



## **Policies and Procedures**

**June 2022**

# Table of Contents

## Administration

- 1.01 Creation and Maintenance of Policies and Procedures
- 1.02 Use of Mailing Labels
- 1.05 Meeting Rules
- 1.07 Pilgrim Pines Camp Use
- 1.08 Items Requiring Board Approval
- 1.11 Email Church List
- 1.12 Document Retention
- 1.13 Safe Church Policy
- 1.14 Administration Board Calendar
- 1.15 Childcare
- 1.16 Hiring Practices
- 1.16 Appendix: Hiring Checklist
- 1.17 ECC Refunds and Fee Waivers
- 1.18 Quarantine Pay
- 1.19 Solicitation of Donations

## Facilities/Security

- 2.01 Authorization to Use IUCC
- 2.02 Using IUCC Facilities
- 2.02 Appendix A: Facility Hold Harmless Agreement
- 2.02 Appendix B: Outside/Non-Member User Policies
- 2.03 Short Term Rental of IUCC Facilities
- 2.03 Appendix: Short-Term Rental of IUCC Facilities Form
- 2.04 Key Policy

## Finance

- 3.01 Cash Management
- 3.02 Receipt and Use of Gifts
- 3.03 Fundraising
- 3.04 Event Tickets
- 3.05 Finance Committee
- 3.06 Budget Process
- 3.07 Pastor Paul Camper Fund

## Committees

- 5.01 Child Care Committee

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Creation and Maintenance of Policies and Procedures</b>	<b>1.01</b>	<b>A</b>	<b>02/17/2015</b>

*Date/Initials*

*Format Reviewed By:* Policies and Procedures Task Force 12/9/99 /J.Aynes

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	02/17/2015
Ministries Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	05/11/2015

**I. PURPOSE**

The purpose of this document is to set forth the method by which Irvine United Congregational Church Policies and Procedures shall be created and maintained. It is to aid those entities of the Church who create Policies and Procedures. It is to ensure that Policies and Procedures adhere to IUCC Bylaws, UCC policy, and the law. Procedures are needed for any task which, if performed wrong, could adversely affect safety, legality, quality, finances and/or the environment.

**II. SCOPE**

A. Applies To

All IUCC entities who create and maintain Policies and Procedures.

B. Administrator

Church Office Staff

C. Policy and Procedure Responsibility

Policies and Procedures Task Force

**III. DEFINITIONS**

A. *Effective Date*

The date when the Policy and Procedure goes into operation is when the appropriate board(s) has completed the approval of it, unless a different date is established.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Creation and Maintenance of Policies and Procedures</b>	<b>1.01</b>	<b>A</b>	<b>02/17/2015</b>

**B. *Policy***

A policy is a governing principle, plan, course of action, or understanding that guides or channels thinking and action. It answers the questions "What will be done?" under certain circumstances and "Why?" to guide appropriate personnel in making decisions. It may also specify delegations of responsibility and authority for particular decisions.

**C. *Procedure***

A procedure is the "how" of a decision presented in the policy statement. It is a detailed step-by-step outline of action that spells out, in sequence, who does what and when within a logical cycle.

**D. *Purpose***

Briefly states what information is covered in a Policy and Procedure document. A concise summary of the objectives of the Policy and Procedure may also be given to clarify the subject matter. The purpose statement should answer two questions for the reader: "What information will I find here? Why was this procedure issued?"

**E. *Subject***

A short title of the information covered.

**F. *Supercedes***

The document(s), if any, which is being replaced.

**IV. POLICY**

The Irvine United Congregational Church (IUCC) is a non-profit corporation organized pursuant to the Corporation Code of the State of California. IUCC has Articles of Incorporation and Bylaws that have been approved by the congregation, which generally set forth the manner in which IUCC is authorized to operate. All Policies and Procedures are to be consistent with and shall expand upon the Bylaws. The Policies and Procedures are to provide more detail on what is to be done and how it should be done.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Creation and Maintenance of Policies and Procedures</b>	<b>1.01</b>	<b>A</b>	<b>02/17/2015</b>

**V. PROCEDURE**

**A. Determining Policies and Procedures Needed**

Policies and Procedures may be generated by any IUCC entity.

**B. Format/Template**

1. The format for Policies and Procedures is set forth in Exhibit A.
2. The document numbering system: All numbering will be done by the Church office staff or Policies & Procedures Task Force.
  - a. The number preceding the decimal point will designate the category of the document as follows:

Administration	1.xx
Facilities/Security	2.xx
Finance	3.xx
Ministries	4.xx
Committees	5.xx
Ceremonies	6.xx
  - b. The two digits following the decimal point represent the sequence of individual documents in a given category (i.e., x.01 = the first document in the category; x.02 = the second document, etc.)
  - c. When a document is revised, a letter is used to designate the sequence of revisions (i.e., "A" = the first revision; "B" = the second revision, etc.)
  - d. The "Effective Date" box will contain the final date the document is approved unless stipulated otherwise by the initiators/approvers.
  - e. The "Supercedes" box at the lower left corner of the document will show "None" if the document is the first version or will show the number of the document being replaced.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Creation and Maintenance of Policies and Procedures</b>	<b>1.01</b>	<b>A</b>	<b>02/17/2015</b>

3. A more detailed supplementary guideline is available in the church office in the form of a document entitled “*Create Effective Policies and Procedures*” (reference document number 1.01.01).

C. Aid in Creating or Revising

The Policies and Procedures Task Force may aid entities in creating or revising Policies and Procedures on a limited basis.

D. Review

The Policies and Procedures Task Force shall review all Policies and Procedures for clarity and adherence to the specified format prior to submission to either or both boards.

E. Approval

The Ministries Board shall approve policies and procedures pertaining to a ministry or the Ministries Board; the Administration Board shall approve policies and procedures of an administrative nature. In an area where both boards are involved, approval from both boards is required.

F. Storage and Access

Copies of all Policies and Procedures can be obtained via the church office and shall be readily accessible online.

G. Maintenance

The Policies and Procedure Task Force is responsible for ensuring all Policies and Procedures are kept up-to-date. The Task Force shall review all Policies and Procedures no later than every five (5) years following effective date or review date.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Use of Mailing Labels</b>	<b>1.02</b>	<b>A</b>	<b>5/18/2015</b>

*Format Reviewed By:* Policies & Procedures Task Force *Date:* 4/23/2015

<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	<i>Date:</i> 5/18/2015
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	Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	<i>Date:</i>
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## I. PURPOSE

The purpose of this policy is to establish rules regarding the distribution of IUCC mailing labels.

## II. SCOPE

### A. Applies To

Any congregant requesting printed labels from the IUCC database.

### B. Administrator

Church office staff  
Pastoral Staff  
Administration Board

### C. Policy and Procedure Responsibility

Church Administrator  
Policy & Procedures Task Force

## II. DEFINITION

IUCC mailing labels consist of any label printed from the church's database.

## III. POLICY

The IUCC database labels are generally reserved for Church-sponsored use such as the newsletter or mailings of Church-related materials. Church labels may be printed by the Church office staff for distribution by a congregant who will use them to send invitations to an important event such as a wedding, commitment ceremony, memorial service, etc., when a significant number of the Church's members and participants will be included. The labels are not to be distributed to any entity for political statements, personal or business promotion, items containing illegal content or contacts, or to advertise an event that has not been approved by an appropriate Church entity.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Use of Mailing Labels</b>	<b>1.02</b>	<b>A</b>	<b>5/18/2015</b>

### **III. PROCEDURE**

- A. Labels must be requested from the church office at least one week in advance. The Church office staff is authorized to approve such requests under the terms of this policy. Any questions about the legitimacy of a request, or its appropriateness under this policy, should be referred by the Church Administrator to the Pastor(s) or the Administration Board who can make the determination to approve the request or not.
  
- B. The congregant making the request will reimburse the church for the printing of the labels. The Church office staff will inform the congregant of the current fee.



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>MEETING RULES OF ORDER AND MINUTES</b>	<b>1.05</b>	<b>A</b>	<b>02/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force

<i>Approvals:</i> Administration Board	✓	Yes	<input type="checkbox"/>	No	02/17/2015
Ministries Board	✓	Yes	<input type="checkbox"/>	No	05/11/2015

## I. PURPOSE

The purpose of this document is to:

- ◆ Clarify expectations regarding rules of order at meetings, (see IV A below) and
- ◆ Provide guidance to those charged with creating minutes so that a faithful record of the proceedings of the Church's entities, (see IV B, below) will be produced in a timely manner and stored in an accessible place.

## II. SCOPE

A. Applies To:

- ◆ The Moderator, the Chair of Administration, the Chair of Ministries, Ministry Chairs, and Committee Chairs with regard to meeting rules of order; and
- ◆ The Clerk of Ministries, the Clerk of Administration and the Chair of the Childcare Committee (or a designee) with regard to creating minutes; and
- ◆ The Church Administrator and the Chair of Administration with regard to providing for the safekeeping of minutes.

B. Administrator

The administrators are those named in II. A. above

C Policy and Procedure Responsibility

Administration Board

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>MEETING RULES OF ORDER AND MINUTES</b>	<b>1.05</b>	<b>A</b>	<b>02/17/2015</b>

### III DEFINITIONS

- A. Minutes - Minutes are a faithful written record of actions proposed and decisions made. See Contents, below, for items to be included.
- B. Robert's Rules of Order - A set of procedures adopted by many organizations in order to facilitate orderly, democratic, and efficient discussion and decision-making at meetings.
- C. Voting Member – A Corporate Member of IUCC.
- C. Types of Votes
  - 1. *Voice Vote or Show of Hands* - Voting members verbally state “yes,” “no” or “abstain” when the Chair asks for such responses from all those in favor of a motion, those opposed to a motion or those who are abstaining from voting for a motion. Variant: Voting members may instead, raise their hands in response to the Chair’s questions.
  - 2. *Polling* - Each voting member present is asked individually whether his/her vote is yes, no, or an abstention.
  - 3. *Secret Ballot* Each voting member is asked to write his vote on a paper ballot which does not identify the member. Such ballots are collected and counted.

### IV POLICY

#### A. Rules of Order

The two Board Chairs and the Moderator, in conducting the meetings of the two Boards, are not required to follow formal parliamentary procedure (such as Robert’s Rules of Order). The same applies to Ministry Chairs and Committee Chairs in conducting meetings. Each of the above is encouraged to conduct meetings in an orderly fashion, striving for a meeting process that is both democratic and efficient. Certain quorum, voting, meeting notice, and adjournment requirements, in conformity with the California Corporations Code governing non-profit religious corporations, are set forth in the Bylaws. Also, votes may be conducted via voice vote, show of hands, polling, or secret ballot, as deemed appropriate by the Moderator, Board Chairs, Ministry and Committee Chairs, or as requested by a voting member(s).

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>MEETING RULES OF ORDER AND MINUTES</b>	<b>1.05</b>	<b>A</b>	<b>02/17/2015</b>

B. Minutes of Meetings - Minutes shall be prepared, distributed and stored for:

1. The Spring and Winter Congregational Meetings and any special meetings of the Congregation.
2. All meetings of the Administration Board.
3. All meetings of the Ministries Board.
4. All meetings of the Child Care Committee
5. Those conducting meetings of other bodies of the Church are encouraged to prepare and store minutes especially when actions are taken by vote affecting any budget item for said body.

## V. PROCEDURE

### A. Rules of Order

At Congregational meetings, whenever feasible, the Chair will appoint an individual to serve as Parliamentarian. Ideally, the Parliamentarian will be familiar with parliamentary procedure and with the Corporations Code governing California non-profit corporations. The Parliamentarian will, as appropriate, give advice to the Chair about conducting the meeting in an orderly, fair, and efficient fashion.

### B. Minutes of Meetings

1. Contents - Minutes created by the Clerks of Ministries and Administration and by the chair of the Child Care Committee (or designee) need not summarize the discussions that take place during meetings; they need simply state the actions proposed and what the group decided to do about each one. The minutes shall also include, at a minimum:
  - a. The name of the Church entity that met;
  - b. The meeting's date, start time, and location;
  - c. The names of those present (required for Board and Child Care Committee meetings but not Congregational meetings.)
  - d. Whether a quorum was present
  - e. The general nature of reports given

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>MEETING RULES OF ORDER AND MINUTES</b>	<b>1.05</b>	<b>A</b>	<b>02/17/2015</b>

- f. Each motion made, by whom, and by whom seconded
- g. The results of each vote taken. Minutes are to indicate whether the motion carried. At the request of a voting member, such members' votes shall be recorded.
- h. A general description of any items tabled for the next meeting
- i. If feasible, the date, time, and location of the next meeting
- j. The time the meeting adjourned
- k. Attachments to minutes

1. It is not necessary to attach supporting documents to draft minutes.
2. For the most part, it is not necessary to attach agendas, monthly financial statements, church calendars, or other documents to which participants have referred during the course of a meeting. Exceptions may be made, and documents attached, when excluding them would create an incomplete record of the Church's decisions and when such documents are not readily accessible elsewhere. Examples of documents to attach: analyses or correspondence upon which a vote is based, and the like.

2. Timing - Those responsible for creating minutes will prepare drafts prior to the next meeting. They are encouraged to include the word 'draft' at the top.
3. Distribution of draft minutes - Those responsible for creating minutes will make every attempt to distribute draft minutes via hard copy or e-mail as soon as practicable after the meeting as follows:

a. Ministries Board:

1. Chair of Ministries
2. Moderator
3. Ministry Chair
4. Pastor(s)
5. Church Administrator

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>MEETING RULES OF ORDER AND MINUTES</b>	<b>1.05</b>	<b>A</b>	<b>02/17/2015</b>

7. Others as appropriate
- b. Administration Board:
  1. Chair of Administration
  2. Moderator
  3. Treasurer
  4. Congregational Representatives
  5. Pastor(s)
  6. Others as appropriate
- c. Child Care Committee
  1. Committee member
  2. Pastor(s)
  3. Others as appropriate
- d. Congregational Meetings:
  1. Meeting Chair - The Clerk responsible for the minutes is encouraged to provide a draft to the meeting's Chair within three weeks after the meeting.
  2. Corporate Members - The Chair of the next Congregational Meeting ensures that the draft minutes are included in the next meeting's information packet so that the members may submit additions or corrections prior to the approval of the minutes.
4. Distributing approved minutes - Once a set of minutes is approved, those responsible for minutes will make any changes approved at the meeting and remove the word "draft." They are encouraged to include, at the top, the words 'approved on \_\_\_\_\_' (adding the date). They will print at least two copies of the approved

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>MEETING RULES OF ORDER AND MINUTES</b>	<b>1.05</b>	<b>A</b>	<b>02/17/2015</b>

minutes. Any attachments are appended to these approved copies. One copy is to be provided to the Church Administrator and one is to be kept by the person responsible for preparing the minutes (per II. A. above).

Approved minutes do not need to be re-distributed to those on the list in 3 above unless the changes are significant.

5. Storing minutes - The Church Administrator will store the approved minutes, once each for the Congregational Meetings, the Ministries Board Meetings, the Administration Board Meetings, and the Child Care Committee meetings. The Church Administrator will store these minutes books in the Church Office.

Minutes shall be available for review to all church entities and individuals, upon request. (See item 6. below for an exception.)

Those responsible for creating minutes will place the second copy of the approved minutes, with any attachments, in a separate minutes binder to which they can refer in their capacity as Clerk when questions arise during meetings about past actions. When the responsibility for creating minutes changes hands, the outgoing Clerks are encouraged to pass on their binders of approved minutes to the new Clerks.

6. Closed meetings - Should the Administration Board need to conduct closed meetings for the limited purpose of discussing and acting on personnel and/or contractual matters, the Clerk of Administration will:
  - a. Follow the content and timing paragraphs above, and mark the minutes “confidential.” Draft minutes need to be distributed to voting members in sealed envelopes marked “confidential.”
  - b. Provide a copy of the approved minutes to the Chair of Administration rather than to the Church Administrator.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Pilgrim Pines Camp Use</b>	<b>1.07</b>	<b>A</b>	<b>1997</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force 4/23/2015

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	5/18/2015
Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	

**I. PURPOSE**

The purpose of this document is to establish rules and guidelines for the use of Pilgrim Pines Camp in Yucaipa, California.

**II. SCOPE**

A. Applies To

All individuals or groups using Pilgrim Pines.

B. Administrator

Church Administrator

C. Policy and Procedure Responsibility

Administration Board

Policies & Procedures Task Force

**III. DEFINITIONS**

Pilgrim Pines is a United Church of Christ retreat camp located in the San Bernardino Mountains in Yucaipa, California.

**IV. POLICY**

Reserving space for IUCC groups at Pilgrim Pines can be done without prior Administration Board approval if it is a repetitive program for which approval has already been received, i.e., the all Church Retreat, Women's Retreat or Choir Retreat. All other usage of Pilgrim Pines Camp must be approved in advance by the Administration Board. Any individuals or groups using Pilgrim Pines Camp will adhere to their policies as well as this policy.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Pilgrim Pines Camp Use</b>	<b>1.07</b>	<b>A</b>	<b>1997</b>

**V. PROCEDURE**

A. A responsible person will be chosen to coordinate the retreat. This person will make all necessary arrangements between the camp and IUCC.

