

Policy Manual

Unity of Fairfax

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Vision Mission, and Core Values

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Updated: January 2024

Vision Statement

We envision a world of peace, abundance and respect for all creation.

Mission Statement

Aligned with the indwelling Christ, we co-create a world that works for everyone.

Core Values

Core Value	Description
Spirit-Centered	Spirit is at the center of who we are and what we do.
Integrity	Integrity is the practice of maintaining honesty and respectfulness.
Oneness	Oneness is the call to revere Divine Life in all living beings and systems.
Love	Love is a magnet for good and an agent of healing.
Engagement	Engagement means participating with others in conscientious dialogue and collaborative action.

Governing Documents

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Updated: December 2023

Each document listed needs to be consistent with the document under which it is indented. For example, the Employee Manual and all documents listed at that indention level have to be consistent with the Policy Manual, which must be consistent with the Bylaws.

<u>Unity of Fairfax Documents</u>	<u>Authority to Update</u>
Vision	Senior Minister and Board of Trustees
Mission	Senior Minister and Board of Trustees
Core Values	Senior Minister and Board of Trustees
Bylaws	Voting Membership
>Policy Manual	Board of Trustees
>>Employee Manual	Senior Minister and Board of Trustees
>>Procedures and Documentation	Staff
>>Rules and Regulations	Staff
>>Communications Manual	Marketing Team
>>Investment Guidelines	Finance Committee

Additional Resources

Updated: December 2023

A wealth of information and direction is available on the **UnityWorldwideMinistries.org website**, search **“Church Policy Manual.”** This resource includes guidelines, samples and models for many, many considerations for churches in the effective management and execution of the church business and programs. Many of the policies of Unity of Fairfax are derived directly or indirectly from this resource. Some of the topics covered are:

- Employee and Administrative policies and procedures
- Job Descriptions
- Volunteer Management
- Codes of Ethics
- Sample forms
- Guidelines for Board Effectiveness
- Federal Laws

Unity of Fairfax minister(s), board, staff, committee members, other volunteers and all members of the community are all encouraged to browse through this resource for valuable guidance.

Operational and Administrative Policies

Music Ministry

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1. APPROVAL DATE: May 2016
2. BACKGROUND: Unity of Fairfax believes in the power of music to lift up the God Spirit in each member of the community, bringing love, peace and joy through the gift of song.
3. POLICY: Unity of Fairfax offers a strong program of music for the participation and inspiration of the community. The program provides opportunities for member participation, as well as programs and concerts at various special services and events throughout the year.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Senior Minister: Employ and supervise a Director of Music Ministry to provide leadership and management of the music program.
 - 4.2. Director of Music Ministry
 - 4.2.1. Provide a variety of musical experiences for the community.
 - 4.2.2. Recruit and support participants to provide music at the Sunday services and at special services and church events.

Building Use

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1. APPROVAL DATE: March 2015; December 2015, modified to acknowledge rental to non-affiliated parties and to assign the responsibility for setting rental rates to the staff; December 2023, updated to add 4.1.1
2. SCOPE: This policy applies to governing bodies, clergy, staff, and congregants as well as non-affiliated groups that use the church facility.
3. POLICY: The primary use of the building is for the furtherance of the Unity way of life. Other uses of the building are secondary, and can be arranged with approval of the Senior Minister or Senior Minister's designee. The facility is available to be rented to non-affiliated parties. All uses of the building are subject to the Facility Use Rules and Regulations.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Board of Trustees: Define policy for renting the facility
 - 4.1.1. Policy: The Board of Trustees designates staff as agents to rent all or part of the physical plant to outside interests for the purpose of generating rental revenue in such a manner that does not impede regular church functions. In the event of a special or unusual circumstance staff shall secure approval from the board of trustees as warranted. Facility includes all parts of the physical plant (building, parking lots, lawns, etc.)
 - 4.2. Senior Minister: Conduct weddings, funerals and memorials held in the facility, or designate another to that responsibility for specific events.
 - 4.3. Staff
 - 4.3.1. Schedule and manage rentals of the facility, including:
 - 4.3.1.1. Maintaining related processes and forms as needed
 - 4.3.1.2. Setting rental rates.
 - 4.3.1.3. Executing a contract for each facility rental, which may be revised as needed for specifics of any rental agreement.
 - 4.3.2. Maintain a document of the Facility Use Rules and Regulations and provide access to each group using the facility.
 - 4.3.3. Maintain a document of the Building Lock-Up Procedures and provide each group using the facility with access to it.
5. REFERENCES: These documents are available from the church office:
 - 5.1. Rental Application
 - 5.2. Rental Contract
 - 5.3. Facility Use Rules and Regulations
 - 5.4. Lock-Up Procedures

Greening the Church

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1. APPROVAL DATE: November 2015
2. SCOPE: This policy applies to governing bodies, clergy, staff, and congregants as well as renters and other non-affiliated groups that use the church facility.
3. POLICY: The congregation of Unity of Fairfax has pledged to be a “green” church. As such, the selection and use of products on the church property will be made with priority given to the environmental impact.
 - 3.1. Kitchen paper products and utensils will be biodegradable and compostable.
 - 3.2. When available, recyclable materials will be used and recycled.
 - 3.3. Lawn and garden products will be selected to minimize harm to the environment.
 - 3.4. Office paper will be conserved.
 - 3.4.1. Use of other media will be prioritized in meeting the need for effective communication.
 - 3.4.2. Excessive paper use will be minimized by printing on both sides where effectiveness is not compromised.
 - 3.5. All products will be selected, used and disposed of with high regard to environmental impact.

Alcohol Use on Church Premises

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1. APPROVAL DATE: April 2015; December 2023 multiple updates
2. SCOPE: This policy applies to governing bodies, clergy, staff, and congregants as well as non-affiliated groups that use the church facility.
3. POLICY: The purpose of this policy is to define the parameters within which alcoholic beverages may be served at events on the property of Unity of Fairfax. Any attempt to circumvent this policy before or during an event will result in immediate suspension of alcohol service at the event.
 - 3.1. Alcoholic beverages may include beer, wine, champagne, cordials and hard liquor.
 - 3.2. Non-alcoholic beverages must also be served and made prominently available;
 - 3.3. Food must be served along with alcohol;
 - 3.4. Any beverage that contains alcohol will be clearly labeled as such. This requirement also applies to food in which alcohol has not been volatilized (cooked out);
 - 3.5. Alcohol service will be incidental to any function or event held at Unity of Fairfax;
 - 3.6. Each event is required to have an Event Host, who ensures the policy is followed and meets the following requirements:
 - 3.6.1. Is a member of the Unity of Fairfax community;
 - 3.6.2. Is over 21 years of age;
 - 3.6.3. Ensure that the appropriate license/permit is present before alcohol is served;
 - 3.6.4. The area in which alcohol is served must be staffed at all times by a TIPS (**T**raini**n**g for **I**nterventi**o**n **P**rocedu**r**e**S**) trained bartender. TIPS is an online training and certification course for the “responsible service, sale, and consumption of alcohol.” No self-service is permitted; the bartender and Event Host retain the right to refuse service of alcohol to any individual.
 - 3.7. No event attendee is allowed to leave the church premises with an alcoholic drink.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Board of Trustees
 - 4.1.1. Ensure that proper liquor liability insurance coverage is in place;
 - 4.2. Event Host
 - 4.2.1. Ensure that the appropriate license/permit is present before alcohol is served;
 - 4.2.2. Monitor that no alcohol is served to anyone under the age of 21;
 - 4.2.3. Monitor the removal of all alcohol at the conclusion of the event;

- 4.2.4. Ensure the prevention of property damage;
- 4.2.5. Possibly serve as bartender at Unity of Fairfax events, if TIPS trained.
- 4.3. Senior Minister or their designee
 - 4.3.1. Maintain a list of qualified Event Hosts;
 - 4.3.2. Obtain the appropriate Commonwealth of Virginia Alcohol Beverage License/Permit for any events affiliated with Unity of Fairfax;
 - 4.3.3. Assign an Event Host for church-affiliated and non-affiliated events.
 - 4.3.4. Ensures the policy is enforced.
- 4.4. Church Affiliated Individuals or Groups
 - 4.4.1. Ensure the prevention of property damage;
 - 4.4.2. Ensure the safety of any person who might become intoxicated;
 - 4.4.3. Make transportation available for any person attending an event who indicates that his or her capacity to drive is impaired.
- 4.5. Non-Affiliated Groups or Organizations
 - 4.5.1. Secure a separate rental contract which will govern the use and protection of the Unity of Fairfax campus. The required paid Event Host will be provided by Unity of Fairfax with all rental contracts;
 - 4.5.2. Cover the cost of the Event Host's services as part of the rental fee (for events, such as wedding rentals);
 - 4.5.3. Obtain the appropriate Commonwealth of VA Alcohol Beverage License/Permit;
 - 4.5.4. Provide a TIPS certified bartender;
 - 4.5.5. Ensure the safety of any person who might become intoxicated;
 - 4.5.6. Make transportation available for any person attending an event who indicates that his or her capacity to drive is impaired.

Facility Maintenance and Improvement

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APPROVAL DATE: March 2015; December 2023 to update 4.2

1. SCOPE: This policy applies to maintenance and improvement of the building and grounds.
2. POLICY: The building and grounds of the church facility will be maintained in good working order and in aesthetically attractive condition.
3. ROLES AN RESPONSIBILITIES:
 - 3.1. Board of Trustees: Review and approve recommendations for alterations or additions to the building or interior decoration affecting the aesthetic value of the property.
 - 3.2. Senior Minister or Senior Minister's designee: Authorize day-to-day repairs, maintenance and purchase of supplies in accordance with the budget, or assign a designee.

