



# OPERATING POLICIES AND PROCEDURES

First Unitarian Church of Des Moines

Executive Team  
Revised 9.2024

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## 1.0 Accounting

### 1.1 Accountable Reimbursement Plan

*Date: 11.2017 (Revised 8.6.2024)*

Ministers and staff shall be reimbursed for any ordinary and necessary business and professional expenses if the following conditions are satisfied:

- The expense clearly supports the work of the congregation and is reasonably necessary to meet the employee's performance objectives and/or job responsibilities.
- The amount of the claimed expenses is reasonable.
- Receipts are provided showing the amount, date, detail of the expense, business relationship and business purpose.
- Funds are available in the individual's professional expense allowance or in an alternate, appropriate budget line as approved in advance by the Executive Team.

Reimbursement requests to the employee or vendor must be submitted to the Church Administrator for processing at least monthly.

Church-issued credit card charges: All receipts substantiating charges to a church-issued credit card must be submitted prior to payment of the credit card statements. Any receipts **for any purpose** not submitted within 60 days of incurring the charge will become taxable to the employee and reported on the employee's W-2. Any charges for **personal expenses** must be reimbursed to the church within 60 days of incurring the charge.

Qualifying expenses include but are not limited to automobile expenses at the IRS standard allowance; conference, meeting and travel expenses; church-related professional development; books, newspapers, periodicals, audio-visual materials and other resources necessary to the employee's performance objectives; professional association dues usual and customary for the position; clerical gowns, robes and religious garments; meals within IRS limits; cell phone, long distance calling and internet expenses incurred in the service of First Unitarian; equipment necessary for the performance of the minister or staff member's duties. For questions regarding eligibility of expenses, the employee should consult the Church Administrator or Senior Minister prior to incurring the expense.

Expenses not covered include, but are not limited to: beer, wine or liquor; personal travel expenses such as dry cleaning, spouse travel/meals and other personal items; gifts, except those to recognize volunteers.

All receipts and documentation submitted must be original – copies are not acceptable.

Excess reimbursements/advances: Any congregational reimbursement or advance that exceeds the amount of business or professional expenses properly accounted for under this plan must be returned to First Unitarian within 120 days of after the associated expenses are paid or incurred by the minister/staff and shall not be retained by the

minister/staff. Note that all items with an initial value in excess of \$75 remain the property of First Unitarian; in the event the minister or staff member leaves the employ of First Unitarian Church, he/she will reimburse the church for such items at the current market value (determined by such methods as Craig's List or It's Deductible).

Amounts in excess of the professional expense budget line item must be reimbursed to the church within 60 days of incurring the charge.

Tax reporting: First Unitarian Church shall not include the amount of business or professional expenses on the minister/staff member's W-2 form, and the minister/staff member should not report the amount of any such reimbursements as income on Form 1040 except as noted above.

Separate Check: Reimbursements shall be paid by separate check drawn from appropriately budgeted funds and not by increasing paychecks by the amount of the business expense.

Unused budget: Monies budgeted for professional expenses that have not been expended by the end of the fiscal year may not be carried forward to subsequent years. Such monies shall not be distributed to the minister/staff or reallocated as compensation in any way.

Retention of Records: All receipts and other documentary evidence shall be retained by First Unitarian Church under the church's Records Retention Policy.

## 1.2 Budget Process

Date: 1.24.2019 (Revised 9.10.2024)

1. **Consultation with Ministry Teams.** In early November, the Senior Minister and Church Administrator will consult with Ministry Teams and other congregational groups about their budget needs for the coming year and draft a budget.
2. **FOC Review** – At the end of November, the Executive Team will send the budget to the Financial Oversight Committee (FOC) for review. The FOC reviews the draft budget, asks questions, and sends it to the board to review the first week in December.
3. **Board of Trustees Review.** At the December Board meeting, the Executive Team and Board review the budget. The Executive Team notifies any committees or teams with changes to their original requests.
4. **Congregational Discussions.** In January, the Board will hold open gatherings sharing the stewardship theme and budget summary, gathering any concerns and questions from the congregation.
5. **Revised Budget to Board.** In March, the Executive Team will submit a revised budget proposal to the Board for the Board's review. A second congregational discussion about the budget will be held.
6. **Board Finalizes Budget.** In May, the Board and Executive Team finalize the budget.
7. **Presentation of the Budget to the Congregation.** On the first Sunday in June, the Board presents the annual budget to the congregation for approval.

### 1.3 Capital Maintenance Fund

*Date: 8.13.2019*

#### **PURPOSE:**

The purpose of the Capital Maintenance Fund is for non-routine repair, improvement or replacement of items of significance with the existing building, grounds and equipment. "Items of significance" are defined as items for which the cost of non-routine repair, improvement or replacement would equal or exceed \$2,500. Documentation on compliance with this policy when expending funds will be reported to the Board in the monthly Executive Report.

#### **FUNDING:**

- a. **Operating budget** - The annual target amount to set aside from the operating budget would be \$1 per square foot of building space annually (currently \$23,000). The total amount of the fund would be capped at 2% of total gross fixed asset cost less land cost on the balance sheet at June 30 of each fiscal year.

These funds will be segregated and accounted for separately as Capital Maintenance within the operating fund of the church.

- b. **Restricted contributions** – Contributions specifically restricted by the donor for the Capital Maintenance Fund will be segregated and accounted for as a restricted asset of the church.

Funds may be transferred to other church funds in accordance with the Executive Limitations included in Board policy. These funds will be budgeted and expended by the Executive in accordance with Board policy (current policy requires two informal quotes required for expenditures from \$2,500 - \$4,999.99 and two competitive bids or sole source justification for expenditures over \$5,000) and reported in the financial statements of the church.

## 1.4 Check Signing

*Date: 10.2.2019 (revised 8.6.2024)*

All checks, drafts, or other order for the payment of money issued in the name of the church shall be signed, physically or digitally, by the Senior Minister, the Church Administrator, the President of the Board of Trustees, or the Vice-President of the Board of Trustees.

All such checks, drafts, or other orders for payment of funds equal to or exceeding \$1500.00 must be signed, physically or digitally, by no fewer than two of the individuals holding the titles referenced in the above paragraph.



## 1.5 Fixed Asset Capitalization

*Date: 5.2012*

Effective for the fiscal year beginning July 1, 2009, all capital purchases over \$1,000 with an estimated useful life of more than one year will be capitalized.

## 2.0 Administration

### 2.1 Alcohol Use Policy

*Date: 4.1.2024*

If alcoholic beverages are to be served, the responsible party agrees that no alcoholic beverages will be sold on the premises at any time, either directly or indirectly, through voluntary contributions or otherwise. There shall not be present a container available for the deposit of coins or bills. It is understood that the Church does not have an Iowa State Liquor License, which must be held by any establishment to legally provide liquor for the receipt of money.

Alcoholic beverages allowed include beer, wine, and champagne.

If alcoholic beverages are served, this Alcohol Policy Agreement must be signed. The responsible party also agrees to use proper discretion in the dispensing of alcoholic beverages. No alcoholic beverages shall be served to or by anyone under the legal age of drinking on the premises and the responsible party will not allow an intoxicated person to drive a motor vehicle from church property. All Iowa laws and Des Moines City ordinances shall be followed by the responsible party.

The responsible party agrees to indemnify and hold harmless the First Unitarian Church of Des Moines, its employees and members for any damages or legal fees which may be sustained as a result of serving alcoholic beverages at any function held on Church property.

Print Name: \_\_\_\_\_

Responsible Party Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
*(Must be 21 years of age to sign)*

## 2.2 Building Use Policy and Procedures

*Date Revised: 8.8.2024*

### **PURPOSE:**

The First Unitarian Church of Des Moines believes our building and grounds are an important asset that should be used by members of the Church community and by community organizations with compatible objectives.

### **RENTAL POLICY**

The building and grounds of The First Unitarian Church of Des Moines is first and foremost for the use by the church for its programming. Space and time permitting, it is then available for rentals by members and community members for other activities as defined in our building usage agreement, so long as those activities align with the church's vision and values. In most cases, the Church expects the costs of usage to be covered by rental fees, and therefore, will request payment from the organizations or persons for requested areas.

The final determination of usage and rates will be made by the Church Administrator in consultation with the Church Minister.

### **LIMITATIONS OF USE**

Groups renting space in the church may not engage in partisan political activity, i.e., activity that supports one political party's tenets to the exclusion of other options, or events that are designed exclusively for member of one political party or the other.

Activities that provide an exchange of ideas, information or views on a particular political topic are welcome, such as candidate debates, informational forums, and other such activities. Final determination of what consists of "church's values" will be made by the Church Administrator in consultation with the church minister.

### **BUILDING ACCESS**

The rental coordinator will work with renters to determine their access needs and timing. Once approved, renters will be provided with information on how to access the building and how to secure the building near the time their rental begins.

The rental coordinator will verify the building is secure once the renters have vacated the building.

### **BUILDING USE SCHEDULING**

1. Persons interested in renting the facilities must talk with the rental coordinator to verify that the desired date and space is available and that the beliefs of the

person/group are consistent with the Church's beliefs. If the beliefs are at odds, the Minister or Church Administrator will decline the rental request.

2. The rental coordinator will help the applicant complete the rental portion of the Building Usage Agreement so it is clear to both parties what rooms will be used and whether a building coordinator will be required. Fees will be determined at this time.
3. The applicant will submit the completed Building Usage Agreement, signed Terms and Conditions of Building Use and signed Alcohol Use Policy forms, if applicable, to the rental coordinator with the requested deposit for the space to be reserved. All signers must be over 18 years old, except for the Alcohol Policy, where signers must be over 21 years old.
4. Once all completed documents are signed and submitted and the deposit paid, the rental coordinator will add the rental to the church calendar and secure the date and time requested.
5. The rental coordinator will then schedule a time to review the building procedures, equipment needs and access requirements with the renter.
6. If requested, the renter will provide the rental coordinator with a copy of a certificate of insurance, naming The First Unitarian Church of Des Moines as an additional insured two weeks prior to the scheduled event.
7. All events need to conclude no later than midnight, including clean up. Given the residential nature of the area, noise needs to be controlled after 10 PM.

## **DEPOSIT**

1. Rental deposits are due when the Building Use Agreement is signed. The deposit covers any damage to the facility, equipment, and contents, and guarantees the space reservation.
2. Notification to the rental coordinator of the cancellation of the space reservation less than 30 days prior to the rental will result in forfeiture of the deposit.
3. The deposit will be "returned" by providing a credit to the final invoice for the rental if all provisions of this policy and the Building Use Agreement, Terms and Conditions of Building Use and the Alcohol Policy are complied with.
4. The Minister or Church Administrator reserves the right to assess fees if damage occurs during the rental or special clean-up is required following the event. The Minister or Church Administrator also reserves the right to cancel any further use of the facilities or grounds by the tenant.

**Deposit:**     \$100 for rentals \$100 or less  
                   \$200 for rentals \$100 or more  
                   \$500 for weddings

**RENTAL FEES**

1. The Minister or Church Administrator may waive aspects of the Building Use Policy and Procedures to groups that have been denied the right of assembly at other locations or would be unable to meet some part of our policy/procedures. The Minister or Church Administrator is authorized to determine if a group may qualify for this consideration.
2. Rentals for a series of meetings or classes should be paid before the start of classes. The assessed fee is based on each meeting.
3. The rental fee is based on the time the building is opened through clean-up.
4. Rental charges are based on Type of Event, space requirements and resources needed.