1. Administrative Responsibilities for the Responsible Person

- a. If this is a new retreat, the matter shall be approved by the Administration Board before the space can be reserved. It is the responsibility of the person responsible for the group to be sure that this matter is placed on the Administration Board's agenda.
- b. If approved by the Administration Board, the responsible person will arrange for deposits to be made by the Church to the retreat center. Pilgrim Pines sets the policy regarding the fees and the deposit percentage and when they are due.
- c. Once approval to reserve the space has been obtained, either the responsible party or the Church Administrator will execute the contract as agreed.
- d. The responsible person will contact the Church office so that the retreat can be entered onto the event calendar.
- e. Reservations for individuals wishing to join each group must be made no later than three weeks before the scheduled event. All monies and the number of reservations involved must be supplied to the Church office not later than three weeks prior to the event. (Check with the Church Administrator to see if Pilgrim Pines policy is still the same.)
- f. Additions can be made up to the day of the event. However, this will be effective only on a "space available basis."

2. Cancellations

- a. Cancellations must be made no less than two weeks prior to the event and require immediate notification to the responsible party for the group event. The responsible party will immediately contact the Church office.



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Pilgrim Pines Camp Use</b>	<b>1.07</b>	<b>A</b>	<b>1997</b>

- b. The payment made to hold individual reservations shall be retained by the Church office until such time as it is determined by Pilgrim Pines Camp administration if the Church is being held financially responsible for the cancellation. All, some, or none of the payment may be used to pay for the charges incurred for the cancellation. Any balance will be refunded by the Church office to the individual(s) involved.

**B. Church Office Responsibilities**

1. The Church Administrator will enter the event on the Church calendar.
2. The Church Administrator shall execute contracts for approved events with Pilgrim Pines, as appropriate.
3. The Church Administrator shall make necessary deposits from Church general funds to secure the reservations and shall receive collected funds from the responsible party and remit to Pilgrim Pines as appropriate.
4. In the event of cancellations, the Church Administrator shall refund balances due to the individuals involved as allowed by contract and policy.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Items Requiring Board Approval</b>	<b>1.08</b>		<b>02/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	02/17/2015
Ministries Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	

### I. PURPOSE

The purpose of this document is to set forth policies which will help Ministries, Committees, other Church entities and individuals determine what items need to be brought to the Ministries Board and/or the Administration Board for approval prior to action being taken.

This document will enable the two Boards to focus on their respective areas of responsibility while, at the same time, allowing the Ministries, Committees and other entities to meet their goals within the mission of the Church.

### II. SCOPE

#### A. Applies To

All IUCC entities and individuals

#### B. Administrator

Administration and Ministries Boards

#### C. Policy and Procedure Responsibility

Policies and Procedures Task Force

### III. DEFINITIONS

A. Internal Fundraisers - Efforts to obtain contributions of cash or property from IUCC members for use by the Church or to forward to other entities. Examples:

1. For use by the Church: (e.g., Oktoberfest, Scrip).
2. For forwarding to other entities: (e.g., Pilgrim Pines scholarships, Round Rock Christmas gifts, Families Forward [formerly Irvine Temporary Housing], and AIDS Services Foundation).

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Items Requiring Board Approval</b>	<b>1.08</b>		<b>02/17/2015</b>

B. External Fundraisers - Efforts to obtain contributions of cash or property from individuals outside of IUCC for use by the Church or to forward to other entities.

#### IV. POLICY

##### A. Budgeting Issues

##### 1. Basic Budget

The Congregationally approved annual budget is a spending plan for each Church entity and for the Church as a whole. Since Church revenues cannot be predicted with certainty and unforeseen major expenditures may be required, each entity should do its utmost to accomplish its goals with a minimum expenditure of funds.

##### 2. Overspending and Underspending Within Budgeted Line Items

a. From time to time spending needs may prove different from the budget plan. In such cases, Ministries and other budgeting entities (the Administration Board, the Ministries Board, and the Early Childhood Center) may, without approval from the Administration Board, overspend in some of their budget line items provided that:

- (1) Any overspending is matched (or exceeded) by underspending within other line items; and
- (2) Any such overspending does not exceed \$500 within any one line item for any calendar year.

b. Certain expenses must be met and therefore, generally, are not eligible for underspending. Examples include:

- (1) Contractual obligations (e.g., our monthly landscape fees, our monthly debt service, and insurance premiums);
- (2) Salaries and payroll taxes; and
- (3) Utilities

c. Should an entity wish to exceed the \$500 limit, Administration Board approval is required. Also refer to P & P on "Cash Management", 3.01A.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Items Requiring Board Approval</b>	<b>1.08</b>		<b>02/17/2015</b>

d. Budgeting entities are encouraged to:

1. hold a vote before deciding to overspend/underspend; and
2. document such overspending/underspending in their own minutes.

#### B. Fundraising Issues

All fundraisers must be sponsored by a Ministry or Committee or other Church entity.

##### 1. Internal Fund Raisers -

- a. Established Fund Raisers - Several fundraisers occur on a regular basis at IUCC (such as Round Rock Christmas gifts). The sponsoring Church entity must coordinate and calendar all such established fundraisers each year with the Funding Development Committee.
- b. New Fund Raisers - Sponsoring Church entities may approve new fundraisers provided that the new fund raising activity furthers the Church's mission. The sponsoring Church entity must then coordinate and calendar any such new fundraisers with the Funding Development Committee.

In some cases the Funding Development Committee may calendar the fundraiser at a different time that the sponsoring Church entity desires in order to avoid overloading Church members with requests for contributions. If any disagreement arises between the Funding Development Committee and the sponsoring Church entity, the matter may be brought before the Administration Board for resolution.

2. External Fund Raisers - External fund raisers must be approved by the Administration Board with the exception that Church youth are permitted to raise funds for their own organized events and activities with the sponsorship of an appropriate Church entity.

#### C. Church Sponsored Events

Activities planned by Ministries, or other Church entities, that convey Church sponsorship of an individual or an organization do not require either Administration Board or Ministries Board approval unless the event:

1. involves financial obligations beyond the stated budgetary requirements.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Items Requiring Board Approval</b>	<b>1.08</b>		<b>02/17/2015</b>

2. creates some contractual or liability issues;
3. is in conflict with Church By-laws;
4. is inconsistent with the Church's Mission Statement.

**D. Mass Mailings**

Mass mailings, other than the Church Goodnews Letter and those pertaining to approved Church events, must have prior approval of the Administration Board, the Ministries Board or the Pastor(s)

**V. PROCEDURE**

- A. Ministry Chairs, Committee Chairs, Leaders of other Church entities, or any individuals planning an activity, need to be aware of the above policies regarding potential financial, contractual or legal commitments and policy infractions and use good judgement in such planning.
- B. If group leaders and individuals are in doubt about how to proceed, they should consult with the appropriate Ministry Chair, Church Administrator or Moderator or Pastor(s).
- C. The Church Administrator should be contacted to put the time and location of the planned event on the Church's Calendar.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>E-mail Church List</b>	<b>1.11</b>		<b>02/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies and Procedures Task Force

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	03/16/2015
Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	

**I. PURPOSE**

To provide guidelines for miscellaneous information to be sent using the E-mail Church List (E-Church List).

**II. SCOPE**

A. Applies To

Any individual or group that wishes to utilize the E-Church list to have a message sent to members who have email.

B. Administrator

Church Administrator

C. Policy and Procedure Responsibility

Office staff and Pastor(s)

Policies & Procedures Task Force

**III. DEFINITIONS**

The E-Church List - A computer-generated report containing the email addresses of members and active participants of the Church.

**IV. POLICY**

A. The following submissions will be accepted for distribution to the E-Church list:

1. Announcements of approved upcoming events.
2. Announcements by a particular Ministry or Committee that are related to the activities or mission of the Church.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>E-mail Church List</b>	<b>1.11</b>		<b>02/17/2015</b>

3. Announcements that have been approved either by the Ministries Board, the Administration Board, the Pastor(s) or the Congregation.
4. Announcements regarding special news of a church family member (illness, death, special needs, etc.)

B. Examples of inappropriate use of the E-Church List are:

1. Advertising of non-church related events or solicitations of any kind unless authorized by a Ministry Chair, officer or Pastoral leader.
2. Jokes, virus warnings, petitions, chain letters requests for help for any non-church people or organizations unless this help is authorized by an IUCC Ministry Chair, officer or pastoral leader.
3. Political action activities unless approved as in Section IV.A. above.

**V. PROCEDURE**

- A. All requests for E-Church messages should be made through the church office.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Document Retention Policy</b>	<b>1.12</b>		<b>2/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies and Procedures Task Force 10/23/2014/DWS

<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	02/17/2015
	Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	Not required

## I. PURPOSE

The purpose of this document is to:

- ◆ Clarify the procedures for document retention and
- ◆ Provide guidance to those charged with retention of all documents for the Church (Administration, Ministries, financials and other bodies of the organization).

## II. SCOPE

A. Applies To:

- ◆ The Church Administrator; and
- ◆ The Chair of the Human Resources Committee; and
- ◆ The Chair of the Child Care Committee; and
- ◆ The Director of the Early Childhood Center; and
- ◆ The Treasurer and Bookkeeper; and
- ◆ The Chair of Administration with regard to providing for the safekeeping of minutes of closed meetings (see Policies and Procedures Doc Number 1.05).

B. Administrator

The administrators are those named in II. A. above



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Document Retention Policy</b>	<b>1.12</b>		<b>2/17/2015</b>

C. Policy and Procedure Responsibility

- Administration Board
- Policies and Procedures Task Force

**III. DEFINITIONS**

- A. *Documents*                                      Paper and electronic records
- B. *ECC*    The IUCC Early Childhood Center
- C. *IUCC*    The Irvine United Congregational Church or Church

**IV. POLICY**

The Church Administrator, along with the Chair of the Administration Board, shall ensure that this Policy and Procedure on the Church's Document Retention Policy is reviewed annually to ensure that compliance with said procedures are current. Said review shall be conducted in January and documented in the Administration Board's minutes no later than the February Administration Board Meeting.

**V. PROCEDURE**

A. Personnel Files

1. All active personnel files must be stored in a secured file cabinet for the duration of employment. These files should contain but are not limited to the following items
  - a. Resume
  - b. Personnel Reviews
  - c. Employee Application
  - d. New Hire Consent Form (background check) and Results
  - e. Offer Letter (if applicable)
  - f. W-4 Form

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Document Retention Policy</b>	<b>1.12</b>		<b>2/17/2015</b>

- g. Signed Job Description
  - h. Notice and signed acknowledgement of wage rate and designated paydays
  - i. Signed Receipt of the IUCC Employee Handbook
  - j. Boundary Training Certificate (if applicable)
  - k. Signed acknowledgement of Safe Church Policy
  - l. I-9 Forms and corresponding documentation (attached DCL, passport, etc.)
2. All inactive personnel files must be retained for seven (7) years from termination date (older files should be shredded). These files should contain:
- a. Resume
  - b. Personnel Reviews
  - c. Employee Application
  - d. New Hire Consent Form (background check) and Results
  - e. Offer Letter (if applicable)
  - f. W-4 Form
  - g. Signed Job Description
  - h. Notice and signed acknowledgement of wage rate and designated paydays
  - i. Signed Receipt of the IUCC Employee Handbook
  - j. Boundary Training Certificate (if applicable)
  - k. Signed acknowledgement of Safe Church Policy
  - l. I-9 Forms and corresponding documentation (attached DCL, passport, etc.)
  - m. The appropriate forms documenting the individuals termination

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Document Retention Policy</b>	<b>1.12</b>		<b>2/17/2015</b>

B. Payroll Documents

1. Payroll files must be retained for seven (7) years (older files should be shredded). Payroll related paper documents for the biweekly pay periods (including time sheets showing hours worked).

C. Resume and Job Applications

1. Resumes and Job Applications of interviewed candidates should be retained for three (3) years. If no one has interviewed the candidate, the resume can be shredded immediately upon filling the open position.
2. The resume of an interviewed candidate filed electronically should be retained for three (3) years.

D. Financial Information

1. Financial information retained for seven (7) years (older files should be shredded):
  - Bank statements.
  - Deposit slips and all other supporting documents.
  - Petty Cash reports.
  - Expense Reimbursement Forms.
  - Accounts Payable
2. Financial information retained indefinitely:
  - IUCC Monthly Financial Reports
  - IUCC EOY Financial Reports
  - ECC Monthly Financial Reports
  - ECC EOY Financial Reports

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Document Retention Policy</b>	<b>1.12</b>		<b>2/17/2015</b>

3. Financial Information retained with conditions:

- Individual Bank/Financial Institution Signature Card files – files are updated with changes of signatory group and previous signatory cards are shredded. Upon closing of an account, the Church Administrator shreds all remaining signature card information pertaining to the closed account (after the required seven (7) years as stated in V (B) (1) above).

E. Historical Information

1. Historical Documentation, as listed below, should be kept indefinitely:

- a. Congregational Meeting Minutes and Annual Reports (paper & electronic)
- b. Administration Board Meeting Minutes (electronic)
- c. Ministries Board Meeting Minutes (electronic)
- d. Individual Ministry Meeting Reports (electronic/when received)
- e. News & Notes Newsletters (paper & electronic)
- f. Events Reports (electronic/when received)

F. Building Documents

1. Blueprints will be held indefinitely

G. Legal Documents

1. The following documents are kept in secured files and copies are retained on the Church server (unless indicated otherwise). The Church server is backed up weekly on Sunday mornings at 4:00 A.M. to offsite storage held at Cebeyond Technology:
  - a. Corporation Grant Deed
  - b. Articles of Incorporation
  - c. Certificate of Amendment of Articles of Incorporation (2/11/2003 Name Change)

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Document Retention Policy</b>	<b>1.12</b>		<b>2/17/2015</b>

- d. IRS Letter of Group Tax Exemption as a member of the United Church of Christ
- e. State of California Statement of Non-Profit Corporation
- f. County of Orange Religious Tax Exemption (paper only)
- g. Orange County Fire Authority Facility Operation Permit (paper only)
- h. City of Irvine Business License (paper only)
- i. Easement Agreement with St. Paul Greek Orthodox Church (signed 10/19/2004)
- j. Conditional Use Permit (Revised 01/1995)
- k. Reciprocal License Agreement for Parking (signed 07/01/2008)

H. ECC

- 1. Each child's records shall be retained for three (3) years following the end of service to the child. These records include the following required documents to remain in compliance with the California State General Licensing Requirements Manual, Section 101221:
  - a. Registration Form
  - b. Sign-Off Sheet
  - c. Parent's Rights
  - d. Children's Personal Rights
  - e. I.D. & Emergency Information
  - f. Health History – Parent's Report
  - g. Physician's Report
  - h. Consent To Treat
  - i. Walking Field Trip Permission

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Document Retention Policy</b>	<b>1.12</b>		<b>2/17/2015</b>

2. Child Sign In & Out records shall be retained for one (1) month in compliance with the California State Licensing Requirements Manual, Section 101230.
3. ECC staff records shall be retained in the files of the ECC Director, during the course of employment. Upon termination, the file will remain in the custody of the ECC Director for a period of one (1) year in compliance with the California State Licensing Requirements Manual, Section 101221. The file will then be transferred to the Church's Inactive Personnel files and retained per Section V(A)(2) of these Procedures (see above).

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

				<i>Date</i>
<i>Format Reviewed By:</i>	Bylaws, Policies and Procedures Committee			06/17/2022
<i>Approvals:</i>	Administrative Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/> No
	Ministries Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/> No
				06/20/2022
				05/19/2013

## I. PURPOSE

The purpose of this Safe and Healthy Church Community Policy is to protect the physical and emotional safety and well being of all members of the church community.

To enact action approved by the Congregation at the Spring Congregational Meeting held on May 19, 2013 and revised at the Spring Congregational Meeting on June 1, 2014.

## II. SCOPE

### A. Applies To

- All members, friends, and visitors of Irvine United Congregational Church
- All users of IUCC's facilities
- All Staff (both IUCC and ECC)

### B. Administrator

Coordinating Council

Church Administrator

### C. Policy and Procedure Responsibility

Bylaws, Policies and Procedures Committee

## III. DEFINITIONS

A. IUCC                                      Irvine United Congregational Church

B. ECC                                         The Early Childhood Center

C. MYP                                        Ministry with Young People

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

D. Safe Church Team IUCC Coordinating Council

#### IV. POLICY

Irvine United Congregational Church (hereinafter “the Church”) is committed to creating a safe and healthy environment in which all people are welcomed, and all can learn about and experience God’s love. The Church celebrates freedom, inclusion, and diversity of belief, and recognizes love as the creative and supporting force in life.

#### V. PROCEDURE

##### A. Policy Prohibiting Abuse, Harassment, Exploitation, and Intimidation

1. The Church is committed to creating and maintaining programs, facilities and a community in which members, visitors, friends, staff, volunteers, and clergy can worship, participate in fellowship activities, learn and work together in an atmosphere that is free from all forms of abuse, discrimination, harassment, exploitation, intimidation, and coercion. Behaviors which constitute abuse, discrimination, harassment, exploitation, intimidation, and coercion are prohibited by church policy and will not be tolerated.
2. The Church encourages its employees and leaders to nurture safety by being attentive to self-care, by educating themselves, and by maintaining appropriate boundaries. Employees will be taught, with the goal of a thorough understanding of the importance of referring those in need to supportive, helpful, and appropriate recourses. In compliance with state law, staff members are required to complete biennial sexual-harassment training.