Classes, Seminars, Workshops, and Speakers

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1. APPROVAL DATE: March 2015; December 2015, modified to encompass presentation of non-Unity specific programs
2. SCOPE: This policy applies to all events presented by Unity of Fairfax for education, service or practice.
3. POLICY: Unity of Fairfax will offer frequent classes, seminars or workshops and will present speakers for events that incorporate and/or reflect the Truth principles taught by Unity. Additionally, programs may be presented that are non-Unity specific in order to offer a broad spectrum of teaching. All events will be compatible with Unity principles and with the tone of the Unity ministries.
4. ROLES AND RESPONSIBILITIES:
 - 4.1. Persons or groups desiring to present a class, seminar or workshop or desiring to be a speaker at an event: Complete an application to schedule the event.
 - 4.2. Senior Minister or Senior Minister's designee: Select or approve all classes, seminars, workshops and speakers as available and desired.
 - 4.3. Staff
 - 4.3.1. Maintain a form for application to schedule an event.
 - 4.3.2. Maintain communication with Senior Minister or Senior Minister's designee to ensure that scheduled events are approved.
5. REFERENCE: The online form for applying to schedule an event is on the Unity of Fairfax website.

Clubs and Other Special Interest Groups

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1. APPROVAL DATE: March 2015
2. SCOPE: This policy applies to all clubs and special interest groups of any kind at Unity of Fairfax.
3. POLICY: Each club or group under the auspices of Unity of Fairfax will include consciousness-raising and service activities and may include social functions in their purpose.
4. ROLES AND RESPONSIBILITIES:
 - 4.1. Senior Minister or Senior Minister's designee: Review and approve the formation of clubs or organizations.
 - 4.2. Staff:
 - 4.2.1. Maintain a form for application to schedule an event, to include club and group meetings.
 - 4.2.2. Maintain communication with Senior Minister or Senior Minister's designee to ensure that scheduled events are approved.
5. REFERENCE: The online form for applying to schedule an event is on the Unity of Fairfax website.

Publications

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1. APPROVAL DATE: October 2015; December 2023 to update 2.0
2. SCOPE: This policy applies to all material that is published by Unity of Fairfax, whether in print or digital format.
3. POLICY: As a participant in the Unity Identity Program, Unity of Fairfax will comply with the guidelines and policies in the toolkit provided by Unity Worldwide Ministries. Publications will be current, in concert with the mission and vision of the ministry, and within budget.
4. ROLES AND RESPONSIBILITIES:
 - 4.1. Senior Minister or Senior Minister's designee: Approve all publications of the ministry.
5. REFERENCE: The Unity Identity Program toolkit is available on the Unity Worldwide Ministries website.

Media

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1. APPROVAL DATE: November 2015: December 2023 multiple updates
2. SCOPE: This policy addresses the various types of media that Unity of Fairfax may use to market itself and the events that it sponsors.
3. POLICY: Unity of Fairfax uses a variety of media to provide information about the church, its events, programs and services, choosing effective media to suit the target audience. Any media releases that include material addressed by the Unity Identity Program will be consistent with the guidelines and policies in the toolkit provided by Unity Worldwide Ministries. All media releases will be consistent with the mission and vision of the ministry, within the approved budget, and approved by the Senior Minister or a designated member of the staff.
 - 3.1. Website: Unity of Fairfax maintains an informative, innovative website that is updated and maintained on a frequent and regular basis.
 - 3.2. Advertising: Unity of Fairfax advertises within a program and budget approved annually by the Board of Trustees.
 - 3.3. Radio and television: Unity of Fairfax endeavors to present creative radio/television programming.
 - 3.4. Social Media: Unity of Fairfax maintains a presence in popular social media.
 - 3.5. Media Relations: Unity of Fairfax provides articles to local press publications to announce events and programs.
 - 3.6. Other media: Unity of Fairfax will use whatever media is determined to be effective for the event and target audience.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Board of Trustees: Approve an annual budget that defines the funding available for marketing and advertising.
 - 4.2. Senior Minister or Senior Minister's designee: Approve or designate responsibility for approving material that is disseminated over the variety of media opportunities.
 - 4.3. Staff: Work with the Marketing Team or its successor, or points of contact for individual programs or events to implement the plan for media usage.
5. REFERENCE: The Unity Identity Program toolkit is available on the Unity Worldwide Ministries website.

Information Access

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1. APPROVAL DATE: November 2015; December 2023 to add First to Chair
2. SCOPE: This policy addresses the handling of church membership lists and contribution information. The handling of employee information is addressed in the Employee Manual.
3. POLICY: Neither the membership list nor the mailing list is ever sold or otherwise provided to unauthorized persons and/or organizations. Those authorized to use this list are Senior Minister, First Chair of the Board of Trustees, and/or a designee of the Senior Minister or First Chair of the Board of Trustees.

Access to financial records pertaining to contributions will be limited to the Senior Minister, Treasurer, and/or a designee of the Senior Minister or Treasurer.

4. ROLES AND RESPONSIBILITIES

- 4.1. All staff members: Share membership lists and information as requested by the Senior Minister, First Chair of the Board of Trustees, and/or a designee of the Senior Minister or First Chair of the Board of Trustees. Report requests from other sources to the Senior Minister.
- 4.2. Senior Minister, First Chair of the Board of Trustees, Treasurer and/or designee of the Senior Minister or Treasurer: Use membership lists and information only for the expressed purpose of the request for such information, without sharing it further with unauthorized parties.

Solicitation

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1. APPROVAL DATE: November 2015; December 2023 to update 3.0
2. SCOPE: This policy addresses all forms of solicitation on the property of Unity of Fairfax, including fund raising, marketing, advertising, recruiting or any other type of solicitation.
3. POLICY: No solicitation or fundraising drive is introduced or supported which directly benefits an individual member of the ministry, without the specific approval of the Senior Minister or the Senior Minister's designee. No materials are distributed, nor outside fundraising projects permitted, without the specific approval of the Senior Minister or the Senior Minister's designee. Requests for approval must be in writing.

4. ROLES AND RESPONSIBILITIES

- 4.1. Senior Minister or Senior Minister's designee:
 - 4.1.1. Being mindful of the policy, respond to any requests for solicitation or fundraising.
 - 4.1.2. Approach and stop anyone doing any unauthorized solicitation.
 - 4.1.3. Keep the Board of Trustees informed of any outside solicitation that has been authorized.

- 4.2. Members of the Board of Trustees: Approach and stop anyone doing any unauthorized solicitation.
- 4.3. All members of the church community: If you see any solicitation that you suspect might not be authorized, report it to the Senior Minister or the Senior Minister's designee or a member of the Board of Trustees immediately.

Voting Membership

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1. APPROVAL DATE: November 2015; revised May 2022
2. SCOPE: The Bylaws of Unity of Fairfax distinguish two classes of members: member and Voting Member. Anyone who states that he or she is a member is accepted as a member. Voting Members have rights and powers such as voting in elections of the Board of Trustees, or in adoption of changes to the Bylaws, or in any other matters that are brought to the membership for vote.

This policy applies to the process to become a Voting Member.

3. POLICY
 - 3.1. The New Member Program at Unity of Fairfax provides an opportunity to meet some of the leadership of the church community, to learn more about the Unity movement and Unity of Fairfax, and to become involved in the church community.
 - 3.2. People are accepted into voting membership by vote of the Board of Trustees based on recommendation by the Senior Minister.
 - 3.3. People interested in becoming Voting Members are invited to participate in the New Member Program. Any exceptions to participation will be considered when the Board votes to accept candidates for membership.
 - 3.4. Candidates are encouraged to participate in a Voting Membership ceremony.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Candidates: Participate in the New Member Program.
 - 4.2. Senior Minister:
 - 4.2.1. Assure that the New Member Program adequately meets the criteria stated above in paragraph 3.1.
 - 4.2.2. Manage the New Member Program or designate a coordinator to manage the program.
 - 4.2.3. Work with the Board of Trustees to clarify reasonable exceptions to full participation in the New Member Program.

4.2.4. Discuss exceptions with candidates who do not fully participate in the New Member Program. For examples, the Senior Minister and the Board may exempt graduates of Y.O.U. from participation in the program; or they may accept limited participation for people who come to Unity of Fairfax as Voting Members of another Unity congregation.

4.2.5. Present the candidates to the Board for approval, reviewing any exceptions to participation in the New Member Program.

4.3. Board of Trustees:

4.3.1. Work with the Senior Minister to clarify reasonable exceptions to full participation in the New Member Program so that he or she is able to be accurate in discussions with candidates.

4.3.2. Review and vote on acceptance of candidates for Voting Membership.

Complaints and Allegations

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1. APPROVAL: October 2018, by Rev. Russell Heiland, Sr. Minister; December 2023 multiple updates
2. SCOPE: This policy applies to all complaints and allegations concerning the behavior of minister/s, staff, congregants and members of the Board of Trustees
 - 2.1. Complaints or allegations about the Senior Minister should be brought to the attention of the First Chair of the Board of Trustees.
 - 2.2. Complaints or allegations of staff or congregants should be brought to the attention of the Senior Minister.
 - 2.3. Complaints or allegations of members of the Board of Trustees should be brought to the attention of the Senior Minister and the First Chair of the Board of Trustees; unless the complaint or allegation involves the First Chair, then it should be taken to the Senior Minister and the Second Chair of the Board of Trustees.
3. BACKGROUND: This policy is intended to support the Unity of Fairfax Core Value of Integrity by providing a means by which complaints and allegations of all sorts may be addressed in a timely and fair way that honors the dignity of those bringing complaints and allegations and those against whom complaints and allegations are made.
4. POLICY: When a complaint or allegation of misconduct is brought to the attention of the appropriate party or parties referenced in section 2 above that communication may be in person, online (video conference), telephone, or other means with the intention of receiving a full report from the complainant of what happened, when it happened, where it happened, who was involved, and any other relevant details. The appropriate party or parties will communicate with the complainant within 5 (five) days or receiving the complaint or allegation and determine:
 - 4.1. The complaint/allegation is without merit.
 - 4.2. A resolution of the matter can be implemented that does not require action by the full Board of Trustees. Possibilities include but are not limited to:
 - 4.2.1. Information share with the minister/s with a request for actions to be taken.
 - 4.2.2. Facilitated conversation with complainant, defendant and any other relevant parties (including one or more representatives of the Board of Trustees, if appropriate). The intention of the conversation is to bring resolution to the matter.
 - 4.2.3. Referral of matter to outside mediation or professionals (e.g. a complaint/allegation brought to the attention of the Board that is, in fact, not a church issue).
 - 4.2.4. Request for information or guidance from Unity Eastern Region and/or Unity Worldwide Ministries.
 - 4.3. The matter should be brought to the attention of the full Board of Trustees for review.
 - 4.3.1. The Board may address the matter in the following ways:
 - 4.3.1.1. Special Meeting

- 4.3.1.2. In Executive Session at its next regular meeting
- 4.3.1.3. As an agenda item at its next regular meeting
- 4.3.2. After consideration of the matter, the Board will then determine:
 - 4.3.2.1. The complaint/allegation is without merit.
 - 4.3.2.2. Facilitated conversation with the complainant, defendant, and other relevant parties (including all or designated Trustees). The intention of the conversation is bring resolution to the matter.
 - 4.3.2.3. Referral of the matter to outside mediation or professionals (e.g. a complaint/allegation brought to the attention of the Board that is, in fact, not a church issue).
 - 4.3.2.4. Referral of the matter to outside professionals in the event the complaint/allegation is determined to be a church matter that warrants subject matter expertise for resolution.
 - 4.3.2.5. The Unity of Fairfax Bylaws address the matter and provide guidance on the issue under consideration.
 - 4.3.2.6. Request for information from Unity Eastern Region and/or Unity Worldwide Ministries.
- 4.4. Legal authorities should be contacted immediately.