**TYPE OF RENTAL:**

<b>Type A Events Donation</b>	<b>Type B Events 50% Discount</b>	<b>Type C Events Full Price</b>
Congregational events, ministry teams, committees, or donation only; member sponsored groups for education or philanthropic activities and no admission fee will be charged; not-for-profit groups that serve the community and Unitarian Universalist values, such as Alcoholics Anonymous; member weddings if their yearly pledge covers the cost of the wedding rental.	Members of First Unitarian Church of Des Moines using the facility for personal events, outside meetings that are not church supported or do not charge admission or tuition, members whose pledge does not cover the cost of the rental.	Community members using the church, weddings, memorial services, social events, parties, receptions, or groups who charge admission/tuition for an event.

<b>Spaces:</b>	<b>Fee Per Hour</b>	<b>One Time Fee</b>
Auditorium (no food/beverages)	\$150	
Mary Safford (no food/beverages)	\$50	
Griffin Hall & Gathering Area (includes basic kitchen)	\$150	
Kitchen (Basic – beverages/snacks or catered)	\$50	
Kitchen (Full)	\$125	
Classroom/Patio/Stonewall Conference Room	\$50	
<b>Wedding Package 1</b> – Wedding and Reception (includes auditorium, Mary Safford, 2 classrooms, Griffin Hall and Kitchen) – up to 8 hours including rehearsal	--	\$1500
<b>Wedding Package 2</b> – Wedding Only (includes auditorium, Mary Safford, and 2 classrooms) – up to 5 hours including rehearsal	--	\$500
<b>Wedding Package 3</b> – Reception only (includes Griffin Hall and Kitchen) – up to 6 hours	--	\$1000

<b>Other Fees:</b>	<b>Fee Per Hour</b>
Pianist	\$50
AV Technician (required to use our equipment)	\$25
Childcare (must have 2 people, not always available, check with the rental coordinator)	\$15 each

### RESOURCES AVAILABLE:

<b>Spaces:</b>	<b>Resources</b>
Auditorium	Soundboard, microphones, screens, audio assistive technology, Zoom capabilities
Griffin Hall	Audio and microphones, screens and Zoom capabilities
Stonewall Conference Room	Screen and Zoom capabilities
Kitchen	Refrigerator, multiple sinks, two dishwashers (one commercial), two ovens and induction stovetop. Dishes, cups, silverware, compostable napkins, dishtowels, cookware, and other supplies are available. The kitchen is ADA compliant, has a range-hood fire suppression system and is “green.” The refrigerator does not have an icemaker, so bring ice if needed. Coffee and coffee accessories are included. <b><i>Must meet with a kitchen coordinator before use.</i></b>
Classroom	Screen and Zoom capabilities

## USAGE

1. Kitchen – any use of the kitchen requires training. The kitchen team will audit the cleanliness of the kitchen after reserved use.
2. Building Coordinator – if your event needs a building coordinator to assist during your rental, please contact the rental coordinator to set this up. Fees may apply depending on the level of involvement you need for your event.
3. Cleaning – we are unable to clean up after your event. However, we've ensured supplies are curated and available for your use. Those who use the building in any capacity are asked to clean up after the event. Failure to do so may lead to a loss of rental deposit.
4. Set Up-Take Down – We are unable to set up for your event or re-set afterwards. Please take a picture of the space prior to rearranging it so you can re-set it as you found it. In Griffin Hall, there is a “blank slate” drawing to assist.
5. Linens – you will need to provide your own linen service for tables.
6. Alcohol Use – Please refer to our Alcohol Use Policy for further details. If alcohol is served, only wine, beer and champagne may be served. NO alcoholic beverages may be sold on the premises at any time, either directly or indirectly, through voluntary contributions or otherwise. There will NOT be a container available for coins or bills. No one under the legal age will be served alcohol. The responsible party will not allow an intoxicated person to drive a motor vehicle from church property. All Iowa laws and Des Moines city ordinances must be followed by the responsible party. It is permissible to distribute alcohol in amounts no more than 2 tablespoons per person during a religious sacrament/ceremony.

## 2.2a Building Use Agreement

Event Date: \_\_\_\_\_ Open Time: \_\_\_\_\_ Close Time: \_\_\_\_\_ Event Time: \_\_\_\_\_

Responsible Party: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Organization & Purpose of Gathering: \_\_\_\_\_

AV Equipment Needs? \_\_\_\_\_

Musician/Childcare Needs? \_\_\_\_\_

Estimated # of Attendees: \_\_\_\_\_ Alcohol? \_\_\_\_\_ YES \_\_\_\_\_ NO

Church Member \_\_\_\_\_ YES \_\_\_\_\_ NO Affiliated Group \_\_\_\_\_ YES \_\_\_\_\_ NO

Space	Fee per Hour	One Time Fee	# Hours	Charge
Auditorium (no food/beverages)	\$150			
Mary Safford (no food/beverages)	\$50			
Griffin Hall & Gathering Area (includes basic kitchen)	\$150			
Kitchen (Basic – beverages/snacks or catered)	\$50			
Kitchen (Full – full meal prepared in kitchen)	\$125			
Classroom/Patio/Stonewall Conference Room	\$50			
Wedding Package 1 – Wedding and Reception (includes auditorium, Mary Safford, 2 classrooms, Griffin Hall and Kitchen) – up to 8 hours including rehearsal	--	\$1500		
Wedding Package 2 – Wedding Only (includes auditorium, Mary Safford, and 2 classrooms) – up to 5 hours including rehearsal	--	\$500		
Wedding Package 3 – Reception Only (includes Griffin Hall and Kitchen) up to 6 hours	--	\$1000		
Pianist	\$50			
AV Technician (required to use our equipment)	\$25			
Childcare Worker (not always available, check with the rental coordinator – must have 2 workers)	\$15 each Min 2 hrs			

**Total Estimated Charges: \$** \_\_\_\_\_

Special Requests: \_\_\_\_\_



## 2.2b Terms and Conditions of Building Use

### **ACCESS AND MARKETING:**

- If you are given an access card, you are the sole person responsible for the card and may not give the card to anyone. You are also responsible for returning the card immediately after your event is over. If the alarm is activated, you will be responsible for paying the \$200 penalty fee. If you lose the card, please notify the rental coordinator immediately so access can be disabled. There will be a fee of \$25 for lost cards.
- No renter may advertise the Church name in their marketing or promotional literature as a sponsoring organization without written approval from the Minister and/or Church Administrator, unless it is a church event or affiliated organization event. Non-church events are prohibited from listing the church's phone number on advertising materials as a contact number for further information. The renter is responsible for providing all necessary information and registration, including directions, to those who may need them.

### **CONDUCT:**

- You are responsible for the participants' conduct and any damage to the building, equipment, or grounds or personal injury to members or guests. The Minister and/or Church Administrator may require your group to provide your own insurance to cover congregational facilities and property during your event with a one-time rider policy presented with the rental agreement. The Minister and/or Church Administrator reserves the right to cancel any permission granted and will not be liable for any costs incurred by the renter.
- Children must be supervised whether the nursery has been rented or not.
- Only service animals are allowed in the building during rentals without prior approval.
- Smoking is prohibited throughout the building.
- Possession and/or use of controlled substances not prescribed by a physician, and unruly behavior are prohibited. Possession and/or use of firearms and/or dangerous weapons is prohibited unless firearms are part of professional security for an event.
- Given our location in a residential neighborhood, we ask that noise be limited especially for events extending past 10 PM. All events, including clean up, should end no later than midnight.

- Use of the facilities shall be strictly limited to those areas designated and approved in the Building Use Agreement. Whenever special equipment is required, a Congregational Representative may be assigned to your event, at additional cost. This cost will be determined by the time the person must be present to complete their responsibilities. This representative shall have complete authority concerning the use of the facilities and grounds.

#### **PARKING AND POLICE/FIRE ASSISTANCE:**

- Parking is restricted to the parking area east and south of the church. If you feel you need additional parking, you may contact the nearby businesses to gain approval to use their parking areas. Do not use their parking lots without gaining permission first.
- If the nature of your event requires special police, chaperones, and/or fire protection, these expenses are your group's obligation. The Minister and/or Church Administrator reserves the right to require that police, chaperones, and/or fire protection be provided along with a one-time insurance rider if concerns exist regarding safety and the well-being of participants and the facilities.

#### **DECORATIONS AND CLEAN UP:**

- You may provide your own decorations. No decorations shall mark or damage the walls, windows, floors, fixtures, ceilings, tables or any other part of the building or its contents. The following may NOT be used: glue, pins, tacks, nails, staples, screws, or tape. Blue delicate surface painters tape MAY be used but even this tape can cause damage. No candles are allowed except for votive candles in an appropriate votive candle holder, battery operated candles, or for a wedding ceremony, candelabras with glass globes. All decorations must be removed at the end of the event. No part of the Church may be damaged or marred by any decorations or other items affixed to the walls, floors, or ceilings. All costs incurred to repair such damage will be deducted from the deposit and any remaining deposit will be refunded. If any of the damages exceed the amount of the deposit, the renter will be billed for those charges more than the deposit.
- The renter is responsible for setting up and cleaning up all areas used. Supplies are provided for you. All items brought to the facility for the event must be removed prior to the agreed-upon building closing time. If kitchen equipment is used, further information will be supplied. Leftover food may NOT be left in the kitchen without approval from the Minister or Church Administrator. Failure to properly tidy/clean the space will result in a fee. Trash bags will be provided to you and all trash/recycling should be placed in the receptacles located in the south parking lot.

**OTHER:**

- The Church is not responsible for individual property that is lost, stolen or damaged. Security, if needed, must be provided, and paid for by the renter.
- All payments must be made two weeks (14 days) before the event starts. Failure will result in event cancellation and the deposit will not be refunded.

The responsible party hereby agrees to defend, indemnify and hold First Unitarian Church of Des Moines, as well as all of its employees, agents, representatives, affiliates, contractors or invitees, harmless from any and all claims, causes of action, judgements, suits and/or demands of every nature instituted by any other person or entity, claiming the First Unitarian Church is liable, in whole or in part, directly or indirectly, for any injuries or damages claimed to have arisen out of the renter's use of First Unitarian Church pursuant to this agreement.

\_\_\_\_\_  
Signature of Responsible Party (*must be over 18 years of age*)

\_\_\_\_\_  
Date

## 2.3 Childcare Policy

*Date Revised: 8.6.2024*

Welcome to First Unitarian Church of Des Moines! We noticed you had a child with you when you first visited and wanted to provide you with some basic information about our childcare program. Childcare is provided so that individuals and families with children can participate in the church's programming. If there is a program that you would like to attend, but cannot because of a need for childcare, please contact the Faith Formation and Congregational Life Coordinator.

### Sunday Morning Childcare:

Childcare is routinely provided each Sunday morning from 9:15 am until after the end of the forum. These times may change as the service times are adapted throughout the year.

Traditionally we offer Infant / Toddler care for children 3 years old and younger. Children 4 years and older are encouraged to participate in Religious Education classes.

There are times when we have no Religious Education Classes and the ages for childcare are expanded to accommodate those slightly older, but still uncomfortable sitting through an hour long program. This would need to be coordinated with the childcare staff and approved before dropping an older child off.

Adults who bring children to the childcare room should sign in on the clipboard provided, including child's name, medical concerns (allergies, recent illness), and parent's name.

Parents are required to stay on church grounds.

Childcare workers are not permitted to dispense prescription or over-the-counter medication to children.

