,039.21	1,081.02	-41.81	-3.87%
121	<b>Pulpit Support</b>	3,500.00	0.00	3,500.00	100.0%
122	<b>Total Worship</b>	<b>5,031.49</b>	<b>1,277.92</b>	<b>3,753.57</b>	<b>293.73%</b>
123	<b>Total Expense</b>	<b>549,802.43</b>	<b>494,361.21</b>	<b>55,441.22</b>	<b>11.22%</b>
124	<b>Net Ordinary Income</b>	<b>-27,630.58</b>	<b>3,520.32</b>	<b>-31,150.90</b>	<b>-884.89%</b>
125		<b>-27630.58</b>	<b>3520.32</b>	<b>-31150.9</b>	<b>-8.84888</b>

**Operating Funds**  
**Balance Sheet Prev Year Comparison**  
As of June 30, 2022

1	June 30, 22	June 30, 2021	\$ Change	% Change
2				
3 <b>Current Assets</b>				
4 <b>Checking/Savings</b>				
5 <b>CC5 Ckg - 5859</b>	27,325.92	34,519.81	-7,193.89	-20.84%
6 <b>Repo Sweep - 0998</b>	160,110.25	202,687.77	-42,577.52	-21.01%
7 <b>Total Checking/Savings</b>	187,436.17	237,207.58	-49,771.41	-20.98%
8 <b>Other Current Assets</b>				
9 <b>Payroll Corrections</b>	-129.04	-129.04	0.00	0.0%
10 <b>Emergency Reserve Fund</b>	-24,075.00	-29,400.00	5,325.00	18.11%
11 <b>Capital Expense Fund</b>	-23,750.00	-25,250.00	1,500.00	5.94%
12 <b>Unearned Pledges</b>	-51,064.61	-75,825.67	24,761.06	32.66%
13 <b>Total Other Current Assets</b>	-99,018.65	-130,604.71	31,586.06	24.18%
14 <b>Total Current Assets</b>	88,417.52	106,602.87	-18,185.35	-17.06%
15 <b>Fixed Assets</b>	1,761,018.93	1,761,018.93	0.00	0.0%
16 <b>Other Assets</b>				
17 <b>Transfer Suspense</b>	1,034.13	875.84	158.29	18.07%
18 <b>Food Coupon Inventory</b>	4,279.76	7,745.00	-3,465.24	-44.74%
19 <b>Petty Cash</b>	100.00	100.00	0.00	0.0%
20 <b>Total Other Assets</b>	5,413.89	8,720.84	-3,306.95	-37.92%
21	<b>1,854,850.34</b>	<b>1,876,342.64</b>	<b>-21,492.30</b>	<b>-1.15%</b>
22				
23 <b>Liabilities</b>				
24 <b>Current Liabilities</b>				
25 <b>Other Current Liabilities</b>				
26 <b>Split Plate</b>	5,464.00	2,635.00	2,829.00	107.36%
27 <b>UUSC Coffee Sales</b>	541.40	393.48	147.92	37.59%
28 <b>Current portion-Loan Meeting H</b>	4,080.00	4,080.00	0.00	0.0%
29 <b>Payroll Liabilities</b>	3,424.02	262.66	3,161.36	1,203.59%
30 <b>Total Other Current Liabilities</b>	13,509.42	7,371.14	6,138.28	83.28%
31 <b>Total Current Liabilities</b>	13,509.42	7,371.14	6,138.28	83.28%
32 <b>Long Term Liabilities</b>				
33 <b>Loan-Meeting House Improvements</b>	66,189.63	71,026.45	-4,836.82	-6.81%
34 <b>Loan-Endowment Fund</b>	0.00	49,425.63	-49,425.63	-100.0%
35 <b>Total Long Term Liabilities</b>	66,189.63	120,452.08	-54,262.45	-45.05%
36 <b>Total Liabilities</b>	79,699.05	127,823.22	-48,124.17	-37.65%
37 <b>Equity</b>				
38 <b>Unrealized Endow Loan Gain/Loss</b>	302,369.30	252,943.67	49,425.63	19.54%
39 <b>Retained Earnings</b>	1,495,575.75	1,415,325.51	80,250.24	5.67%
40 <b>Net Income</b>	-22,793.76	80,250.24	-103,044.00	-128.4%
41 <b>Total Equity</b>	1,775,151.29	1,748,519.42	26,631.87	1.52%
42	<b>1,854,850.34</b>	<b>1,876,342.64</b>	<b>-21,492.30</b>	<b>-1.15%</b>



## Decision regarding ERTC Credit

In June we engaged a company, ERTC Express, to calculate what we could get if we filed for an Employee Retention Tax Credit, a program of the federal government authorized in the CARE's act. At the time we did not expect to receive much money, given what we had already received from PPP Loans. In August they informed us that they expect us to get:

2020 ERTC Credit - \$20,612.10

2021 ERTC Credit. -\$79,870.40

Total ERTC Credit to you - \$100,482.50

When we engaged this company a contract was signed which requires us to pay them but leaves the choice of payment for a later time. Now we need to decide which option to use, these are the three options:

Option #1 - 18% Up Front - \$18,086.85

Option #2 - 25% Total Fee - \$25,120.625 (Requires a 3% Deposit - \$5,000 minimum) balance due when IRS pays

Option #3 - 30% Full Deferral - \$30,144.75 - Due when IRS pays

The Finance Committee discussed these options at length. We recommend that FPBUU pay the up-front fee of 18% (\$18,086.85) with the expectation that we will be receiving \$100,482.50 once the IRS processes the submission.

