

UNITARIAN CHURCH OF CALGARY HANDBOOK

Section 8: Policies of the Unitarian Church of Calgary

SECTION 8, POLICIES of the UNITARIAN CHURCH OF CALGARY

There are different levels of Policy within the Unitarian Church of Calgary.

A. OUR VISION AND MISSION

A-1 Our Vision and Mission.

B. POLICIES OF THE CHURCH

B-1 Policy on Sexual Harassment.

B-2 Policy on the Church Banner and On Taking Public Stands on Behalf of The Church.

B-3 Policy on Being A Welcoming Congregation.

B-4 Policy Regarding Art in the Church.

B-5 Policy on Same-Sex Marriage

B-6, Policy on Disaffiliation from the UUA

C. POLICIES OF THE BOARD

C-1 Policy on Fundraising.

C-2 Policy On Parental Leave.

C-3 Policy On Distribution of the Quest.

C-4 Policy on Purchasing Major Purchases.

C-5 Policy on Privacy of Data including Canvass Data

C-6: Policy to Limit Access To Church Property By Those Who Have Been Convicted of a Criminal Offence Against a Minor

C-7: Policy on Conflict Management

D. POLICIES OF THE ADMINISTRATION COMMITTEE.

(These may be referred to the Board for Approval, but I don't think this always happens.)

D-1 The UCC/CYPT Safety Policy for Employees Working Alone.

D-2 UCC Privacy Policy and Steps to Implement This Policy

E. POLICIES OF THE HISTORY AND ARCHIVES COMMITTEE.

E-1 Policy on Retention of Church Documents.

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- F. UNKNOWN (This policy has been reinforced at a number of Annual Budget Meetings, but I can't find a MOTION.)**
F-1 Policy on Being an Honour Society.

This page revised by Bob Spinney, April 13, 2004
C:\Church Handbook\Revised church handbook\Section 8,9 Policies of the UCC and William Irvine award.doc
Revised by Eric Leavitt, November 7, 2005

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SECTION A-1: OUR VISION AND MISSION STATEMENT

The following Mission and Vision statement was adopted at the UCC Annual Congregational Meeting of May 2, 2004.

The Unitarian Church of Calgary

MISSION

**The Unitarian Church of Calgary cultivates a welcoming, caring community.
In our religious exploration, we encourage spiritual, intellectual, and ethical growth for all.
We speak and act for social and environmental justice.
In our shared ministry, we serve each other, Calgary, and the wider world.**

VISION

Ministry is the act of service that supports our congregation's principles and values. Individually and together, we share the responsibility to minister to our congregation and the broader community.

This is our vision of our shared ministry at the Unitarian Church of Calgary by 2009:

CONGREGATIONAL COMMUNITY VISION – FIVE YEARS FORWARD

Our congregational community has members in all stages of life who:

- care for and nurture each other;
- actively integrate new members into our community;
- participate in a variety of social events and common interest groups.

VISION FOR CHURCH SERVICES – FIVE YEARS FORWARD

We address the spiritual needs and wishes of people of diverse ages and interests, expanding services as we grow.

On Sundays and at other times, we provide distinct services that include:

- alternative services such as earth-based and modern
- traditional services with sermon and music;
- alternative services such as earth-based and modern;
- forums and discussions
- special services such as Remembrance Day Vespers

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- services for youths and for young adults with more music
- children's worship in the Church School
- intergenerational services
- rites of passage for church and the larger community

VISION FOR PROGRAMMING – FIVE YEARS FORWARD

The congregation and its leaders support a life-span religious education program that is consistent with our mission and vision. We provide the opportunities for children, youth, and adults to nurture spiritual and personal growth, and social and environmental responsibility. These opportunities are extended wherever possible to the wider community in Calgary.

A full-time (or equivalent) Director of Religious Education and enthusiastic, well-trained volunteers supports children and youth programs. Adult programs are ongoing and are supported by the minister and well-trained volunteers.

VISION FOR SOCIAL AND ENVIRONMENTAL ACTION – FIVE YEARS FORWARD

Social Action is an integral part of our programming, which supports our principles with action. We have a congregational vision and structure that focuses our social justice and environmental issues using democratic processes and incorporating internal and external coordination.

Our vision addresses the areas of:

- immediate action
- root causes; and
- education.

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VISION FOR BUILDING – FIVE YEARS FORWARD

Our congregational home evokes and supports our values.

We are centrally located, transit accessible and a known landmark. Our space enhances and accommodates the diverse activities and ages in our community, physically, acoustically, and aesthetically. Our building reflects environmental leadership, is cost-effective, and is well maintained. We serve selected needs of the larger community, generating recognition and revenue.