The church does not provide diapers, extra clothing, or blankets; children must come with their own supplies.

Our goal is to provide two childcare workers or volunteers in each of the childcare rooms. Junior and senior high youth are welcome to work with at least one adult assigned to each room. All staff and adults who volunteer in the childcare rooms will be required to submit to a criminal background check.

Children are not to be left alone in the childcare room at any time, either by parents or staff.

Mid- Week/ Multi-aged Childcare:

If childcare is provided for an event or midweek class, it will be available 15 minutes before an event begins. Children should be picked up no later than 10 minutes after the conclusion of the event.

Parents must never leave church grounds when using childcare.

Every effort will be made to provide childcare as scheduled; however, should unexpected circumstances due to weather or illness occur preventing childcare from being available, a parent volunteer may be recruited to offer childcare services, or a cancellation notice will be posted.

## 2.4 Disposition of Furniture and Equipment

*Date Revised: 8.6.2024*

The church will dispose of furniture and equipment that is no longer functional or useful in a manner that serves the best interests of the church community keeping in mind the desire of the church to use “green processes” when available.

When an item of furniture or equipment is determined to be no longer functional or useful, the Church Administrator will be notified so a determination of method of disposition can be made.

When the Management Team determines an item of furniture or equipment no longer has value or usefulness to the church, it will be **disposed of in one of the following ways:**

1. Furniture of minor value and old computer equipment may be offered to church members for haul away. Any remaining items will be donated to a non-profit, charitable organization and/or recycled through the best available alternative available.
2. Items not covered by the above will be sold through sealed bids, auction or publicly advertised sale with any proceeds from such sale being deposited to the operating fund of the church.
3. Trade-in allowances on any item of equipment being replaced or upgraded may be accepted.

## 2.5 Document Retention

*Date: 5.2012*

This policy provides guidelines for the retention of documents relating to the operation of the church. Many of these documents will be physically stored in the church archives room although they are not considered part of the archives. The church “archives” will maintain their own guidelines for other church documents of historical significance.

The following documents should be kept for a minimum of three years:

- Duplicate bank deposit slips
- Employment applications and interview materials of those not hired
- Petty cash vouchers
- Pledge records

These documents should be kept five years:

- Authorization to perform background checks and the results obtained

These documents should be kept a minimum of seven years:

- Accounts payable ledgers
- Bank reconciliations and bank statements
- Cancelled checks
- Monthly financial statements
- Loan payments and schedules
- Payroll registers
- Personnel records after termination
- Time sheets
- Vendor invoices
- Vouchers of payments to employees for reimbursements, allowances, etc. (filed with vendor invoices)

These documents will be kept permanently:

- Annual Financial Statements
- General Ledger (called Account Analysis in Power Church) by fiscal year
- Depreciation schedules
- Articles of Incorporation and by-laws
- Audit reports
- Board meeting minutes
- Contracts and Leases in effect
- Expired contracts and leases
- Insurance Policies, including expired policies
- Payroll tax returns, including Form 941, 1099, W-2, W-3, and state withholding returns
- Real property documents including closing statements, appraisals, deeds, mortgages, special assessment and property tax records and related cancelled checks

- Real estate records for as long as property is owned plus three years after disposition
- Securities owned, detailed records of purchases, sales, dividends and investment expenses

Each year, records should be purged and shredded according to these guidelines. The Church Archives committee has established the following guidelines for retention of information for archives purposes:

- Minutes of the meetings of the Board of Trustees, including financial report to Board
- Annual Reports (the minutes of the Annual meeting of the church congregation)
- Information about “special” financial operations of groups within the church, such as:
  - a) Capital fund drives
  - b) Endowment Fund
  - c) Bequests and gifts to the church or some of its sub-sets, such as:
    - Memorial garden
    - Items for kitchen
    - Contribution of funds for special needs of the building and grounds
    - On-going church involvement in community-wide projects (such as second basket offering/collections) and AMOS projects’ costs
  - d) “Isolated” one of a kind financial events, such as:
    - Sale of church lands or building
    - Purchase of new church lands or buildings



## 2.6 Inspection of Church Records

*Date Revised: 8.6.2024*

Board policy (Board Policy on Inspection of Church Records) establishes accessibility guidelines for access to church records. This policy explains how access will be implemented.

Summary budgetary information will be available:

1. At budget forums scheduled annually in April.
2. Printed in the Annual Meeting booklet.
3. By written request (email is sufficient-admin@ucdsm.org) to the Church Administrator.

Minutes and agendas of meetings of the board or membership will be made available on the church website.

Access to other information specified in the Board policy, including (1) A record of names and addresses of all members, or (2) Accounting records, to include line-item budget detail will be made available in the following manner:

1. By written request (email is sufficient) to the Church Administrator with a specific description of the information being requested.
2. The request should specify if the requestor wishes a copy (electronic or paper) of the information or wishes to examine the records in person at the church office.
3. If the requestor wishes to examine the records in person, a time must be scheduled in advance with the Church Administrator or the Church Administrator's designee during regular business hours, excluding holidays.
4. A maximum of ten business days should be allowed for the request to be fulfilled. If a longer period of time is necessary to fulfill the request due to the complexity of the request, the Church Administrator will communicate that information to the requestor and provide an approximate date when the request can be fulfilled.

## 2.7 Network and Password Security (Church members)

*Date: 5.2012 (Revised 8.6.2024)*

The secure church network is for church-related business and communications. Access to the network is available for authorized church business. Access to the unsecured church wi-fi network is available for members and guests.

This policy is to ensure three goals are met:

- **Confidentiality** – authorizing people to have access only to information that is needed for the required task(s).
- **Integrity** - maintaining the value and the state of information so it is protected from unauthorized modification.
- **Availability** - ensuring that information and information systems are available and operational when they are needed to support the church's processes.

Any software or other material downloaded to church-owned 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 Church Administrator is required before introducing any software into the church-owned computer system.

Inappropriate use includes, but is not limited to:

- transmitting obscene, harassing, offensive or unprofessional messages.
- 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.
- transmitting any of the church's confidential or proprietary information, including member/friend data or other materials.
- Engaging in illegal activities.
- Uploading a virus, worm, or other harmful component to vandalize the network.

Access to the church network should be requested through the Church Administrator. The request should include a description of the reason or purpose for the access and the period of time for which access is requested.

By accepting a user ID and password, you agree to adhere to this policy. User ID and password information must not be shared with any other church member or staff person to protect the integrity of the church network and the confidentiality of data.

Violation of any provisions of this policy will result in termination of access rights.

## 2.8 Placement and Planting of Items on Grounds and Woods

*Date Revised: 8.6.2024*

Any request for changes (addition to or removal from, including flowers, shrubs, trees and grasses) to the Grounds and Woods must be submitted to the Grounds Council, through the Council leader, for review and recommendation to the Management Team of the action on the request.

Changes must be consistent with UU principles, the Woods Master Plan and/or any other future developed plans. Aesthetics of any additions must be consistent with the church building exterior and existing landscaping and/or structures. Any structures such as art/sculptures, arbors, play equipment, trail entry features, etc. must be structurally sound, meet safety requirement of the city, state and/or federal government and be installed to ensure the safety of the structure and of individuals using the structure or on the grounds. In addition, any zoning requirements must be met.

Information to be submitted in the request for an addition should include:

1. Sponsoring/requesting group (including contact name, email address and phone number) or individual's name, email address and phone number
2. Detailed description and photo/drawing of the item
3. Cost and source of funding
4. Specific description of location to be placed on the grounds
5. Start date and completion date
6. If on-going maintenance is required, a specific plan for maintenance must be submitted with the request including who will perform the maintenance, frequency of maintenance, cost of annual maintenance and source of funding for the maintenance.

Information to be submitted in a request for a removal should include:

1. Sponsoring/requesting group (including contact name and phone number) or individual's name
2. Specific description of location and item(s) to be removed
3. Reason for the removal
4. Cost and source of funding
5. Start date and completion date
6. If repairs to the ground, soil, etc. are necessary after the removal, include a detailed description of the repair work necessary, who will perform the repairs, estimated cost, and source of funding.

No banners, signs or similar items may be placed on the grounds of the church without the prior approval of the Church Administrator.

## 2.9 Use of Church-Owned equipment

*Date: 5.2012 (Revised 8.6.2024)*

Church-owned equipment is defined as any piece of equipment purchased with church funds or accepted by the Management Team as a donation to the church. The basis of this policy is to safeguard the equipment from damage or loss.

This equipment includes, but is not limited to,

- Sound system equipment
- Stage lighting
- Musical equipment
- Chairs and tables
- Audio-visual equipment
- Kitchen equipment and tablecloths
- Ladders
- Classroom equipment and supplies
- Assistive medical devices such as wheelchairs and walkers

Church-owned equipment is for use within the church building for church events and rental events. This equipment is not for the personal use of church members. However, the assistive medical devices are used as part of Caring Ministry and as such, may be loaned to church members for temporary use. The Caring Ministry volunteers are responsible to track the assignment and return of this equipment.

If a church member desires to borrow church-owned equipment for a church-related event on private property (such as a Food Fair event) or for use by a church-sponsored group (such as AMOS), the member should contact the Church Administrator to determine if the equipment can be temporarily loaned to the member. The Church Administrator will consider, among other things, the availability of the equipment in relationship to other church events during the same time period, the type of equipment requested for use, the beginning and ending date of the loan and the location of the event. If the use of such equipment is granted, arrangements for pick-up and return should be made with the Church Administrator. The church member is responsible for the safe transportation, storage and appropriate usage of the equipment when not on church property.

## 3.0 Member Activities

### 3.1 Forums

*Date Revised: 8.12.2024*

#### **Definition of a Forum**

For the purpose of this policy, forums will be defined as assemblies or presentations for the purpose of discussing and becoming informed of public matters. Forums can be a one-time topic or a series of discussions to present different aspects of a complex issue. Forums will be held 30 minutes after the conclusion of the service on Sunday mornings.

#### **Guidelines for Forums:**

The topic of a forum shall fit within the goals statements of First Unitarian Church of Des Moines and relate to the UUA covenant or at least one of the seven UU principles. All discussions of a topic or presentation must be respectful of multiple points of view. The primary purpose of a forum cannot be for commercial reasons. i.e. selling of products.

#### **Scheduling a Forum**

The Adult Programming Team is responsible for scheduling all Forums. An individual or group of the church considering proposing a forum must first consider if the topic fits within the stated guidelines. If so, the individual or group shall contact the Adult Programming Team to propose the Forum topic.

## 3.2 Fundraising

*Date: 4.2011 (Revised 8.26.2024)*

Fundraisers are an important part of active church life, providing opportunities for our members to strengthen their commitment and contribution to the church as well as providing funds for the church, its groups and programs, and pre-approved charitable causes.

The purpose of this policy is to establish guidelines for reviewing fundraisers and fundraising activities proposed by church groups or individuals for any purpose, by any means and at any location.

The purpose of the review is to ensure that our fundraising activities are consistent with our not-for-profit status; that we are not overburdening the congregation with requests for money; and that the use of church resources is consistent with the church's Ends Statements focused on the highest priority needs, and consistent with the approved church budget.

Fundraising activities at First Unitarian Church fall into two broad categories (these are examples but are not limited to the listed activities):

### **1. Budgeted fundraisers**

- a. Examples may be the Food Fair and Progressive Voices Concert Series.