##### B. Requirement for Ministries and Programs Involving Children and Youth

###### For Staff Members

1. Staff screening, onboarding, and continuing education is governed by the personnel policies of the IUCC Employee Handbook.
  - a. Staff members are required to review this policy as part of their onboarding.
  - b. Applicants and staff will be subject to background screening, particularly mandated for anyone with the potential of working directly with children. IUCC will reimburse for any screening the church requires.



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

- c. In compliance with California Assembly Bill 506 (Chapter 169, Statutes of 2021), those staff members who work with or have contact with children will complete child abuse and neglect reporting training via <https://mandatedreporter.ca.com/> or other training authorized by the California Department of Social Services.
- d. To every extent feasible, there should be two adults (staff members and/or registered volunteers) present for all interactions with children and youth.
- e. Clergy will participate regularly in boundary awareness and safe church training as mandated by the Southern California Nevada Conference of the United Church of Christ or the local Association.

For Volunteers

1. All volunteers who work with children and/or minor youth (persons under the age of 18) must be registered by a program staff or clergy member prior to beginning working with children and youth. Those who volunteer to work with children and/or minor youth on an on-going basis will have regularly and frequently attended the Church for at least three (3) months, including the three-month period immediately before beginning to work with children or youth. Any exception to this requirement must be approved by the Safe Church Team.
2. All volunteers, but especially those who may have direct contact with children and youth, should review this policy.
3. ~~Registration as volunteer will include completing and signing a self-disclosure form, submission of references with current contact information, and a meeting with the clergy or program staff member designated by the minister.~~
4. In compliance with California Assembly Bill 506 (Chapter 169, Statutes of 2021), volunteers who provide more than sixteen (16) cumulative hours (of direct interaction with minors) within thirty (30) days or thirty-two (32) cumulative hours within one (1) calendar year will be required to: (1) complete the free 2-hour training for child abuse and neglect identification via <https://mandatedreporter.ca.com/> or other training authorized by the California Department of Social Services; and (2) undergo background screening.
  - a. Direct interaction could include: Sunday School, Youth Group, Vacation Bible School, service projects, field trips or other MYP-associated programming and events.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

- b. The MYP Director or MYP Ministry designee, in collaboration with the Church Administrator, will track direct interaction hours so as to communicate to volunteers when they are approaching the threshold to meet these requirements.
- c. Once volunteers reach the 16- or 32-hour threshold, they will have thirty (30) days to complete the training and screening. Completion certificates should be provided to the MYP Director, MYP Designee or Church Administrator. If volunteers cannot meet the 30-day deadline, they may be asked to refrain from direct-interaction-with-minors activities until the completion certificates are submitted.
- d. IUCC will reimburse for any screening the church requires of volunteers using the standard reimbursement request form available at <https://www.iucc.org/portal/documents/> under the “Admin Forms” tab.

For All IUCC/ECC

- 5. To the extent possible, there will be two unrelated adults in attendance at church sponsored events, programs and activities that involve children and youth. For this purpose, an adult shall be at least 18 years of age and at least four years older than the oldest participant in the program. When there are not enough adults available to place two Sunday School teachers in each classroom, an adult will be designated to visit the rooms in which only one adult is present to offer assistance and support.
- 6. The telephone number of the Child Protective Services and Adult Protective Services, including reporting guidelines, shall be posted in the church office.
- 7. When staff or volunteers are transporting children and youth in the context of a church sponsored event, there will be an additional adult or at least two children in the vehicle. Volunteers and staff who will transport youth or minors on behalf of the church will provide copies of driver’s license, auto registration, and insurance to the MYP Director, MYP staff member, MYP Designee or Church Administrator.
- 8. Participation by youth or children not being accompanied by a parent or guardian at activities other than regular worship services and Sunday School requires prior written consent of a parent or guardian, including emergency phone numbers and medical release forms.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

9. Prior written consent of a parent or guardian is required for any photographs, videos or digital imaging of minors intended for publication in print or electronic media, including the IUCC website.
10. Doors must always remain unlocked and windows uncovered in rooms where any activities involving children or youth are in progress.
11. Proper judgment shall be used when having physical contact with children or youth in accordance with child protection and awareness training and use of healthy boundaries. Examples of inappropriate physical contact with children would include but not be limited to: full frontal hugs, wrestling, tickling, touching knees and/or legs, messaging, or inappropriately commenting on the child's or minor's physique.
12. Incidents or accidents resulting in injury to a child or youth during church activities require a written incident report to be signed by the attending adult, a parent or guardian, and the program staff or clergy person with oversight of the program. A copy will be given to the parent and a copy will be kept on file in the office by the Safe Church Team.

C. The Safe Church Team

The Safe Church Team (hereinafter, "the Team") is established by the IUCC Bylaws. The Team administers this policy and assists other ministries in complying with this policy. The Team ensures that other users of church facilities are advised about this policy. The IUCC Coordinating Council shall serve as the Safe Church Team. The Coordinating Council is comprised of: the Senior Pastor, the Moderator, Chair of the Administration Board, and Chair of the Ministries Board.

D. Other Partners in Safety

1. IUCC's pastoral staff is expected to be committed to the Safe Church Policy. They will lead other staff members by supervision and personal example. They will assist the Team in locating appropriate resources and will encourage the other ministries in their work towards a safe church. Their preaching and teaching will include appropriate attention to the safety and health of the church community. They will provide pastoral counseling, within their expertise, to those who are healing from experiences with abusive behavior and will provide referrals to external professionals as appropriate.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

2. The Adult Programs Ministry/Ministry with Young People, along with administrative staff, will be responsible for developing and continuing to develop appropriate training plans for all staff and volunteers. These ministries will ensure the safe church training is included in the orientation of new staff and volunteers and may conduct refresher classes annually. Working with pastoral staff, these Ministries will provide opportunities for the church community to learn about and grow in the areas of personal boundaries and abuse prevention. This training will include a policy on the proper use of social media.
3. The Buildings and Grounds Committee will be especially alert to safety issues as they see to the maintenance of the church facilities. They will consider the safety implications of maintenance and repair projects. As part of the use agreements, they will require regular users of the facility to indemnify IUCC. In consultation with the church's insurance carrier, they will require appropriate documents showing that the Church is properly protected by the user's insurance.
4. The Safe Church Team will coordinate with other ministries to establish plans and procedures, by which the church community may respond to emergencies such as medical problems, fire, earthquake, actual or threatened violence, or other interruptions to the safe and healthy community.
5. The Church Administrator will inform other users of church facilities about this policy and provide the information to them via the church website or printed copies.

**E. Child, Elder, or Dependent Adult Abuse**

1. The Church will make a report to appropriate authorities, including but not limited to the Orange County Department of the Child and Family Services or the Orange County Department of Aging and Adult Services, Adult Protective Services, and/or law enforcement if at any time the Church has reasonable cause to believe that a minor, elder or dependent adult may be an abused or neglected child, elder or dependent adult as defined by Penal Code Section 11164 – 11174.3.
2. Being a caring Christian community, a member of the Church who becomes aware of facts or circumstances indicating that child, elder or dependent adult abuse or neglect may occur in the reasonably foreseeable future is encouraged to report the matter to pastoral staff or any member of the Team so that the Church may take appropriate action in a timely manner. Nothing in this paragraph is intended to prevent or discourage any person from calling police, fire, medical, or

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

other emergency personnel when necessary to deal with an immediate threat or a dangerous activity in progress.

3. ~~All employees must sign The Child Abuse Reporting P.C. 11166 Reporter Responsibilities document. The signed original shall be kept in the staff person's personnel file. This document is to be signed by the day employment begins.~~
  4. Employees who become aware of suspected child abuse situations must report them to the Child Protective Services, first by telephone at the posted number (714) 940-1000 and then within 36 hours by written report on the appropriate form.
  5. Employees reporting abuse must inform their supervisor of this action, as well as the reasons for it.
  6. Staff who are not sure whether a situation constitutes suspected child abuse must confer with their supervisor for direction and proceed accordingly.
  7. ~~See 1.13 APPX Child Abuse Reporting Statement and attached Penal Code sections.~~
- F. Procedures for Responding to Complaints of Sexual Abuse, Harassment, Exploitation, Intimidation or Coercion
1. Regardless of the actions that public agencies may take, the Team must continue to provide for the welfare of the Community. Several approaches may be taken in addressing incidents of alleged sexual abuse, harassment, exploitation, intimidation, or coercion:
    - a. The complainant can attempt to resolve the matter directly with the respondent, the accused individual.
    - b. The complainant may report the incident to pastoral staff or any other member of the Team in an effort to resolve the matter informally.
    - c. If an informal resolution of the complaint does not seem wise, appropriate, achievable, or does not succeed, the complainant or pastoral staff or other member of the Team may request that the Team be convened to initiate formal review. The complainant may make a request for formal review to any member of the Team as identified above.
  2. Formal review may include the following steps:

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

- a. The Team may gather statements or other information from the individuals involved in the alleged event or events.
- b. The Team may gather information from others who may have pertinent information, such as witnesses to alleged events, persons who may otherwise have important information or insight into the alleged events, and qualified professional consultants.
- c. The Team may seek the advice of legal counsel or others to advise it on ongoing investigations or other risk being undertaken.
- d. If the person against whom the complaint has been made is a paid member of the Church staff, then findings and reports of the Team will be made to the Administration Board.
  - i. The following procedure is to be followed when an allegation of child abuse is reported against a paid member of the Church staff.
    - a) All allegations shall be reported to the Safe Church Team.
    - b) If a report under Penal Code 11166 has been filed, IUCC shall never try to investigate an allegation of child abuse
    - c) To avoid conflicting or contradictory statements and to safeguard the privacy of all individuals involved, IUCC shall designate a spokesperson (Moderator, pastor(s) or designee of the Administration Board), who will be authorized to speak with the press and the congregation regarding an allegation of child abuse. Specific details and names shall not be used.
    - d) All other church leaders shall be instructed to direct all questions to the authorized spokesperson.
    - e) The authorized spokesperson may prepare a statement for use with the press and the congregation.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

- f) All matters, discussions, and activities involving the allegation must be documented. Documentation must include minutes of all meetings on the allegation.
  - g) The leader of the church entity (for which the accused is a paid member of the Church staff), in cooperation with the Safe Church Team, in conjunction with the Administration Board and in compliance with the Employee Handbook, shall determine an appropriate course of action.
  - h) The Safe Church Team shall immediately report the allegation to the insurance company and the United Church of Christ.
  - i) The Safe Church Team shall, if appropriate, notify the Child Abuse Registry within 36 hours, or as required by law, of receiving information of the allegation. Forms for notification are in the Creating Safe Spaces folder in the Church Administrator's office.
  - j) An attorney for the church shall be present when an IUCC employee is answering questions from the police or social service agencies, regarding possible child abuse.
  - k) Pastoral resources may be offered to all parties involved. These referrals may come from the Pastor(s).
  - l) All church leaders and employees shall always remember not to judge, blame, minimize, or deny the situation, but try to maintain an attitude of impartiality while the situation continues. To do otherwise can damage the church more than necessary.
- e. If the person against whom the complaint has been made is a volunteer, then findings and reports of the Team may be made to the staff member who has oversight of the program wherein the volunteer is working.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

- i. The following procedure is to be followed when an allegation of child abuse is reported against a volunteer.
  - a) All allegations shall be reported to the Safe Church Team.
  - b) If a report under Penal Code 11166 has been filed, IUCC shall never try to investigate an allegation of child abuse.
  - c) To avoid conflicting or contradictory statements and to safeguard the privacy of all individuals involved, IUCC shall designate a spokesperson (Moderator, pastor(s), or designee of the Administration Board] who will be authorized to speak with the press and the congregation regarding an allegation of child abuse. Specific details and names shall not be used.
  - d) All other church leaders shall be instructed to direct all questions to the authorized spokesperson.
  - e) The authorized spokesperson may prepare a statement for use with the press and the congregation.
  - f) All matters, discussions, and activities involving the allegation must be documented. Documentation must include minutes of all meetings on the allegation.
  - g) The leader of the church entity [for which the accused is a volunteer], in cooperation with the Safe Church Team and in consultation with the Administration Board, may immediately remove the accused from their volunteer position pending the outcome of the investigation.
  - h) The Safe Church Team shall immediately report the allegation to the Administration Board, insurance company, and the United Church of Christ.
  - i) The Safe Church Team shall, if appropriate, notify the Child Abuse Registry within 36 hours, or as required by law, of receiving information of the allegation. Forms



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

for notification are in the Creating Safe Spaces folder in the Church Administrator's office.

- j) An attorney for the church shall be present when an IUCC employee is answering questions from the police or social service agencies, regarding possible child abuse.
  - k) Pastoral resources may be offered to all parties involved. These referrals may come from the pastor(s).
  - l) All church leaders and employees shall always remember not to judge, blame, minimize, or deny the situation, but try to maintain an attitude of impartiality while the situation continues. To do otherwise can damage the church more than necessary.
- f. The Team may deem it necessary to request that the respondent not participate in specific church activities until the matter is resolved.
- g. The Team, in conjunction with the Administration Board, will make determinations and take actions appropriate to resolve the matter. These may include:
- i. A finding that no sexual abuse, exploitation, coercion, harassment, or intimidation has occurred.
  - ii. A finding that sexual abuse, exploitation, coercion, harassment, or intimidation has occurred, and that the appropriate body of the Church is called upon to take action accordingly. Such actions may include one or more of the following:
    - a) A formal reprimand, with defined expectations for changed behavior.
    - b) Recommending or requiring psychological or psychiatric assessment, counseling and/or treatment.
    - c) Requiring agreement to a Covenant of Limited Access, with the terms of contact clearly defined.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

- d) Probationary standing, with the terms of the probation clearly defined.
- e) Dismissal from employment or authorized volunteer position in the Church.
- h. A confidential written summary of the Team proceedings in such cases will be maintained in a locked cabinet in the church office and in secure electronic files.
- i. The person(s) toward whom the inappropriate behavior is directed need not be the complainant. Neither consent nor acquiescence by the persons(s) to whom the behavior is directed, will excuse, or exonerate inappropriate behavior. At any time, the Church may initiate or proceed with the formal complaint process.
- j. In determining whether alleged conduct constitutes sexual harassment or exploitation, consideration shall be given to the record of the alleged incident(s) as a whole and to the totality of the circumstances, including the context in which the alleged incident(s) took place.
- k. Any person bringing a complaint of abusive or inappropriate behavior, or assisting in investigating such a complaint, will not be adversely affected in terms and conditions of employment or church membership or affiliation, or otherwise discriminated against or discharged. However, willful malicious use of this process may itself be investigated as a form of harassment. The Team will carefully discern the difference between misunderstandings or errors made in good faith and malicious actions.
- l. If the complainant or respondent is not satisfied with the disposition of the matter by the Team, he or she has the right to appeal to the Administration Board and then to the Church and Ministry Committee of the Southern Association of the Southern California Nevada Conference of the United Church of Christ (hereafter, "C&M Committee"). The subject of any such appeal to the C&M Committee shall be limited solely to whether the procedures of this policy were followed. The matter will not be reconsidered on the merits, and the decision of the C&M Committee will be the final resolution of the matter. If the C&M Committee determines that the procedures of this policy were not followed, it will refer the matter back to the Team to

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

complete the processing of the complaint in accordance with these procedures.

- m. If the results of any investigation by the Team call into question the fitness for ministry of any Authorized Minister, these results will be promptly forwarded to the C&M Committee. As of June 2022, the Conference may be contacted at (626) 798-8082 and information on current leadership may be found at [sencucc.org](http://sencucc.org).

#### G. Guidelines for Involving Sex Offenders

1. No person who has been convicted of, or with an unresolved accusation of, any sexual misconduct will be permitted to be involved in any children’s religious education or youth group activities at the Church. A person with a known history of sex offenses against children or youth will never be allowed to interact with children, work with children or youth, or socialized with children or youth at any congregational functions. Exemption may be granted by the Team, in conjunction with the Administration Board, after a comprehensive exploration of the specific situation.
2. Sex offenders who have completed prison sentences and mandated, as well as registered with the state have, according to the court system, complied with their sentences. However, the Church must assure that a convicted sex offender does not have the opportunity to re-offend in the church community. Additionally, the sex offender should not be permitted in situations where he or she can be falsely accused.
3. This also recognizes that the presence of any sex offender in the congregation creates concerns for membership. The physical and emotional safety and the well being of the congregation must be considered and weighed in any decisions that limit the participation of any church member. The Church’s need to model forgiveness and help in the healing and reconciliation process must also be considered.

#### H. Summary

The safety and well-being of all God’s children is of utmost importance and concern in our life as the body of Christ and to our services as Christ’s Church. All forms of abusive behavior, including inappropriate sexual behavior, exact immeasurable spiritual, psychological, and physical costs in terms of suffering and lost potential for future growth and wholeness to victims. Abusive behavior (sexual or otherwise)

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Safe &amp; Healthy Church Community Policy</b>	<b>1.13</b>	<b>A</b>	<b>06/20/2022</b>

within the Church results in damage to the social stability of the Church, and the peace, wholeness, and spiritual growth of all members of the Church. Such a loss also affects all churches and diminishes their credibility and therefore the ability of the Church to demonstrate the peace of God in society as a whole.

