

2.1 Treatment of People: UUA Governance Manual

With respect to interactions with people, the President shall not cause or allow conditions, procedures, or decisions that are unsafe, undignified, disrespectful, unnecessarily intrusive, or oppressive.

A. Further, without limiting the scope of the foregoing by this enumeration, the President shall not:

1. Fail to promote the full participation of persons in all UUA [Unitarian Universalist Association] activities, UUA employment, purchasing, and contracting, and in the full range of human endeavor without regard to race, color, sex, disability, affectional or sexual orientation, gender identity, age, or national origin and without requiring adherence to any particular interpretation of religion or to any particular religious belief or creed.

~~2. Fail to ensure that inclusive language be used in all publications, presentations and events of the UUA.~~

~~3.2~~ Fail to avoid cultural misappropriation in all UUA events.

~~4.3~~ Fail to provide for appropriate confidentiality and adequate personal safety and privacy during UUA activities.

~~5. Fail to institutionalize an ongoing system to acknowledge and respond to sexual, discriminatory or other misconduct by persons employed as paid staff, by members of our professional ministry, or by volunteers of the Association.~~

~~6. Fail to inform people of this policy and to provide a way for persons to be heard who believe they have not been accorded a reasonable interpretation of their protections under this policy.~~

~~Operate without a whistleblower policy that prevents retaliation against any person who in good faith reports a concern about an action of paid or volunteer staff.~~

Comment [D1]: Not needed – micromanaging. Also covered by A.1.

Comment [D2]: This behavior is covered by the Whistleblower Policy, which we require to be implemented in policy 2.3.1G

Comment [D3]: This behavior is covered by the Whistleblower Policy, which we require to be implemented in policy 2.3.1G

Comment [D4]: This is not needed – it is covered by the whistleblower policy

2.2 Treatment of Congregations: UUA Governance Manual

With respect to member congregations or those congregations seeking membership, the President shall not cause or allow conditions, procedures, decisions or services that are untimely, disrespectful, inequitable, discriminatory or not transparent.

Further, without limiting the scope of the foregoing by this enumeration, the President shall not:

1. ~~Fail to establish an effective and seamless response system to communications from congregations.~~
1. Fail to provide a an effective process for dealing with congregational complaints.
2. ~~Fail to establish open and transparent communications related to decisions that affect congregations.~~
3. ~~2~~ Fail to operate in accordance with the current Board policy regarding loans to congregations, as documented in "Appendix 2.A: Congregational Properties and Loan Commission (CPLC) Loan Program".
4. ~~3~~ Fail to provide information necessary to help our congregations remunerate all staff with fair, equitable, and geographically consistent compensation packages.

Comment [D5]: This is micro-managing and is covered by the global statement

Comment [L6]: Suggestion from trustee when we monitored this policy last

Comment [D7]: This is micro-managing and is covered by the global statement

Comment [D8]: This will be moved to policy 2.15

2.3 Treatment of Staff: UUA Governance Manual

With respect to the treatment of paid and volunteer staff, the President may not cause or allow conditions that are inequitable, undignified, disrespectful, disorganized, unclear, or discriminatory.

Further, without limiting the scope of the foregoing by this enumeration, the President shall not:

1. Operate without written personnel rules which include:
 - A. Confidentiality requirements
 - B. Prohibition of disclosure about the Association's internal affairs
 - C. Guidelines for internet, email and computer use.
 - D. Provision for effective handling of grievances, and

- E. Protection against unethical conditions, ~~real or perceived~~, such as nepotism and preferential treatment for personal reasons.
 - F. Procedures to implement the Association's Conflict of Interest policies (Appendix 2J).
 - G. Procedures to implement the Association's Whistleblower policies (Appendix 2K).
 - H. Safety and ethics policies.
2. Fail to permit, and provide emotional space for, the non-disruptive expression of dissent by any staff member.
 3. Fail to consider ~~geographic~~ diversity in appointments to staff committees and task forces.
 4. Allow staff to work under unsafe conditions.

Comment [D9]: We are concerned with a variety of forms of diversity. The staff can interpret "diversity."

2.4 Compensation and Benefits for UUA Staff: UUA Governance Manual

2.4 Compensation and Benefits for UUA Staff: UUA Governance Manual

With respect to employment, compensation, and benefits for Association staff, the President shall not cause or allow:

- A. An unfair or inhumane benefit structure.
- B. Conditions that jeopardize the fiscal integrity of the Association.

Further, without limiting the scope of the foregoing by this enumeration, the President shall not:

1. Promise permanent employment.
2. Set salaries at levels that are materially less than those paid by comparable nonprofit organizations.
3. Provide less than a living wage to all employees.
4. Change or administer benefits so as to cause imprudent or inequitable situations, including those that:

~~A.~~ Incur unfunded liabilities.