This decision has not been an easy one and there has been much research into the company in terms of its reputation and integrity. One concern that has come out is that the contract is not clear what would happen if we pay the 18% but get less than what has been calculated. We have confirmed with the company owner that, in the unlikely event that we get less than what is expected, they would refund the overpayment of the fee.

The finance committee is requesting that the board approve the payment of the 18% fee. We have ample cash in the operating account to cover this.

Karen Witting 914-420-1190

**Personnel Policy Manual**  
for  
**FIRST PARISH BREWSTER**  
**Unitarian Universalist Church**



**Revised November 2021**

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## **I. EMPLOYMENT POLICIES AND PRACTICES**

### **A. STATEMENT OF PURPOSE**

*This FPBUU Personnel Policy Manual is not a contract and can be modified or changed at any time. The relationship between FPB and employee is legally defined as “employment at will”, which means that such employment may be terminated without penalty by either party. FPB may not be compelled to pay wages to persons no longer in their service, and employees may not be compelled to render their labor without their consent.*

We have prepared this Personnel Manual to help employees understand some of the policies and procedures of First Parish Brewster Unitarian Universalist (referred to herein as "FPB"). Employees should familiarize themselves with the Manual, as it will provide answers to some questions the employee may have about her/his employment. Nothing in this Manual or in any other written or unwritten policies and practices of FPB creates an express or implied contract, promise or representation between FPB and any employee.

FPB’s policies generally will be applied consistently. However, FPB reserves the right to deviate from normal policy in certain situations. Since every employment situation cannot be anticipated, this Manual provides a general overview only.

From time to time, changes in the Manual may become necessary. Therefore, FPB reserves the right to amend, supplement or rescind any provisions of this Manual as necessary.

The Manual applies to all staff, whether full-time, part-time, exempt or nonexempt, except where otherwise stated. This Manual does not apply to ordained Senior Ministers called by vote of the congregation.

This Manual supersedes all previous employment policies, whether written or oral, expressed or implied. If any provisions of this Manual are found to be invalid or unenforceable, the remaining provisions will remain in full force and effect.

If an employee has any questions or comments about this Manual, or needs more information, the employee should ask her/his supervisor or Administration and Finance Director. An employee's comments and suggestions are genuinely encouraged.

## **B. ~~FPB MISSION AND HISTORY~~**

### A Brief History of First Parish Brewster

The original First Parish was organized in 1700 on the current site as a Congregational Church in the Pilgrim Tradition. In the early and mid-18th century Brewster was home to many prominent sea captains and the church became known as the Church of the Sea Captains. Their names remain on the pews. The church is an historic landmark in the Town of Brewster.

Over the first half of the ninetieth century the church evolved into Unitarianism and went with the denomination at the merger of the Unitarians and Universalists in the twentieth century—in 1961.

The current Meetinghouse, dedicated in 1834, is the third building on the site upon the hill. Dawes Hall, built in 1909, was used for many purposes, including as a sanctuary in cold weather during hard times. The Parish Hall was built in the 1980s and the Barn and Winslow House were purchased in the late 1990s. When the Meetinghouse began to show serious signs of decay in 2005, the leadership with the support of the parish and the wider community, raised the funds and restored the building to its present state.

First Parish is a leader in social justice, addressing a variety of societal concerns. It was the first Welcoming Congregation among all the UU churches. In 2014 we gained green sanctuary status.

By John Myers, 2015

## **C. EQUAL EMPLOYMENT OPPORTUNITY**

FPB is an equal employment opportunity church for all qualified persons, without regard to race, color, ancestry, national origin, religion, sex, age, physical disability, medical condition, veteran status, marital status, sexual orientation or gender expression. This applies to all employment practices, including recruitment, hiring, compensation, benefits, promotions, demotions, training, disciplinary action, and termination.

Employees who have questions about discrimination in the workplace, or who believe this policy has been violated, should report their concerns immediately to the Administration and Finance Director. Retaliation against individuals who make a claim of discrimination or participate in the investigation of such a claim is prohibited by this policy and will not be tolerated.

## **D. SEXUAL HARASSMENT**

Sexual harassment is prohibited and will not be tolerated. This policy applies to sexual harassment by members of the same gender as well as opposite genders. Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitutes sexual harassment when:

- submission to the conduct is made either explicitly or implicitly a term or condition of employment;

- submission to or rejection of the 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:

- repeated and unwelcome suggestions regarding, or invitations to, social engagements or social events; or
- 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; or
- unwelcome or coerced physical proximity or physical contact which is of a sexual nature or sexually motivated; or
- the deliberate use of offensive or demeaning terms which have a sexual connotation; or
- inappropriate remarks of a sexual nature.