The Irvine United Congregational Church is called as an instrument of Christ's Compassionate Peace to continue to build an environment that seeks to:

- Prevent abusive behavior.
- Resolve directly, fairly, and definitively any instance or appearance of abusive behavior.
- Provide a safe and creative community and practice in which those affected by past abusive behavior may find support and healing.

<b>IRVINE UNITED CHURCH OF CHRIST POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Administration Board Calendar</b>	<b>1.14</b>	<b>A</b>	<b>2/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force 11/17/2014 A. Rosse

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	02/17/2015
Ministries Board	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	

**I. PURPOSE**

The purpose of this document is to:

- Establish a monthly calendar for essential Administration Board responsibilities.

**II. SCOPE**

A. Applies To:

Administration Board

B. Administrator

Administration Board

C. Policy and Procedure Responsibility

Administration Board

Policies and Procedures Task Force

**III. DEFINITIONS**

A. IUCC – Irvine United Congregation Church

B. ECC – Early Childhood Center

**IV. POLICY**

Per the IUCC Bylaws, the Administration Board is responsible for:

- short and long-term financial and business plans.
- preparing budgets.

<b>IRVINE UNITED CHURCH OF CHRIST POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Administration Board Calendar</b>	<b>1.14</b>	<b>A</b>	<b>2/17/2015</b>

- monitoring income and expenses.
- presenting budgets and plans to the congregation.
- ensuring that all performance evaluations are completed annually.

Duties related to the above responsibilities have been calendarized to help ensure timely and appropriate completion.

**V. PROCEDURE**

In the designated month, the Administration Board will review and act on said task as needed:

January:

- Winter Congregational Meeting Agenda
- Document Retention Policy (to ensure compliance and update as needed)

February

-

March

-

April

- Leadership Nominations

May

- ECC Tuition Rates
- Spring Congregational Meeting Agenda

June

-

July

- Attend/participate in Leadership Weekend

<b>IRVINE UNITED CHURCH OF CHRIST POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Administration Board Calendar</b>	<b>1.14</b>	<b>A</b>	<b>2/17/2015</b>

August

-Aspirational Budgets Due from Committees and Ministries

September

- Stewardship Goal

October

-

November

-Ensure that all performance evaluations will be completed by year-end

December

-Budget for next year  
-Activation/deactivation of members

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Childcare Policy</b>	<b>1.15</b>		<b>5-18-13</b>

*Date/Initial*

*Format Reviewed By:* Policies and Procedures Task Force

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	5-18-13
Ministries Board	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	

**I. PURPOSE**

To provide guidelines for when IUCC will provide childcare for church events.

**II. SCOPE**

A. Applies To

Any ministry, committee, staff or other church group who wishes to utilize childcare for a church event.

B. Administrator

Ministry for Young People Director  
Administration Board

C. Policy and Procedure Responsibility

Administration Board  
Policies and Procedures Task Force

**III. DEFINITIONS**

Childcare – The provision of supervision and care for infants and minor children.  
Childcare Attendant – The staff member who provides the childcare.

**IV. POLICY**

IUCC is committed to being welcoming and hospitable to young families. As such, IUCC provides infant and childcare as specified below:

- On Sunday mornings and for IUCC special events immediately following Sunday services.



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Childcare Policy</b>	<b>1.15</b>		<b>5-18-13</b>

- At IUCC events that take place outside of Sunday morning/immediately after services, including choral concerts, speaker series, special events, congregational meetings and church-sponsored social events.
- IUCC does not provide childcare for regularly scheduled meetings (including Administration and Ministries Boards, ministry or committee meetings, gatherings or choral practices).

**V. PROCEDURE**

- A. All requests for childcare should be directed to the Ministry for Young People Director. Requests must be made well in advance of any event for which childcare is needed.
- B. In certain instances, the costs for IUCC-provided childcare will be reimbursed by families using the care (e.g., Family-Friendly Comma Group).
- C. Costs related to providing childcare are included in the annual IUCC budget. Ministries and committees are not expected to pay for childcare.
- D. The availability of childcare should be included in any event-related publicity.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>HIRING PRACTICES</b>	<b>1.16</b>	<b>A</b>	<b>4/15/19</b>

		<i>Date</i>	
<i>Format Reviewed By:</i>	Policies & Procedures Task Force	April 2019	
<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes
	Ministries Board	<input type="checkbox"/>	Yes
		<input type="checkbox"/>	No
		<input checked="" type="checkbox"/>	No
		04/15/19, 09/16/19	

**I. PURPOSE**

To establish hiring practices that are ethnically and culturally diverse as well as inclusive of sexual orientation, preference and/or identification. These hiring practices are to be used in the recruitment of all employees (both IUCC and ECC), with the exception of positions designated by the United Church of Christ as “Search and Call.”

**II. SCOPE**

- A. Applies To
  - All IUCC entities (including Search Committees, Staff Managers)
- B. Administrator
  - Administration Board
  - Chair, Human Resources Committee
- C. Policy and Procedure Responsibility
  - Administration Board
  - Policies and Procedures Task Force

**II. DEFINITIONS**

<i>IUCC</i>	Irvine United Congregational Church
<i>ECC</i>	Early Childhood Center

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>HIRING PRACTICES</b>	<b>1.16</b>	<b>A</b>	<b>4/15/19</b>

#### **IV. POLICY**

IUCC affirms its moral, theological and legal commitment to support and implement a program of equal employment opportunity which, in accordance with federal and state laws, does not discriminate against any employee or applicant because of: race, color, national origin, ancestry, ethnicity, gender, gender identity and expression, age, sexual orientation, disability, status as a veteran or in the military, marital status, genetic information, political belief or activity, or religion, except when religion is a bona fide occupational requirement.

The policy applies to all areas of employment, including recruitment, hiring, training and development, promotion, transfer, termination, layoff, compensation benefits, social and recreational programs, and all other conditions and privileges of employment in accordance with applicable federal, state, and local laws.

It is the policy of IUCC to comply with all the relevant and applicable provisions of the Americans with Disabilities Act (ADA). IUCC will not discriminate against any qualified employee or job applicant with respect to any terms, privileges, or conditions of employment because of a person's physical or mental disability. IUCC also will make reasonable accommodation wherever necessary for all employees or applicants with disabilities, provided that the individual is otherwise qualified to safely perform the duties and assignments connected with the job and provided that any accommodations required are not an undue hardship to IUCC.

#### **V. PROCEDURE**

##### **A. Job Descriptions**

1. All job descriptions must include: required, desired and minimum qualifications, and essential duties.
2. All job descriptions should be examined carefully to identify any overt or covert implication of discrimination which might have the effect of screening out persons. Examples of overt implications include: specific race, ethnic, or gender based requirements. Examples of covert implications are more subtle. For example, they might include an implied suggestion that the candidate must be young; terms such as “fresh perspective” and “high energy” can be seen as code words discouraging older applicants.
3. All job descriptions should be reviewed by the Chair of the Human Resources Committee and must be approved by the Administration Board.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>HIRING PRACTICES</b>	<b>1.16</b>	<b>A</b>	<b>4/15/19</b>

4. Recognizing that ECC staff may turn over more frequently than other job categories, job descriptions for: (a) teachers, (b) assistant teachers, and (c) substitutes may be continually posted on the IUCC web site, together with a notation that openings may occur at any time and that, therefore, applications are welcome at any time.

#### B. Job Postings

1. Along with the job description, a job posting needs to be written that succinctly describes the job opening, essential duties, required qualifications and salary information. The posting will be used to widely disseminate the opening.
2. All job postings must include the following language (or a link to said language) pertaining to IUCC's strong commitment to equal employment opportunity:

*IUCC affirms its moral, theological and legal commitment to support and implement a program of equal employment opportunity which, in accordance with federal and state laws, does not discriminate against any employee or applicant because of: race, color, national origin, ancestry, ethnicity, gender, gender identity and expression, age, sexual orientation, disability, status as a veteran or in the military, marital status, genetic information, political belief or activity, or religion, except when religion is a bona fide occupational requirement.*

#### C. Dissemination of Job Posting

1. Searches should be vigorous, proactive and broadly advertised to reach a diverse and inclusive audience. Strategies to achieve these objectives will be reviewed by the Administration Board; prior consultation with the Human Resources Committee may be helpful.
  - a. All job openings must be posted on iucc.org.
  - b. When appropriate, job openings should also be posted with the Southern California Nevada Conference of the United Church of Christ.
  - c. Examples of additional dissemination options include: local universities and colleges, other local churches, idealist.org, profession-specific job sites, outlets read by diverse audiences, etc.
  - d. Postings must be publicly disseminated for no fewer than three (3) weeks unless the Administration Board grants an exception.
2. Search strategies for ECC (a) teachers, (b) assistant teachers, and (c) substitutes may be approved by the Administration Board on a blanket and enduring basis, covering and applying to all foreseeable searches.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>HIRING PRACTICES</b>	<b>1.16</b>	<b>A</b>	<b>4/15/19</b>

3. Recognizing that licensing requirements for the ECC mandate staffing levels and ratios that must be maintained at all times, and recognizing that staff are hired in an environment where other child care centers may be competing for well-qualified candidates, the Administration Board may waive the three-week dissemination requirement for ECC (a) teachers, (b) assistant teachers, and (c) substitutes on a blanket and enduring basis.
4. In light of blanket and enduring waivers, and at its discretion, the Administration Board may request annual (or other recurring) ECC reports about hiring practices, rates of hiring success, and other analyses that demonstrate essential adherence to IUCC's strong commitment to equal employment opportunity.

**D. Hiring Manager/Search Committees**

1. For positions that are supervisory in nature, typically a Search Committee will be formed to manage the recruitment process. For non-supervisory positions, the recruitment process typically will be handled by a Hiring Manager.
2. When a single individual (Hiring Manager) is managing a recruitment, a second, separate interview with a different individual (e.g., Senior Pastor) is required.
3. All Search Committees should be inclusive and diverse bodies, seeking to represent key IUCC stakeholders. Search Committees recognize and affirm IUCC's commitment to being a multicultural, multiracial, intergenerational, open and affirming, accessible to all, equal opportunity employer.
4. Hiring Managers and Search Committees should exercise conscientious and rigorous efforts to attract a broad and inclusive pool of candidates.

**E. Screening of Applicants**

1. Resumes are to be reviewed and screened carefully to highlight those applicants who have demonstrated abilities or qualities as per the position description.

**F. Interview Questions/Interviewing**

1. Job-related interview questions and evaluation tools are developed by the Hiring Manager or Search Committee. Questions are developed primarily from the job description and in advance of conducting interviews to foster an atmosphere of openness. All applicants are asked the same questions following a structured interviewing style, without candidate-to-candidate variation.
2. Interview questions should be reviewed by the Chair of the Human Resources Committee before any interviewing begins.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>HIRING PRACTICES</b>	<b>1.16</b>	<b>A</b>	<b>4/15/19</b>

G. Offers of Employment

1. In all hiring decisions, finalists are to be interviewed by the immediate supervisor and a member of the pastoral staff before an offer is made.
2. If reference checks are done for more than one applicant for the same position, the same questions should be asked in a structured style, without candidate-to-candidate variation.
3. Offer letters should be reviewed by the Chair of the Human Resources Committee and must be approved by the Administration Board.
4. All offers of employment are made by the Administration Board only.
5. All employment at IUCC is subject to background screening (including Live Scan).

H. New Employee Orientation/Ongoing Training

1. All new employees will be provided with the appropriate church-mandated (e.g., Safe Church Policy) as well as all locally-, state- and federally-mandated materials.
2. Information about performance reviews and other important topics is available in the IUCC Employee Handbook.
3. Ongoing training will be provided as mandated by local, state and federal requirements.

I. Document Retention

1. Archival retention of recruitment-related documents is determined by IUCC's Document Retention Policy (Doc. 1.12).
2. Master employee files will be kept (under lock) in the church office; a second set of files for ECC employees will be kept (under lock) in the preschool.



POLICY 1.16 APPENDIX  
HIRING CHECKLIST

Position: \_\_\_\_\_

Hiring Manager/Chair of Search Committee: \_\_\_\_\_

YES/NO/DATE

TASK

\_\_\_\_\_ **Has Hiring Practices (Doc. 1.16) been reviewed?**

\_\_\_\_\_ **Job Description**

\_\_\_\_\_ HR Chair Review

\_\_\_\_\_ Administration Board Approval

\_\_\_\_\_ **Job Posting**

\_\_\_\_\_ HR Chair Review

\_\_\_\_\_ Administration Board Approval

\_\_\_\_\_ **Dissemination Strategy to Advertise Posting**

\_\_\_\_\_ HR Chair Review

\_\_\_\_\_ Administration Board Approval

\_\_\_\_\_ **Jobs are to be Posted for No Fewer than 3 Weeks**

(Exceptions to this timeline may be granted by the Administration Board)

\_\_\_\_\_ Was an exception granted? When? \_\_\_\_\_

\_\_\_\_\_ Start Date

\_\_\_\_\_ End Date

Where was it posted? \_\_\_\_\_

\_\_\_\_\_ **Hiring Manager/Search Committee**

(Search committees should reflect diverse perspectives and stakeholders)

\_\_\_\_\_ HR Chair Review

\_\_\_\_\_ Administration Board Approval

Name(s) of Hiring Manager/Search Committee: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Interview Questions**

\_\_\_\_\_ HR Chair Review

\_\_\_\_\_

**Initial Screening**

Who performed the initial screening? \_\_\_\_\_

\_\_\_\_\_

**Interviews**

\_\_\_\_\_ Phone/Online (if applicable)

\_\_\_\_\_ Hiring Manager/Search Committee

\_\_\_\_\_ Secondary Interviews/Senior Pastor

\_\_\_\_\_

**Reference Checks**

\_\_\_\_\_ Reference #1 (Name: \_\_\_\_\_)

\_\_\_\_\_ Reference #2 (Name: \_\_\_\_\_)

\_\_\_\_\_ Reference #3 (Name: \_\_\_\_\_)

Who did the reference checks? \_\_\_\_\_

\_\_\_\_\_

**Approval to Hire/Offer Letter**

\_\_\_\_\_ HR Chair Review

\_\_\_\_\_ Administration Board Approval

\_\_\_\_\_

**Background Screening**

\_\_\_\_\_

**Onboarding/New Employee Orientation**

**Please turn in this completed form, along with copies of relevant documents (e.g., job description, applicants list, interview questions, etc.) to the Administrative Pastor/Church Office or the Early Childhood Center Director (for preschool employees). Archival retention of these documents is determined by IUCC's Document Retention Policy (Doc. 1.12).**



<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>ECC Refunds and Fee Waivers</b>	<b>1.17</b>		<b>03/15/21</b>

	<i>Date</i>				
<i>Format Reviewed By:</i> Bylaws, Policies and Procedures Committee	March 2021				
<i>Approvals:</i> Administration Board	<table border="1" style="display: inline-table; vertical-align: middle;"> <tr> <td style="width: 30px; text-align: center;"><input checked="" type="checkbox"/></td> <td style="width: 30px; text-align: center;">Yes</td> <td style="width: 30px; text-align: center;"><input type="checkbox"/></td> <td style="width: 30px; text-align: center;">No</td> </tr> </table> <span style="margin-left: 10px;">March 15, 2021</span>	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No		
Ministries Board	<table border="1" style="display: inline-table; vertical-align: middle;"> <tr> <td style="width: 30px; text-align: center;"><input type="checkbox"/></td> <td style="width: 30px; text-align: center;">Yes</td> <td style="width: 30px; text-align: center;"><input type="checkbox"/></td> <td style="width: 30px; text-align: center;">No</td> </tr> </table>	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No		

**I. PURPOSE**

To establish a policy for how already-paid tuition and deposits to the IUCC Early Childhood Center are refunded or the circumstances in which fee waivers may be granted.

**II. SCOPE**

- A. Applies To  
ECC and ECC Families
- B. Administrator  
ECC Director
- C. Policy and Procedure Responsibility  
Bylaws, Policies and Procedures Committee  
Administration Board

**III. DEFINITIONS**

IUCC    Irvine United Congregational Church

ECC    IUCC Early Childhood Center

**IV. POLICY**

From time to time, it may be appropriate for the ECC to refund some tuition and/or deposits that client families have already paid, or to waive portions of tuition and/or deposits that would otherwise be due. Examples include circumstances in which:

- The ECC or one of its classes is temporarily shut down, due to the epidemic spread of a disease or for other reasons; or

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>ECC Refunds and Fee Waivers</b>	<b>1.17</b>		<b>03/15/21</b>

- A family unexpectedly is unable to provide the required advance notice that a child will be withdrawing from the ECC; or
- For other compassionate or business reasons.