### **2. Non-budgeted fundraisers**

- a. Fundraisers that support church-related causes
  - i. Examples may be Youth Group cookie dough sale and Memorial Garden plant sale.
- b. Fundraisers that support non-church-related causes
  - i. UUA-related – to be held at the minister's discretion, in consultation with others as determined necessary by the circumstances.
    1. Examples may be UUSC or UUA Association Sunday.
  - ii. AMOS-related sales of tickets, etc. where the receipts go to AMOS – to be held at the minister's discretion, in consultation with others as determined necessary by the circumstances.
  - iii. Assisting other UU congregations when a natural disaster strikes – to be held at the minister's discretion, in consultation with others as determined necessary by the circumstances.
  - iv. Fundraisers for Persons or other non-profit, non-church related events
    1. Examples would include, but are not limited to, public or private school or club fundraising sales, sales by individuals related to non-church groups or events, fund raisers for other non-profit sponsored events for which the non-profit is NOT affiliated with First Unitarian Church of DM. Such non-church related sales may not have an established sales

location (table) before or after services, at church-related events or in the building.

### 3. Exemptions from the policy

- a. Sales of books, CDs or other items by guest speakers, musicians and others whose appearance is otherwise approved by the Minister or Director of Music.
- b. Activities pursuant to a rental agreement where a rental fee is paid.

### Procedures for requesting permission to hold a non-budgeted fundraising activity:

1. The church members, church committees or staff members (sponsor) who wishes to raise funds in excess of \$100 per event from the church community shall complete a written Fundraising Planning Form outlining the purpose of the fundraiser, a description of the event, the means by which those funds will be raised, the time schedule, location, and other pertinent information requested on the Form. The sponsor is required to adhere to the information submitted on this form. If any changes occur after submission and approval, the sponsor must immediately notify the Church Administrator in writing by sending an email to [admin@ucdsm.org](mailto:admin@ucdsm.org).
2. Games of chance, raffles, gambling or similar activities involving risk must be conducted in accordance with Iowa Code Chapter 99B and any applicable Iowa Administrative Rules.
3. The sponsor should contact the Office Manager prior to submission of the form to determine the availability of the desired space and date on the church calendar for the proposed fundraising activity.
4. When funds anticipated to be raised are to be less than \$100 for the event, the sponsor should contact Office Manager to ensure there is no conflict on the date planned.
5. The Fundraising Planning Form should be submitted to the Church Administrator a **minimum** of four weeks prior to the anticipated event date.
6. The Executive Team, in consultation with others as necessary, will approve or deny the request within 14 days of receiving the request. If the request is denied, i.e. does not meet the criteria in this policy, the reasons will be conveyed in writing to the sponsor.
7. Approval must be obtained before any material expenses are incurred.

### Criteria:

1. The activity supported by the fundraiser meets the principles of Unitarian Universalism and the First Unitarian Church of Des Moines Ends Statements.
2. Are consistent with our not-for-profit status.
3. Avoid overburdening the congregation with requests for money. Criteria to be considered in this evaluation include the two broad categories of fundraising

activities above, Budgeted and Non-budgeted Events, in the priority order as listed.

4. The Fundraising Planning Form clearly defines the purpose of the fundraiser, the means by which the funds will be collected, the beneficiary of the raised funds and the time schedule.
5. The fundraising activity does not conflict or overlap with other church fundraising activities or goals. Exceptions to this may be determined by the Executive Team depending on the timeframe(s) of the requested activities, who will be solicited in the activity and the anticipated amount of funds to be raised.

### **Procedure for processing funds:**

All proceeds collected will be deposited in the safe in an envelope that clearly identifies the contents as money for the name of the fundraiser immediately following the event. Cash donations received at the event will be counted and signed for by two church members. Checks should be made out to First Unitarian Church of Des Moines. A notation should be made on the face of the check to indicate the purpose of the donation.

Bills related to the fundraising event will be paid in accordance with regular Church policy for payments. Any costs related to the fundraiser shall be consistent with the intent of the fundraiser as written on the Fundraising Planning Form. In no case shall costs exceed receipts.

Event sponsors should be prepared to provide receipts to donors when requested. (The purchase price of a raffle ticket is not deductible.) Such receipts should include language as follows: "The contribution to First Unitarian Church of Des Moines is tax-deductible net of the value of any goods or services provided in conjunction with the donation. Furthermore, it is understood that this contribution is offered apart from any pledge or other commitment by the donor to the church."

### **Other:**

A church-wide calendar of fundraising activities will be maintained by the Office Manager.



### 3.2a Fundraising Planning Form

#### **Fundraising Guidelines:**

1. The Executive Team must approve any fundraising efforts.
2. This form must be presented to the Church Administrator, and information listed below must be provided before approval.
3. This form should be submitted **a minimum of 4 weeks prior** to the event, unless waived by the Executive Team.

#### **Required Information:**

Date of Request: \_\_\_\_\_ Date of Activity/Event: \_\_\_\_\_

Person/Team making the Request: \_\_\_\_\_

Phone and/or email of Requestor: \_\_\_\_\_

Where will the Event/Activity occur: \_\_\_\_\_

Description of the Event/Activity: \_\_\_\_\_

Who will participate in the Event/Activity: \_\_\_\_\_

Who will be solicited to contribute to the Event/Activity: \_\_\_\_\_

Who will organize/supervise/chaperone the Event/Activity: \_\_\_\_\_

Who will be responsible for the collection of any monies: \_\_\_\_\_

What facilities, equipment and supplies will be needed from the church: \_\_\_\_\_

Who will be responsible for cleanup at the conclusion of the Activity: \_\_\_\_\_

Who will be responsible to deposit funds collected with the Church Administrator and authorized payment of bills for the activity: \_\_\_\_\_

Will Matching Gifts be requested? \_\_\_ YES \_\_\_ NO If yes, what organization: \_\_\_\_\_

Has the organization been notified? \_\_\_ YES \_\_\_ NO

Has the organization approved the Event and the matching gift applications:

\_\_\_ YES \_\_\_ NO

Contact person at the matching gift organization: \_\_\_\_\_

Phone number and/or email address for matching gift organization: \_\_\_\_\_

### 3.3 Memorial Garden

*Date Revised 8.13.2024*

The Memorial Garden is a special place where members may honor loved ones or find a peaceful place for the interment of cremated remains. It is a living reminder of the contribution of our members – past and present – have made to our church community.

The Memorial Garden Fund is used for the long-term care and maintenance of the garden.

The Memorial Garden is available for the interment of cremains of current or past church members. The cremains must be prepared by a mortuary in a biodegradable cloth bag for interment in a designated area as part of a special commemoration service. Although markers are not allowed, a grid drawing of the garden will be provided reflecting the location of the cremains. A plaque is displayed near the garden, listing the names of those interred. Only the names of those interred will be inscribed. There is no fee for interment of cremated remains. Donations to the Memorial Garden Fund are encouraged in whatever amount the individual's family, or other designee, wishes. Also, cremains may be scattered rather than interred upon request.

A memorial brick or granite paver may be purchased and placed in the walkway through the garden. Either one may be engraved to honor a loved one, celebrate a milestone in someone's life or commemorate a contribution to the garden. Individual monuments are not placed in the Memorial Garden so as to maintain a balanced, respectful and consistent aesthetic and feel in the garden and to afford an equality of treatment of all who are interred there.

The location of the garden is intended to be permanent. If the church should ever move, a symbolic shovel of dirt from the garden and the memorial plaque will be moved to the new site.

The garden is available for small gatherings that include weddings, memorial services, meetings and classes. It is also meant to be used as a place for private contemplation.

Contact the Church Administrator for information on interment or on purchasing a memorial brick or granite paver. Contact the Office Manager for reservations to use the garden for an event.

## 3.4 Social Media

*Date Revised: 8.12.2024*

### **Facebook and Instagram Church Accounts**

First Unitarian Church of Des Moines maintains active Facebook and Instagram accounts as part of our communication strategy. These platforms are utilized to share information, attract visitors, and facilitate interactions among interested parties through comments, web links, photos, and more.

### **Content Guidelines for Church Social Media Pages:**

- **Promotion:** These pages will highlight activities and events at First Unitarian, community events sponsored by the church, and activities involving our members.
- **Content:** Posts may include personal comments, photos, web links, and other content related to the church, its members, and activities.
- **Branding:** The pages will feature the church's chalice logo, colors, and other graphics consistent with our brand.
- **Information:** Key information such as the church's global end, contact details, and a link to the church website will be prominently displayed in the bios.
- **Photos:** Photos must be of good quality, and any images of children under 18 require a Photo Release form on file with the Faith Formation Coordinator.
- **Moderation:** Posts will be regularly monitored, and any inappropriate content, including language, photos, or posts inconsistent with Unitarian Universalist values, will be removed. New content will be added several times weekly.

### **Moderation Policy:**

Our Facebook page welcomes contributions that are directly related to First Unitarian and Unitarian Universalism. Posts and comments should be relevant, respectful, and mindful of the UUA's Principles and Purposes. First Unitarian reserves the right to delete any inappropriate content, including but not limited to irrelevant or redundant content, hateful or malicious content, personal attacks, financial solicitations, political endorsements, and content that violates Facebook's terms of use or code of conduct.

### **Administrator Responsibilities:**

Administrators are responsible for monitoring content and ensuring it aligns with the following guidelines:

- Adherence to UU principles and the church's values.
- Avoidance of slander, libel, copyright violations, profanity, off-color humor, and political endorsements.
- Protection of private, personal information.
- Exclusion of commercial advertisements.
- Accuracy and relevance of posted information.

- Timeliness and clarity in announcements.

### **First Unitarian Facebook Group (Members Only):**

This group is an official space for UCDSM members to share church and local events, resources, information, and engage in discussions. Membership is limited to current UCDSM members and staff.

### **Group Membership and Rules:**

- **Eligibility:** Only UCDSM members are eligible to join.
- **Adding Members:** New members are added upon request.
- **Group Rules:**
  - **Diverse Viewpoints:** Diverse viewpoints are welcome, but extended discussions of complex subjects are discouraged.
  - **Confidentiality:** Respect the privacy of group members; what's shared in the group should stay in the group.
  - **Kindness:** Treat everyone with respect, avoiding hate speech and bullying.
  - **Promotions:** Promotional posts should be rare and relevant to the church community. "Go Fund Me" or financial solicitations for individuals must be approved through the administrator first.
  - **Memes (graphics with captions):** Memes should be relevant and considerate of those using screen readers.
  - **Post Length:** Posts exceeding 500 words will be deleted to maintain group engagement.
  - **Impact:** Consider the impact of your words, especially if you hold a position of leadership within the church.
  - **Principles:** Postings should reflect our UU Principles.

### **Accountability and Welcome:**

Our goal is to make this group accessible and welcoming to all members, and a place for positive engagement. Discussions involving marginalized groups should be handled with care to avoid causing harm or discomfort. Administrators reserve the right to address problematic posts and manage group dynamics to ensure a safe and inclusive environment for all.

### **Reinstatement Procedures:**

If a member is removed from the group for a limited time, they may be re-added upon request and completion of certain conditions, such as issuing an apology if necessary. If you have questions or concerns about administrator decisions, you may contact them directly for clarification.

## 4.0 Safety

### 4.1 Inclement Weather Policy

*Date Revised: 8.13.2024*

#### **Weekly Events, Activities, and Office Staff Guidelines for Inclement Weather**

Our church follows the Des Moines Public Schools (DMPS) policy for inclement weather. Please review the following procedures:

##### **1. School Cancelled:**

- **Staff:** If schools are cancelled for the day, staff will not be in the office. Staff will work remotely, if they are able.
- **Church Events:** All church events and activities will be cancelled.