Any employee who believes he or she has been sexually harassed by another employee, a supervisor, or any other person encountered in the course of employment should report in writing that conduct immediately to the Senior Minister or member of the Safe Congregational Committee. If there is a complaint against the Senior Minister, this complaint needs to be brought to the President of the Board of Trustees.

The person above who receives the complaint will promptly investigate the complaint or report of sexual harassment. If there is a complaint against the Senior Minister, this complaint will be investigated by the President of the Board of Trustees or Safe Congregational Committee. Although investigations will be conducted with sensitivity to confidentiality issues, investigative information will be communicated as appropriate to those with a need to know. The person who investigates the complaint will arrange a meeting with the employee within seven days of the submitted written complaint. If the investigation indicates that a violation of this policy may have occurred, timely and appropriate action will be taken. Often such situations may necessitate outside counsel, and it is highly recommended that FPB use this resource. The Personnel Committee Chair and the President of the Board of Trustees will be available for consultation.

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.

All staff including clergy will have a CORI/SORI (Criminal and Sexual Offender Record Information) report on file. All new staff hiring will be subject to background checks and completion of the screening form. CORI/SORI checks will be the responsibility of the Director of Admin and Finance and Director of Children and Youth Ministries. New hires will be contingent upon clean reports about sexual offenses. (See APPENDIX, D. CORI/SORI POLICY for more information)

## **E. HARASSMENT**

FPB prohibits conduct that shows hostility or an aversion toward an individual because of his/her/their race, color, religion, sex, national origin, age, disability, sexual orientation, gender expression or any other classification protected by law, and that:

- has the purpose or effect of creating an intimidating, hostile, or offensive work environment;  
or
- has the purpose or effect of unreasonably interfering with an individual's work performance;  
or
- otherwise adversely affects an individual's employment opportunities.

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

- epithets or slurs; or
- threatening or intimidating acts; or
- written or graphic material;
- written, verbal or physical acts that purport to be jokes or pranks.
- Any employee who believes he/she/they has been harassed by another employee, a supervisor, or any other person, in the course of employment should submit a description of that conduct in writing immediately to the Senior Minister. If there is a complaint against the Senior Minister, this complaint needs to be brought to the President of the Board of Trustees.

The person above who receives the written complaint will promptly investigate the complaint or report of harassment. If there is a complaint against the Senior Minister, this complaint will be investigated by the President of the Board of Trustees or their designee. Although investigations will be conducted with sensitivity to confidentiality issues, investigative information will be communicated as appropriate to those with a need to know. The person who investigates the complaint will arrange a meeting with the employee within seven days of the submitted written complaint. If the investigation indicates that a violation of this policy may have occurred, timely and appropriate action will be taken. Often such situations may necessitate outside counsel, and it is highly recommended that FPB use this resource. The Personnel Committee Chair and the President of the Board of Trustees will be available for consultation.

Retaliation or reprisal against employees who report 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.

#### **F. GRIEVANCE POLICY INVOLVING WORKING CONDITIONS**

Effective communication is essential for productive working relationships. To that end, employees are encouraged to discuss any concerns about work or suggestions for improving operations in the following manner:

In the event of any disagreement with respect to being treated fairly in matter of pay, benefits, promotions, or other specific working conditions, the employees are encouraged to first speak to their supervisor in an attempt to resolve the problem.

If discussion with the supervisor does not resolve the matter to the employee's satisfaction, the employee should submit the original grievance in writing to the Minister.

The minister or their delegate shall gather the evidence necessary to complete an investigation and submit their findings to the President of the Board and chair of the Personnel Committee. The President will arrange a meeting with the employee and his/her/their supervisor, the minister and a member of the Personnel Committee in an agreed-upon time. Upon review of this material, the minister, Board president, member of the Personnel Committee and supervisor will render a decision. The President will provide the employee with the final decision within seven days.

## **G. INTERNET POLICY**

FPB provides Internet access (including e-mail) to its staff members to assist and facilitate business communications and work-related research. These services are for legitimate business use only in the course of assigned duties. All materials, information and software created, transmitted, downloaded or stored on FPB's computer system are the property of FPB and may be accessed only by authorized personnel. If a personal computer or device is used for work related activity, FPB may have access to work related material and emails.

Inappropriate Internet use includes, but is not limited to:

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

FPB reserves the right to monitor employee use of the e-mail system or 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.

Any software or other material downloaded into FPB'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 Administration and Finance Director is required before introducing any software into FPB's computer system.

Only authorized staff members may communicate on the Internet on behalf of FPB. Employees may not express opinions or personal views that could be misconstrued as being those of FPB. Employees may not state their church affiliation on the Internet unless required as part of their assigned duties. Any violation of this policy may result in disciplinary action.

## **H. MEDIA INQUIRIES**

Requests for information about FPB from newspapers, television and radio media should be directed to the Administration and Finance Director.