We have a plan that addresses our growth by either supporting a second congregation in Calgary, moving to a different or new building, or both.

VISION FOR OUTREACH – FIVE YEARS FORWARD

We are well-known in the Calgary community because:

- We have high visibility in the Calgary local media.
- As we work to eliminate barriers, we communicate our desire to be an inclusive and diverse congregation.
- Newcomers and visitors to Calgary can find us easily and learn about us readily.
- We serve the wider community with high-quality programming that incorporates and responds to its needs.
- We are active in interfaith dialogue and participate in interfaith projects.
- We are a leader in the Unitarian movement in our region and in the Canadian Unitarian Council.

This section was edited by Eric Leavitt on October 30, 2005.
Changes consisted of formatting to make spacing, text font consistent throughout the document.

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**SECTION B: POLICIES THAT HAVE BEEN APPROVED BY THE CONGREGATION
AT CONGREGATIONAL MEETINGS**

SECTION B-1: POLICY ON SEXUAL HARASSMENT

This page is followed by the Sexual Harassment Policy of the Unitarian Church of Calgary that was adopted by the congregation at the Annual General Meeting on May 2, 1993. It was Moved by Ron Sveen and Seconded by Ellie Tyndale.

Note that the attachment is labelled 'DRAFT PROPOSAL'. I asked History and Archives to get the Attachment to the 1993 Minutes and it is also labelled a 'draft'. (Bob Spinney, 99-08-30).

As of November, 2005 the words Draft Proposal were removed from the Policy and it is assumed that it was passed as worded at the May 2, 1993 meeting. (Eric Leavitt)

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Sexual Harassment Policy of The Unitarian Church of Calgary

Purpose Statement

We believe that the Unitarian Church of Calgary should be a safe environment for all those within the church, and that we should not tolerate any behaviour which constitutes sexual harassment.

We believe the adoption of a sexual harassment policy provides a means for dealing with harassment experienced within the church community.

We feel the best resolution of any situation will both stop the unwanted behaviour and allow all parties to still feel at home within the church.

We understand harassment is not always intentional, but may in fact arise through miscommunication or lack of awareness. Regardless, we believe this is a serious issue that our congregation can best face by adoption of the following policies.

Definitions of Sexual Harassment?

- being subjected to a sexually offensive environment
- being subjected to unwanted sexual attention
- being coerced as an unwilling person in a sexual relationship; and/or
- being punished for refusing to comply with any of the above.

Sexual harassment must be understood as an exploitation of a power relationship, rather than as an exclusively sexual issue.

This may involve a wide range of behaviours from verbal innuendo and subtle suggestions to overt demands and physical abuse. Sexual harassment has both males and females as its victims and perpetrators. It can occur between members of the opposite sex or of the same sex.

Sexual harassment occurs not only where there is a real or perceived power imbalance (for example minister/parishioner; adult/child), but also amongst peers.

Responses to Sexual Harassment

We are often unsure whether what we are experiencing is sexual harassment.

Our reactions to sexual harassment are varied but almost always involve some degree of confusion, embarrassment or unease. It is sometimes easy for us to "explain away" a problem, especially if no physical harm was done, partially because it is difficult to admit sexual harassment could even be happening. On the other hand, sometimes attempts to deal with the situation are met with anger, denial and scorn.

Often people who experience harassment are made to feel responsible for the perpetrator's behaviour.

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People who experience sexual harassment sometimes have been the subject of gossip and have developed stress-related illnesses from the pressure of living in fear of the next advance or incident. "You must have done something to encourage it," is a familiar comment.

People who have been harassed need support, empowerment, and a structure within which to respond creatively and safely.

What Can You Do if You Think You've Been Sexually Harassed?

It's sometimes hard to determine if the unwanted behaviour you are subject to is actually sexual harassment, and if it is intended. Regardless of the intention, we each have the right to call another on his or her behaviour when it seems inappropriate or causes uneasiness and embarrassment. It makes no difference if this behaviour is verbal (crude or suggestive remarks or proposals) or physical (unwanted touching, kissing, stroking, grabbing or pelting). One way to call someone on unwanted behaviour is to tell the harasser what it is that you find offensive and ask that the behaviour stop. Sometimes sexual harassment is a matter of miscommunication. If the behaviour is unintentional, communicating your discomfort may be enough to stop it. However, it is often extremely difficult to confront someone directly with sexual harassment concerns. Do not feel that you have to handle the situation yourself before approaching anyone else.

If you feel uncomfortable directly approaching your harasser, if you are unsure whether it is harassment, or if speaking with the individual has not changed the situation, contact a member of the Sexual Harassment Team.

Sexual Harassment Team in the Church:

- a. the Minister
- b. a designated board member
- c. the Director of Religious Education.