##### **2. Late Start:**

- **Staff:** If DMPS has a late start, staff may choose to work from home for the day or come into the office in the afternoon.
- **Church Events:** Morning church events will be cancelled. Afternoon and evening events will proceed unless the event leader decides otherwise.

##### **3. Early Dismissal:**

- **Staff:** If DMPS dismisses early, staff will be sent home to finish their workday remotely.
- **Church Events:** Morning church events will continue as scheduled. All afternoon and evening events will be cancelled.

#### Staff Guidance:

- **Travel Safety:** Always use your best judgment when traveling during inclement weather. If you are uncomfortable driving or unable to work due to local weather conditions, notify your supervisor to arrange to work from home.
- **Alternative Work Options:** If you are unable to work from home, you may:
  - Work another day during the same pay period.
  - Use earned vacation time (if available).
  - Note: If none of these options are feasible, missed hours cannot be made up.

#### Communication with Church Members:

- **Notification:** Church members will be informed of the inclement weather policy starting in December, with periodic reminders throughout the winter.

- **Channels:** Notifications will be sent through the Intercom, posted on the church website, and shared via Realm.

Sunday Services and Activities:

- **Online Services Only Decision:** The Senior Minister will decide whether to conduct church services only due to bad weather by 7:00 a.m. on Sunday, prioritizing member safety.
- **Communication:**
  - The minister will personally inform Sunday staff, the celebrant, and other service participants about any changes to online services only.
  - A notice of online services will be posted on Facebook, and a notification will be sent through Realm.

## 4.2 Food Safety Policy

*Date: 9.13.2011*

This policy applies to all staff/volunteers that handle food, including but not limited to: Wednesday night chefs, religious education volunteers and childcare staff.

New volunteers will be required to review this policy with staff or volunteer leaders and sign off on policy annually before they are allowed to handle food. Additionally, safety checklists will be posted in the kitchen.

There are several areas of food safety as outlined below:

### **Wash hands frequently, using hot water and soap:**

- ❖ Before starting work
- ❖ During food preparation as often as necessary to prevent cross contamination when changing tasks and when changing from handling raw foods to cooked foods.
- ❖ And after:
  - coughing, sneezing, using a handkerchief or tissue.
  - Touching bare human body parts.
  - Eating, drinking or smoking.
  - Handling raw meats, poultry and fish.
  - Handling garbage, sweeping or picking up items from the floor.
  - Using cleaners and other chemicals.
  - Using the toilet.
  - Handling soiled equipment and utensils.
  - Switching between raw foods and ready-to-eat foods.

### **Avoid cross-contamination:**

Cross contamination occurs when harmful bacteria are transferred from one food to another by means of a nonfood surface, such as utensils, equipment or human hands. Cross contamination can also occur food to food, such as when thawing meat drips on ready-to-eat vegetables. Prevent cross contamination by observing these recommendations:

- ❖ Use proper hand washing procedures.
- ❖ Use clean and sanitized utensils and cutting boards when preparing food. Clean cutting boards thoroughly with hot soapy water, followed by a hot water rinse.
- ❖ Store cooked food and raw food separately. Do not leave raw meat out on the counter for more than a few minutes.
- ❖ Wash all fresh fruits and vegetables with clear running water. Use a brush as necessary.

- ❖ Wash, rinse and sanitize can openers. Wash and rinse tops of cans before opening.
- ❖ Prepare batches of food no further in advance than necessary. If necessary to prepare in advance of serving, refrigerate immediately.

## Thawing

Thaw foods in refrigerator units, under cool running water, or in a microwave oven (depending on the amount of food). If thawing foods in running water, do not allow thawed portions of raw animal foods to be above 41F for more than four hours.

- ❖ Do not thaw meat or other foods at room temperature.
- ❖ Cook microwave-thawed foods immediately.

## Cooking

- ❖ Cook foods to a safe internal temperature.
- ❖ Do not interrupt cooking times by partially cooking foods.
- ❖ Use tasting spoons -- not the stirring spoon -- to test foods. A clean tasting spoon should be used every time food is tested.

## Holding/Displaying Foods between Preparation and Serving

- ❖ Fresh vegetables and produce must be refrigerated until preparation/cooking or serving.
- ❖ Keep hot foods hot and cold foods cold.
- ❖ Hold cold foods in serving containers on ice or in the refrigerator.
- ❖ Do not put previously held food on top of freshly prepared food. Use up the previously held food first.
- ❖ Do not handle ready-to-eat foods such as lettuce, ham and cheese with bare hands. Use spatulas, tongs, or clean utensils to handle food.
- ❖ In self-service/buffet situations, provide spoons or tongs so human hands do not touch food.
- ❖ Handle plates by their edges, glasses by the bases and cups by their handles.
- ❖ Handle utensils by their handles.
- ❖ Use metal or plastic scoops -- not glasses, bowls, cups or plates -- to scoop ice.



In addition to the above requirements all volunteers are responsible for:

- ❖ Keeping cooking/serving areas clean.
- ❖ When finished, make sure the space is left the way you found it or better. This includes wiping down countertops, the stove top, and the sink area.
- ❖ If you are cooking do not leave oven or stove unattended while it's on.
- ❖ Do not leave leftover food in the fridge unless you have spoken to staff and know how that food will be used in the future.
- ❖ Label all items left in kitchen or pantry as appropriate.

This policy protects you, the church, its members and friends.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Staff Signature \_\_\_\_\_

Date \_\_\_\_\_

## First Unitarian Church of Des Moines Food Safety Checklist:

- ✓ Wash hands before beginning a task and after every interruption that could contaminate hands.
- ✓ Avoid cross-contamination. Cross contamination occurs when harmful bacteria are transferred from one food to another by means of a nonfood surface, such as utensils, equipment or human hands.
- ✓ Wash all fresh fruits and vegetables with clear running water. Use a brush as necessary.
- ✓ Prepare batches of food no further in advance than necessary.
- ✓ Refrigerate until serving time.
- ✓ Thaw foods in refrigerator units, under cool running water or in a microwave oven (depending on the amount of food). If thawing foods in running water, do not allow thawed portions of raw animal foods to be above 41F for more than four hours.
- ✓ Cook foods to a safe internal temperature.
- ✓ Keep hot food hot and cold foods cold.
- ✓ Do not put previously held food on top of freshly prepared food. Use up the previously held food first.
- ✓ Do not handle ready-to-eat foods such as lettuce, or ham and cheese with bare hands. Use spatulas, tongs, or clean plastic gloves to handle food.
- ✓ Keep cooking/serving areas clean.
- ✓ When finished, make sure the space is left the way you found it or better. This includes wiping down countertops, the stove top, and the sink area.
- ✓ Do not leave leftover food in the fridge unless you have spoken to staff and know how that food will be used in the future. Label as appropriate.

## 4.3 Our Whole Lives Policies

Date Revised: 8.26.2024

### I. Structure of the Program

#### A. Registration and Fees

1. All legal parents/guardians of minor participants must sign the permission form. If divorced parents share legal custody, the congregation must obtain written permission from both parents. If divorced parents do not have joint custody, and the divorce agreement clearly stipulates that the custodial parent may make decisions regarding their child's education without consulting the non-custodial parent, then it is only necessary to get the written permission of the parent with sole legal custody. However, if the situation is unclear, or if there are persistent questions or concerns, and *especially* if there is a history of conflict between the divorced parents, it is wise for the participating parent to consult a lawyer for clarification of their agreement because even a parent without *physical* custody can still share *legal* custody and retain rights regarding decisions about the child, including decisions about education or religion.
2. It is strongly recommended, but not required, that *all* adults who are in an active parental/guardian role (e.g., step-parent) for the child sign the permission form, even if they technically don't have legal custody. This is both to satisfy legal requirements and to honor the diversity of family structures in our congregations.

### II. Teaching

#### A. Class Coverage

1. Each class shall have at least 2 facilitators, although 3 to 4 are recommended to allow them to rotate. Each class session must have at least 2 facilitators during the entire class (except for brief periods when one facilitator is escorting a student to the bathroom or bringing equipment from the Faith Formation office, etc.). It is recommended, but not required, that each facilitator team represent a diversity of gender identity and sexual orientation.

#### B. Training Requirements

1. Facilitators must attend a UUA- or UCC-sanctioned training program to prepare for leading *Our Whole Lives*. A facilitator must have received training for the level being taught in order to be a lead teacher; however, those trained in other levels may co-teach and lead activities. While only those who have received training can teach, others may be present in the classroom to attend to the needs of participants (see Section IV).
2. If the trainers at the *Our Whole Lives* training program express reservations about a prospective facilitator, their recommendations must be followed.

#### C. Recruitment

1. *Our Whole Lives* facilitators are recruited by the Faith Formation Team (FFT), OWL team members (if applicable), and Faith Formation Staff. Facilitators are then affirmed by the FFT.
2. Given the unique nature of the *Our Whole Lives* curricula and the specialized knowledge necessary to cover the material and answer participants' questions, *Our Whole Lives* facilitators need not be members of the

congregation. However, they should ideally have been associated with the congregation for at least 3 to 6 months and have a relationship of trust with their fellow facilitators. (Please see the last page of this document for further information on choosing facilitators.)

3. Teachers will be asked to attend an interview, and submit to a criminal background check before they can be sent for training.
4. People who have already attended an approved *Our Whole Lives* facilitator training who are affiliated with some other religious organization may also serve as *Our Whole Lives* facilitators for a UCDSM *Our Whole Lives* class, at the discretion of the FF Staff, and the FFT.

#### D. Age Requirements

1. Grades K-1, 4-6, and 7-9: Facilitators must be at least 21 to teach *Our Whole Lives* programs for children or junior high youth.
2. Grades 10-12: So that the boundary between youth and adult is clear, adult facilitators of *Our Whole Lives* for Grades 10-12 must be age 25 or over. However, a trained, qualified youth or young adult could co-lead a high school program in collaboration with a trained, qualified adult 25 or over.
3. Adult and Young Adult: Facilitators of *Our Whole Lives* for Adults and *Our Whole Lives* for Young Adults can be either young adults or older adults.

#### E. FF Program Requirements

1. All facilitators must be trained in (1) the safety policies and practices of the congregation and the FF Program and (2) teaching children and youth with special needs. To accomplish this, teacher training workshops will be offered each year, as needed. *Our Whole Lives* facilitator training, for this aspect of training only, may be co-convened with FF teacher training.
2. Teachers will be required to read and sign a Code of Ethics each academic year.

### III. Classes

#### A. Class Assignments

1. Children are assigned to classes by school grade.
2. Exceptions can be made by the OWL coordinator in consultation with the facilitators, parents, and possibly FF Staff. (See IV A)

#### B. Class Sizes

1. *Our Whole Lives* classes should ideally be taught with approximately 8-12 participants at the beginning of the class. UCDSM will cap classes at 12 participants with priority given to UCDSM member families.
2. If a substantially higher number of participants is expected, the Faith Formation Coordinator should investigate the possibility of opening a second class at the same age level, or otherwise expanding the program temporarily or long-term. In no case will an *Our Whole Lives* class for K-1, 4-6, 7-9, or 10-12 be allowed to exceed 12 participants.
3. A planned class may be cancelled if less than 4 participants are expected, but the assigned facilitators, in consultation with the OWL coordinator and FF Staff, may still choose to offer the class.
4. Parents should preregister their child/youth before the class (orientation session) begins. Acceptance of late registration will be determined by the *Our*

*Whole Lives* facilitators (if possible, in consultation with the OWL coordinator) on a case-by-case basis.