## **I. CONFIDENTIALITY**

Employees may in the course of their employment have access to confidential information about FPB, 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 FPB's premises, copied, transmitted or in any other way used for any purpose by employees outside the scope of their employment. All requests for information concerning past or present employees received from organizations or individuals should be directed to the Administration and Finance Director.

## **J. CONFLICTS OF INTEREST**

Employees are expected to avoid conflicts of interest, defined as any situation where an employee may attain personal gain or which may be detrimental to FPB, either monetarily or to its public image, because of the use of information or personal contact which is not generally available except through employment with FPB.

Employees shall not engage in any business or transaction or have a financial or other personal interest which is incompatible with their employment duties or which would impair their judgment or actions in the performance of their duties for FPB. Employees who have questions about whether an activity violates this policy should discuss the matter with the Administration and Finance Director.

## **K. OUTSIDE EMPLOYMENT**

We understand that employees may take on employment outside their job with FPB. However, employees should not engage in any collateral employment or business activity that is incompatible or in conflict with their duties, functions or responsibilities as an FPB employee. Activities that may constitute a conflict include use of FPB'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 shall not engage in any outside activity which, by its nature, hours or physical demands, would impair the employee's performance of FPB duties, reflect discredit on FPB, or tend to increase FPB's payments for sick leave, worker's compensation benefits or long term disability benefits. Collateral employment should not result in outside telephone calls while on duty for the congregation.

## **L. EMPLOYMENT OF RELATIVES AND MEMBERS**

Other members of an employee's family may be considered for employment; however, relatives may not supervise one another. "Relative" is defined for this purpose as a spouse, domestic partner, parent, sibling, child, grandparent, or grandchild.

## **M. PERSONNEL RECORD**

It is very important that employees keep up-to-date all the information provided to FPB at the time of hire. This information will be recorded on a Personnel Record Form and is essential for many purposes, including benefit administration, mailing information to the employee's home, and contacting friends or family in case of emergency. The Administration and Finance Director should be promptly notified of any changes in:

- Address and telephone number;
- Marital status (including legal separation);
- Legal change in employee's name;
- Dependents;

- Changes in beneficiaries;
- Criminal and Sexual Offender Record Information (CORI); (SORI)
- Person to notify in case of emergency; and
- Any relevant changes in licensing or education.

#### **N. INITIAL REVIEW PERIOD**

New employees and employees who are transferred to another position are required to complete an initial review period of ninety days, but this may be shortened or lengthened at FPB's discretion. Upon satisfactory completion of this period, the employee will be considered a regular employee. Completion of the initial review period does not alter the employment-at-will relationship. Employees must continue to perform satisfactorily even after the initial review period is completed. ~~Although regular employees typically work on an ongoing basis, there is no guarantee that any job position will continue indefinitely. Any position may be eliminated at any time at the discretion of FPB.~~

#### **O. PERFORMANCE EVALUATION**

Employees will receive a written performance evaluation at the end of the first six months of employment and again at the end of the first year and each year going forward. Factors considered in assessing performance include but are not limited to quality and quantity of work; dependability; attendance and punctuality; effective interpersonal relationships with the congregation and colleagues; and professional conduct.

Employees are requested to identify goals and objectives with their supervisors in advance so that their work may be evaluated on the basis of clear criteria they have helped to develop.

The Administration and Finance Director will assure that annual evaluations of all staff have been completed and placed in the employee's personnel file, dated and signed by the employee and the supervisor. The written evaluation will be maintained in the employee's permanent personnel file.

## **II. WAGE AND HOUR ADMINISTRATION**

### **A. EMPLOYMENT CLASSIFICATIONS AND HOURS OF WORK**

For purposes of determining the applicability of various policies, practices, and benefits, employees are classified by the nature of the position to which they are assigned and by their regular work schedule.

Full-time employees are regularly scheduled to work 40 hours per week. Employees scheduled to work less than 40 hours per week will be considered part-time employees and their eligibility for benefits will be pro-rated according to the percentage of time worked.

Employees who are subject to state or federal minimum wage and overtime laws are referred to as "non-exempt" employees. Those in administrative, management, or supervisory positions who are not subject to such regulation are referred to as "exempt" employees and include the Administration and Finance Director, Music Director, and Lifespan Religious Education Director.

### **B. TIMEKEEPING AND OVERTIME**

Non-exempt employees at the discretion of their supervisor may be required to submit a written and signed record of their time worked at the end of each week. Any scheduled hours not worked or time worked in excess of their regular schedule must be noted. Employees should not work overtime without written authorization in advance.

## **C. PAY AND PAYROLL DEDUCTIONS**

Pay adjustments generally will be considered for all employees once a year and any adjustments will normally begin at the beginning of the fiscal year. There is no guarantee of an annual pay adjustment. Pay is usually based upon such factors as cost living increase, UUA guidelines, job responsibilities and the financial status of FPB.

Deductions made from employees' wages are reflected on the stubs of their paychecks. 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 are optional and are made only if the employee has authorized their deduction.

Employees are responsible for promptly notifying the Administration and Finance Director of any changes to or errors in their deductions. Any necessary adjustments usually are made and reflected in the employee's next paycheck.