5. ROLES AND RESPONSIBILITIES

5.1. Board of Trustees

- 5.1.1. In the event a member of the Board of Trustee received a complaint or allegation involving a staff member or congregant, the Trustee will refer the complainant to the Senior Minister in accordance with Section 2 above.
- 5.1.2. In the event a complaint or allegation involves a Trustee or an individual in relationship to a Trustee (life partner, business partner, family member, etc.), that Trustee will recuse her/himself from investigations regarding the complaint or allegation.
- 5.2. Complainant, if a voting member of Unity of Fairfax, is expected to conduct her/himself in alignment with the Core Values of Unity of Fairfax and respect the investigation process outlined to her/him in the initial communication with the investigating party or parties.
- 5.3. If the complainant is not a voting member of Unity of Fairfax, the same expectations apply as if they were a voting member.
- 5.4. Defendant, if a minister, staff member, or Trustee or voting member of Unity of Fairfax, is expected to conduct her/himself in alignment with the Core Values of Unity of Fairfax and respect the investigation process outlined to her/him in the initial communication with the investigating party or parties.

- 5.5. All parties involved in the investigation and resolution of a complaint or allegation will be provided with copies of the “[Agreeing and Disagreeing in Love](#)” document and expected to commit to upholding the principles contained therein.
6. OUTCOMES AND RESOLUTIONS: Any outcomes or agreements as a result of actions taken pursuant to this policy will be considered final.
7. REFERENCE: “[Agreeing and Disagreeing in Love](#)” (adopted with permission from Lombard Mennonite Peace Center).

Disruptive Behavior

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1. APPROVAL DATE: September 2018; December 2023 changes to 2.0.
2. SCOPE: While inclusivity is expressed in the principles held by Unity Worldwide Ministries, we affirm our belief that our congregation must maintain a secure atmosphere where such openness can exist. When any person’s physical and/or emotional well-being or freedom to safely participate in this community is threatened, the source of this threat must be addressed firmly and promptly, even if this ultimately requires the expulsion of the offending person or persons.
3. BACKGROUND: Unity of Fairfax strives to be an inclusive community, affirming both our differences and our oneness; however, concern for the safety and well-being of the congregation as a whole must be given priority over the privileges and inclusion of the individual. To the degree the disruptive behavior compromises the health of this congregation, our actions as people of faith must reflect this emphasis on sacred safety and security.

There have been times when disruptive behavior of an individual in the church building or on the church grounds has led members to voice their concerns about one or more of the following:

- 3.1. Perceived threats to the safety of any adult or child;
- 3.2. The disruption of church activities;
- 3.3. Diminishing appeal of the congregation to its potential and existing membership.
4. POLICY: The following shall be the policy of Unity of Fairfax in dealing with these issues:
 - 4.1. If an immediate response is required, this will be undertaken by the Minister(s), if available, and/or the leader of the group involved. This may include asking the offending person or persons to leave, OR suspending the meeting or activity until such time that it may be safely resumed. If further assistance is required, the Police Department may be called. Anytime any of these actions are undertaken without the Minister(s), the Minister(s) must be notified; a follow-up communication detailing the offense and the action taken because of the offense, should be written and distributed to the Minister(s) and the Board First Chair.
 - 4.2. Situations not requiring immediate response will be referred to an ad hoc committee appointed by the Board. The committee will respond in terms of their own judgment observing the following:
 - 4.2.1. The committee will respond to problems as they arise. There will be no attempt to define “acceptable” behavior in advance.

- 4.2.2. Persons identified as disruptive will be dealt with as individuals. Stereotypes will be avoided.
- 4.2.3. The committee will collect all necessary information.
- 4.2.4. To aid in evaluating the problem, these points will be considered:
 - 4.2.4.1. DANGEROUSNESS – Is the individual the source of a threat or perceived threat to persons or property?
 - 4.2.4.2. DISRUPTIVENESS – How much interference with church functions is going on?
 - 4.2.4.3. OFFENSIVENESS – How likely is it that prospective or existing members will be driven away?
- 4.2.5. To determine the necessary response, these points will be considered:
 - 4.2.5.1. CAUSES – Why is the disruption occurring? Is it a conflict between the individual and others in the church? Is it due to a professionally diagnosed condition or mental illness?
 - 4.2.5.2. HISTORY – What is the extent, if any, of disruption cause in the past?
 - 4.2.5.3. PROBABILITY OF CHANGE – How likely is it that the problem behavior will diminish in the future?
- 4.2.6. The committee will, after prayerful discernment, decide on the necessary response on a case by case basis. However, three levels of action/response are recommended:
 - 4.2.6.1. LEVEL ONE – The committee shall inform the Minister(s) of the problem and either the Minister(s) or a member/s of the committee shall meet with the offending person/s to communicate the concern.
 - 4.2.6.2. LEVEL TWO – The offending individual/s is excluded from specific church activities for a limited period of time, with reasons and conditions of return written and made clear (with a copy going to the offender/s and one going into congregational files).
 - 4.2.6.3. LEVEL ONE or LEVEL TWO action taken may be appealed to the Executive Session of the Board, and/or the Minister(s).
 - 4.2.6.4. LEVEL THREE – The offending individual is permanently excluded from church premises and all church functions. Before this is carried out, the committee will consult with the full Board and the Minister(s). If it is agreed that the expulsion take place, a letter will be written and sent by the Minister, or a designated member of the Board if that is more appropriate, to the individual outlining expulsion, the individual's rights, and any possible recourse.

[Adapted from <https://www.uua.org/safe/disruptive-behavior-policies>. Accessed 28 August 2018]

Background Checks Policy

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1. APPROVAL DATE: October 2018, by Rev. Russell Heiland, Sr. Minister; December 2023 for changes to 2.0
2. PURPOSE

Unity of Fairfax seeks to ensure the safety of its volunteers while on duty (whether on or off premises), the safety of its constituents (staff and community) and the protection of its assets and reputation. To reduce risks to our volunteers, staff, constituents and the organization, prospective and, as applicable, current staff and volunteers for certain position (namely, Board of Trustees, anyone working with minors, anyone providing one-on-one service in the name of Unity of Fairfax - e.g. Helping Hands, other volunteer positions as deemed warranted by the Board of Trustees) at Unity of Fairfax will undergo a background check that complies with the Fair Credit Reporting Act (FCRA). Volunteers are treated as applicants under the FCRA.

This policy sets forth guidelines for performing such background screens. Unity of Fairfax has selected an approved background screening provider, namely Protectmyministry.com. The Board of Trustees or the Senior Minister may change the vendor providing background checks for all screenings or particular screenings.

Any questions or special considerations concerning this policy should be directed to the Senior Minister at Unity of Fairfax or the First Chair of the Board of Trustees.

3. SCOPE: This policy applies to all prospective and current staff and designated volunteers with rescreens occurring every three years.

4. POLICY

- 4.1. Disclosure and Authorization

Selection, retention, and reassignment of applicants and volunteers are subject to meeting the requirements of a background screen. In addition, all applicants/volunteers will be required to complete a Disclosure and Authorization form, which requests information that the approved background investigation provider requires to conduct the background screen. The approved Disclosure and Authorization form allows Protectmyministry.com, or other duly approved vendor, to perform updates to the background check to the extent permitted by law. After a period of three years, Unity of Fairfax will initiate a new background check (rescreen) with Protectmyministry.com, or other duly approved vendor, and a new authorization form will be completed by the volunteer or staff member.

- 4.2. Checks to be Conducted

- 4.2.1. The following reports will be obtained for time periods permitted by law for a background screen:

- 4.2.1.1. National Criminal Database: This includes OFAC and OIG/GSA search.

- 4.2.1.2. National Sex Offender Database: We go directly to all 50 states sex offender registry, at the state level. Instead of using the Dru Sjodin federal database, we go directly to the source of the data. This is done because it can take some time for the federal database to update with the information and 14 states do not report date of birth to that registry.

- 4.2.1.3. SSN verification: Validate that the SSN provided is accurate.

- 4.2.1.4. Address History: Our system pulls a list of addresses and alias names that are tied to the SSN.
 - 4.2.1.5. Alias/Maiden Name Search: Using the information provided on the SSN Verification and Address History, we automatically submit any names tied to the SSN through the National Criminal Database and National Sex Offender Registry.
 - 4.2.1.6. Re-Verification: When a report comes back with a record, the consumer reporting agency's research team conducts our re-verification process on a background check before reporting it on the final report, insuring the accuracy of the report. Additional information on Protect My Ministry's re-verification process can be found here, <https://protectmyministry.com/background-checks/re-verification/>.
- 4.2.2. If warranted based on the position being considered, the following checks may be ordered from ProtectMyMinistry.com:
- 4.2.2.1. Motor Vehicle Record Check
 - 4.2.2.2. Social Security Trace (SS Trace) - A Social Security Trace uses the applicant-provided social security number to find all reported address information for an individual over the last 7 years. The trace also finds all names used by the applicant – the given name as well as any alias/maiden names used. The information returned from the trace is then used to determine the name/court of record combinations that will be searched.
 - 4.2.2.3. County/State Residence Criminal Search (Current) - The address entered during the background check order process is used to determine the county and state of residence (U.S.) for the volunteer. The search should look for any reported criminal history for the volunteer in that county or state at the primary source of information (the state or county courthouse).
 - 4.2.2.4. County/State Search(es) – 7 Years of Address History - All counties/states in which the applicant has lived in the last 7 years should be identified. Those counties/states should be searched at the primary source of information (the state or county courthouse) using the name in question and other personally identifiable information.
 - 4.2.2.5. Nationwide Criminal History Search with Validation - A Nationwide Criminal History search uses the full name and date of birth provided by the applicant during the order process to search over 900 criminal information data sources from all 50 states.
 - 4.2.2.6. National 50 State Sex Offender Registry Search (Dru Sjodin/NSOPW) - The National 50 State Sex Offender Registry Search / National Sex Offender Public Website (NSOPW) is a comprehensive 50-state sex offender search – *it is the only up-to-date, comprehensive source of sex offender information.*
 - 4.2.2.7. Alias/Maiden Name Search - An alias or maiden name is any name an individual has used at another time, in another place, or in another circumstance, for any reason. An alias/maiden name search should search those names provided during the screening order process as well as those names uncovered through an SSN Trace.