C. Class Schedules

1. Timing of classes (number of sessions, days of the week, times of day) will be determined by the *Our Whole Lives* facilitator team and the OWL coordinator and will be dependent on both pedagogical considerations and room availability. *Our Whole Lives* facilitators may consult parents of participants about scheduling changes that come up during the class.

IV. Inclusion of Participants With Special Needs

A. Class Assignments

1. Children and youth with special needs should not be excluded from *Our Whole Lives* classes because of their special needs. They should take *Our Whole Lives* classes at a stage that is appropriate to their individual development, which may not correspond with the usual age ranges for the program. For example, depending on the type of special need, it might be more effective for a child to take the 4<sup>th</sup>-6<sup>th</sup> grade *Our Whole Lives* class at a later biological age. When to have a particular child or youth participate in a particular level of *Our Whole Lives* will be determined through consultation among the *Our Whole Lives* facilitators, parents, OWL coordinator, and possibly FF Staff.
2. Parents should make every effort to notify *Our Whole Lives* facilitators, the OWL coordinator, or FF Staff of their wish for their child or youth with special needs to participate in *Our Whole Lives* class well before the class begins. If parents do not do so, it may not be possible to offer all accommodations, as recruiting the volunteers necessary for some accommodations requires a longer timeline. In extreme cases only, children or youth may be denied the chance to participate during a given year if there is not enough time to set up the necessary accommodations.

B. Accommodations

1. Accommodations should be made for children and youth with special needs to allow them and other students to benefit maximally from *Our Whole Lives* class. The accommodation will be determined on a case-by-case basis before the beginning of the *Our Whole Lives* class by the *Our Whole Lives* teachers, parents, OWL coordinator, and possibly FF Staff. Patton's work "Faith-Based Sexuality Education Guide for the Inclusion of Children and Youth with Special Needs" provides extensive guidance on this topic and should be consulted. The accommodations suggested here are based on that work. Accommodations may include any of the following:
  - a. No accommodations (for mild special needs or those being successfully treated, as might be the case for ADD/ADHD or mild dyslexia).
  - b. Reduced use of reading/writing activities during class, and conversion of reading/writing activities in the curriculum to oral activities (implemented by the teachers, as needed).
  - c. Allowing a child/youth to sit out of activities and not participate, while still remaining in class.
  - d. Use of an Inclusion Team throughout the time period of the class will be used to determine and implement the necessary accommodations. The

team may include at least one FF Staff member or the OWL coordinator, one *Our Whole Lives* teacher of the relevant class, and one parent of the child/youth)

- e. A separate meeting before the *Our Whole Lives* class begins between parents, the *Our Whole Lives* teachers for the class, and possibly an FF Staff member or the OWL coordinator, to discuss accommodations. A meeting that involves the child/youth with special needs may also be held.
  - f. Lending of a curriculum book to the child's/youth's parents, or advice that they buy a copy, so that the parents can pre-read or review lessons with the child/youth.
2. The need to include children and youth with special needs in *Our Whole Lives* classes does not mean that disruptive behavior that interferes seriously with the class is acceptable. Patton's work includes guidelines on making an agreement with the child/youth about what behavior is necessary in order to remain in the *Our Whole Lives* class. However, the Inclusion Team should make every effort to find a solution before any child is excluded from *Our Whole Lives* class.
  3. Inclusion of adults with special needs in Young Adult and Adult *Our Whole Lives* classes: As part of the pre-registration process, an adult with special needs may request a meeting with the *Our Whole Lives* facilitators, and an FF Staff member or the OWL coordinator to discuss what accommodations, if any, are necessary.

#### V. Parent Involvement

##### A. Orientation

1. Part of *Our Whole Lives*'s philosophy is that parents are their children's primary sexuality educators. For this reason, at least one parent/guardian must attend the Orientation. However, it is recommended that all parents/guardians/step-parents in a child's life attend.
  2. Facilitators may arrange to meet with parents who are unable to attend orientation, provided that this meeting is held before the first session.
  3. Childcare will be available during all orientations.
  4. Parent Orientation for *Our Whole Lives* 7-9 and 10-12 must include the showing of the appropriate *Sexuality and Our Faith* DVDs. Parents must give written consent for their child(ren) to view the applicable DVD in class.
- B. Meals/Snack: Parents may be asked to contribute to the class by supplying meals or snacks for long sessions (i.e., for *Our Whole Lives* 7-9 and 10-12 classes).

#### VI. Multi-church Involvement

##### A. Outreach

1. Children/youth who are not associated with UCDSM, and whose parents/guardians are not members of UCDSM, may participate in *Our Whole Lives* classes at UCDSM. If there are more participants expected for an *Our Whole Lives* class than can be accommodated (see above), UCDSM will make efforts to accommodate all interested participants, but priority may be given to UCDSM member families, if necessary.

The following was excerpted from Planning Guide for *Our Whole Lives* Trainings (revised and updated Fall 2007); It can also be found on UUA website in OWL FAQs (updated June 1, 2010):

## **GUIDELINES FOR SELECTING *OUR WHOLE LIVES* LEADERS**

The success of this program depends on the qualified and caring persons who are selected and trained to be *Our Whole Lives* facilitators. Keep the following criteria in mind when choosing your facilitators:

1. **A commitment to value-based, comprehensive sexuality education.** A facilitator needs to have values in harmony with the *Our Whole Lives* program and goals, and to feel comfortable with his or her own sexuality.
2. **Experienced, skilled, and comfortable with the specific age group and its developmental needs.** A facilitator needs to stimulate discussion by asking open-ended questions, encouraging communication among participants, and facilitating activities that foster experiential learning. A facilitator needs to use sexual terminology and age-appropriate language comfortably, relate well with the age group of the participants, and convey warmth and a sense of humor.
3. **Anti-bias awareness.** A facilitator needs to understand, appreciate, and celebrate diversity of race/ethnicity, culture, age, ability, gender, gender identity, and sexual orientation. A facilitator needs to have the skills to work with people of diverse backgrounds as well as the ability to create a safe and engaging learning environment.
4. **An advocate for sexual health and safety.** A facilitator needs knowledge and skills not only to educate about sexual health but to fulfill the trust inherent in the role of sexuality educator. This role includes the responsibility to recognize and report abuse. The facilitator must support your organization's safety-abuse policy and must follow your state's or province's process for reporting and investigating an alleged abuse.
5. **Ability to build relationships.** A facilitator needs to develop rapport with participants, and when the participants are children or youth, with parents and family as well. Facilitators need to build community in the classroom, uphold the Participation Guidelines, and develop relationships of respect, reciprocity, and responsibility within your organization and the wider community.
6. **Dedicated learner and facilitator.** A facilitator needs to be willing to become thoroughly familiar with the content of the program, to work with a co-facilitator or teaching team, and to listen to and learn from young people and parents.
7. **Appropriate boundaries.** Facilitators need to understand that the class is an opportunity for the participants to explore their sexuality and test boundaries and assumptions, which may occasionally involve self-disclosure from participants. Facilitators may be called upon to uphold boundaries on participants' sharing. Further, facilitators should not use class for their own personal exploration or self-disclosure. This is critically true for the children's and adolescent levels of *Our Whole Lives*, but it is also true for the peer-led Young Adult and Adult levels. Facilitators need to understand the ways that their own participation could compromise their effectiveness as facilitators.

8. **Person of faith.** When offering *Our Whole Lives* in a congregational context, a facilitator needs to be a person who is respected by the congregation and comfortable discussing the integration of sexuality and spirituality with members of their faith community. They should be aware of their own spiritual or religious grounding, and should possess an ability to connect the program values with their religion's principles, traditions and history.



## 4.4 Safety Policy

*Date: 6.20.2019 (Revised 8.30.24)*

### **I. Purpose**

As Unitarian Universalists, our commitments to the inherent worth and dignity of every person and to justice and compassion compel us to create for our children, members, and staff a safe environment which protects their physical, mental and emotional well-being and promotes their spiritual growth.

Recognizing that violence and child abuse are two of the most troubling issues our society faces today, the policies and procedures contained in this document were developed to reduce the risk of harm to children, members, and staff and ensure that First Unitarian Church and its programs provide a safe haven for them. Issues of violence and sexual abuse will be addressed openly, honestly, and with care.

### **II. Misconduct Prevention and Safety Policy**

To safeguard its children, youth, congregants, staff, and volunteers, First Unitarian church has adopted this Safety Policy, which includes:

- Requirements for staff and volunteer recruitment, selection, and conduct.
- Procedures for safety and supervision in all faith formation programs for children and youth.
- Procedures for reporting and responding to concerns, complaints, and/or allegations regarding sexual misconduct or abuse or other forms of misconduct or harassment (“misconduct”).
- Requirements for ongoing congregational education and discussion about misconduct, child protection, and responsible behavior toward both children and adults.

It is the policy of the First Unitarian Church to take seriously all allegations of misconduct, especially allegations involving children and youth. We recognize that allegations of misconduct may be devastating to both the accuser and the accused. Consequently, we have created a Safety Response Team to handle concerns, complaints, or allegations of misconduct as they may arise (see Section VI). The Safety Response Team is expected to act in ways that respect the inherent worth and dignity of all the parties involved.

No person with a history of sexually or physically abusing another individual may be involved in any way in our faith formation program for children and youth unless a specific exception is made with a documented agreement with all members of the Safety Response Team. No person against whom a complaint of misconduct has been filed and who is under investigation will be permitted any unsupervised direct contact with children or youth at church or church-sponsored activities.

Depending on the content of the complaint of misconduct, a person may also be barred from leadership or participation in other church activities. For example, an adult accused of misconduct against another adult may be barred from activities until there has been a resolution of the complaint or a limited access agreement effective while the resolution is pending.

We, the First Unitarian Church, accept the responsibility to educate ourselves and our children about sexual misconduct and abuse and pledge to do our best to protect and support those who come to us either at risk or in crisis.

As a churchwide preventative policy, it is understood that parents are responsible to supervise their children (up to age 18) at all times, except when children are attending activities sponsored by the Faith Formation Ministry and supervised by members of that ministry team.

We recognize that this policy is a living document, and the congregation may in future years wish to amend it to reflect changes in understanding or needs.

### **III. Code of Ethics for Adults and Older Youth who are Leaders with Children and Youth**

Leaders will not engage in sexual, seductive, or erotic behavior with children and youth. Leaders will also not be involved in sexual harassment or any other behavior with youth which constitutes verbal, emotional, or physical abuse.

“Leader” refers to any person who is working with children and youth in any program of First Unitarian Church. All such leaders are bound by this Code of Ethics statement. Adults and older youth who are in leadership roles are mentors who play a key role in fostering spiritual development of individuals and our faith community. It is, therefore, especially important that those in leadership positions be well qualified to provide the special nurture, care, and support that will enable children and youth to develop a positive sense of self and a spirit of independence and responsibility.

The relationship between young people and their leaders must be one of mutual respect if this positive potential is to be realized. There are no more important areas of growth than those of self-worth and the development of a healthy identity as a sexual being. Adults play a key role in assisting children and youth in these areas of growth. Children, youth, and adults suffer damaging effects when church leaders become sexually involved with children and youth in their care or with adults with whom there is a relationship of trust and guidance.

Leaders shall be informed of this code of ethics and agree to it before assuming their role. In cases of violation of this code, appropriate action will be taken. Signing the Affirmation Form below signifies that leaders have been informed of the Code of Ethics.