## **III. EMPLOYEE BENEFITS**

Outlined below is a brief summary of the types of employee benefits currently available through FPB. This summary is not intended to and does not create an express or implied contract, promise or representation between FPB and the employee. These benefits are subject to change at any time at the discretion of FPB. In the event of any discrepancy between the benefits outlined below and the plan itself, the plan will govern. Any questions about employee benefits should be directed to the Administration and Finance Director.

### **A. GROUP INSURANCE PROGRAMS**

#### **3. Health Insurance**

For employees who work at least 20 hours per week, FPB makes available (as of the date of hire) and pays for a portion of their health insurance. FPB currently pays 80% of the premium for employees who work at least 35 hours per week and prorates coverage payments for those working less than 35 hours per week based on the number of hours worked. The insurance is the UUA Standard PPO "Gold" insurance plan and UUA Medicare supplemental insurance plan.\* For employees who are enrolled with the UUA group health insurance, FPB will pay 50% of health insurance premiums for their children.

For example:

- Employee A works 40 hours per week and FPB pays 80% of Employee A's health insurance premium.
- Employee B works 30 hours per week and FPB pays 60% of Employee B's health insurance premium.
- Employee C works 20 hours per week and FPB pays 40% of Employee C's health Insurance

premium.

This percentage of contribution is reviewed annually as part of the budget process.

Employees may elect coverage through the church's plan or through an alternate plan. For employees who receive health insurance coverage elsewhere rather than through the plan offered by FPB, the church will pay an amount equivalent to what FPB would contribute if the employee were covered under the FPB plan. However, in no case will FPB reimburse an employee more than the actual cost to the employee.

\*Note: Employees who work at least 750 hours per year (approximately 15 hours per week, year round) are eligible for the UUA health insurance plan but FPB only pays a portion of the health insurance premium for those who work at least 20 hours per week, year round.

### **1. Group Dental, Term Life, and Long-Term Disability Insurance**

Employees who work at least 750 hours per year (approximately 15 hours per week) are offered the option of purchasing, on their own, term life insurance, through the group plan sponsored by the UUA. FPB currently pays 80% of the premium for dental insurance for employees who work at least 35hrs/wk or 1820 hours annually. For employees who work at least 15hrs per week but less than 35 hours per week benefits will be prorated based on the number of hours worked. Further information concerning these policies is available from the Administration and Finance Director. For these same employees (who work at least 750 hours per year), FPB offers and pays for (through the employee's salary/wages) the UUA group plan for long-term disability insurance.

### **2. Workers' Compensation Insurance**

FPB 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 immediate supervisor. Employees are required to provide a physician's statement in order to receive worker's compensation benefits, or to return to work.

## **B. RETIREMENT BENEFITS**

The Unitarian Universalist Association (UUA) maintains a defined contribution qualified retirement plan to assist eligible employees to accumulate tax-deferred savings for retirement. Under the plan, FPB contributes a percentage of the employee's wages, and the employee has the option of making additional voluntary contributions on a pre-tax basis.

If an employee is employed 1000 hours or more per year, has reached the age of 21, and has completed one year of service with FPB or a combination of UUA organizations, an employee may participate in the UU Organizations Retirement Plan.

First Parish Brewster does not automatically enroll employees. If an employee wishes to be part of the retirement plan, the employee will need to complete the enrollment forms. The forms are available from the Administration and Finance Director.

FPB will contribute 10% of an employee's compensation base to the Plan. In addition, an employee may contribute up to 5% of her/his compensation base to the Plan. Compensation "base" means an employee's salary only and does not include any other compensation (value of health insurance premiums, professional development funds, etc.). This retirement plan is available only to employees of First Parish Brewster (whose income is reported on Form W2) and is not available to any contract employees (whose income is reported on Form 1099). More information on the retirement plan is available from the Administration and Finance Director or from the UUA.

### **C. PAID TIME OFF (PTO)**

First Parish Brewster offers paid time off (PTO) to employees who work at least 10 hours per week that can be used as they wish for sick days, vacation and/or other personal needs.

The Administration and Finance Director oversees the record-keeping and use of paid time off (PTO). During the first six months of employment, an employee will accumulate PTO. However, an employee is not eligible to use PTO until after that six months.

#### **1. Earning Paid Time Off**

Employees earn time off based on hours worked and years of service.

During the first three years of employment, full-time employees earn 176 hours of PTO each year. If they work less than full time, this benefit will be prorated.

From four to ten years of service, full-time employees earn 216 hours of PTO per fiscal year. Again, if an employee works less than full time, the hours will be prorated.

After ten years of service, full-time employees earn 256 hours of PTO per fiscal year, prorated as above for part-time employees.

The amount of PTO available to an employee will be specified in the annual Letter of Agreement.

Employees may be given the week between Christmas and New Year's Day off without using their PTO.