4.3. Disqualification Criteria

The Senior Minister and relevant supervisor will review the report and determine if any negative information has a direct connection with an applicant's ability to fulfill the applicant's duties with competence and integrity, or that might impact safety. Matters that might raise a concern include but are not limited to the following:

4.3.1. Criminal History Search

A criminal conviction will not automatically prohibit an individual from volunteering at Unity of Fairfax, but will be reviewed on a case-by-case basis. In some cases, statutes dictate the types of offenses that disqualify applicants from volunteering with certain organizations or in certain positions. Those lists will be referenced as well by Unity of Fairfax when making a decision regarding the applicant's eligibility.

For Example: In accordance with Virginia law regarding "Barrier Crimes," convictions for the following categories of crimes are generally considered role-related when working with vulnerable populations including children, the disabled, and the elderly, and, therefore, will be considered in making decisions:

- 4.3.1.1. Any felony conviction – these serious crimes are usually defined by statutory guidelines, and in general, are punishable by more than 1-year incarceration.
 - 4.3.1.1.1. Theft – including burglary, robbery, embezzlement, forgery, fraud.
 - 4.3.1.1.2. Violent crimes – including murder, robbery, assault, battery.
 - 4.3.1.1.3. Drug-related crimes – including use, sale, possession, distribution, or manufacture of illegal drugs.
 - 4.3.1.1.4. Sex offenses – including rape and sexual assault.
 - 4.3.1.1.5. Serious motor vehicle offenses – includes driving under the influence of alcohol or drugs.
- 4.3.1.2. Arrests that are not pending and did not result in conviction should not be considered. Arrests pending disposition that are role-related may be considered subject to state law.
- 4.3.1.3. Prior to making a decision regarding eligibility, Unity of Fairfax will validate, using approved identification (e.g. Driver's license), that the background check was run using the same correct information.
- 4.3.1.4. Arrest information: Arrests that are disclosed within 48 hours pursuant to Unity of Fairfax policy or that are revealed during the background check process will not necessarily result in termination of application/employment/volunteer status but will be reviewed on a case-by-case basis.

4.3.2. Motor Vehicle Reports – This report can indicate that the applicant has a suspended or revoked license. Further, serious motor vehicle violations such as Driving While Intoxicated, Driving Under the Influence, Driving While Ability Impaired or reckless driving may be relevant for all positions.

4.3.3. Reference Interviews – These checks may reveal information that indicates an applicant is not an acceptable fit for Unity of Fairfax. Information gained in a reference interview will be carefully reviewed for any omissions or inaccuracies contained in the applicant's application or made during the interview process.

4.4. Pre-Adverse Action and Adverse Action Based on Information in Background Check

4.4.1. Pre-Adverse Action – Unity of Fairfax will notify the applicant of a negative report BEFORE any adverse employment action is taken. If the consumer reporting agency reports information which may be used, in whole or in part, as a basis for an adverse action (e.g. denying applicant position), the applicant will receive notification before a final decision is made to deny the staff or volunteer role. This will provide the applicant with an opportunity to dispute the information in the consumer report directly with the consumer reporter agency. Unity of Fairfax will provide a copy of the consumer report, a pre-adverse action letter and another copy of the FCRA notice of rights.

The applicant shall also receive any applicable state rights as required.

4.4.2. Waiting Period to Find Out What, if Any, Explanation is Offered by the Applicant

If the applicant does not respond at all to the notification within a reasonable period of time (5 days), Unity of Fairfax may proceed with its decision to deny the position. If the applicant responds, Unity of Fairfax will carefully consider the information submitted and then make a decision. If the explanation is reasonable under the circumstances, then it may still be possible to go forward with hiring or onboarding (e.g. a case of mistaken identity). However, if the applicant's explanation is determined to be insufficient, then Unity of Fairfax will proceed to the next step, notification of Adverse Action.

4.5. Notification of Adverse Action – Unity of Fairfax will provide the applicant with written notice of the adverse action and the name and contact information of the consumer reporting agency.

4.6. Equal Employment Laws

Unity of Fairfax will adhere to all equal opportunity laws. When reviewing any criminal record information that appears on a background check, Unity of Fairfax shall factor in any known factors relating to:

- 4.6.1. The facts and circumstances surrounding the offense
- 4.6.2. The number of offenses for which the individual was convicted
- 4.6.3. The age of the individual at the time of conviction or release from prison
- 4.6.4. Evidence that the individual has performed the same type of work, post-conviction, with the same or a different organization, without incidents of criminal conduct
- 4.6.5. Any efforts of the application towards rehabilitation.
- 4.6.6. Employment or character references obtained regarding the individual's fitness for the particular position.
- 4.6.7. Whether the individual will be bonded for the position.

4.7. Confidentiality

- 4.7.1. Unity of Fairfax assures all applicants that personal data and information collected from the background screening will not be used for purposes other than determining the eligibility and appropriateness to work in the specific role to which they are applying.
- 4.7.2. Unity of Fairfax assures all applicants that their personal information will be securely stored, and access available to only to those who have a need to know.
- 4.7.3. All documents related to the background screen process must be retained for at least five years.

Staff Employment

1. APPROVAL DATE: November 2015; December 2015, updated Equal Opportunity Employment paragraph to itemize additional classes; December 2023 update to 3.5.1.
2. SCOPE: This policy applies to all activities of recruiting, hiring and managing staff at Unity of Fairfax.
3. POLICY: It is the intent of Unity of Fairfax that the work environment be one of care and respect for others. Our policy is to maintain a safe, productive working environment free from sexual harassment, inappropriate and other disruptive behavior. Personal conduct that interferes with operations, creates safety hazards, brings discredit to the ministry, or is offensive to members or fellow employees will not be tolerated.

3.1. Equal Opportunity Employment

In accordance with applicable Federal Laws and Regulations, the employment policies and practices of Unity of Fairfax are administered without regard race, color, gender, gender expression, marital status, age, creed, religion, national origin, ethnicity, physical disability, sexual orientation, military obligation and political ideology.

This Equal Employment Opportunity Program will have as its firm objective, equal opportunity in recruitment, hiring, rates of pay, promotion, training, termination, and benefit plans, and all other forms of compensation, conditions, and privileges of employment for all employees and applicants.

3.2. Americans with Disabilities Act

Unity of Fairfax is committed to providing equal employment opportunities to otherwise qualified individuals with disabilities, which may include providing reasonable accommodations where appropriate. The employee will be responsible for notifying her/his designated supervisor of the need for any such accommodations. The employee may be asked for input on the type of accommodation necessary, or the functional limitations of the employee's disability. When appropriate, Unity of Fairfax may need permission to obtain further information from the employee's physician, or other medical, or rehabilitation professionals.

3.3. Harassment / Sexual Harassment

Unity of Fairfax is committed to maintaining a positive, constructive working environment where all employees may pursue personal career satisfaction. Unity of Fairfax will not tolerate harassment based on race, color, religion, ancestry, national origin, sex, age, disability, veteran status, sexual orientation, or political ideology. Harassment not only violates church policy but also may be a violation of state and federal law. Both Unity of Fairfax and each of its employees are responsible and accountable for maintaining an environment free of harassment.

Discriminatory harassment includes verbal or physical conduct intended to threaten, intimidate, offend, demean, or coerce; and may impair an employee's ability to do his/her job.

Sexual harassment is a form of employee misconduct that undermines the integrity of the employment relationship. It is also a violation of the law and will not be tolerated. It is the intent of Unity of Fairfax to be in full compliance with Equal Employment Opportunity Commission, 29 CFR Part 1604.11 45 FR 25024, "Guidelines on Discrimination Because of Sex."

3.4. Safety and Health

Unity of Fairfax intends to provide a safe place of employment, and maintain sound operating practices which result in safe working conditions and efficient operation. This includes compliance with all applicable health and safety regulations issued by the Federal Occupational Safety and Health Administration (OSHA) and applicable Virginia Commonwealth laws and regulations.

3.5. Drug- and Alcohol-Free Work Place

Unity of Fairfax is a drug-free workplace. The purpose of this policy is to ensure the safety of all employees and to promote productivity. This policy applies to all employees, contractors, temporary workers and volunteers. Substances covered under this policy include alcohol, illegal drugs, inhalants, and prescription and over-the-counter drugs. The employee who begins work while "under the influence" or who becomes impaired while at work is guilty of a major violation of ministry policies and is subject to disciplinary action which can include suspension, dismissal, or any other penalty appropriate under the circumstances. Likewise, the use, possession, transfer, or sale of any substance on company premises is prohibited. Company premises include our buildings, grounds, parking lots, and company-provided vehicles.

An employee is considered to be "under the influence" if any substance:

- impairs behavior or his/her ability to work safely and productively
- results in a physical or mental condition that creates a risk to the employee's own safety, the safety of others or company property.

3.5.1 Exception: any employee may consume a non-intoxicating level of alcohol at church events where alcohol is being served.

4. ROLES AND RESPONSIBILITIES

- 4.1. The Senior Minister or the Senior Minister's designee is responsible for ensuring the timely maintenance of a written and up-to-date Employee Manual supporting this policy.
- 4.2. All staff are responsible for following the policies and procedures as written in the Employee Manual and for providing input and suggestions to improve the document.