**V. PROCEDURE**

1. When a parent client requests a refund of a tuition or a deposit, or the waiver of a tuition charge or deposit that otherwise is due or payable to IUCC, or when the ECC Director, in consultation with the Senior Pastor, determines that it will be wise to make a refund or a waiver, the ECC Director may recommend to the Senior Pastor that a waiver or refund be made; and if the Senior Pastor agrees, the Senior Pastor shall direct the IUCC Bookkeeper to make the refund or waiver.
2. Any such refund or waiver shall be reported to: (a) the Chair of the Administration Board, the Moderator, and the Treasurer, at the time of the refund or waiver; and (b) the Administration Board at the Board’s regular monthly meeting.
3. Any refund or waiver accomplished pursuant to this policy shall not exceed \$1,000, or one-half of the monthly tuition for the most expensive childcare program offered by the ECC, whichever is greater. The Senior Pastor may seek Administration Board approval for amounts that exceed this limit.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Quarantine Pay</b>	<b>1.18</b>		<b>03/15/21</b>

*Date*

*Format Reviewed By:* Bylaws, Policies and Procedures Committee      March 2021

<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	March 15, 2021
	Ministries Board	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	

**I. PURPOSE**

To establish a policy for employee compensation during quarantine.

**II. SCOPE**

- A. Applies To  
IUCG Staff
- B. Administrator  
Church Administrator
- C. Policy and Procedure Responsibility  
Bylaws, Policies and Procedures Committee  
Administration Board

**III. DEFINITIONS**

IUCG                                      Irvine United Congregational Church

ECC                                        IUCG Early Childhood Center

**IV. POLICY**

When public health authorities have issued disease-specific guidelines (e.g., measles, coronavirus), quarantine may be appropriate (a) when a person has been in close contact with someone who has tested positive for the disease, or (b) when a person has him- or herself tested positive. Times and details may vary by state or the public health authority. For close contact situations, quarantines may typically be ten days, as per the Orange County Health Agency.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Quarantine Pay</b>	<b>1.18</b>		<b>03/15/21</b>

It is in the business interest of IUCC, and especially of the ECC, that employees do not face an incentive – such as loss of income or loss of accrued sick days/vacation time - to *not* report having come in close contact with an infected person. It is also appropriate that IUCC be compassionate in dealing with its employees.

When an employee must quarantine, IUCC will compensate the quarantined individual on the same basis that he or she would be paid if the employee were not quarantined.

## V. PROCEDURE

1. When, as required by Orange County Health Care Agency guidelines, an employee must quarantine, the employee shall seek consultation with his/her immediate supervisor.
  - a. If that employee’s work can reasonably be done remotely, arrangements shall be made for that.
  - b. If that employee’s work cannot reasonably be done remotely, IUCC will compensate the quarantined individual on the same basis that he or she would be paid if the employee were not quarantined. This pay status shall be known as *Quarantine Pay*. This pay during the period of quarantine shall not diminish the employee’s accrued sick leave or vacation time.
2. Unless the Administration Board deems otherwise, this Quarantine Pay shall be limited to ten calendar days, which means that normally fewer than ten paid days would be eligible for Quarantine Pay.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Solicitation of Donations in Support of a Worthy Cause, or in Honor of or Appreciation for an Individual</b>	<b>1.19</b>		<b>07/19/21</b>

*Date*

*Format Reviewed By:* Bylaws, Policies and Procedures Committee June 2021

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	July 19, 2021
Ministries Board	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	

**I. PURPOSE**

To establish a policy for the solicitation of donations in support of a worthy cause, or in honor of or appreciation for an individual.

**II. SCOPE**

A. Applies To

All members and friends of Irvine United Congregational Church

B. Administrator

Church Administrator

C. Policy and Procedure Responsibility

Bylaws, Policies and Procedures Committee

Administration Board

**III. DEFINITIONS**

IUCC

Irvine United Congregational Church

**IV. POLICY**

Churches ask for financial support from members and friends and, in doing so, face questions about frequency and priorities. The Administration Board makes judgments about all financial requests that express or imply endorsement of Irvine United Congregational Church.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Solicitation of Donations in Support of a Worthy Cause, or in Honor of or Appreciation for an Individual</b>	<b>1.19</b>		<b>07/19/21</b>

**Excluded Activities:** This policy does not extend to a group of friends who informally collect funds from each other in order to make a contribution to a worthy cause, or to fund a small gift that appreciates or honors an individual, and where the collection and disbursement of funds does not involve church accounting, bookkeeping, banking, or other handling in the church office. Activities that do not involve cash, or where expenditures are minor and incidental (e.g., the purchase of a greeting card), are also not covered by this policy.

**Included Activities:** This policy covers all instances where persons issuing requests for donations or other financial support either to support a worthy cause (disaster relief may be an example), or to fund an honorarium or cash appreciation of an individual:

- a) wish to use IUCC media (including but not limited to emails from the Church Administrator, notice on the web site, and/or notice published in the newsletter) to encourage contributions;
- b) wish to have the contribution or honorarium formally endorsed, as coming from IUCC;
- c) wish to collect donations by check or other financial instruments payable to IUCC; and/or
- d) wish to bless a contribution or to bestow an honorarium during a worship service or other activity on the church premises, to include worship or other activity that is electronically mediated via Zoom or other means.

## V. PROCEDURE

1. **Soliciting Support Other than Cash Donations:** An individual or group may wish to solicit support, but not cash donations, to a worthy cause or in honor or appreciation of an individual. An example may be encouraging persons to visit a web site and to make a donation there.
  - a. The individual or group shall submit a written request using **Policy 1.19 Appendix** at least two weeks in advance that describes: the cause or individual to be honored; what is being solicited; and how this fundraising aligns with IUCC's priorities, mission and ministries.
  - b. This written request shall be submitted to the Fund Development Committee for endorsement before being submitted to the Administration Board.
  - c. Upon approval, the individual or group may make use of church media with any particular, one-time restrictions that the Administration Board may set.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>ADMINISTRATION</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Solicitation of Donations in Support of a Worthy Cause, or in Honor of or Appreciation for an Individual</b>	<b>1.19</b>		<b>07/19/21</b>

2. **Soliciting Cash Donations:** Proposals to solicit cash donations from IUCC members and friends shall require endorsement by the Fund Development Committee and approval by the Administration Board.
  - a. The individual or group shall submit a written request using **Policy 1.19 Appendix** at least two weeks in advance that describes: the cause or individual to be honored; what is being solicited; and how this fundraising aligns with IUCC’s priorities, mission and ministries.
3. The Board may disapprove a proposal, or it may approve a proposal by placing the solicitation into one of the following categories:
  - a. **Facilitation Only of Donation Requests:** By placing a request in this category, the Board offers use of IUCC media but make no other endorsement, and offer no office support (such as receiving donations in the church office). Donations in this category are not expected to be tax-deductible as a contribution to IUCC. Donations to a third-party web site may fall into this category.
  - b. **Limited Endorsement of Donation Requests:** By placing a request in this category, the Board offers use of IUCC media *and also* agrees that a contribution to a worthy cause or an honorarium or award will be understood as coming from the congregation. Checks or other financial instruments may be made out to IUCC, as designated gifts, and as such may be tax-deductible.
  - c. **Full Endorsement of Donation Requests:** By placing a request in this category, the Board normally would expect that a contribution to a worthy cause or an honorarium or award would be made publicly, at an IUCC worship service or other formal IUCC gathering, and would be presented as coming from the congregation. IUCC media would normally be made available for any donation request, and checks or other financial instruments may be made out to IUCC, as designated gifts, and as such may be tax-deductible.
4. **Augmenting Funds:** In making either a Limited Endorsement or a Full Endorsement to a donation request, the Board in its discretion may add money from an appropriate budget source to increase the amount of support for a worthy cause or to increase the size of an award or honorarium.



POLICY 1.19 APPENDIX
Solicitation of Donations in Support of a Worthy Cause,
or in Honor of or Appreciation for an Individual

Please complete this form and submit it to the Fund Development Committee for endorsement followed by the Administration Board for approval at least two weeks prior to the desired date to begin fundraising.

Date \_\_\_\_\_

Name of Individual/Ministry/Committee completing this form/making this request \_\_\_\_\_

Contact Information: \_\_\_\_\_ (email) \_\_\_\_\_ (phone)

What is the name of the organization or individual who would benefit from this solicitation of donations? \_\_\_\_\_

What kinds of donations would be solicited (e.g., cash, gifts to a registry, gift cards, etc.)? \_\_\_\_\_

Is there a dollar goal for how much you'd like to raise? Yes \_\_\_ No \_\_\_ Amount? \_\_\_\_\_

Website links (if appropriate) \_\_\_\_\_

How does this fundraising campaign align with and/or support IUCC's priorities, mission, and ministries? \_\_\_\_\_

Multiple horizontal lines for additional notes or details.

\_\_\_\_\_ Endorsed by the Fund Development Committee on \_\_\_\_\_ (date)

\_\_\_\_\_ Approved by the Administration Board on \_\_\_\_\_ (date)



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>FACILITIES/SECURITY</b>		
	<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>
<b>Who May Be Authorized to Use IUCC Facilities</b>	<b>2.01</b>	<b>A</b>	<b>7/16/18</b>

*Date/Initial*

*Format Reviewed By:* Policies and Procedures Task Force 07/02/2018

<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	07/16/2018
	Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	

**I. PURPOSE**

The purpose of this policy is to establish who may be authorized to use IUCC facilities.

**II. SCOPE**

A. Applies To

Any groups or persons requesting use of any facilities owned by IUCC.

B. Administrator

Church Office Staff

C. Policy and Procedure Responsibility

Church Administrator

Policies & Procedures Task Force

**III. POLICY**

A. Irvine United Congregational Church (IUCC) is a tax-exempt, non-profit corporation. The primary purpose of the church campus is worship and Christian education. The rental of the facility must be limited to events that are sponsored by a non-profit entity, be considered a religious activity or be educational or charitable in content. The facilities of IUCC are made available to groups and organizations which are in alignment with the overall mission of the church and which provide for the service and social needs of the community. IUCC will not derive rental income from activities which are unrelated to our exempt purposes. The Church, at the discretion of the Administration Board, can deny use of the facility to any individual or group that does not exemplify the Mission Statement of the Church or if the group's or individual's beliefs conflict with the Church's Bylaws.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>			
	<b>FACILITIES/SECURITY</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Who May Be Authorized to Use IUCC Facilities</b>	<b>2.01</b>	<b>A</b>	<b>7/16/18</b>

B. Members may be allowed to use the facilities for life celebrations such as birthdays, anniversaries, showers, subject to availability of the space. Users shall be responsible for any damages to our facilities. The Administration Board will have the discretion to allow use of the Church's facilities to long-term, non-member participants of the church.

#### **IV. PROCEDURE**

A. Procedures for Using IUCC Facilities (Doc. 2.02) and Short-Term Rental of IUCC Facilities (Doc. 2.03) must be followed if authorization is granted.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Using IUCC Facilities</b>	<b>2.02</b>	<b>A</b>	<b>5/18/2015</b>

		<i>Date</i>	
<i>Format Reviewed By:</i>	Policies and Procedures Task Force	April 2019	
<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes
		<input type="checkbox"/>	No
	Ministries Board	<input type="checkbox"/>	Yes
		<input checked="" type="checkbox"/>	No
		April 15, 2019	

**I. PURPOSE**

The purpose of this policy is to establish the limits under which IUCC facilities can be used. It does not define who may be authorized to use the facilities, but rather what the rules of use are once such use is approved. Refer to Doc. 2.01 for Who May Be Authorized to Use IUCC Facilities.

**II. SCOPE**

A. Applies To

Any groups authorized to use IUCC facilities (excluding the use of the facility for child care services under the title of IUCC Early Childhood Center since it is a direct function of the Church).

B. Administrator

Church Office Staff

C. Policy and Procedure Responsibility

Administration Board

Policies and Procedures Task Force

**III. DEFINITIONS**

- A. Sanctuary                      Large geodesic dome.
- B. Plumer Hall                      Small geodesic dome.
- C. Church Offices                      Any space designated to be used as an office for staff.
- D. Early Childhood Center                      A major section of the Alice Atwood Building—the one-story building with multiple classrooms located between the Sanctuary and Plumer Hall.
- E. Meeting Rooms                      Configurable meeting rooms adjacent to the Sanctuary.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Using IUCC Facilities</b>	<b>2.02</b>	<b>A</b>	<b>5/18/2015</b>

- F. Pastor's Patio Outdoor patio adjacent to Staff Offices and Meeting Room #106.
- G. Parking Lot All paved areas located after entering the Church's property off of Alton Parkway and extending up to and including the Woodbridge Village Association parking area which IUCC is permitted to use at certain times.
- H. Grounds The grounds include all grassy areas, the playgrounds located to the side and back of the Alice Atwood Building, the sidewalks, and the patio areas located in back and in front of the Alice Atwood Building, as well as the area located in front of the Sanctuary.

#### IV. POLICY

- A. It is the responsibility for those who have been authorized to use the facilities to ensure that all usage has been properly scheduled and that the facilities are left in the same (or better) condition as when they were entered.
- B. It is the responsibility for those who have been authorized to use the facilities to review, complete and return the required forms, which may include: 2.02 Appendix A, the Facility Hold Harmless Agreement, and 2.02 Appendix B, the Non-Member Group User Policies Notice.
- C. No alcoholic beverages shall be sold on the premises.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Using IUCC Facilities</b>	<b>2.02</b>	<b>A</b>	<b>5/18/2015</b>

**V. PROCEDURE**

**A. General**

1. For each event requiring space in any of the Church's facilities a person must be designated to be responsible for following and upholding the policies and procedures for using the space. Designation of said responsible person will be made via the appropriate form(s), which may include: 2.02 Appendix A, the Facility Hold Harmless Agreement and 2.02 Appendix B, the Non-Member Group User Policies Notice.

The responsible party will contact the Church Office staff (in person, by phone, or via email) or via the online room reservation system to reserve the space. The Church Office staff will enter the event on the Event Calendar.

2. Furniture, equipment, etc., is not to be removed from the facility. Exceptions may be made for Church-related events if prior permission is given to the responsible party by the Church Office staff.
3. The responsible party must obtain prior approval from the Church Office (in person, by phone, or email) before any item may be nailed, taped or hung to the walls of any of the buildings.
4. Furniture will be restored to its original placement, trash put in the appropriate receptacle, and surfaces wiped down at the end of the event.
5. At the Church Office staff's discretion, groups may be moved to another location on the IUCC campus.
6. Use of IUCC facilities is limited to programs sponsored by an IUCC Ministry or Committee, or when an IUCC member will be present to open, supervise, clean up, and lock the facility. Exceptions to this policy must be approved by the Administration Board. Normally, outside groups which meet without an IUCC member present will utilize Plumer Hall.

**B. Security/Safety**

1. When using Church facilities, for safety and security purposes, all doors should be locked once everyone has arrived for the event or meeting.
2. The responsible party must ensure that all doors and windows are locked and that lights and heat/air conditioning are turned off after using the facilities.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Using IUCC Facilities</b>	<b>2.02</b>	<b>A</b>	<b>5/18/2015</b>

C. Janitorial

1. The responsible party must ensure that the portion of the facility used is returned to its original condition (or better) and that all furniture, equipment, decorations, etc., are returned to their original location.
2. If any additional charges for custodial work are determined, the responsible party must notify the Church Office staff prior to the work being performed and must identify the appropriate entity to be charged.
3. The responsible party must notify the Church Office staff of any breakage or needed repairs.

D. Sanctuary

The Sanctuary is generally reserved for use in worship and meditation or for other large gatherings where the space is required.

1. Other than for sacraments of worship, food and beverages are not permitted in the Sanctuary.
2. Arts and crafts materials are not to be used in the Sanctuary.
3. Animals are not allowed in the Sanctuary except for service animals and church directory photos.
4. Significant movement of chairs within the Sanctuary is not allowed. Exceptions may be made when the responsible party has received prior approval by the Church Office staff, Ministries Board or Administrative Board. Minor rearrangement of chairs is allowed if the chairs are returned to their original configuration.

E. Plumer Hall

Plumer Hall is available for social events and classes that require the use of materials not permitted in the sanctuary. Whenever food, drink, craft projects, etc., are used in this facility, the responsible party must ensure that the furnishings are not damaged.

F. Kitchen

1. The sponsoring group must ensure that food and paper goods are supplied including coffee, creamer, coffee cups, sugar, sweeteners, etc.
2. The responsible party must ensure that the kitchen and all equipment is returned to original location and condition (or better.)

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Using IUCC Facilities</b>	<b>2.02</b>	<b>A</b>	<b>5/18/2015</b>

G. Church Offices

1. Staff Offices are not available for use without permission from the Church Office staff.
2. Items should not be removed from any Office without the permission of the Church Office staff.
3. If items need to be left for a Church-related project/program, a note should be left identifying the purpose of the item(s) and a name and phone number of a contact person.

H. Early Childhood Center

Any use of the Early Childhood Center rooms requires restoration to its original configuration upon completion of the event. Events conducted during the Early Childhood Center's normal hours of operation shall not utilize any of the Early Childhood Center's equipment or disrupt any Early Childhood Center activities.

I. Equipment and Supplies

Equipment and supplies are to be used for Church-related purposes only. This includes:

1. Telephones.
2. Copy machine. Arrangements for “large run” uses of the copy machine should be made in advance with the Church Office staff.
3. Computers. These are not available for use by anyone except Church Office staff unless prior arrangements have been made with the Church Office staff.
4. Playground equipment.
5. Postage machine. This is not available except by prior arrangement with the Church Office staff.
6. Supplies. Tape, staplers, paper clips, pens, pencils, etc. are for Church-related purposes only. These items cannot be removed from the Office without prior permission from the Church Office staff.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Using IUCC Facilities</b>	<b>2.02</b>	<b>A</b>	<b>5/18/2015</b>

I. Meeting Rooms

1. Food trash should be removed from the meeting rooms and placed in the covered receptacles immediately outside Plumer Hall.
2. The cleaning supplies and small vac located in each room should be used to treat carpet stains and other messes immediately.