#### **2. Accumulation of Paid Time Off**

PTO is available at the beginning of each fiscal year (July1-June30) and approved by the employee's supervisor or Minister. If an employee uses paid time off and terminates employment before the paid time off is accrued, it must be paid back. The total annual PTO hours for each employee is presented in the annual employee contract. Two weeks of PTO earned by June 30 of the fiscal year may be carried over to the next fiscal year providing an employee uses it within the first six months of the following year. The Administration and Finance Director has a form that must be completed one month prior to the end of the year and approved by an employee's supervisor.

#### **3. Upon Resignation**

If an employee voluntarily resigns (after working beyond an employee's probationary period), an employee may be paid time for any time off an employee has accumulated as of the date of an employee's resignation.

#### **4. Applying for PTO**

Employees must submit a written request for PTO to their supervisor for approval. Overlapping requests will be negotiated so that the needs of the church are covered.

#### **5. Emergency or Unplanned Leave**

If employees need emergency, unplanned leave, they must report their absence promptly to their supervisor before the emergency leave begins. These hours will be deducted from their PTO.

#### **6. Short-Term Medical Leave**

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 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. Employees will remain responsible for their contributions to these plans.

### **D. HOLIDAYS**

The following paid holidays are observed each year:

- New Year's Day
- Martin Luther King Day
- President's Day
- Patriot's Day
- Memorial Day
- Juneteenth
- Fourth of July
- Labor Day
- Indigenous People's Day (Columbus Day)
- Veteran's Day
- Thanksgiving Day
- Day after Thanksgiving Day
- Christmas (or another holiday to be arranged with your supervisor)

If an observed holiday falls on a Saturday, the preceding Friday generally will be observed as the holiday. If an observed holiday falls on a Sunday, the following Monday generally will be observed as the holiday. If employees are required to work on an observed holiday, they generally will be granted another day off.

### **E. LEAVES OF ABSENCE**

## **1. General provisions**

The policies in this section describe various types of paid and unpaid leaves of absence provided by FPB. Leaves must be requested in advance in writing and require the approval of the employee's immediate supervisor. 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 his or her supervisor.

## **2. Personal leave without pay**

Employees can request in writing days for unpaid personal leave from their supervisors and such requests must be approved by the supervisor, the President of the Board of Trustees (or designee), and Chair of Personnel Committee (or designee).

## **3. Military leave without pay**

Employees who are members of the uniformed services of the United States (including the National Guard or other reserve unit) will be granted 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 for all or part of the period of military service. Leaves of absence in excess of any available vacation 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.

## **4. Funeral or bereavement leave with pay**

Employees working 20 hours or more may be eligible for a leave of absence for up to 10 days (prorated on FTE, Full Time Equivalent) with pay for the death of an immediate family member. The number of paid hours off will be determined by the supervisor and Administration and Finance Director based on the circumstances.

## **5. Jury duty leave with pay**

Employees called for jury duty are paid their regular pay for up to twenty working days. Employees should appear for work upon being excused from jury duty on any day.

## **6. Parental Leave with pay**

In the case of the birth or adoption of a child, the employee shall be granted twelve weeks of paid leave after one year of employment. Unpaid leave should be extended only after all paid leave has been used. Accrued paid vacation and paid sick days can be used for the unpaid portion of parental leave. During periods of unpaid leave, the Congregation will continue paying premiums for health, life, and long-term disability insurance. The employee must give 30 days notice of parental leave to their supervisor.

## **F. VEHICLE USAGE AND REIMBURSEMENT**

Employees using their own cars for church-related business may be paid mileage at the current rate per mile as established by Internal Revenue Service. The employee, with approval by their supervisor, will be reimbursed for mileage upon request. The employee's supervisor must authorize trips. 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 FPB.

## **G. PROFESSIONAL EXPENSES**

U.S. tax law provides that congregations and other organizations employing ministers and other religious professionals may consider certain items as usual business expenses. Such expenses are not included in the compensation paid to individuals; they are part of the necessary expenses of the organization and are not reported for income tax purposes. The minister(s) and Directors of FPBUU are entitled to professional expenses per their letters of agreement.

Items of enduring value purchased with non-taxed professional expense funds are the property of the congregation. Such items may subsequently be purchased at their depreciated value by the employee. Items will reduce by 1/3 each year, if the employee leaves FPBUU before 3 years they will reimburse FPBUU the depreciated cost of the item or leave the item.

The items below are allowable as professional expenses. However, basics that a staff member needs in order to perform their job should be funded through an appropriate budget line. (For instance, an employee should not need to pay for their office supplies or furniture through their professional expenses.)

### **Allowable Expenses**

Automobile expenses while on official business (such as to meetings, hospital or home visits, trips for educational purposes or to purchase supplies, travel with a youth group or a church school class, etc.) are reimbursable at the standard mileage rate in effect at the time. The costs of commuting to and from home to work are not allowable as business automobile expenses.

Travel expenses while away from home overnight for work or business, including air fare, taxis, rental automobiles, lodging, meals, and incidentals are all professional expenses. This includes costs to attend professional conferences.

Entertainment expenses directly related to the mission or programs of the organization are considered professional expenses. These may include entertainment at home or in restaurants of members or potential members of the congregation.