Board of Trustees Policies

Nominating Ministry Team

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1. APPROVAL DATE: October 2015; December 2023 changes to 2.0.
2. SCOPE: The Bylaws of Unity of Fairfax call for a policy for the execution of the duties of the Nominating Ministry Team, a policy that will prescribe the communication goals to adequately inform the membership about the candidates for the Board of Trustees and provide opportunities for the candidates to meet with members prior to the election at the annual meeting. In the event to a question to this policy, please refer to the Unity of Fairfax Bylaws Article VI, Section 10.
3. POLICY: The identification, vetting and introduction of candidates for the Board of Trustees is accomplished each year by a Nominating Ministry Team, formed as prescribed in the Unity of Fairfax Bylaws.
4. ROLES AND RESPONSIBILITIES OF THE NOMINATING TEAM
 - 4.1. Identify nominees based on a review of the statements in the Bylaws of the qualifications and responsibilities of Board members, as well as consideration of the needs on the current Board and any known challenges the Board is or will soon be facing.
 - 4.2. Provide an opportunity for members to nominate candidates.
 - 4.3. Provide nominees with a schedule of the election activities and a schedule of the meetings of the Board of Trustees in the coming year.
 - 4.4. Consider the background and qualifications of each nominee to confirm that he or she meets the requirements prescribed in the Bylaws for Board members.
 - 4.5. At least 15 days before the membership meeting at which the election of Board members will occur, provide the community with background information about each candidate.
 - 4.6. Provide interactive opportunities for the membership community to meet the candidates and learn about their background and interest in serving on the Board.
5. REFERENCES: Unity of Fairfax Bylaws, Article VI. Board of Trustees.
 - 5.1. Section 3. Prohibition of Service [on the Board of Trustees].
 - 5.2. Section 9. Duties and Responsibilities of the Board of Trustees.
 - 5.3. Section 10.A. Qualifications [for the Board of Trustees]
 - 5.4. Section 10.B. Nomination and Election

Conduct of Elections

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1. APPROVAL DATE: November 2015; December 2023 multiple updates
2. SCOPE: This policy applies to the election of Board of Trustee positions. The Bylaws of Unity of Fairfax specify that the election of Board of Trustee positions is held as part of the annual membership meeting, and can also be held at a special membership meeting when the total number of trustees, including the Senior Minister, falls below four.
3. POLICY
 - 3.1. A ballot for the election of members to the Board of Trustees will be distributed in person or electronically to each attendee upon confirmation of Voting Membership for the annual meeting.
 - 3.2. A proxy ballot will be given to each attending Voting Member who presents a signed proxy from a Voting Member not in attendance.
 - 3.3. Every reasonable effort will be made to have a secret ballot option for online and in person voting. Individuals who participate online but do not want to run the risk of their vote being known must designate an in person proxy in advance of the meeting.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Staff: Make proxy authorization available to the membership no less than three weeks prior to the annual meeting for Voting Members who do not plan to attend the annual meeting or do not want to run the risk of their online vote being known.
 - 4.2. Board of Trustees
 - 4.2.1. Assign an election ministry team to count votes for candidates to the Board of Trustees.
 - 4.2.2. Manage the registration of Voting Members (in person and online) and distribution of ballots at the annual meeting. Report to the election ministry team the total number of ballots distributed to reconcile number of votes.
 - 4.2.3. Manage the collection of the ballots to protect the secret ballot process.
 - 4.3. Chair of the Nominating Ministry Team: Give each candidate an opportunity to introduce him or herself at the annual meeting, and call for the ballots to be cast and collected.
 - 4.4. Election Ministry Team: Count the votes and report the results to the Chair of the Board of Trustees.
 - 4.5. Chair of the Board of Trustees: Announce the results of the election.

5. REFERENCES: Unity of Fairfax Bylaws, Article VI. Board of Trustees.

5.1. Section 10.D.1. Election Requirements

5.2. Section 10.D.2. Election Procedure

Communications with the Board of Trustees

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1. APPROVAL DATE: March 2016; December 2023 multiple updates

2. SCOPE: This policy applies to communications with the Board of Trustees at Unity of Fairfax

3. POLICY

3.1. Communication with the Board of Trustees will be facilitated by:

3.1.1. Maintaining a group email address that will forward emails to all elected members of the board.

3.1.2. Publishing contact information for the Board in readily available locations.

3.2. Emails from the community will be responded to within a one-day period. When further communication is appropriate, the initial response will acknowledge that the email has been received and will clarify the expectation for further communication.

4. ROLES AND RESPONSIBILITIES

4.1. Board of Trustees: Maintain a current and valid group email address for the elected members of the board.

4.2. Staff:

4.2.1. Publish contact information for the Board in readily available locations.

4.2.2. Forward contact information to the webmaster for publication on the church website.

Remote Attendance and Electronic Voting

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1. APPROVAL DATE: November 2018; May 2022; December 2023 multiple changes
2. BACKGROUND
 - 2.1. Unity of Fairfax desires to keep its technology and related practices up to date and deploy those practices consistent with our core values spirit-centered, integrity, oneness, love and engagement. Unity of Fairfax affirms Board participation that leverages technology to promote inclusivity, attracts as broad a range of Board members as possible, maximizes Board input, and maintains Board rapport, congeniality, and effectiveness.
 - 2.2. Each Board member brings a valuable perspective to the Board. Using technology for remote participation can reduce the impact when a Board member cannot be physically present. We seek to meet in person when possible for all the benefits that provides. The remote participation and electronic voting policy creates agile ways for the Board to discharge its duties efficiently.
 - 2.3. Additionally, although not necessary, Unity of Fairfax historically has attempted to harmonize its bylaws with those of Unity Worldwide Ministries (“UWM”). UWM’s bylaws permit Board and ministry teams to meet by telephone conference or other electronic communications that allow all participants to interact simultaneously. This policy follows though does not wholly duplicate that policy.
 - 2.4. Accordingly, Unity of Fairfax affirms its desire to:
 - 2.4.1. Use technology efficiently and intelligently;
 - 2.4.2. Enhance its effectiveness and productivity;
 - 2.4.3. Render Unity of Fairfax and its volunteer leadership roles appealing to modern generations;
 - 2.4.4. Enable the Board of Trustees efficiently and effectively to address issues as they arise in a timely manner, which may often include matters that should be addressed before the next regularly-scheduled Board meeting;
 - 2.4.5. Enhance inclusivity in Unity of Fairfax matters, which is a core Unity of Fairfax value;
 - 2.4.6. Respect Board members’ dedication and commitment to their Board duties which drives their desire to participate in Board meetings even if out of the area or otherwise unable to attend due to unforeseen scheduling conflicts;
 - 2.4.7. Enable representative participation (voices and perspectives) and allow for flexibility for the Board to fulfill its role with excellence and diversity of thought despite challenges that might arise from family, health, travel, business, weather, or other unforeseen conditions;
 - 2.5. Allow for meaningful participation of:
 - 2.5.1. Working adults to serve on the Board;
 - 2.5.2. Adults with children or caregivers to serve on the Board;

- 2.5.3. Board members who may not, on account of health reasons, be able to participate in person;
 - 2.5.4. Board members who may have requirements or opportunities to travel for business or personal reasons;
 - 2.5.5. Allow for the Board to maintain its meeting schedule virtually in the event of inclement weather or other unavoidable issues (e.g., injuries, family emergencies, etc.);
 - 2.5.6. Allow virtual participation of congregation members in alignment with the Unity of Fairfax practice of having open board meetings; and
 - 2.5.7. Encourage and ensure willingness of qualified volunteers who bring the technical and leadership skills needed for effective Board functioning to become Board members.
3. POLICY: Unity of Fairfax permits appropriate remote participation in regularly-scheduled Board meetings via technology that allows all Board members to hear and speak to each other. Unity of Fairfax permits electronic voting provided certain conditions are met, as set forth below.

3.1. REMOTE MEETING PARTICIPATION

- 3.1.1. Board Members are expected to attend all Board Meetings. Given competing priorities such as family, business, caregiving, and health, it is recognized that Board members may occasionally miss a Board Meeting. The bylaws limit the number of meetings each Board member may miss per year. This limit has been established in order to sustain continuity and information exchange. The Board meeting attendance requirement set forth in the bylaws remains in effect.
 - 3.1.2. Board members and community members may attend regularly-scheduled Board meetings remotely through technology that allows all Board members to hear and speak to each other.
 - 3.1.3. Though preferred, the technology chosen may or may not include video capabilities.
 - 3.1.4. Board members attending a meeting remotely in accordance with this policy are considered “present” for all purposes.
 - 3.1.5. Board members may exercise their sound discretion in deciding whether to attend a regularly-scheduled Board meeting remotely, balancing the five core values of Unity of Fairfax and any other factors the Board member deems appropriate.
 - 3.1.6. Board members must attend the 1st quarter retreat in person barring unusual circumstances.
- 3.2. ELECTRONIC VOTING: Action to be taken by the Board may be taken without a meeting if each Board member signs a consent describing the action to be taken and delivers it to the corporation. Such consent may be accomplished by one or more electronic transmissions. A consent so signed has the effect of action taken at a Board meeting and may be described as such in any document.

Youth and Family Ministries (YFM)

Establishment of Programs for Children and Youth

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1. APPROVAL DATE: May 2016; December 2023 multiple changes
2. BACKGROUND: Unity of Fairfax is a warm and welcoming multigenerational community dedicated to developing the Spiritual Presence within every member of the families in our community.
3. POLICY: Unity of Fairfax accepts children as full participants in our congregation, offering classes and activities for all ages at age appropriate levels. Children are integrated into our Sunday worship program and are encouraged to perceive the congregation as their own community as well as that of their parents or guardians.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Senior Minister: Employ and supervise a Director of Youth and Family Ministry to provide age appropriate programming for children and families in our congregation.
 - 4.2. Director of Youth and Family Ministries:
 - 4.2.1. Recruit and support volunteers to provide an effective ministry to children and youth in a family-friendly environment.
 - 4.2.2. Provide a curriculum with age appropriate classes for children and youth.
 - 4.2.3. Maintain effective communication with families in the congregation to ensure understanding of the program and what it has to offer.
 - 4.2.4. Provide family activities periodically throughout the year to support the integration of the family as a whole.
 - 4.2.5. Maintain appropriate security practices to ensure the safety of the children.