Speaking with one of these individuals will not automatically begin an investigation. You may just want to talk and sort out your feelings and options. If, however, you wish to pursue the matter, an ad hoc committee of three, including the minister, will be formed to deal with the situation in a confidential manner. Again, the goal is to ensure that the church is a safe environment for all, that any unwanted behaviour ceases, and that all persons feel welcomed within the church. Priority will be given to ensuring that any unwanted behaviour stops.

The ad hoc committee will look at all aspects of the situation and will treat all participants with respect and caring.

Incidents of sexual harassment (or suspected harassment) by the minister are a special case and should be reported either to the designated board member, the president or a member of the Ministerial Relations Committee. If someone other than the president is initially approached, that

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individual will notify the president of the situation. The president will then call on the Department of Ministry of the UUA for support and guidance in dealing with the minister and any breach of ministerial ethics and guidelines.

We believe it is the responsibility of everyone in the church to help safeguard our children and youth. If you suspect anyone, adult, youth or child, of sexual harassment of a young person, the situation should be reported to the Minister, Director of Religious Education or the designated board member.

Principles and Assumptions Related to Procedures Dealing With Cases of Sexual Harassment:

- Sexual harassment is unacceptable within the Unitarian Church of Calgary.
- Sexual harassment is not the fault of the victim.
- All complaints of sexual harassment will be taken seriously and be dealt with expeditiously.
- Confidentiality will be assured. The complainant will deal with only one member of the team unless he or she chooses otherwise.
- Each stage in dealing with a case of harassment will involve as few people as possible.
- As much as possible, the complainant is in control of each step in whatever action is taken.
- All policies and procedures will strive to minimize further distress and ensure fairness for all.

Scanned from typed document and added to file on November 6, 2005. (Eric Leavitt)

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SECTION B-2: POLICY ON USE OF THE CHURCH BANNER, AND ON TAKING
PUBLIC STANDS ON BEHALF OF THE CHURCH

In keeping with the principles of the Unitarian Universalist Association, and in order to facilitate timely responses to social issues, committees of the Church may take public stands in their own (committee) names on issues of their choosing, through such means as;

- carrying banners or signs with their committees name on it (e.g., "Social Justice Committee, Unitarian Church of Calgary")
- writing letters or speaking to the media in the name of their committee.

Committees taking such actions are asked to inform the Board of Trustees and/or the Minister of their intent or actions at the earliest opportunity, so that appropriate support, follow-up, and co-ordination of efforts may be provided.

Should a member or group of members wish a stand to be taken in the name of the Church as a whole (including actions such as carrying the Church banner in public meetings or demonstrations), congregational approval will still be required.

See the minutes of the AGM of May 3, 1992, and the Budget meeting of December 2, 1992. Moved by Conrad Ayasse and Seconded by Paul Armstrong.

Revised February 18, 2002, Section number only.
Revised April 13, 2004, format only.
Revised November 6, format only.

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SECTION B-3: POLICY ON BECOMING A WELCOMING CONGREGATION

The following Motion (Verna Blanchard/Cheryl Lyte) was passed at the Annual General Meeting on May 5, 1996.

As Unitarian Universalist affirm the worth and dignity of every person, it is resolved that the Unitarian Church of Calgary become a Welcoming Congregation, and that its members recognise the existence of these five sexual orientations; bisexual, asexual, gay, heterosexual, and lesbian. It is further resolved that the members of the Unitarian Church of Calgary are intolerant of activity that diminishes the rights of individuals of the above-mentioned sexual orientations.

Revised Section number on February 18, 2002

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SECTION B-4: POLICY REGARDING ARTS in the CHURCH

The following Motion was passed at the Annual budget Meeting on December 8, 1991.

In principle the Unitarian Church of Calgary supports artistic freedom within our congregation, while at the same time upholding Unitarian Universalist Association principles. Decisions concerning the suitability of any artwork for display in the Church shall be made to the Ambience Committee. Works which may be controversial will generally be displayed in the Gallery.

Revised Section number on February 18, 2002.

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SECTION B-5: POLICY ON SAME-SEX MARRIAGES

The following Motion was passed at the Annual General Meeting on May 2, 2004.
It was presented by the Social and Environmental Justice Council.

WHEREAS: The Unitarian Church of Calgary has been accredited as a Welcoming congregation, welcoming gays and lesbians, bisexuals and transgendered persons, as well as heterosexuals: and

WHEREAS: The first principle of Unitarian Universalism is to affirm and promote the worth and dignity of every person: and

WHEREAS: The second principle of Unitarian Universalism is to affirm and promote justice, equality and compassion in human relations: and

WHEREAS: The third principle of Unitarian Universalism includes acceptance of one another; and

WHEREAS: Unitarians across Canada have provided services of union to same-sex couples since the 1970's:

The Unitarian Church of Calgary affirms, by vote of the congregation on May 2, 2004, its support of the legal right of same-sex couples to marry.