Honoring and adhering to this code of ethics is not only a policy of this congregation but is also inherent in our Unitarian Universalist values set forth in this congregation’s bond

of union, its mission, its covenant, and in the UUA's Article II Bylaws. Adherence to these ethical standards is integral to the covenantal relationship within which all Unitarian Universalists stand. Accordingly, if an adult or older youth leader has not signed this form, that person is nonetheless bound by this code of ethics.

**Affirmation of Receipt of Code of Ethics**

I have received and read the First Unitarian Church of Des Moines Code of Ethics for Adults and Older Youth. I understand and agree to abide by the Code of Ethics throughout the duration of my involvement with the church and its community.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness

## **IV. Selection of Staff and Volunteers Programs with Children and Youth**

To safeguard children and youth, as well as staff and volunteers, the First Unitarian Church requires staff and volunteers who work with children and youth to meet the following selection and qualification requirements.

### **A. Application Process**

1. Both paid staff and volunteers who will have contact with children (either on the premises or in the programming of the First Unitarian Church) must go through an application and screening process. Employees will be oriented to the church's human resource policies on misconduct.
2. The application and screening process will, at a minimum, include a formal written volunteer information form and checking of references. Personal interviews may also be conducted.
3. Applicants will be asked to consent to checks of the Department of Human Services Child Abuse Registry and the Department of Criminal Investigations criminal records. Checks will be made for all applicants for paid employment. Checks may be made for applicants for volunteer positions.
4. Volunteers who have been through the application and screening process will not be asked to do so again unless there is a change in circumstances. Volunteers must inform the Church Administrator if there is a change in circumstances (including, but not limited to, arrests, convictions, or registered on the Child Sex or Sex Offenders Registry).

### **B. Eligibility**

1. *Six Month Rule.* Volunteers must have participated regularly in First Unitarian Church's congregational life for a period of at least six consecutive months before they are eligible to work with children and youth. The following exceptions may apply:
  - a. An exception may be made by agreement of the Safety Response Team for volunteers with appropriate references.
  - b. An exception may be made by agreement of the Safety Response Team for volunteer activities at one time events which are held in a public setting.
  - c. Parents are invited to visit and participate in their own children's classrooms and activities. But if a parent has consented to their child's participation in a special curriculum like the Our Whole Lives (in which parents do not participate so as to allow full discussion of the curriculum's content), then the classroom is not open to the parent except when invited.
2. *Prior Offense Rule.* An adult who has been convicted, arrested, or investigated for child abuse is not eligible to work directly with children and youth unless the Safety Response Team makes a specific exception via document signed by all Safety Response Team members and submitted to

the Church Administrator.. The Safety Response Team may encourage an adult barred from a role in the children and youth faith formation program to volunteer in other areas of congregational life. The Safety Response Team may recommend pastoral guidance and counseling to help the barred adult understand the church's responsibility to provide the highest level of protection for children and youth.

## V. Supervision in the Faith Formation Program for Children and Youth

The Faith Formation Ministry Team has instituted the following practices and policies to promote child safety in the supervision and program design of the faith formation program for children and youth at the First Unitarian Church.

- A. *Two Adult Rule.* Teaching teams will be established for all children's religious education activities and classes. No individual will be assigned to be the only teacher or supervisor of a program or activity for children and youth.
- B. *Visibility.* The windows in the doors of the children's religious education classrooms will not be obstructed. Classroom activity should be open to view from the hallway at all times, unless youth are participating in a special curriculum or activity for which parents have given written consent.
- C. *Adult Greeter.* An adult greeter will be assigned to the downstairs hallway of the church just prior to, and during, the regular Sunday morning faith formation program for children and youth. The greeter will welcome guests and be alert to safety issues.
- D. *Nursery Visits.* Because of the isolated location of the nursery, the Faith Formation Coordinator will arrange for frequent, unscheduled visits to the nursery during regular Sunday morning programming.
- E. *Annual Training.* The Faith Formation Coordinator, working with the Faith Formation Team, will provide annual training for Faith Formation teachers about child sexual abuse; appropriate boundaries, roles, and responsibilities; and this Safety Policy.
- F. *Awareness.* The Faith Formation Coordinator, working with the Faith Formation Team, will develop and implement a plan for teaching children and youth about safety awareness.
- G. *First Aid.* A first aid kit will be readily available in the office of the Faith Formation Coordinator and in each classroom.
- H. *Display of Emergency Information.* The Faith Formation Coordinator is required to ensure that an escape plan and the location of fire extinguishers is posted near each classroom door.
- I. *Fire/Disaster Drill.* In consultation with the Senior Minister, the Faith Formation Coordinator will conduct a Sunday morning fire/disaster drill for children and youth at least once annually. This drill may be separate from or together with a drill that applies to adults engaged in Sunday morning activities.

## VI. Incident Reporting and Response Procedures

- A. *Safety Response Team.* The following individuals are designated as the Safety Response Team for the First Unitarian Church:
- Senior Minister
  - Church Administrator
  - Faith Formation and Congregational Life Coordinator
  - President of the Board of Trustees
  - Faith Formation Team Leader (or person appointed by the Team Leader)
  - Two additional members appointed by the named members of the Safety Response Team.
- B. *Maintenance of Records.* Copies of all screening forms, reference checks, incident reports, DCI screening reports and Department of Human Services Child Abuse Registry reports will be kept in a place with restricted access in the church office.
- C. *Duty to Report.*
1. A volunteer in the Faith Formation program who becomes aware of or has reason to believe there has been an incident of misconduct either within the church or in connection with a program or activity sponsored by the church must report the incident to a Safety Response Team member.
  2. An employee who becomes aware of or has reason to suspect an incident of misconduct either within the church or in connection with any program or activity sponsored by the church is required to report the incident to a Safety Response Team member.
  3. Adult church members, volunteers in the Faith Formation program, and church staff are expected to be alert to circumstances likely to result in misconduct and are expected to report those circumstances to a Safety Response Team member.
- D. *Reporting Procedures*
1. A person with a reporting responsibility as stated in “C. Duty to Report” is required to make an oral report to a member of the Safety Response Team as soon as possible and not later than 24 hours after an incident occurs or after becoming aware of circumstances likely to result in misconduct.
  2. The report is to be made in the following manner:
    - a. If the incident involves a member of the Safety Response Team, the oral report should be made to a different member of the Safety Response Team.
    - b. In the event that a Safety Response Team member is not immediately available in person or by phone to receive an oral report, the person making the report must immediately text or email a brief written report to a member of the Safety Response Team.

- c. An oral report or a brief written report should be followed as soon as possible by a written report and, in any event, within 72 hours. An Incident Report Form is included at the end of this Safety Policy and may be sent by email to or printed and placed in the church mailbox of the Safety Response Team. (Paper copies of the Incident Report Form are available in the church office and in the office of the Church Administrator).
- E. *Response Procedure in Situations of Misconduct Toward a Child or Youth*
1. Coordination of the Safety Response Team's response is ordinarily the responsibility of the Faith Formation Coordinator, unless the coordinator, with the consent of the team, delegates coordination responsibility to another team member. If the Faith Formation Coordinator is the person accused of misconduct, the coordinator must withdraw from the Safety Response Team until absolved of misconduct and the Safety Response Team will determine which of their members will coordinate the team's response. The person with coordination responsibility is the Response Coordinator.
  2. The Response Coordinator must document the allegations of misconduct and the Safety Response Team's response.
  3. The Safety Response Team must decide what actions need to be taken to ensure the safety of the alleged victim and other children and youth in the congregation and ensure that those actions are carried out.
  4. If the Safety Response Team determines that reasonable grounds exist to investigate whether misconduct involving a child or youth has occurred, and the alleged offender is **not** a child's parent or guardian, the Response Coordinator must notify the following people:
    - a. The child's or youth's parent(s) or guardian(s), both to inform them of the alleged misconduct and to advise them to contact Child Protective Services or Law Enforcement.
    - b. The Iowa Department of Human Services Child Protective Services.
    - c. The Church Administrator who will then notify:
      - i. the church's attorney and
      - ii. the church's insurance agent. The agent will not be given the names of the victim or the alleged perpetrator unless a claim seems imminent.
  5. If the alleged offender **is** a child or youth's parent or guardian, the Response Coordinator must **not** inform the alleged offender but instead must inform the child or youth that the church will report the alleged misconduct to the Iowa Department of Human Services and that someone from Child Protective Services will meet with the child or youth to make sure the child or youth is safe.
  6. The Response Coordinator must immediately remove the alleged offender from contact with children and youth and not allow any contact with children or youth until the allegations have been investigated and the

Safety Response Team is in agreement that it is safe for the alleged offender to have contact with children or youth. The alleged offender will be notified orally and in writing that this No Contact Rule is being invoked. The No Contact Rule means the alleged offender is not allowed to attend any activity at church at which children or youth may be present.

7. If the alleged offender is a paid staff member, that person will be placed on involuntary paid leave until (a) the Safety Response Team makes a determination that the safety of children and youth can be reasonably assured and (b) the Senior Minister makes a determination allowing the individual's continued employment (or, if the alleged offender is the Senior Minister, until the Board of Trustees has makes a determination allowing the Senior Minister's continued employment). Regardless of whether criminal charges are filed, continuation of employment is based on the best interests of the church.
8. If the Safety Response Team determines that it is necessary to inform the congregation of the misconduct, the Safety Response Team will prepare a public statement to inform and answer questions that members of the congregation may have. Only the Senior Minister or other designated members of the Safety Response Team will make statements to congregation members or to the press.
9. If the misconduct becomes public, the Senior Minister or other designated member of the Safety Response Team will consult with the UU Trauma Response Ministry (UUTRM) and may consult UUTRM in determining whether to make the misconduct public.
10. The Safety Response Team will ensure that pastoral care is available to all parties involved and to other congregants in need of pastoral support.

F. *Response Procedure in Situations of Misconduct Toward an Adult*

1. If a member of the Safety Response Team receives a report of misconduct toward an adult, that team member must immediately inform the other Safety Response Team members.
2. Coordination of the Safety Response Team's response in the case of misconduct toward an adult is ordinarily the responsibility of the Senior Minister, who may delegate the responsibility of coordination to another team member. If the Senior Minister is the person accused of misconduct, the Senior Minister must withdraw from the Safety Response Team until absolved of misconduct and the Safety Response Team will determine which of their members will coordinate the team's response. The person with coordination responsibility is the Response Coordinator.
3. The Response Coordinator must document the allegations of misconduct and the Safety Response Team's response.
4. The Safety Response Team must decide what actions need to be taken to ensure the safety of the alleged victim and others in the congregation and ensure that those actions are carried out.
5. If the Safety Response Team determines that reasonable grounds exist to investigate whether misconduct has occurred, the Response Coordinator



must notify the following persons of the of the allegations of misconduct: the alleged offender; the Church Administrator and, if there is a continuing risk of harm to congregants, law enforcement. The Church Administrator will notify the church's attorney and the church's insurer.