Books and journals acquired and used for professional purposes may be treated as business expenses.

Computers and related equipment costs may be treated as a business expense through a Section 179 deduction if the items are used 50% or more for professional activities. It is customary today to consider computers and peripherals as essential for the performance of one's duties.



Educational expenses such as tuition, books, and supplies are professional expenses if related to one's professional status or responsibilities, or to maintain skills needed in one's work. Travel solely for entertainment cannot be treated as a professional expense. Travel in connection with educational activities, conferences, or worship services will usually be legitimate.

Where the purpose of travel is both personal and business, the expense may be pro-rated as partly a business expense and partly a personal one.

Dues for membership in professional organizations are legitimate expenses.

Telephone expenses, except for the basic charge for a home phone, may be counted as business expense if related to the performance of one's duties.

Religious garments or robes may be purchased and cleaned with funds for professional expenses, but this does not apply to garments worn as ordinary clothing.

#### **IV. OTHER FPB POLICIES**

##### **A. ATTENDANCE AND PUNCTUALITY**

Each employee is expected to be prompt and regular in his or her attendance at work. Personal appointments should be scheduled before or after work hours, if possible. The supervisor must approve all scheduled absences in advance. Employees who are unable to report to work at their scheduled time must call their supervisor 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.

The employee's supervisor must approve unscheduled absences. If the employee expects to be absent the following day, he or she should inform the supervisor of that fact at the same time.

Any employee who fails to report to work without notice for three or more consecutive expected working days will be considered to have voluntarily terminated employment, effective immediately.

##### **B. 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 FPB.
- Absenteeism or tardiness.
- Leaving work without notice.
- Failure to report absences as required.
- Sexual harassment or harassment described in this Manual.
- Entering into a romantic relationship with someone you serve in your capacity as a staff member at FPB.

- The use, possession or sale, or being under the influence of alcohol or controlled substances (other than those used for bona fide medical purposes) while working.
- Unauthorized possession of weapons.
- Disclosure of confidential information.
- Smoking tobacco or cannabis on any church grounds and buildings.
- Failure to report-on-the job injuries.
- Working another job while absent.
- Arrest and conviction for criminal offenses that are job related, including those that may affect the employee's ability to perform his or her job.
- Theft or dishonesty.
- Falsifying records or information (or misuse or unauthorized manipulation of any computer or electronic data processing equipment or system).
- Discourteous treatment of others.
- Taking FPB property without paying for it or without written permission.
- Reckless, careless or unauthorized use of FPB property, equipment or materials.
- Improper or profane language.
- Violation of any other FPB policy.

### **C. SEPARATION FROM EMPLOYMENT**

Non- exempt employees who resign are expected to give at least two weeks written notice in order for the congregation to find a suitable replacement. Exempt employees must give at least four weeks' written notice.

Any employee who is absent for three consecutive days without notifying his or her supervisor, or who fails to report to work on or before the expiration of a leave will be deemed to have resigned, consistent with applicable law.

When an employee is leaving their position, they will be offered an exit interview with a member of the board and a member of the Personnel Committee.

### **D. 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 at all times. They should know the whereabouts of fire extinguishers and the first aid kit.

Any unsafe condition, equipment or practice observed by an employee should be reported immediately to the supervisor or Administration and Finance Director. All on-the-job accidents or injuries to employees, no matter how minor, should be reported immediately to the Administration and Finance Director. In the event of a fire or other emergency, the fire department and/or police should be called immediately, and all staff and members of the congregation should leave the premises.

### **E. PERSONAL PROPERTY**

FPB cannot be responsible for damage to or loss of personal property, including loss or damage to vehicles or other property in or on church property. Employees should report any lost items to the

Administration and Finance Director 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 Administration and Finance Director.

## **F. WORKPLACE THREATS AND VIOLENCE**

Threats, threatening behavior, or acts of violence against persons by anyone on church property will not be tolerated. Anyone who verbally or physically threatens another, exhibits threatening behavior or engages in violent acts on church property may be removed and will remain off church property pending the outcome of an investigation. If FPB determines that a violation of this policy has occurred, FPB 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 the Administration and Finance Director or their supervisor of any behavior, which they have witnessed or experienced, which they regard as threatening or violent, when that behavior is job-related or is connected to employment.

## **G. PROFESSIONAL BEHAVIOR**

If a FPBUU member is hired as a staff member, they will be asked to rescind their membership in order to keep clear boundaries between the congregation and staff. When they leave their position at FPBUU, a conversation will be had with their supervisor on whether they wish to reinstate their membership and the outcome will be documented in their employment file.

Employees should maintain professional behavior and appearance that is appropriate to their position and the FPB community. Personal mail and non-essential telephone calls at work are discouraged.

## **H. INSPECTION RIGHTS**

Churches, like other organizations, are sometimes the victims of thieves. The church has on its premises storage facilities such as desks, file cabinets, closets and storage areas for the use of employees, however, the church can make no assurances that they will always be secure. The storage of any unauthorized alcohol, illegal drugs or drug-related paraphernalia is prohibited on church premises. Therefore, FPB 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 church owned desks, cabinets, closets or storage areas.