J. Parking Lot and Grounds.

1. Responsible party must ensure that all areas are left in the same condition (or better).





**POLICY 2.02 APPENDIX A  
FACILITY HOLD HARMLESS AGREEMENT**

Name of Group \_\_\_\_\_

Name/Type of Event \_\_\_\_\_

Date \_\_\_\_\_ Start Time \_\_\_\_\_ End Time \_\_\_\_\_

IUCC Room \_\_\_\_\_

I/We, the undersigned responsible party(ies), acting on behalf of the above-identified group, understand and agree that neither the United Church of Christ, Irvine United Congregational Church, nor its trustees, representatives, officers, directors, employees, or agents may be held liable in any way for any occurrence in connection with said use, which may result in injury, harm, death, or other damages to any participant in the above-identified activity.

As part of the consideration for use of said facility, I/we further release the United Church of Christ, Irvine United Congregational Church, its trustees, officers, directors, employees, agents, or representatives for any damage which may occur while participating in the event listed above or in any other activity on United Church of Christ, Irvine United Congregational Church's premises during or around the time listed above (the "Activity"). I/We further agree to save and hold harmless the United Church of Christ, Irvine United Congregational Church, its trustees, officers, directors, employees, agents, or representatives from any claim by the undersigned participant, their estates, heirs, or assigns arising out of participation in this Activity. I/We also authorize the United Church of Christ, Irvine United Congregational Church, its employees or agents to render or obtain such emergency medical care or treatment as may be necessary should any injury, harm, or accident occur while participating in the Activity.

I/We represent that the above-identified group has general liability insurance with coverage limits of \_\_\_\_\_ now in effect, and which will remain in effect during the above-identified Activity. I/We agree to name the Church as an additional insured on our general liability insurance policy and shall provide proof of such additional insurance coverage to the Church prior to the date of the Activity.

I/We further state that I/we are authorized to sign this agreement; that I/we understand the terms herein are contractual and not mere recital; and that I/we have signed this document of my/our own free act and volition. I/we further state and acknowledge that I/we have fully informed ourselves of the content of this affirmation and release by reading it before I/we signed it.

I/We have executed this affirmation and release on the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

Responsible Party (1) Name \_\_\_\_\_

Responsible Party (2) Name \_\_\_\_\_

Signature \_\_\_\_\_ Signature \_\_\_\_\_

July 2020



**POLICY 2.02 APPENDIX B  
OUTSIDE/NON-MEMBER USER POLICIES**

An “outside/non-member user” is any party/organization that is not regularly associated with the Church or sponsored by a Church ministry. Outside users include: other religious organizations, civic groups, Alcoholics Anonymous, and Orange County Equality Coalition.

In general, IUCC rents to groups with 501(c)3 status. IUCC does not typically provide space to commercial entities, or any group that could be considered politically partisan in nature.

Children shall never to be left unattended, and playground equipment may be used only with adult supervision.

Events must end by 10:00 pm and groups must secure the facility and vacate the campus no later than 12:01 am.

All outside/non-member users must provide the following:

- A letter, or other written communication, stating the type of function and the details pertaining to the function. This should be on the organization stationary with their 501(c) 3 status and include the name of the person who will be the responsible contact person for the event.
- Certificate of Liability Insurance (CLI) naming IUCC as certificate holder for the date and times the facility will be used. The General Policy Limits must be listed as \$1,000,000 or greater. These certificates are available online or via a local insurance office. This must be submitted to the church office no later than 3 business days prior to the event.
- In some circumstances a Certificate of Liability Insurance (CLI) may not be required if one of our pastoral staff members is conducting the ceremony and will be present throughout the event. If a reception is to be held in our facility, the responsible parties must agree and sign a statement that no alcohol will be served during the event.
- Serving Alcohol may be permitted with additional insurance requirements. An insurance rider specifically covering serving alcohol must be presented along with the general Certificate of Liability (CLI). Alcohol can be served but sales of alcoholic beverages is not permitted.

- Youth Events must comply with IUCC’s Safe Church Policy, including providing appropriate chaperones. The Safe Church Policy is available from the Church Office or at [iucc.org/portal/documents](http://iucc.org/portal/documents) under the “Reports” tab.

I acknowledge that I have read and reviewed these policies before signing.

Responsible Party Name \_\_\_\_\_

Responsible Party Signature \_\_\_\_\_

Date \_\_\_\_\_

July 2018

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>FACILITIES/SECURITY</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Short-Term Rental of IUCC Facilities</b>	<b>2.03</b>	<b>A</b>	<b>05/16/22</b>

		<i>Date</i>	
<i>Format Reviewed By:</i>	Bylaws, Policies and Procedures Committee	05/11/2022	
<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes
		<input type="checkbox"/>	No
	Ministries Board	<input type="checkbox"/>	Yes
		<input checked="" type="checkbox"/>	No
		05/16/2022	

**I. PURPOSE**

The purpose of this policy is to establish rules regarding the short-term rental of any of IUCC's facilities.

**II. SCOPE**

A. Applies To

Any individual, group or entity renting the facility

B. Administrator

Church Office Staff

C. Policy and Procedure Responsibility

Church Administrator

Bylaws, Policies and Procedures Committee

**III. DEFINITIONS**

For definitions of space available for short-term rental within the facility, refer to the policy entitled Who May Be Authorized to Use IUCC Facilities (Doc. 2.01) and Using IUCC Facilities (Doc. 2.02).

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>FACILITIES/SECURITY</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Short-Term Rental of IUCC Facilities</b>	<b>2.03</b>	<b>A</b>	<b>05/16/22</b>

#### IV. POLICY

The Church's facilities are available for short-term rental to persons or groups that qualify under the policy entitled "Who May be Authorized to Use IUCC Facilities" (Doc. 2.01). Fees for religious ceremonies are assessed based upon the principal beneficiaries of the event who must be present during the event. IUCC members are exempt when they, or their immediate families, are the principal beneficiaries. Rental fees for long-term, non-member IUCC participants may be waived at the discretion of the Pastor(s) or Church Administrator. The Church, at the discretion of the Pastor(s), can deny use of the facility to any individual or group that does not exemplify the Mission Statement of the Church or if the group's or individual's beliefs conflict with the Church's Bylaws.

#### V. PROCEDURE

- A. Any rental of the facility must be approved by the Church Administrator and entered onto the Church calendar in accordance with the policy entitled Using IUCC Facilities Doc. 2.02.
- B. A deposit of 50% of the fee, together with a signed form (enclosed) assuming responsibility for the damages to the facility, must be received by the Church Office within 15 days of scheduling to hold the space for the requested date. The balance is due at least 30 days prior to the event. For events scheduled within 30 days, 100% of the fee must be received within two (2) business days of scheduling.
- C. Initial deposits will be refunded at 100% if cancellation is made prior to 45 days before the event. Cancellation made less than 45 days prior to the event, result in complete forfeiture of all payments received. For rentals that are booked less than 30 days prior to the event, cancellations made fewer than 10 days will result in a complete forfeiture of all payments received.
- D. The responsible person must make any additional arrangements with the Church Office staff for set-up, clean-up, lock-up, or coordination of event participants.
  1. Rented equipment must be delivered the day of the event and picked up immediately following the event, unless other arrangements are made with the Church Office staff.
  2. Rehearsals and meetings with vendors may be scheduled at no extra charge, but they must first be approved by the Church Office staff and entered onto the Church's calendar.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>FACILITIES/SECURITY</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Short-Term Rental of IUCC Facilities</b>	<b>2.03</b>	<b>A</b>	<b>05/16/22</b>

## **VI. RENTAL FEES**

Rental rates are as follows. These rates are effective as of May 2022 and may be subject to change.

### **A. Sanctuary**

1. \$500 for up to three hours.
2. Additional time can be scheduled at a rate of \$150 per hour.

### **B. Plumer Hall**

1. \$350 for up to four hours.
2. Additional time can be scheduled at a rate of \$100 per hour.

### **C. Meeting Rooms**

1. \$100/room for up to three hours.
2. Additional time can be scheduled at a rate of \$50 per hour.

### **D. Pastor's Patio**

1. \$100 for up to three hours.
2. Additional time can be scheduled at a rate of \$50 per hour.
3. May be rented only if renting Meeting Room 108.

A technical support person may be available at a rate of \$200 for up to 3 hours, \$50 per hour for any additional hours.

IUCC facilities may be available for longer-term commitments at possibly discounted pricing. Please contact the Church Office for more information.



**POLICY 2.03 APPENDIX  
SHORT-TERM RENTAL OF IUCC FACILITIES**

This form is required for all Short-Term Rentals of Irvine United Congregational Church facilities. It must be filled out by the Responsible Person and returned to the Church Administrator within five days of receipt.

Date \_\_\_\_\_ Time From \_\_\_\_\_ To \_\_\_\_\_

I would like to reserve:

\_\_\_\_\_ Sanctuary

\_\_\_\_\_ Plumer Hall

\_\_\_\_\_ Meeting Room 106

\_\_\_\_\_ Meeting Room 107

\_\_\_\_\_ Meeting Room 108

\_\_\_\_\_ Meeting Room 106 + 107

\_\_\_\_\_ Meeting Room 107 + 108

\_\_\_\_\_ Meeting Room 106 + 107 + 108

\_\_\_\_\_ Pastor's Patio (may only be reserved if renting Meeting Room 108)

I have read 2.03, Short-Term Rental of IUCC Facilities, and will comply with all guidelines. I understand that I will be held personally responsible for any damage to the facility.

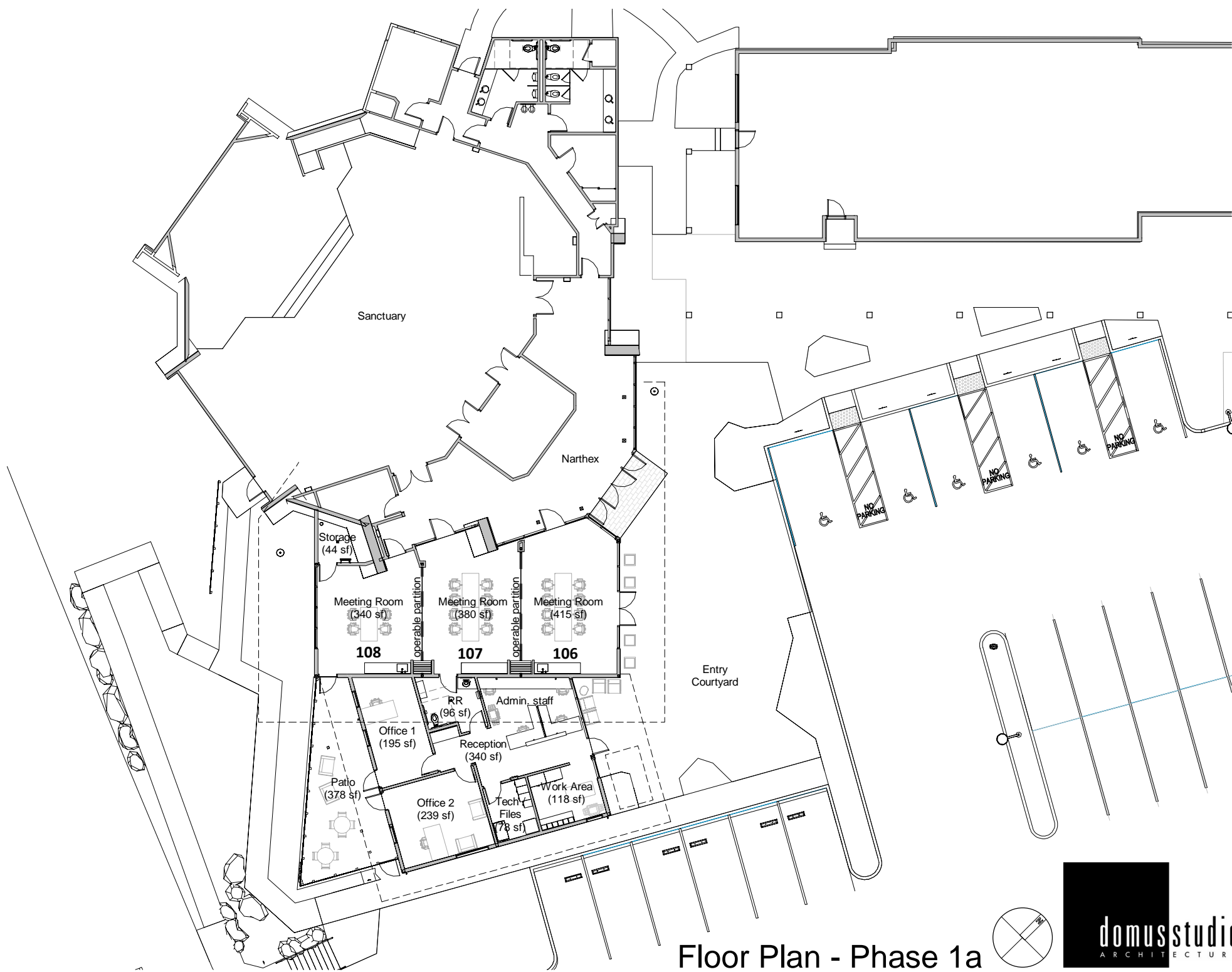
Responsible Person Name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Phone Number \_\_\_\_\_ Email \_\_\_\_\_

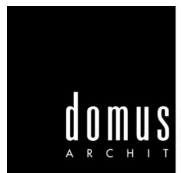
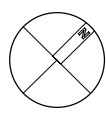
Deposit Amount \_\_\_\_\_ Method of Payment \_\_\_\_\_





Irvine United Congregational Church

Floor Plan - Phase 1a



<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Key Policy</b>	<b>2.04</b>		<b>05/16/22</b>

		<i>Date</i>	
<i>Format Reviewed By:</i>	Bylaws, Policies and Procedures Committee	05/11/2022	
<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes
	Ministries Board	<input type="checkbox"/>	Yes
		<input type="checkbox"/>	No
		<input type="checkbox"/>	No
			05/16/2022

**I. PURPOSE**

To establish a policy governing the distribution of IUCC facilities keys and key fobs.

**II. SCOPE**

A. Applies To

Any groups or persons requesting keys or key fobs to IUCC facilities.

B. Administrator

Church Office Staff

C. Policy and Procedure Responsibility

Church Administrator

Bylaws, Policies and Procedures Committee

**III. DEFINITIONS**

IUCC Irvine United Congregational Church

**IV. POLICY**

Most of IUCC’s spaces are accessible via key fob. However, some spaces are accessible only by key. Users will be issued keys and/or key fobs as appropriate and necessary.

Keys or key fobs to IUCC facilities will be issued on a(n):

- (1) Term-limited basis to employees, long-term users (e.g., Alcoholics Anonymous) and contracted vendors (e.g., cleaning service).
- (2) Annual basis to newly elected lay leaders and, as requested, to designated ministry and committee members.
- (3) Temporary basis to short-term users.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Key Policy</b>	<b>2.04</b>		<b>05/16/22</b>

**V. PROCEDURE**

a. Term-limited basis:

- i. as part of employee orientation, new hires will be issued a facility key fob set to provide access to only those areas needed to carry out their job responsibilities; some employees may not need key fobs. Some employees may be issued keys as well. Keys and key fobs are to be returned immediately when employment ends.
- ii. as part of a usage agreement, long-term users will be issued key fobs set to provide access to the facility(ies) designated in the agreement (typically Plumer Hall). Access will be limited to scheduled meeting day(s)/time(s), with a grace period of thirty (30) minutes before and after, unless other arrangements are made. If necessary, long-term users may also be issued keys. Keys and key fobs are to be returned immediately when the usage agreement ends.
- iii. as part of contracted services, vendors will be issued key fobs set to provide access to the facility(ies) designated in the service agreement. Vendors may be issued keys, if necessary. Keys and key fobs are to be returned immediately when the service agreement ends.

b. Annual basis:

- i. newly elected lay leaders will be issued those facility keys or key fobs needed to carry out their ministerial or committee responsibilities. Outgoing leaders are required to promptly return their keys or key fobs, no later than thirty (30) days from the beginning of IUCC’s leadership year (currently July 1). A ministry or committee chair may request that facility keys or key fobs be issued to designated ministry or committee members when access is needed to carry out ministerial or committee responsibilities. Key fobs will typically be set to provide access only 8 am–8 pm, Monday through Saturday, and 8 am–2 pm on Sundays, unless other arrangements are made.

c. Temporary basis:

- i. For short-term use (please refer to Docs. 2.01, 2.02, and 2.03 governing use of IUCC facilities), facility key(s) or key fob(s) will be issued on a temporary basis. Key fobs will be set to provide access only to those facility areas and times designated necessary. Keys or key fobs are to be returned no later than 7 days after the designated use.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FACILITIES/SECURITY</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Key Policy</b>	<b>2.04</b>		<b>05/16/22</b>

- d. To be issued a key or key fob, an individual must be at least 18 years of age. For facility users under 18, arrangements should be made with Ministry with Young People staff.
- e. Keys and key fobs will only be issued during regular office hours. Currently, these hours are Monday to Thursday: 9:30 am – 4:30 pm and Sunday mornings.
- f. A key and key fob log will be maintained in the Church Office.
- g. The replacement cost for lost keys or key fobs is \$25.
- h. For events sponsored by a ministry but involving outside users, the ministry should provide facility access by having a representative present at the event instead of requesting that a key or key fob be issued to the outside group.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Cash Management</b>	<b>3.01</b>	<b>A</b>	<b>5/27/99</b>

*Date/Initial*

*Format Reviewed By:* Policies and Procedures Task Force

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	08/17/2015
Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	

**I. PURPOSE**

The following policy is intended to provide for the safeguarding of cash assets of the Church, and provide for a reasonable return on those assets, all in consideration of the provisions of the Church's Bylaws and other contractual obligations.