Sacred Safety

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1. APPROVAL DATE: August 2019; December 2023 multiple changes
2. BACKGROUND: Sacred Safety is about keeping children and adults safe with policies and procedures that reduce the possibility of loss, injury or danger. Unity of Fairfax has plans in place that provide a safe environment yet have clear steps to be taken in the event of an emergency situation. The Unity of Fairfax Safety Manual outlines various scenarios and the associated action items for the whole church community. In addition to the Safety Manual, other policies in this YFM section address specific Sacred Safety considerations.
3. POLICY
 - 3.1. In the event of extreme and threatening weather conditions during a YFM class or event, youth and children will be directed to an interior room.
 - 3.2. In the event of fire, teachers will calmly lead the children to the parking lot of the adjacent Fairfax County Library. Parents or Guardians will come to this area to unite with their children.
 - 3.3. YFM classes are held in rooms that have windows to the hallway in the door or in one or more classroom walls, allowing viewers to see into the classroom at any time.
 - 3.4. Volunteers in the YFM program must be members of the Unity of Fairfax community for 6 months and must pass a background check. Refer to policy on Background Checks of this manual.
4. ROLES AND RESPONSIBILITIES: Volunteers are to report safety concerns to the Directory of Youth and Family Ministries.

Code of Ethics

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1. APPROVAL DATE: August 2019; December 2023 to 4.2.
2. BACKGROUND: Unity of Fairfax puts strong emphasis on the responsibility of working with children and youth. All participants in the program are held to a high standard of conduct which the church management believes is of supreme importance to protect the safety and to promote the spiritual development and health of the young people in the community.
3. POLICY: All persons working with children or youth at Unity of Fairfax will be required to sign a code of ethics, effective each year at the beginning of the Sunday school year in September and valid through August of the following year. This code of ethics includes commitment to appropriate behavior both on and off church property and addresses the understanding of policies in this manual pertaining to the Youth and Family programs.
4. ROLES AND RESPONSIBILITIES
 - 4.1. The Director of Youth and Family Ministries will maintain the YFM Code of Ethics.
 - 4.2. The Senior Minister will approve the content of the YFM Code of Ethics.
 - 4.3. The Director of Youth and Family Ministries will keep a file of the signed Code of Ethics documents in the church office.

Adult-to-Child Ratio

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1. APPROVAL DATE: August 2019; December 2023 to 3.0
2. BACKGROUND: Knowing that safety and effectiveness is compromised when there are too many children or students for supervision by the number of program leaders available, Unity of Fairfax is committed to assuring that enough program leaders are present for all program activities.
3. POLICY: The goal of the YFM program is to have 2 adults per classroom, however there are times this may not happen. As referenced in this manual, all adults serving with children have current background checks on file.
4. ROLES AND RESPONSIBILITIES
 - 4.1. The Director of Youth and Family Ministries will assure that one adult is in charge of each occupied classroom during the Sunday school hour.

Nursery Staffing

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1. APPROVAL DATE: August 2019; December 2023 in 3.3.
2. POLICY: The Unity of Fairfax Nursery is staffed by Unity of Fairfax volunteers over the age of 18. Teens in the YFM program also help out in the Nursery from time to time, under supervision of the volunteer in charge. The target ratio of volunteers and helpers to infants/toddlers in the nursery will be no less than 1:4.
3. ROLES AND RESPONSIBILITIES
 - 3.1. The Director of Youth and Family Ministries will assign one or more volunteers to provide nursery services.
 - 3.2. The assigned volunteer(s) are expected to arrive by 15 minutes prior to the beginning of the service or program for which the nursery is staffed.
 - 3.3. Parents or guardians may bring their children to the nursery no sooner than 15 minutes before the beginning of the service or program and need to pick up their children immediately after the service or program ends.
 - 3.4. Nursery attendants will follow the Diaper Changes policy in this section.

Child Abuse Reporting

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1. APPROVAL DATE: August 2019; December 2023 multiple updates
2. BACKGROUND: Virginia requires mandatory reporting of child abuse, which includes physical, sexual or mental abuse or neglect by a child's parent and/or guardian for their care.
3. POLICY: If anyone working with the children at Unity of Fairfax suspects physical, sexual or mental abuse, he or she is to immediately contact the Director of Youth and Family Ministry or the Senior Minister who will be responsible to call and report their suspicions to Fairfax County Child Protective Services (CPS) and to complete a CPS Report Form. These forms will be kept onsite at Unity of Fairfax, accessible to the YFM Director and the Senior Minister.
4. ROLES AND RESPONSIBILITIES
 - 4.1. Anyone working with youth or children at Unity of Fairfax is to report any indication of possible physical, sexual or mental abuse.
 - 4.2. The Director of Youth and Family Services and Senior Minister are to report any suspicion of abuse to Fairfax County Child Protective Services.

1. APPROVAL DATE: August 2019; December 2023 multiple updates
2. BACKGROUND: Unity of Fairfax recognizes the potential impact of social media in our culture and provides guidance for its appropriate use by the Youth Ministry staff and volunteers.
3. POLICY: All use of social media by the Youth Ministry staff and volunteers is subject to the following parameters:
 - 3.1. Limit use to ministry-related business.
 - 3.2. Do not engage in proactive one-on-one communication with Unity of Fairfax youth under 18 on social networking sites.
 - 3.2.1. Accept invitations to profiles, groups and events but do not initiate any type of communication with the youth.
 - 3.2.2. Respond to minor-initiated communications ONLY on professional social media sites and NOT on personal pages.
 - 3.2.3. Discourage private one-on-one communications.
 - 3.3. Recognize that you are a role model for the youth of Unity of Fairfax at all times and limit your public presence on social media to information, comments, photos, etc., that are appropriate for a youth or parent and/or guardian to view.
 - 3.4. Be respectful of Unity of Fairfax, its youth and adult leaders and its policies in all postings in profiles, blogs and other mediums of internet communication.
 - 3.5. Do not use blogs, social media sites and other internet communication mediums to disparage individuals or ministries of Unity of Fairfax.
 - 3.6. Do not use a social networking profile, group page, blog or other internet communication medium to discuss behavior that is against signed Unity of Fairfax codes of ethics.
 - 3.7. Any pictures of youth posted on the Unity of Fairfax website, Facebook page, blog or other type of social media must have a written permission form from the parent and/or guardian for minors under 18 or the youth if 18 or older.
 - 3.8. Limit access to any site directed toward youth under 18 to authorized members and leaders by use of password or similar protection.
 - 3.9. With any electronic communication with youth, always apply **TAP** principles:
 - 3.9.1. **T**—Transparent, maintain openness, visibility and accountability;
 - 3.9.2. **A**—Accessible, consider all electronic communication to be a matter of record;

3.9.3. **P**—Professional, use correct grammar and tone, choose appropriate subject matter and choose words that are courteous.

4. ROLES AND RESPONSIBILITIES

- 4.1. All volunteers and staff of the Youth and Family Ministry program at Unity of Fairfax are subject and to be held accountable to this policy.
- 4.2. Any member of Unity of Fairfax is empowered to bring infractions of this policy to the attention to the Director of Youth and Family Ministries or to the Senior Minister.
- 4.3. The Director of Youth and Family Services and Senior Minister are responsible to follow-up on any reports received and to address the behavior of the communicator using social media appropriately according to their own judgment, even to the extent of discontinuing his or her role with the youth of the church.
- 4.4. The Youth and Family Ministries Director and the Senior Minister share the responsibility for addressing infractions. Decisions about addressing the situation will be collaborative and will not be treated or spoken of as having been made by either one or the other of the two leaders.

Junior Sponsors

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1. APPROVAL DATE: August 2019
2. BACKGROUND: Junior Sponsors in the Youth and Family Ministries program at Unity of Fairfax are from 21–24 years of age.
3. POLICY
 - 3.1. Junior Sponsors will not be assigned nor authorized to drive youth to or from rallies and other program events.
 - 3.2. They cannot be head sponsors and consequently will not be given sole responsibility for students at regional and sub-regional events.
4. ROLES AND RESPONSIBILITIES: Head sponsors are to provide supervisory guidance to the Junior Sponsors assigned to them.

YFM Disruptive Behavior

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1. APPROVAL DATE: August 2019

2. BACKGROUND

2.1. This policy is consistent with the church's broader Disruptive Behavior Policy in the Operational and Administrative Policies section of this manual. As presented in this Youth and Family Ministries (YFM) section, the policy is focused specifically on behavior of and response to youth in the YFM programs. Disruptive behavior by adults in the program falls under the church's broader policy.

2.2. Unity of Fairfax Youth and Family Ministry (YFM) affirms the inherent worth of all people and seeks to create an open and inclusive spiritual community. This requires a safe and supportive environment which includes addressing any situation which impinges on the individual's or the community's well-being. Such situations will be addressed promptly, directly, clearly and with compassion and consistency.

2.3. Disruptive behavior under this policy means one or more of the following behaviors:

2.3.1. HARMFUL: The youth's behavior perceived to be harmful to people engaged in Unity of Fairfax's activities or property for which it is responsible. Examples are children running or shoving in the building, playing on equipment without permission, food fights, etc.

2.3.2. DISRUPTIVE: The youth's behavior has a significant negative impact on ministry activities and /or significantly interferes with the development of healthy relationships within the spiritual community. Examples are disruptive classroom behavior that impacts the experience of other children, attitudes toward others that cause negative impact, bullying behavior, etc.

2.3.3. OFFENSIVE: The individual's behavior is such that persons attending Unity of Fairfax activities could reasonably decide to leave or not join the community. Examples are extreme disrespect toward other, name-calling, inappropriate language, drawings or writings, etc.

3. POLICY

3.1. Since prayer is foundational to who we are, when disruptive behavior arises, the leadership will respond first with prayer, holding the situation and all those involved in a space of love and wholeness.

3.2. In order to address disruptive behavior fairly and effectively, leaders will keep accurate and timely records which document the disruptive behavior and the actions taken.