## **I. EMPLOYMENT AUTHORIZATION**

Federal law requires that prospective employees must show proof of eligibility to work in the United States in the position for which they are applying.

## **APPENDIX**

### **A. PERSONNEL COMMITTEE JOB DESCRIPTION IS AS FOLLOWS:**

Purpose: It is the purpose of the Personnel Committee is to assist and support FPB in the appropriate, safe, fair, and fiscally responsible use of its human resources. The Consultants serves the Board of Trustees and the Senior Minister in an advisory capacity. It will be made up of two to four members with personnel and/or management experience.

Duties include: Assist in the development of job descriptions, salary administrative practices, benefits, and other employment policies needed to comply with applicable Massachusetts and federal laws; serve on each hiring sub-committee established when a position is vacated or created; participate in grievance procedure if employee has followed the procedure and a resolution has not been reached.

## **B. HIRING PROCESS**

The Board has the final authority to hire, terminate, or change terms of employment in consultation with the Senior Minister

Terminated employees may continue to be enrolled in the company's health insurance plan by law (C.O.B.R.A.) for 18 months after separation provided the employee pays the entire cost of the insurance by the first of every month.

Each staff position has a written job description, approved by the Board, outlining the general duties of the job, annual Paid Time Off, and other benefits. Your job description will be reviewed each year at the time of your annual evaluation. Proposals for any major changes from the original job description will be approved by the Senior Minister, in consultation with the Personnel Consultants, prior to the job opening being posted. The Senior Minister then submit the proposed changes to the Board of Trustees for approval.

## **C. PROCEDURES FOR REPLACING STAFF OR HIRING NEW STAFF**

1. An ad hoc Hiring Team made up of the supervisor, congregational member(s) with expertise in the area of focus (a parent for CYM or choir or member of the orchestra for music director, for example) and a member of the Personnel Committee , will be formed.
2. The existing job description will be reviewed by the supervisor, Senior Minister, and the Personnel Committee and an approved job description will be reviewed by the Hiring Team.
3. The salary and benefits, recommended by the Hiring Team in consultation, as needed, with the Senior Minister and Personnel Committee , will be reviewed and approved by the Board of Trustees.
4. The Hiring Team will post the position advertisement in the weekly Angle, on the website and in other relevant media and receive resumes.
5. Hiring Team will review resumes/applications and conduct interviews of selected candidates. The Hiring Team is responsible for checking applicate references.
6. The Hiring Team, in consultation with the Senior Minister, will make a recommendation to the Board of Trustees for their approval.

## **D. CORI/SORI POLICY**

As required by the Commonwealth of Massachusetts, employees of FPB must have a background free of conduct that may adversely affect the church's ability to provide for the safety and well-being of the congregation. Upon application for employment and periodically thereafter (at the discretion of

the Minister and Board of Trustees), Criminal and Sexual Offender Record Information (CORI/SORI) will be requested.

Where Criminal and Sexual Offender Record Information (CORI/SORI) checks are part of a general background check for employment or volunteer work with children and youth, the following practices and procedures will be followed;

The Administration and Finance Director and the Director of Children and Youth Ministries will be certified to request CORI/SORI checks.

The Minister (for job applicants and staff) and the Director of Children and Youth Ministries (for CYM volunteers) will be certified to access CORI/SORI records.

Only individuals in these staff positions are authorized by First Parish Brewster to review CORI/SORI reports. All CORI/SORI reports are filed separately from other personnel files in a locked file cabinet in the Senior Minister's office. The Senior Minister and the Administration and Finance Director are the only individuals with access to the key.

FPB maintains two certifications to request and receive CORIs/SORIs:

1. The Director of Children and Youth Ministries is authorized to request and receive CORIs/SORIs via the Internet.
2. Administration and Finance Director is authorized to request and receive CORIs/SORIs by mail.

## **PERSONNEL POLICY MANUAL ACKNOWLEDGMENT FORM**

I, \_\_\_\_\_, hereby acknowledge that I have received a copy of the Personnel Policy Manual of First Parish Brewster. I understand that it is my responsibility read the Manual and to comply with the policies, practices and rules of FPB.

I specifically understand and agree that my employment is at will and for an unspecified period of time and that either the FPB or I may terminate the employment relationship, at any time, with or without reason and with or without notice. I specifically understand and agree that this statement of policy contains all of the terms relating to termination of employment and that no representations may be made contrary to the foregoing, either express or implied. I understand that this statement of policy is not subject to change.

I understand that this Manual supersedes all previous policies, written or oral, express or implied. I also understand that this Manual is neither a contract of employment nor a legal document, and that FPB reserves the right to add, change or rescind any policy, practice or rule at any time with or without notice.

I understand that my signature below indicates that I have read and understood the above statements and have received a copy of the Personnel Policy Manual,

dated: \_\_\_\_\_.

\_\_\_\_\_

Date

\_\_\_\_\_

Employee Name (Print)

\_\_\_\_\_

Employee Signature