6. In conducting an investigation, the Safety Response Team must schedule a time to talk separately with the reporter of and/or the victim of the alleged misconduct and with the alleged offender, along with others who may have relevant information.
7. If the alleged offender is a paid staff member, that person will be placed on involuntary paid leave until (a) the Safety Response Team makes a determination that the safety of congregants is reasonably assured and (b) the Senior Minister makes a determination allowing the individual's continued employment (or, if the alleged offender is the Senior Minister, until the Board of Trustees has makes a determination allowing the Senior Minister's continued employment). Regardless of whether criminal charges are filed, continuation of employment is based on the best interests of the church.
8. The Senior Minister, Board President, or other person the Safety Response Team designates may consult with the UU Trauma Response Ministry (UUTRM) about the misconduct at any stage of the response process and must consult UUTRM before informing the congregation of the misconduct.
9. If the Safety Response Team determines that it is necessary to inform the congregation of the misconduct, the Safety Response Team will prepare a written statement to share with members. Only the Senior Minister (or authorized delegate) has the authority to make additional oral or written statements to congregants or to the press. If the Senior Minister is the alleged offender, the Safety Response Team must designate another authorized spokesperson to make statements to congregants or to the press. The authorized spokesperson may be a UUTRM responder deployed to assist the church.
10. The Safety Response Team will ensure that pastoral care is available to all parties involved and to other congregants in need of pastoral support.

## **VII. Safety Plan and Limited Access Agreement**

- A. *Safety Plan*. If the Safety Response Team determines there is sufficient evidence of misconduct to require protection of the congregation (whether or not the victim of the misconduct is affiliated with the church), the team will treat all persons involved with care and respect and will take the following safety precautions:
  1. If the misconduct was toward a child or youth, the offender will not be permitted to have contact with children or youth involved in church activities until the offender has received appropriate treatment and the offender's treatment professional recommends reintegration into the church community.

2. If the Safety Response Team receives a reintegration recommendation from the offender's treatment professional, the Safety Response Team may agree to a reintegration safety plan including, if appropriate, a limited access agreement; however, the Safety Response Team is not permitted to allow the offender to work in the faith formation program for children and youth.
  3. The Safety Response Team will develop a reintegration safety plan in consultation with the offender, the offender's treatment professional, and support persons of the offender's choosing.
    - a. The safety plan will identify the individual's high-risk situations and specify safeguards designed to deal with those risks. An example might be having another adult present who knows about the individual's risk factors whenever he or she is involved in activities where children, youth, or potentially vulnerable adults are present.
    - b. The safety plan must allow the individual's treatment professional and the church Safety Response Team to share information so that the team can take appropriate actions to monitor the safety of children, youth and adult congregants.
    - c. The safety plan must be in writing and must specify the ways in which the offender's access to people or activities is limited. It must be signed by the offender and by a representative of the church (the Senior Minister, Board President, or other person designated by the Safety Response Team).
- B. *Safety Plan for Registered Sex Offender.* If a person wishing to participate in church activities is a registered sex offender, that person is required to meet with the Safety Response Team and enter into a safety plan with appropriate limitations on access. A registered sex offender's safety plan must at least meet the specifications of the safety plan in A. *Safety Plan.*
- C. *Open Discussion.* It is a goal at First Unitarian Church to create an atmosphere of openness so that adults and children feel supported and safe to talk about misconduct. Keeping secrets about misconduct (especially sexual misconduct) is harmful to victims, potential victims, the congregation, and the offender. Adults and children must be sufficiently aware so that they can recognize potentially risky situations both on and off church premises.
- a. The Safety Response Team will share the existence of a safety plan and limited access agreement with appropriate members of the congregation.
  - b. In cases involving misconduct toward a child or youth, the team will encourage parents or guardians to talk with their children openly and honestly (in an age-appropriate way).
  - c. To ensure the safety of children and youth, the Safety Response Team will ensure that children and youth are informed (in an age-appropriate way) of the specific danger a offender presents and the limitations on that person's access to children and youth.

- d. As is appropriate, the Faith Formation Team may carry out discussions with children and youth in their faith formation classes (with parents invited to participate).

**Appendix for 2024-2025:**

During this fiscal year, the Safety Response Team consists of:

- Rev. Meredith Garmon, Interim Minister
- Tracy Aukes, Church Administrator
- Faithyna Leonard, Faith Formation and Congregational Life Coordinator
- Natalie Mason, Board of Trustees President
- Chelsea Hayes, Faith Formation Team Lead
- Marilyn Lantz, appointed member
- Harvey Harrison, appointed member

## 4.4a Incident Report Form

Please complete this form with all the info available and include any attachments.

File the originals with the Safety Response Team. **Additional information may be added on the other side of the form.**

<b>TIME AND PLACE OF INCIDENT</b>	Date _____ Time _____ AM / PM Where, specifically, on campus did the incident occur?
<b>PERSON(S) INVOLVED IN THE INCIDENT</b>	Name _____ Age _____ Parent or Guardian (if minor) _____ Who was first on the scene _____
<b>FULL DESCRIPTION OF THE INCIDENT</b>	
<b>WERE EMERGENCY PERSONNEL INVOLVED</b>	Yes / No If yes, name / role of primary responder _____
<b>LIST ALL THE PEOPLE WHO WERE INVOLVED / PRESENT</b> <i>(if anyone was injured, please fill out an injury report and attach)</i>	Name _____ Phone _____ Email _____ Name _____ Phone _____ Email _____
<b>PERSON FILLING OUT REPORT</b>	Name _____ Date _____ Phone _____ Email _____
<b>PERSON RECEIVING REPORT</b>	Name _____ Date _____ Phone _____ Email _____

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4.4b Injury Report Form	
<b>TIME AND PLACE OF INJURY</b>	Date _____ Time _____ AM / PM Where, specifically, on campus did the injury occur? _____ _____
<b>PERSON INJURED</b>	Name _____ Age _____ Parent or Guardian (if minor) _____ Injuries Sustained _____ Who was first on the scene _____ Describe response to injury _____ _____ Did the injured party require medical treatment? _____ If so, who was notified and how were they treated? _____ _____ _____
<b>FULL DESCRIPTION OF THE INCIDENT</b>	
<b>WITNESSES</b>	Name _____ Phone _____ Email _____ Name _____ Phone _____ Email _____
<b>PERSON FILLING OUT REPORT</b>	Name _____ Phone _____ Email _____

## 4.5 Supervising Children and Youth at First Unitarian Church of Des Moines

Maintaining the safety of our youth and children is part of the covenant we have with the church and with each other. Parents are responsible for their own children and youth when they are not in a scheduled church activity as well as before and after scheduled church activities.

During the times children (ages birth to grade 6) are not in a religious education setting with two adults present or in a childcare room with paid childcare staff, families are required to take responsibility for the children, both in the building and on the grounds. Supervision is not provided on the playground or church grounds except when a religious education teacher or paid staff take the children or youth outside.

Middle school and high school age youth can be unsupervised, although cannot be in a room with the door closed and/or lights off.

The church is not responsible for the safety of children and youth on church grounds at times other than during the time of scheduled church events. Parents of children, birth to grade 6, should not leave church grounds while their children are in a supervised activity. No children or youth should be on the church grounds at times when no church events are scheduled unless a parent or adult authorized by a parent is present with the child or youth. The High School Youth Coordinator and Advisors shall see that youth are not left alone on the property but are attended by at least two adults while awaiting pick-up by parents after meetings.

## 4.6 Use of Products on Church Grounds

Members at First Unitarian have a great respect for the environment and also have a significant interest in improving and utilizing the woodlands that are on church property. This policy establishes guidelines for the use of selected products on church property – grounds and woods.

Unchecked, invasive species form monocultures, reducing natural stability and displacing viable wildlife habitats. They degrade the ecosystem by depleting the soil moisture, exacerbating erosion problems and disrupting nutrient cycles in the soil. Invasive plants limit the usability of the church woodland area because they inhibit movement through the space and some, such as poison ivy, are a health risk. They also make the space unattractive to members, visitors and neighbors and may spread to neighboring properties.

Invasive species have been and will be in the woods for several years. Past work has removed some of these temporarily but the effort to get these under control will be long-term. Invasive plants are highly resistant to mechanical control and, in some species, actually stimulates reproduction. A three-pronged approach will be used to control these identified plants: (1) an initial large-scale effort with researched, reliable chemicals applied appropriately; (2) re-planting appropriate species immediately; (3) on-going control with an organic product and/or mechanical removal, or when necessary, limited cut stump-only treatment.

Acceptable products and treatment methods to be used are:

<b>Plant</b>	<b>Product</b>	<b>Acceptable Treatment method</b>
Buckthorn	<i>Pathfinder, Garlon</i>	Foliar, cut stump, basal bark
Tree of Heaven	Pathfinder, Garlon, Tordon	Hack and squirt on larger trees, “burn” foliage on saplings
	Burnout	Resprouts
Bush Honeysuckle	Roundup, Pathfinder, Garlon	Foliar spraying (only after first frost when other plants are dormant), cut stump



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Black Locust	Pathfinder, Garlon	Basil bark
	<i>Roundup, Pathfinder, Garlon</i>	Hack and squirt or cut stump
Garlic Mustard	Roundup, Pathfinder, Garlon or Burnout	Foliar, mechanical
Poison Ivy	Roundup, Garlon, Pathfinder	Foliar on small plants; Cut stump of large vines
	Burnout	Foliar on small plants

### Application

All users must follow the label directions, including the use of protective gear, in ALL cases. Protective gear includes but is not limited to rubber gloves, long sleeved shirts and pants, eye protection and closed toe boots. Empty chemical bottles must be disposed of properly, according to label directions.

Notifications at the site of chemical application must be posted, including the re-entry time period specified on the label.

The following zones have been identified for limited chemical use as specified below:

1. *Within 5 feet of children's play areas, ceremonial space, along trail corridors and heavy use areas such as the Memorial Garden and Patio.* Use of mechanical removal and organics (such as Burnout) only with the exception of spot treatment of noxious species (poison ivy).
2. *Creek valley corridor.* Use of organics, mechanical or Round-up with hack and squirt only. No Tordon/2-4D should be used.

The following chemicals have been researched and due to the nature of these products are unacceptable for use on the church grounds:

- ✓ Aminopyralid
- ✓ Clorpyralid
- ✓ Imazapyr
- ✓ Metasulfuron methyl (AKA Escort)

## Emergency Procedures

- If a member applying the chemical comes in harmful contact with it, follow label directions to mitigate the effects of contact.
- If this is a life threatening situation, call 911 IMMEDIATELY and notify the workday leader(s).
- Call the Iowa Poison Center at 1-800-222-1222 for additional guidance.
- The State of Iowa requires any person storing, handling, transporting, or disposing of a hazardous substance to notify the Department of Natural Resources and local law enforcement of the occurrence of a hazardous condition, i.e. a chemical spill.
- The notification should be made as soon as possible but not later than six hours after the onset or discovery of the hazardous condition.
- **Report the hazardous condition by calling the Iowa Department of Natural Resources at 515-281-8694 and the Des Moines Police Department at their non-emergency number of 515-283-4811.**

See also Appendix A.

**Use of Products on Church Grounds  
Appendix A**

This is a summary of acceptable products, as discussed in the policy, and relevant information.

<b>Product</b>	<b>Advantages</b>	<b>Drawbacks</b>
Roundup (glyphosate)	Can be applied year round – best late summer to fall (prior to color change)	Non-selective
	Low soil mobility, low risk of groundwater contamination	
Garlon, Pathfinder (Triclopyr)	Broadleaf selective	Application time depends on plant target but not over 85 degrees
	Practically non-toxic to slightly toxic for mammals, birds and bees.	Can result in ground water contamination due to soil mobility
Tordon	Can be applied year round	Highly water soluble but volume used for targeted application may mitigate this issue
	Low toxicity to terrestrial organisms	Toxic to aquatic organisms
	Broadleaf selective	
Burnout	No lasting harmful effects	Requires full sun and hot weather
		Non-selective