3.3. If the disruptive behavior presents an immediate danger to anyone in the ministry or if an individual is disrupting a class to the point the leadership decides the lesson cannot go on or that other students are being negatively impacted, an immediate response is required.

3.3.1. The youth will be escorted to his or her parents or guardians or a Unity of Fairfax staff member.

3.3.2. The meeting or activity will be suspended until such time as it can safely be resumed.

3.3.3. The YFM Director will be notified as soon as possible and a written report will be submitted promptly to the YFM Director.

4. ROLES AND RESPONSIBILITIES

4.1. The teaching team and YFM Director will prayerfully discern when action needs to be taken on disruptive behavior. To determine the necessary response, the following questions may be appropriate:

4.1.1. Is it a conflict between the individual and others in the ministry?

4.1.2. Is there a known, professionally diagnosed condition of emotional, psychological or educational conditions?

4.1.3. What is the frequency and degree of disruption caused in the past?

4.1.4. How likely is it that the problem behavior will diminish in the future?

4.2. The teaching team and YFM Director, with prayerful consideration, will decide upon the necessary response on a case-by-case basis. The following three levels of response are recommended for consideration:

4.2.1. **LEVEL ONE:** The teaching team or representative and YFM Director will meet with the individual and parents or guardian. The team will clearly articulate the Unity of Fairfax YFM Disruptive policy and current concerns and will work with the youth and family to co-create a plan of action which addresses the impact of the disruptive behavior on the community and will work to assure that such behavior does not continue.

4.2.2. **LEVEL TWO:** The teaching team and YFM Director will give written notice that the individual will be excluded from ministry activities as appropriate for a defined period of time, with clearly identified reasons, the conditions of return and reference to the previous response step taken in Level One.

4.2.3. **LEVEL THREE:** The teaching team and YFM Director will give written notice that the individual will be permanently excluded from ministry activities. This notice will be provided in a letter from the YFM Director to the youth and parents or guardian explaining the expulsion and the individual's rights and possible recourse, if any.

4.3. The teaching team and YFM Director will review the immediate response. Next, the YFM Director will, as soon as possible, meet with the Unity of Fairfax Senior Minister about the "immediate response" situation. If further follow-up restrictions are considered to be appropriate, a follow-up letter will be sent to the youth and family explaining in reasonable detail the further restrictions and what steps, if any, must be taken before returning to the activities involved.

Background Checks

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1. APPROVAL DATE: August 2019
2. POLICY: All staff and volunteers working with youth and children at Unity of Fairfax are subject to a background check, which will be reviewed by both the Youth and Family Ministries Director and the Senior Minister. Refer to the policy in the Operational and Administrative Policies section of this manual.

Sign-In and Sign-Out

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1. APPROVAL DATE: AUGUST 2019
2. POLICY: For the sacred safety of our children, the Youth and Family program at Unity of Fairfax uses a Sign-In and Sign-Out process.
3. SCOPE: The Sign-In and Sign-Out process is used for children in the 5th grade and younger.
4. POLICY:
 - 4.1. Sign-In/Sign-Out sheets are located near each classroom door.
 - 4.2. A parent or guardian must Sign-In any child in the 5th grade or younger each time the child is dropped off for a class or program event and Sign-Out the child at the end of the class or event.
 - 4.3. Sign-Out will be after the service in the sanctuary is over.
 - 4.4. Children who are taken into the sanctuary at the end of a service will remain on the platform with their teacher, who will have a Sign-Out form, until their Sign-Out is complete. Children who stay in the classroom will be signed out from the classroom.
 - 4.5. The Sign-In/Sign-Out form will include a space for concerns for the teacher's attention that are not listed on the child's registration form. The teacher will review these concerns at each meeting of the class or program event.
 - 4.6. If there is no class being held on any given Sunday, including the YOU, a sign will be put on the closed classroom door indicating that there is no class that day and that those students are invited to attend the Sunday service in the sanctuary.
5. ROLES AND RESPONSIBILITIES
 - 5.1. A parent or guardian will sign the child in and out for each class or program event.
 - 5.2. The teacher or event leader will not release any child who is not signed out.

Drivers

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1. APPROVAL DATE: August 2019; December 2023 multiple updates
2. BACKGROUND: Sometimes there are events in the Youth and Family Ministries program that include transportation. Unity of Fairfax considers the safety of the youth and children during that transportation with the same priority, care and emphasis as during programs and classes that are conducted at the church site.
3. POLICY
 - 3.1. When a YFM program or event involves transportation, the leaders will provide a list of the drivers' names, license numbers and youth or children in particular vehicles. The list will be left in the church office with the administrative staff member.
 - 3.2. Once a youth or child is assigned to a particular vehicle, he or she will not be switched to another vehicle for the duration of the event's transportation.
 - 3.3. Driver requirements
 - 3.3.1. Driver must be 25 years of age or older.
 - 3.3.2. Driver must have a valid Virginia driver's license and a minimum of 5 years driving experience.
 - 3.3.3. Drivers must willing to provide proof of current liability insurance on the vehicle being driven for bodily injury and property damage.
 - 3.3.4. Drivers must not have had a DUI in the past 5 years.
 - 3.4. Vehicles will have a working seatbelt for the driver and each passenger.
 - 3.5. A current Medical/Liability Release Form for all occupants must be in the car at all times.
 - 3.6. Parents or guardians will sign a Hold Harmless agreement which will be held in the church office.

Diaper Changes

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1. APPROVAL DATE: August 2019
2. BACKGROUND: Recognizing that changing a baby's diaper is a sensitive and privileged action, the nursery at Unity of Fairfax provides a form granting permission for performing this action while the child is in the care of the Nursery.
3. POLICY:
 - 3.1. Nursery volunteers and staff may change diapers of children for whom a signed Diaper Changing form is on file. If a signed form has not been submitted, the diaper will not be changed and the parent or guardian will be immediately notified and required to change the soiled diaper in order for the child to remain in the Nursery.
 - 3.2. Forms are to be available in the Nursery.
 - 3.3. Diaper changes must occur on the diaper changing table and used diapers must be disposed of in the designated container.
 - 3.4. The diaper changing table must be cleaned after each diaper change.
4. ROLES AND RESPONSIBILITIES
 - 4.1. The nursery attendant is to assure that a form granting permission to change diapers of the specific child has been signed by the parent or guardian before performing that action.
 - 4.2. The child's parent or guardian is to sign the Diaper Changing form.

Rallies and Retreats

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1. APPROVAL DATE: August 2019; December 2023 to 2.2.1.
2. BACKGROUND
 - 2.1. Unity of Fairfax is a part of the Unity Worldwide Ministries Eastern Region, which holds rallies and retreats for youth in member churches.
 - 2.2. YOU Rallies
 - 2.2.1. The Eastern Region's annual Fall and Spring Rallies are open to high-school-age Youth of Unity in grades 9, 10, 11 and 12 with a minimum age of 14 and a maximum age of 19 or if not in high school, a maximum age of 18, as well as ministers, sponsors, parents or guardians, and chaperones. Teen participants should be active members of their YOU chapter or home church.
 - 2.2.2. The intention of the Regional YOU team is to create a safe place of unconditional love and acceptance where youth from across the Eastern region can gather for a weekend of spiritual growth and fun.
 - 2.2.3. The annual Winter Rallies are hosted by a YOU chapter with the Eastern Region.
 - 2.3. UNITEEN Retreats
 - 2.3.1. A Regional UniTeen Retreat is an overnight or weekend spiritual event specifically geared to Unity middle school teens and pre-teens, planned and facilitated by Regional staff and/or UniTeen leaders, at a camp or host church located within the Eastern Region.
 - 2.3.2. To attend a UniTeen Retreat, teens and pre-teens must be in grades 6, 7, 8, or equivalent, with a minimum age of 11. Participants should also be active in the church UniTeen group.
3. POLICY
 - 3.1. YOU Rally eligibility
 - 3.1.1. For the YOU Fall Rally, the youth must attend YOU classes at least 2 times between the start of fall quarter and Rally, or 4 times in April through September.
 - 3.1.2. For the YOU Winter Rally requires attendance at YOU classes at least 4 times in October, November and/or December.
 - 3.1.3. For the YOU Spring Rally, participants are required to have attended YOU classes at least 4 times in January, February, and/or March.
 - 3.1.4. Participation in YOU Rallies requires the signature of the Director of Youth and Family Ministries and the Senior Minister on the registration form.
 - 3.2. UniTeens Retreat eligibility
 - 3.2.1. For the Fall Retreat, participants are required to have attended 6 UniTeen classes between and including the months of May through October.
 - 3.2.2. For the Spring Retreat, participants are required to have attended 5 classes between and including the months of November through April.

3.2.3. Participation in UniTeen Retreats requires the signature of the Director of Youth and Family Ministries and the Senior Minister on the registration form.

Financial Management Policies

Finance Committee

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Approval Date: December 2023

General Commission

The Finance Committee is commissioned by and responsible to the Board of Trustees to assume oversight responsibility in matters concerning Unity of Fairfax's finances. The role of the Finance Committee is primarily an advisory body to the Treasurer and the Board, but it may be designated as a voting body in some circumstances. This committee functions subject to, and in conformity with, established policies as approved by the Minister and the Board of Trustees.

Appointments and Composition

The Treasurer of the Board, or his/her delegate serves as Chairperson of the Finance Committee, and appoints members of the congregation to serve on an annual basis. Additional members may be appointed from the Board of Trustees as needed, according to particular ability.

Responsibilities

The Finance Committee shall meet at least quarterly. Regular committee agenda items will include assistance in the development and review of an annual budget and monitoring of budget performance through the year.

Other activities within the Committee's charge include:

1. Supervise endowment and investment portfolios and makes recommendations on investments of funds. The Unity of Fairfax Investment Policy specifically designates the Finance Committee as the primary congregational oversight group for that policy, and as a confirmatory voting body in addition to the board regarding specific investment actions such as emergency withdrawals from the Investment Fund.
2. Participate in the preparation of the Financial Plan, Annual Budget and interim financial planning and projections.
3. Provide guidance and assistance for fundraising and development.
4. Review and provide guidance on other finance-related issues including goal-setting, long-range planning, strategies, procedural guidelines, benchmarking, metrics, auditing and performance assessment.