~~B.A.~~ Provide less than a reasonable level of benefits to all employees.

~~C.B.~~ Allow any employee to lose benefits already promised.

~~D.C.~~ Differentiate among classes of employees.

Comment [D10]: Under any reasonable interpretation this is covered under 2.4A above

2.5 Compensation of Religious Professionals and Church Staff: UUA Governance Manual

With respect to religious professionals throughout the Association and our congregations, and to all program and administrative staff employed by our congregations, the President shall not fail to provide information necessary to help our congregations remunerate all staff with fair, equitable, and geographically consistent compensation packages.

Comment [L11]: Moved and slightly reworded to Policy 2.15

2.6-5 Employee Benefits for UU Organizations: UUA Governance Manual

With respect to the operation of benefit plans for UU [Unitarian Universalist] organizations, the President shall not cause or allow conditions that are unfair or discriminatory, or that jeopardize the fiscal integrity of the plans.

Further, without limiting the scope of the foregoing by this enumeration, the President shall not:

1. Exclude eligible UU organizations, as defined in the specific plan documents, from participation in the Association's benefit plans. Except if specified otherwise by the plan document, organizations in the following categories are eligible for UUA benefit plans:
2. UU congregations in good standing.
3. UUA [Unitarian Universalist Association] districts.
4. UU related organizations, specifically Associate Member Organizations, Professional Organizations, and Theological Schools.
5. 1. Other UU organizations as approved by the Board of Trustees after recommendation of the President.
6. 2. Permit participation in a benefit plan by an individual or organization that is ineligible according to the plan document or these policies.
7. 3. Charge an administrative fee to any benefit plan that exceeds a reasonable estimate of the costs incurred by the Association in administering the plan.
8. 4. Generate an excessive level of surplus revenue in any plan, or use surplus revenue in a way that:
 - A. is prohibited by the plan document or and
 - B. if not expressly prohibited by the plan document, is not intended to address issues related to compensation and the financial needs of religious professionals and other employees of the UUA and eligible UU organizations.

Comment [D12]: The plan documents govern who is eligible

Comment [D13]: The plan documents must govern who is eligible.

Comment [D14]: Any legitimate surplus must be both allowed by the plan document and be used for the purpose listed.

Comment [L15]: Not needed.

Renumber current 2.7 to 2.6

~~2.8-7~~ **Financial Condition and Activities:** **UUA Governance Manual**

The President shall not cause or allow conditions that would jeopardize the Association's fiscal health.

Further, without limiting the scope of the foregoing by this enumeration, the President shall not:

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2.7.9 Incur unfunded liabilities, including those related to employee benefit plans.

Renumber all sections 2.9, 2.10, 2.11, 2.12, 2.13 and 2.14 to be 2.8, 2.9, 2.10, 2.11, 2.12 and 2.13

~~2.15-14~~ **Implementation of the Business Resolutions of General Assembly**

The President shall not fail to implement in a timely manner and provide ongoing implementation support for those resolutions of the General Assembly that direct the work of the staff. Such resolutions are identified in Appendix 2.G

Further, without limiting the scope of the foregoing by this enumeration, the President shall not:

~~1. Fail to work with leaders of the Arizona UU congregations to establish and fund an Arizona immigration ministry.~~

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~~A. Fail to provide the funding in amount not less than of \$25,000 for FY2011—as requested by the General Assembly Accountability Group and the Arizona ministers—and additional funding in FY2012. This policy will sunset in October, 2012, and the Board will review at that time whether any ongoing policy is needed at that time.~~

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~~B.A. The President shall not fail to establish, in a timely manner, an Arizona immigration ministry that provides adequate time for partner groups to participate in the work for General Assembly 2012. This policy will sunset in October, 2012, and the Board will review at that time whether any ongoing policy is needed.~~

~~2. 1~~ Fail to have an active, viable and funded program to help our congregations build the capacity to stand in opposition to systemic racism in our congregations, local communities and in our own lives

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1. ~~2~~ Fail to provide information needed to help congregations and remunerate religious professionals, program and administrative staff throughout the Association with fair, equitable, and geographically consistent compensation packages.
- ~~3~~ 3 Fail to assist the Board and the Association in making progress on the areas identified in the 1997 GA resolution calling on the UUA to become an anti-racist institution.

Appendix 2.A [Congregational Loan Policy](#)

Appendix 2.B [Investment Policy](#)

Appendix 2.~~FC~~ [Beacon Press Financial Policy](#)

Appendix 2.~~HD~~ [Endowment Payout Policy](#)

Appendix 2.~~JE~~ [Conflict of Interest Policy](#)

Appendix 2.~~FK~~ [Whistleblower Policy](#)

[Appendix 2.G List of General Assembly Resolutions Directing the Work of the Staff and the Board](#)