**II. SCOPE**

A. Applies To

Any volunteer or Church employee entrusted with the safeguarding of the Church's cash assets.

B. Administrator

Church Administrator

Treasurer

Administration Board

C. Policy and Procedure Responsibility

Church Administrator, Treasurer and Administration Board

The Policies and Procedures Task Force

**III. DEFINITIONS**

A. Cash assets are all monies readily available for unrestricted use..

B. Plumer Endowment Fund are funds held in a separate Capital Reserves Account and in an investment account with The United Church of Christ Cornerstone Fund.

**IV. POLICY & PROCEDURE**

A. Deposits

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b> <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Cash Management</b>	<b>3.01</b>	<b>A</b>	<b>5/27/99</b>

Whenever possible, deposits (cash or checks) should be made at the bank on the same day received in the church office. When income is received on a weekend (such as Sunday collections) the deposit should be made as soon as possible. All checks should be endorsed "For Deposit Only" as soon as received. All deposits should be held in a secure location until deposited.

#### B. Counting of Offerings

Currency from offerings should be counted by two individuals, either church staff or trained volunteers. Checks may be prepared for deposit by a single individual. All gifts from members should be credited to their giving statement. Those items not tax deductible (or those that may not be fully tax deductible) should still appear on the statement so as to provide a full accounting of all monies received. The Church Treasurer should approve notations as to the potential tax consequences.

#### C. Other Income

Other income (such as reimbursements from rentals from non-profit organizations, the Early Childhood Center or fundraising activities) should be recorded in the income accounts set up for such purposes, and not offset against the related expense accounts unless directed by the Treasurer. All income from fundraising events shall be segregated and submitted for deposit as soon as collected and not used to pay for expenses. If individuals from the Fund Development Committee (or other volunteers) need cash for expenses, those funds should be reimbursed when receipts are submitted (or advanced, if necessary).

#### D. Check Writing Authorization

The Pastor(s), the Church Administrator, the Treasurer and the Chair of the Administration Board are authorized to sign checks drawn against all Church bank accounts. Only one signature will be required except for checks over \$5,000 which will require two signatures.

#### E. Expenses

Approval of invoices is set forth in the table below. Advance approval should preferably be made in writing, but approval by telephone or e-mail will be acceptable when time does not permit otherwise. The Treasurer shall review not only the appropriateness of the nature and amount of the expenditure, but also the appropriateness of the account to which the expenditure is to be charged. Administration Board approval is required for any expenditure which was not provided for in the annual budget, *before* the expense is incurred.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b> <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Cash Management</b>	<b>3.01</b>	<b>A</b>	<b>5/27/99</b>

For emergency situations (such as heating, air conditioning, or other building problems), a member of the Pastoral staff may approve necessary expenses, but the Chair of the Administration Board should be contacted as soon as possible. In the absence of Pastoral Staff, any officer of the Church may authorize said emergency expenditures.

Invoice approval required

	<u>&lt; \$200</u>	<u>\$200-\$300</u>	<u>&gt; \$300</u>
Recurring Budgeted exp.	Ministry Chair or staff	Ministry Chair or staff	Ministry Chair or staff
Non-Recurring Budgeted exp.	Ministry Chair or staff	Ministry Chair or staff & Treasurer (after pmt.)	Ministry Chair or staff & Treasurer (after pmt.)
Unbudgeted exp.	Ministry Chair or staff	Ministry Chair or staff & Treasurer (before pmt.)	Ministry Chair and Administration Board

F. Capital Reserve Accounts

A Capital Fund Reserve account has been established, consisting of one or more separate bank accounts. The purpose of this (these) account(s) is to segregate remaining reserves and additional cash reserves in the General Fund which have been generated by prior years' surpluses. Each year (as part of the budget process) the amount needed from the Reserves shall be determined and budgeted. This amount should represent any operating shortfall expected.

During the year, transfers from Capital Fund Reserve accounts to General Fund accounts may be approved by the Treasurer, if within the budget (with the exception of the Plumer Endowment Fund). If during the year it is determined that more than the amount budgeted will be required to be used from the Reserves, then Administration Board approval shall be required and, if significant, as required by the Bylaws, Congregational approval shall be sought. (The definition of "significant" should be determined by the Administrative Board in relation to the amount of existing Reserves and the current year budget.) Currently, "significant" is defined as over \$25,000.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Cash Management</b>	<b>3.01</b>	<b>A</b>	<b>5/27/99</b>

If, during the year, it becomes apparent that a significant surplus will be generated during the year (e.g. the church receives a large, unexpected gift to the General Fund), excess cash in General Fund accounts should be transferred to the Capital Fund Reserve account(s) in amounts recommended by the Treasurer and approved by the Administration Board. Also, any excess in the Early Childhood Center (“ECC”) accounts should be transferred to Capital Reserve account(s). Such amount should be determined based upon an analysis of future needs of the ECC.

G. All Bank Accounts

Bank accounts shall be maintained and established in accordance with the Bylaws. Signature cards shall be kept current. Only a minimum of funds should be kept in non-interest bearing checking accounts (below a \$10,000 balance). Regular transfers should be made between the interest bearing and the non-interest bearing checking accounts as appropriate. The Church Administrator may make these transfers, upon approval of the Treasurer. No single bank account should maintain a balance of more than \$100,000 (or more than the amount that is FDIC insured). All bank reconciliations should be prepared by a church staff member without signing authority on any bank accounts, and the reconciliations should be reviewed monthly by the Treasurer.

H. New Bank Accounts

Should the need arise to establish a new bank account, prior approval shall be sought from a group made up of the following: Treasurer, Senior Pastor, Chair of the Administration Board, and Moderator. All bank accounts shall be FDIC insured. Approval to open new accounts will be conveyed to the Church Administrator by a member of this group via a meeting, phone conference, or written approval. In the event that not all of the individuals serving on the group are available, the Treasurer and one other person from the group may act, with notification of said transaction given to the other individuals as soon as possible. Notification of the new account shall be given at the next Administration Board meeting and shall be incorporated into the minutes of that meeting.



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Receipt and Use of Gifts</b>	<b>3.02</b>	<b>A</b>	<b>04/18/2022</b>

				<i>Date</i>
<i>Format Reviewed By:</i>	Bylaws, Policies and Procedures Committee			04/16/2022
<i>Approvals:</i>	Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/> No
	Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/> No
				04/18/2022

## I. PURPOSE

Irvine United Congregational Church (hereafter referred to as "IUCC"), an IRS 501(c)(3) not-for-profit organization, solicits and accepts gifts for purposes that will help IUCC fulfill its mission and ministry. This policy provides guidelines on the receipt and use of gifts, and allows flexibility in the treatment of gifts on a case-by-case basis.

## II. SCOPE

### A. Applies To

1. All donors to IUCC.
2. The Church Office that must properly respond to such gifts.

### B. Administrator

Treasurer  
Church Administrator

### C. Policy and Procedure Responsibility

Administration Board  
Bylaws, Policies and Procedures Committee

## III. DEFINITIONS

- A. Gifts: Donations to IUCC other than annual tithes, pledges, and unpledged offerings to the general fund.
- B. Cash: Including, but not necessarily limited to currency, checks, cashier's checks, money orders, or electronic stock transfers.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Receipt and Use of Gifts</b>	<b>3.02</b>	<b>A</b>	<b>04/18/2022</b>

C. Tangible Property: Personal items of value (e.g., artwork).

D. In-Kind Donations: Instead of giving money to buy needed goods and services, the goods and services themselves are given (e.g., a printer gives a significant discount on printing costs to IUCC).

#### IV. POLICY

A. This policy rests on several assumptions and principles:

1. All gifts shall be consistent with IUCC's Charter, Bylaws and Mission Statement.
2. The solicitation and administration of charitable gifts is a process involving spiritual, philanthropic, personal, financial, legal, and tax considerations. IUCC intends the process will achieve a fair and proper balance between the interests of the donor and the purposes of IUCC.
3. Donors are encouraged to discuss gift planning with their professional advisors. Any communication with donors regarding planned giving or deferred gifts should clearly indicate that IUCC does not provide legal or tax advice.
4. No irrevocable gift, whether outright or life-income in character, will be accepted if IUCC has cause to believe that, under any reasonable set of circumstances, the gift would jeopardize the donor's financial security.

B. The following policies and guidelines govern acceptance of gifts made to IUCC for the benefit of any of its operations, programs, or services.

1. Use of Legal Counsel: IUCC will seek the advice of legal counsel in matters relating to the acceptance of gifts when appropriate. Review by counsel is recommended for:
  - a. Documents naming IUCC as trustee or requiring IUCC to act in any fiduciary capacity.
  - b. Gifts requiring IUCC to assume financial or other obligations.
  - c. Transactions with present or potential conflicts of interest.
  - d. Gifts of property which may be subject to environmental or other regulatory restrictions.
2. Restrictions on Gifts: IUCC will not accept gifts that
  - a. Are in violation of IUCC's Charter, Bylaws and Mission Statement;
  - b. Would result in IUCC losing its status as an IRS 501(c)(3) not-for-profit organization;

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Receipt and Use of Gifts</b>	<b>3.02</b>	<b>A</b>	<b>04/18/2022</b>

- c. Are too difficult or too expensive to administer in relation to their value;
- d. Would result in any unacceptable consequences for IUCC; or
- e. Are for purposes outside the mission of IUCC.

C. Decisions on the restrictive nature of a gift, and its acceptance or refusal, shall be made by the Administration Board, which should in every instance ensure that the views of the Senior Pastor, Treasurer, and Church Administrator are considered.

D. Gifts Generally Accepted Without Review

1. **Cash.** All lawful unrestricted gifts by cash, check, money order or online transfer shall be accepted by IUCC. Gifts shall be made payable to IUCC and include information as to the intent of the donor. In no event shall a gift be provided to, or a check be made payable to, an individual who represents IUCC.
2. **Pledges.** Pledges of unrestricted cash may be payable in single or multiple installments. The pledge should generally not exceed three (3) years in duration, unless otherwise agreed to by the Administration Board in collaboration with the Fund Development Committee or in the case of specific major giving campaigns for which longer term pledges may be appropriate. Donors using this option must complete a pledge form or otherwise confirm the pledge in writing.
3. **Marketable Securities.** Marketable securities may be transferred electronically to an account maintained at one or more brokerage firms or delivered physically with the transferor's endorsement or signed stock power (with appropriate signature guarantees) attached. As feasible, all marketable securities should be sold promptly upon receipt unless otherwise directed by the Administration Board. In some cases, marketable securities may be restricted, for example, by applicable securities laws or the terms of the proposed gift; in such instances the decision whether to accept the restricted securities shall be made by the Administration Board.
4. **Real Estate.** IUCC will only accept real estate as part of a trust or will, not as a direct gift, with the designated executor or trustee handling all aspects of the disposition of said real estate before directing the proceeds to IUCC. In special circumstances, a gift of real estate may be accepted with the approval of the Administration Board.
5. **Cryptocurrencies.** Cryptocurrencies may be transferred electronically to an account maintained at one or more brokerage firms. As feasible, cryptocurrencies should be sold promptly upon receipt unless otherwise directed by the Administration Board.
6. **Vehicles.** In general, vehicles will not be accepted as a direct gift. Rather, they

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Receipt and Use of Gifts</b>	<b>3.02</b>	<b>A</b>	<b>04/18/2022</b>

will be accepted if the donor arranges for a third-party broker to handle the disposition of said vehicle and assumes all broker-related fees before directing the proceeds to IUCC.

7. **Planned Gifts and Life Income Arrangements.** Planned gifts are given from accumulated assets that will provide future financial resources for IUCC’s mission and ministry. Life income arrangements provide current benefits to donors or their designees. IUCC encourages planned gifts to benefit the present and future setting of the church. Individuals may contact the Senior Pastor, Treasurer, Fund Development Committee or Church Administrator for information. Planned gifts include bequests and beneficiary designations under revocable trusts, life insurance policies, commercial annuities, and retirement plans.

E. Gifts Subject to Review

Certain forms of gifts or donated properties may be subject to review by the Administration Board prior to acceptance. As appropriate, the Administration Board may seek input from the Senior Pastor, Treasurer, Church Administrator and/or Ministries Board. Examples of gifts subject to prior review include, but are not limited to:

1. **Highly designated gifts.** Gifts that are highly designated as to a specific project, geographical location, or that may be counter to or cause a shift in program priorities.
2. **Life Insurance.** IUCC will accept gifts of life insurance policies where IUCC is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.
3. **Gifts In-Kind.** In-kind contributions are donations of goods or services or time instead of cash. Such gifts may be subject to pre-approval to ensure that they align with IUCC’s mission and ministry. Although the intent of the donor is greatly appreciated, IUCC may not have use for some types of gifts in-kind. Gifts in-kind whose value is less than \$1000 may be accepted by the Church Administrator, who shall report such gifts promptly to the Treasurer. These types of gifts could include providing a donation credit in lieu of reimbursement where the expense is clearly otherwise the obligation of the congregation.
4. **Endowment.** IUCC will work with prospective donors on the terms and conditions of restricted or unrestricted endowments, provided they support the mission of IUCC. In all cases, the establishment of a special purpose endowment fund requires review by the Fund Development Committee and

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Receipt and Use of Gifts</b>	<b>3.02</b>	<b>A</b>	<b>04/18/2022</b>

approval by the Administration Board. A gift agreement or memo of understanding shall be drafted to articulate the donors' intentions and IUCC's understanding of those intentions. Because conditions change over time, these agreements should contain the following contingency clause:

*If, in the opinion of the Administration Board, all or part of the funds cannot be applied in strict conformance with the purposes previously stated, IUCC may use these funds for other appropriate purposes that are generally aligned to the original intent of the donor as good conscience and needs dictate.*

F. Certain Other Gifts

Potential gifts not otherwise addressed in this policy must be reviewed by the Administration Board prior to acceptance.

G. Gifts Generally Not Accepted

***Tangible Personal Property.*** IUCC does not generally accept the gift of tangible personal property. Instead, donors are encouraged to dispose of these kinds of gifts and donate the resulting funds to IUCC. Although the intent of the donor is greatly appreciated, IUCC may not have use for such gifts, a place to store them or the expertise, time, or talent to dispose of the gifts.

***Intangible Personal Property.*** IUCC does not generally accept the gift of intangible personal property (e.g., copyrights, patents, trademarks).

V. **PROCEDURE**

- A. When a gift to IUCC is made, it can be either a contribution to serve the Church in an unspecified way or it can be a donation designated for a specific purpose.
  - 1. For cash offered, whether a designated gift or not, the Church Administrator will deposit the funds into a "Special Gifts" account.
- B. The use of gift funds placed in the "Special Gifts" account will be handled in the following manner.
  - 1. In the case of funds designated for a specific purpose by the donor, the Administration Board will make every effort to carry out the donor's wishes as soon as feasible.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Receipt and Use of Gifts</b>	<b>3.02</b>	<b>A</b>	<b>04/18/2022</b>

2. In the case of unusually large special gifts (larger than \$10,000) unspecified by the donor as to use, the Administration Board will determine the use of the funds to best meet the needs of the Church. As appropriate, the Administration Board may seek input from the Pastor(s), Ministries Board and/or family and friends of the donor.
  3. In all cases, for the benefit of both Boards, a fund status report will be prepared by the Treasurer in advance of any decision as to use of funds in the "Special Gifts" account.
- C. Acknowledgements. IUCC will provide acknowledgments to donors meeting IRS substantiation requirements for property received by the charity as a gift. However, except for gifts of cash, publicly traded securities and cryptocurrencies, no value shall be ascribed to any receipt or other form of substantiation of a gift received by IUCC. The donor has sole responsibility for identifying the value of any non-cash gift(s) for tax purposes.

IUCC will respect the intent of the donor relating to gifts for restricted purposes and those relating to the desire to remain anonymous. With respect to gifts given anonymously, IUCC will restrict information about the donor to only those staff members with a need to know.

The following acknowledgment process will be followed.

1. For annual pledges (stewardship) - giving statements (distributed up to three times per year) shall serve as acknowledgment.
2. For memorial gifts, the family of the deceased will receive a list of all donors (but no gift amounts).
3. For celebratory gifts (e.g., cash given to IUCC in honor of a wedding or commitment ceremony), the couple will receive a list of all donors (but no gift amounts).
4. For stock transfers, a letter will be sent to the donor(s), if requested.
5. For fiduciary institutions (including trusts), a letter will be sent to the donor and the institution, if requested.
6. For in-kind gifts, a letter will be sent to the donor and will include, if appropriate, the donated and invoiced amounts, if requested.
7. The Fund Development Committee and/or church and pastoral staff may provide additional acknowledgment letters.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Fundraising</b>	<b>3.03</b>		<b>02/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force 10/23/2014/DWS

<i>Approvals:</i> Administration Board	✓	Yes		No	02/17/2015
Ministries Board	✓	Yes		No	05/11/2015

### I. PURPOSE

The purpose of this document is to:

Provide guidance to Ministries and individuals who wish to produce fundraising events held on behalf of IUCC.