Investment Policy and Guidelines

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Purpose

This document defines policies and procedures for the management of Unity of Fairfax's financial assets. It specifically focuses on the Unity of Fairfax Mildred Park Endowment Fund.

The Mildred Park Endowment Fund was established in 2015 in conjunction with the Mildred Park Society, whose membership is comprised of Unity of Fairfax congregants who have voluntarily

communicated their intent to include Unity of Fairfax in their Estate Plans. The Mildred Park Endowment Fund was specifically established to house these gifts and thereby build longer term assets that function as an endowment for the Church. These funds are separate and distinct from the Unity of Fairfax General Operating Accounts (which are restricted to cash and cash alternatives) and Real Estate investments.

Congregant contributions follow two paths:

- Restricted Gifts. These gifts are accepted by The Board and made to support specific programs and initiatives. The Mildred Park Endowment Fund is intended to build and maintain the church's long-term, reserve assets. The Endowment Fund is funded by restricted contributions, including those specifically labeled as contributions to the Mildred Park Endowment or another restricted purpose.
- Un-designated/Non-restricted Gifts. Congregants who make gifts or bequests that can be used according to the Board of Trustees' discretion are deposited in the Unity of Fairfax General Operating Account. Funds in this account are deployed at the discretion of the Unity of Fairfax Board of Trustees.

The guidelines set forth herein are intended to be sufficiently specific to be meaningful and to demonstrate prudent investment management. They are also intended to provide the Board flexibility to exercise informed decision making and discretion necessary to achieve the requirements of Unity of Fairfax.

The Board will review these guidelines annually and make updates, as recommended by the Treasurer and Investment Committee, who are responsible for supervision and administration of the guidelines.

Responsibilities

The Investment Committee is entrusted with day-to-day supervision of the assets, reporting to the Board. Unity of Fairfax's Treasurer will serve as member/Board Liaison of the Investment Committee.

These guidelines define procedures and parameters for the Treasurer/Investment Committee and any/all Investment Advisors and Investment Managers entrusted with management of the Endowment Fund.

The Board of Trustees and The Investment Committee will maintain oversight authority for the overall investment management process for the Mildred Park Endowment Fund. The Treasurer is empowered to implement the investment strategy on behalf of The Investment Committee. The Board will monitor performance of the Mildred Park Endowment fund on a quarterly basis.

The Investment Committee is empowered to screen, select, and recommend investment managers that will be engaged with Board approval.

The Board will review these guidelines annually to ensure continued relevance of these objectives, financial condition of Unity of Fairfax and capital market expectations.

General Investment Principles

The Fund's Investment Objective is Balanced Growth – that is, preserving principal, maintaining purchasing power and providing a steady and consistent income stream in support of the Unity of Fairfax.

The guiding principles for this fund are as follows:

- Investment of the Mildred Park Endowment Fund shall be diversified cash/cash equivalents, stocks, and bonds to manage risk and minimize the possibility of large losses.
- A positive total return is sought, though it is understood that market values of specific investments will fluctuate.
- The Mildred Park Endowment Fund shall be invested with care, skill, prudence, and consideration of the prevailing economic and investment market conditions.
- The Board has defined milestones for the Mildred Park Endowment Fund, as follows:
 1. Values below \$100,000. Assets will not be used unless an essential need occurs.
 2. Values above \$100,000. The Board is empowered, at its discretion, to use earnings in support of Unity of Fairfax, so long as the \$100,000 balance is maintained. Positive investment earnings will be used from the endowment to fund the operating budget. As of 2022 ratification of this document, The Board's intent is to execute annual withdrawals that are the larger of 10% of fund assets, or 75% of the prior year's investment gains.

Annual Withdrawals. Annual withdrawals require a vote of the Board based on the latest performance information for the Fund. This threshold will be evaluated and updated on an annual basis and/or as additions are made to the Fund.

Extraordinary Use Provisions. Withdrawals from the Mildred Park Endowment Fund are permissible under extraordinary circumstances. These withdrawals require the Board to approve the use of the endowment and require a vote from either an advisory board formed outside of the board or the entire congregation.

Permissible Securities and Transactions

Unity of Fairfax Board of Trustees will vote on Investment Advisors and third-party managers that have been screened and recommended for engagement by the Investment Committee.

All purchase and liquidation transactions inside the Fund will be authorized by Unity of Fairfax's Treasurer as point of contact for the Board and Unity of Fairfax Investment Committee.

The following securities are allowed:

Cash equivalents:

- US Treasury Bills
- Money market funds (including interest-bearing checking and savings accounts)
- Certificates of Deposit (in accordance with FDIC limits)

Publicly Traded, Fixed Income Securities and Fixed-Income Mutual Funds

US Treasury and Agency Notes and Bonds
Investment Grade Corporate Bonds
Mortgage-backed bonds
Preferred stock (Mutual Fund Only)
Convertible notes and bonds (Mutual Fund Only)

Mutual Funds that invest in publicly traded, Equity securities

Common stocks
Convertible preferred stocks
American Depository Receipts of non-U.S. companies
American Depository Receipts (Foreign stocks that trade on US exchanges and are denominated in U.S. Dollars)

Alternative Investments, so long as they are in a “Mutual fund” structure.

Some mutual funds invest in derivative securities, including options and futures, to achieve certain portfolio objectives. The use of options and futures as hedges is not prohibited and will not disqualify the mutual fund investment. However, the use of options and futures by mutual funds must be analyzed to ensure that these securities do not result in unacceptable risk.

The following transactions and securities are expressly prohibited:

Margin and debt-financed investments
Short-Selling
Options, Futures and Derivative contracts
Insurance and Annuity contracts, except as donated to Unity of Fairfax
Restricted stock
Limited Partnerships and other, illiquid investments
Real Estate
Debt-Instruments of foreign governments
Loans (of any kind) to individuals or businesses
Closely held, private companies
Artwork and collectables and other non-marketable, hard-to-value assets

Safekeeping and Custody

All securities held in the Unity of Fairfax Mildred Park Endowment Fund Investment Accounts shall be titled as follows:

Unity of Fairfax Mildred Park Endowment Fund

The Board requires that margin will not be a feature used in any Unity of Fairfax/Mildred Park account.

Performance Review and Evaluation

The Fund Custodian will provide monthly account statements and performance reports on an on-going basis. Performance The Treasurer/Investment Committee will report performance to the Board on a quarterly basis. The Board will share performance results with the Congregation at least annually.

Performance shall be measured based on total return; that is, the aggregate return from capital appreciation, dividend, and interest income.

The investment return on the Unity of Fairfax Investment Account will be measured against commonly accepted performance benchmarks (standard market indices for each asset class).

Consideration shall be given to the extent to which the investment results are consistent with the investment objectives, goals and guidelines set forth in these Unity of Fairfax Investment Guidelines. Unity of Fairfax intends to evaluate the performance of the Mildred Park Endowment Investment Account management and the total portfolio over at least a three-year period, but reserves the right to terminate an Investment Manager for any reason including the following:

1. Investment performance which is significantly less than the established benchmark given the investment discipline employed and the risk parameters established, or unacceptable justification of poor results.
2. Failure to adhere to any aspect of these Investment Guidelines, including communication and reporting requirements.
3. Significant qualitative changes to the investment management organization.

Deposits and Disbursements

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Deposits: Procedure for Sunday and weekly deposits and handling of cash contributions or payments will be determined by the Minister, Treasurer, and/or designee, and approved by the Board of Trustees.

Disbursements: Procedures for payment methods and signatories will be coordinated by the Minister and Finance Director, and periodically reviewed/approved by the Board of Trustees.

Tithes

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The tithe is paid on the gross income of the ministry, less expenses related to UWM conferences and travel by the minister for UWM purposes. The Board of Trustees may review and identify other potential exceptions.

Interest Bearing Accounts

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It is at the discretion of the Board whether interest is accrued to each individual account, or to the general fund taking into consideration the needs of the general fund and the size of the fund in question.

Memorial Funds

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Designated: Designation is by approval / acceptance of the Board and such funds are deposited to a high interest bearing account until “designation” is completed. Final payment for a designated project is by approval of the Board, after acceptance of the finished project. Any remainder not necessary to fund “designation” reverts to “undesignated” category.

Undesignated: Such funds are placed in a special account for capital improvements or other uses for the further development of the ministry as the Board of Trustees designates. A statement of philosophy is printed and made available to interested donors.

Special Purpose Funds

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Such funds are established by approval of the Board of Trustees for special, short-term projects. On completion of the project, said fund is closed and any residual amount accrues to the general fund.

Minister's Expenses

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Updated: December 2023

The Board of Trustees normally approves reimbursement to the Minister for expenses in entertaining visiting dignitaries upon submission of a request by the Minister. Any membership dues, fees, or other expense for the Minister in appropriate clubs or organizations is decided by the Board on an individual basis.

The Minister's travel expenses to the Annual Unity Worldwide Ministries Conference, Pre-Conference, Regional Conference, and to Minister/Board/Lay Person Workshops is to be paid by the ministry, in accordance with the financial plan. If the Minister serves on a Unity Worldwide Ministries Team, his/her expenses to the January Unity Worldwide Ministries Meeting are paid by the ministry. Travel expenses for the Minister's spouse are normally paid to the Annual Unity Worldwide Ministries Conference and to the Regional Conference. Given the minister's service to UWM, these expenses are deducted from tithes.

Bookstore

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Updated: December 2023

The Senior Minister and Board of Trustees of Unity of Fairfax may declare that the existing Bookstore operates as a taxable entity and thereby may pay property taxes. Effective as of the date of the tax formula determination by the Department of Revenue, an area designated as the "Bookstore" will be set aside in the ministry with the perimeters determined. The rest of the ministry continues to operate as a tax-exempt entity.

The management of the bookstore depends on staff circumstances. At present, the Finance Director oversees the operations of the bookstore and supervises the volunteers. The Finance Director is responsible for filing the quarterly sales taxes and purchasing items for sale.

If a volunteer or paid person is available and circumstances allow, the Bookstore is may be operated by a manager who has daily responsibility for and authority over the store.

The manager will present goals and plans to the Senior Minister, Finance Director and Board for approval. The Minister or other designee receives and reviews a quarterly financial report from the Bookstore Manager and makes appropriate reports and/or recommendations to the Board.