### II. SCOPE

A. Applies To:

- All Ministries and Other Bodies of IUCC
- The Treasurer
- The Chair of the Administration Board
- The Chair of the Ministries Board

B. Administrator

All Ministries and Other Bodies of IUCC

C. Policy and Procedure Responsibility

Policies & Procedures Task Force

### III. DEFINITIONS

A. *Event Tickets*

Tickets sold as a Fundraiser for IUCC as defined in Policies and Procedures Document 3.04 A

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Fundraising</b>	<b>3.03</b>		<b>02/17/2015</b>

- B. *IUCC Events* Any event put on by or sponsored by a Ministry or Other Body of the Church.
- C. *Fundraisers* Events held for the purpose of raising funds for the General Fund of IUCC.
- D. *General Fund* The account on the Church's books that represents the fund used for general purposes (undesignated funds).

#### IV. POLICY

Any event put on by a Ministry or Other Body of IUCC for the purpose of or that will include an element of fund raising shall be done so as a fundraiser in support of the General Fund of IUCC unless otherwise directed by approval of the Administration Board.

#### V. PROCEDURE

- A. If a fundraiser event has not been planned in the Annual Budget, prior approval is required as follows:
1. Any Ministry or Other Body of IUCC may hold a fundraising event, provided that first:
    - a. the Fund Development Committee is consulted for the appropriateness of the event in regards to the calendar of events so not to conflict with the Annual Stewardship or special Capital Gifts Campaign; and
    - b. following the Fund Development Committee review, the Administration Board approves of said event. Said approval will also include direction of the funds being raised should it be requested to support anything other than the General Fund of IUCC.
    - c. if expenses are non-budgeted expenses, a proposal shall be submitted to the Administration Board for approval prior to the event.

#### B. Promotion

1. It shall be the responsibility and expense of the Ministry or Other Body of IUCC putting on the event to promote it.



<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Fundraising</b>	<b>3.03</b>		<b>02/17/2015</b>

2. It is advised that the Ministry or Other Body of IUCC putting on the event should work with the Outreach Ministry in promoting said event.

C. Collection of Funds

1. Funds collected from the fundraiser should be turned in to the church as soon as possible after the event or as collected per Item IV (C) of the 3.01 Cash Management Document of IUCC's Policies and Procedures. A Fundraiser/Event Deposit Count Record form should be completed and, along with the funds, should be put into the Drop Box Safe located in the Worship Closet in the Sanctuary.
2. A member of the Staff will collect the funds from the Drop Box Safe, verify the deposit count and make the deposit per the 3.01 Cash Management Policies and Procedures.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Event Tickets</b>	<b>3.04</b>	<b>A</b>	<b>2/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force 10/23/2014/DWS

<i>Approvals:</i> Administration Board	✓	Yes	<input type="checkbox"/>	No	02/17/2015
Ministries Board	✓	Yes	<input type="checkbox"/>	No	05/11/2015

### I. PURPOSE

The purpose of this document is to:

- Provide guidance to Ministries and individuals on the issue of selling tickets for events held on behalf of IUCC.

### II. SCOPE

A. Applies To:

All Ministries and Other Bodies of IUCC

B. Administrator

All Ministries and Other Bodies of IUCC

C. Policy and Procedure Responsibility

- The Treasurer
- The Chair of the Administration Board
- The Chair of the Ministries Board
- Policies & Procedures Task Force

### III. DEFINITIONS

A. *IUCC Events* Any event put on by or sponsored by a Ministry or Other Body of the Church.

B. *Event Tickets* Tickets sold as a fundraiser for IUCC as defined in Policies and Procedures Document 3.03

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Event Tickets</b>	<b>3.04</b>	<b>A</b>	<b>2/17/2015</b>

*C. Free Tickets*

Event Tickets that are given to an individual gratis as determined by the Ministry or Other Body of the IUCC producing the fundraising event.

**IV. POLICY**

Any event put on by a Ministry or Other Body of IUCC that will include the sale of Event Tickets shall be done so as a fundraiser in support of the General Fund of IUCC unless otherwise directed by approval of the Administration Board.

The Administration Board policy is that everyone should purchase Event Tickets except the Senior Pastor, Director of MYP, the Director of Adult Programs and performers unless otherwise directed by approval of the Administration Board.

**V. PROCEDURE**

**A. Ticket Sales**

1. Any Ministry or Other Body of IUCC may sell Tickets for an IUCC Event, provided that first:
  - a. approval of said event has been approved per the procedures of Policies and Procedures Document 3.03, Item V A 1.

**B. Printing of Tickets**

1. It shall be the responsibility and expense of the Ministry or Other Body of IUCC to print tickets for any event.
2. It shall be the responsibility of the Ministry or Other Body of IUCC selling said tickets to collect funds for the sale of tickets and turn in said funds to the Church per the Policies and Procedures Document 3.03 "Fundraising".

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>COMMITTEES</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Finance Committee</b>	<b>3.05</b>		<b>5/17/15</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	5/18/15
Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	

### I. PURPOSE

The purpose of this document is to:

- Provide guidance to the Finance Committee with respect to responsibilities.

### II. SCOPE

A. Applies To:

Finance Committee

B. Administrator

Finance Committee

Administration Board

C. Policy and Procedure Responsibility

Administration Board

Policies and Procedures Task Force

### III. POLICY

Per the IUCC Bylaws, the Finance Committee shall review the budget and financial reports of the Church in conjunction with the Treasurer, the Bookkeeper, other Church staff and in cooperation with the Administration Board. Functions of this committee will include:

- Provide feedback to the Treasurer/Administration Board on topics including budget preparation, cash management and financial policies/procedures
- Provide backup to the Treasurer in reviewing/approving reimbursement requests.
- Act in the capacity of the Treasurer as needed

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>COMMITTEES</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Finance Committee</b>	<b>3.05</b>		<b>5/17/15</b>

#### **IV. PROCEDURE**

##### A. Accountability

1. The Finance Committee reports to the Administration Board.
2. Any decisions made in the Treasurer's absence needs to

##### B. Composition

1. The Finance Committee shall consist of five (5) members:
  1. Chair
  2. Treasurer
  3. Three (3) Committee Members

The current Treasurer shall not serve as chair. Committee members may include: the current Treasurer, a former Treasurer, an incoming Treasurer, one of the Congregational Representatives from the Administration Board, and a congregation member.

2. The Bookkeeper will serve as an ex-officio member of this committee.
3. Consistent with the IUCC Bylaws, the Finance Committee Chair must be an IUCC member and is elected to a one (1) year term by the Corporate Membership at the Spring Congregational Meeting and shall be responsible for appointing the other members (excluding the Treasurer). The Chair may serve no more than five (5) consecutive 1-year terms.

##### C. Meetings

1. The Finance Committee shall meet at least quarterly and as needed.
2. Policies and Procedures Document 1.05 (Meeting Rules of Order and Minutes) does not apply.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Budget Process</b>	<b>3.06</b>		<b>08/17/2015</b>

*Date/Initial*

*Format Reviewed By:* Policies and Procedures Task Force

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	08/17/2015
Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	

**I. PURPOSE**

The purpose of this policy is to establish IUCC's annual budget process.

**II. SCOPE**

A. Applies To

Any volunteer or Church employee involved in budgeting.

B. Administrator

Administration Board

C. Policy and Procedure Responsibility

Administration Board

Policies and Procedures Task Force

**III. DEFINITIONS**

- A. Aspirational Budget      The preliminary budget that reflects funding needs to undertake all possible proposed programs and staffing. This budget establishes the goal for IUCC's annual Stewardship Campaign.
- B. Proposed Annual Budget      The proposed but unapproved budget that reconciles the Aspirational Budget to available funding.
- C. Annual Budget      The final budget as approved by the Administration Board and the IUCC Congregation.
- D. Finance Committee      As established by Policy 3.05, the Finance Committee shall work with the Treasurer and Administration Board to assist with budget preparation and implementation.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Budget Process</b>	<b>3.06</b>		<b>08/17/2015</b>

E. Budget Committee

The committee formed annually by the Treasurer to make recommendations to the Administration Board regarding the annual budget. Members typically include the Treasurer, Coordinating Council, Finance Committee, Child Care Committee Chair, one Congregational Representative of the Administration Board, the Fund Development Chair and the Church Administrator.

**IV. POLICY**

The preparation and approval process of IUCC's Annual Budget shall include:

- Preparation of an Aspirational Budget by the Budget Committee and establishment of a Stewardship Goal;
- Stewardship Campaign results;
- Reconciliation of Stewardship Campaign results and Aspirational Budget into Proposed Annual Budget by the Budget Committee;
- Review and approval of Proposed Annual Budget by the Administration Board;
- Dissemination of Proposed Annual Budget and Budget Forum(s) for the IUCC Congregation;
- Review and approval of Proposed Annual Budget by the Congregation at the Winter Meeting.

**V. PROCEDURE**

- A. In early August of each year, the Treasurer, in conjunction with the Bookkeeper, will announce the deadline (typically late August) for receipt of all ministry, committee, and church Aspiration Budget requests. Additionally, budget packets will be distributed to assist those tasked with preparing a budget request.
- B. The Treasurer, in conjunction with the Finance Committee, will prepare the personnel budget and review all of the submitted ministry, committee and church Aspiration Budget requests. The Treasurer will prepare a combined preliminary Aspiration Budget no later than the second week of September.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Budget Process</b>	<b>3.06</b>		<b>08/17/2015</b>

- C. The Treasurer will convene the Budget Committee to begin meeting in September to review the Aspirational Budget, with the goal of having a Stewardship Campaign goal established no later than the first week of October. If adjustments are made to submitted ministry, committee or church Aspirational Budget requests, a representative from the Budget Committee will communicate those adjustments to the relevant staff member or volunteer.
- D. The Stewardship Goal (amount to fund the Aspirational Budget) is announced to the IUCC Congregation and the Stewardship Campaign is undertaken.
- E. In late November, when the results of the Stewardship Campaign are known, the Budget Committee begins to meet to reconcile the Aspirational Budget with available funding sources – resulting in the Proposed Annual Budget. As adjustments are made to submitted Aspirational Budget requests, a representative from the Budget Committee will communicate those adjustments to the relevant staff member or volunteer.
- F. The Proposed Annual Budget will be presented for review and approval at the December meeting of the Administration Board.
- G. The Proposed Annual Budget (as approved by the Administration Board) will be disseminated no later than 10 days before the Winter Meeting and Congregation Members will have the opportunity to attend a Budget Forum before the Winter Meeting.
- H. Once approved by the Congregation, the Annual Budget will be posted to the IUCC Website. Annual Budget-related financial statements will be reviewed monthly by the Administration Board, and made available to ministry/committee chairs and employees.



<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Pastor Paul Camper Fund</b>	<b>3.07</b>		<b>04/20/20</b>

	<i>Date</i>
<i>Format Reviewed By:</i> Bylaws, Policies and Procedures Committee	February 2020
<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No April 20, 2020
Ministries Board	<input type="checkbox"/> Yes <input type="checkbox"/> No _____

**I. PURPOSE**

To establish procedures for the Pastor Paul Camper Fund.

**II. SCOPE**

A. Applies To

Any persons applying for financial assistance for IUCC-sponsored, off-campus events (e.g., Pilgrim Pines, mission trips)

B. Administrator

Church Administrator/Adult Education Director/Ministry with Young People Director

C. Policy and Procedure Responsibility

Bylaws, Policies and Procedures Committee  
Administration Board

**III. DEFINITIONS**

IUCC   Irvine United Congregational Church

Pastor Paul Camper Fund            A fund established from donated funds to provide assistance so that financial need is not a barrier to participating in IUCC-sponsored, off-campus events

**IV. POLICY**

The Rev. Dr. Paul Tellström, Senior Pastor Emeritus, was a strong advocate for the value of participating in camp programs. Established with funds donated in his honor, the Pastor Paul Camper Fund provides camperships to deserving individuals so that financial need is not a barrier to participation.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Pastor Paul Camper Fund</b>	<b>3.07</b>		<b>04/20/20</b>

## V. PROCEDURE

### a. Committee:

- i. A committee comprised of the following individuals will jointly make decisions regarding the distribution of campership funds:
  1. Church Administrator
  2. Adult Education Director
  3. Ministry with Young People Director

### b. Calendar:

- i. On an annual basis, the committee will identify events for which camperships may be needed. The committee will disseminate to the congregation on a timely basis the availability of camperships and the application process. All such dissemination will include reference to the fund name, "The Pastor Paul Camper Fund."

### c. Application:

- i. Individuals wishing to apply for financial assistance to attend an IUCC-sponsored, off-campus event will submit an application of no more than one page describing:
  1. The event he/she wishes to attend
  2. Why financial assistance is needed
  3. The amount of financial assistance needed (e.g., full campership, half campership, etc.)
- ii. This application will be submitted confidentially to the Church Administrator who will share it only with other committee members.

### d. Decision-Making

- i. The committee will meet as needed to make decisions re: the awarding of financial assistance.
- ii. The committee may seek consultation with pastoral staff, if needed, while respecting applicants' right to privacy.
- iii. The committee will work with the Church Bookkeeper in identifying how much funding is available for camperships.

<b>IRVINE UNITED CONGREGATIONAL CHURCH POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>FINANCE</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Pastor Paul Camper Fund</b>	<b>3.07</b>		<b>04/20/20</b>

e. Dissemination

- i. The Church Administrator will confidentially inform applicants of the committee's decisions.
- ii. The Church Administrator will work with the Church Bookkeeper on distribution of funds.
- iii. The Committee will report on at least an annual basis to the Administration Board re:
  1. The number of camperships awarded
  2. The funds disbursed
  3. Fund balance

Applicant names will not be disseminated as part of the reporting process.

f. Donations:

- i. Donations made in honor of Pastor Paul seeded this fund. On an ongoing basis, additional donations will be solicited to replenish this fund so that camperships can continue to be awarded as long as there are available funds.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>  <b>POLICY &amp; PROCEDURE</b>	<b>Category</b>		
	<b>COMMITTEES</b>		
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Child Care Committee</b>	<b>5.01</b>		<b>10/20/2014</b>

*Date/Initial*

*Format Reviewed By:* Policies & Procedures Task Force 10/23/2014 A. Rosse

<i>Approvals:</i> Administration Board	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	No	10/20/2014
Ministries Board	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No	

**I. PURPOSE**

The purpose of this document is to:

- Provide guidance to the Child Care Committee with respect to responsibilities.

**II. SCOPE**

A. Applies To:

Child Care Committee

B. Administrator

Child Care Committee

Administration Board

C. Policy and Procedure Responsibility

Administration Board

Policies and Procedures Task Force

**III. DEFINITIONS**

A. CCC – Child Care Committee

B. ECC – Early Childhood Center

**IV. POLICY**

The CCC ensures that the ECC provides a quality program in an environment compatible with IUCC's mission. The CCC recommends strategic direction and oversight, including program development, consistent enrollment, budgeting, director performance review, director/teacher compensation, hiring, tuition adjustments, capital improvements, and licenses/permits.

<b>IRVINE UNITED CONGREGATIONAL CHURCH</b>	<b>Category</b>		
	<b>COMMITTEES</b>		
<b>POLICY &amp; PROCEDURE</b>			
<b>Subject</b>	<b>Doc Number</b>	<b>Rev</b>	<b>Effective Date</b>
<b>Child Care Committee</b>	<b>5.01</b>		<b>10/20/2014</b>

**V. PROCEDURE**

**A. Accountability**

1. The ECC is a fully integrated part of IUCC, sharing the same tax ID number. The CCC is accountable to the IUCC Administration Board, with the CCC Chair reporting monthly to the board. The Administration Board sets the final budget for the ECC, has ultimate human resources responsibilities, and authorizes facility and capital improvements. The ECC director is accountable to the CCC. The IUCC Senior Pastor serves as a member of the CCC and as an onsite resource. In the event of an emergency, the Senior Pastor should supervise the situation, informing the Chair or Vice Chair as soon as possible thereafter about the issue and resolution.

**C. Composition**

1. The CCC shall consist of seven (7) members:
  1. Chair
  2. Vice Chair
  3. Clerk
  4. Senior Pastor
  5. Administration Board Representative
  6. Member
  7. Member
2. The ECC Director will serve as an ex-officio member of this committee.
3. Consistent with the IUCC Bylaws, the CCC Chair must be an IUCC member and is elected to a one (1) year term by the Corporate Membership at the Spring Congregational Meeting and shall be responsible for appointing: the Vice Chair, Clerk, and two (2) members. The Administration Board Chair will appoint that board's representative. Committee members need not be IUCC members. The Chair may serve no more than five (5) consecutive 1 year terms.

**D. Meetings**

1. The CCC shall meet monthly.
2. In compliance with Policies and Procedures Document 1.05 (Meeting Rules of Order and Minutes), minutes will be prepared, distributed and stored.