Inserted by Bob Spinney on May 14, 2004.

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SECTION B-6: POLICY ON Disaffiliation from the UUA

The following Motion was passed at the Annual General Meeting on June 13, 2004.

WHEREAS: The Canadian Unitarian Council has assumed a large part of the role that the Unitarian Universalist Association used to play in supporting Canadian congregations;
And,

WHEREAS: We no longer pay our 'fair share' to support the UUA:

The Unitarian Church of Calgary ends its membership in the Unitarian Universalist Association, by vote of the congregation on June 13, 2004.

Inserted by Bob Spinney on May 14, 2004.

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SECTION C: POLICIES OF THE BOARD OF THE UNITARIAN CHURCH OF CALGARY

The following policies have been passed by the Board of Trustees of the Unitarian Church of Calgary but not by the Congregation.

SECTION C-1, POLICY ON FUND-RAISING

1. Fund raising events are normally for the benefit of the Church, and all proceeds are paid into the general Church funds. The Treasurer pays directly bills for expenses or reimburses organisers from the general fund for expenses supported by receipts.
2. If any group within the Church wishes to have a fund raising event for its own special purpose this must receive prior approval of the Board. All organisers and participants in the event must know and approve of the special purpose at the time of being recruited. The event must be clearly advertised as being in aid of the special purpose.
3. If any outside organisation wishes to use the Church premises for a fund raising event, this must be arranged with the Church Administrator and a rent will be required in accordance with the normal schedule of rents, or at some other level approved by the Board.
4. Any member of the Church wishing to appeal for donations to a fund for a special purpose must have the prior approval of the Board and must make it clear at all times that this appeal is extra to the annual pledge campaign.

APPROVED BY THE BOARD OF TRUSTEES, NOVEMBER 20, 1991.

The Administration Committee sometimes has a person who takes special interest in Fund Raising.

Revised Section number February 18, 2002. Revised, format only, Bob Spinney, April 13, 2004.

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SECTION C-2: POLICY ON PARENTAL LEAVE

At the time of writing, May 8, 2000, this policy is only a policy of the Board of Trustees.

“ That it will be the Policy of the Board to grant up to 6 months unpaid Parental leave to any employee.”

Approved by the Board of Trustees, April 19, 2000.

Section number revised February 18, 2002 by Bob Spinney.

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SECTION C-3, POLICY ON DISTRIBUTION OF THE QUEST

- I.** The Quest shall be sent free of charge to:
- a) All Members who have donated the required minimum amount during the preceding calendar year.
 - b) All Friends who have contributed as in part I-a.
 - c) All Unitarian Societies in the Western Regional Network Group.
 - d) Some other Societies with whom we regularly exchange Newsletters.
 - e) Certain specific people for various reasons. For example,
 - e-1) Ex Ministers who have expressed an interest in receiving the Quest.
 - e-2) Ex Members and Friends for compassionate reasons.
 - f) For 3 months to all people who signed the Guest book, and who live in Calgary or the vicinity.
- II.** All other people, who wish a mailed copy, will be required to pay the going rate. At the time of writing, this is \$33 per year.
- III.** The Quest shall be E-mailed free to anyone who requests it.
- IV.** *The label printing program should have the capability of printing the labels required for mailing the Quest. I understand the database now flags people receiving the Quest under item I-f above, and terminates printing labels when the free period is up. The new program/database should also have the capability of flagging and deleting those covered in II above.*
- V.** To insure the above policy is followed there shall be an annual review of the Quest mailing and E-mail lists. This review shall be the responsibility of a person appointed by the Administration committee, and shall be done by the end of February each year. This person will require assistance from the Quest Editor, the Treasurer, and the Database Administrator. This person shall present a report to the Administration Committee for action.

New, September 21, 2001, by Bob Spinney
Revised, April 13, 2004, by Bob Spinney - format & filename only.

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SECTION C-4: POLICY ON MAJOR PURCHASES

All organization should have limits to which purchasing authority should be approved. The following lays out the procedures for the Unitarian Church of Calgary.

Committee Chairs have authority for purchases within their budgets that do not exceed \$500.

Over \$500 there should be more than one quote for a purchase.

Over \$1,000 there should be written quotes and the Chair of Administration should be informed and be asked to confirm that there are budget dollars.

Over \$2,000 the President and Treasurer need to approve the purchase to ensure that there is budget and due process has been followed in getting the best price.

This POLICY was approved by the Board on Wednesday, February 3, 2002.

Revised April 28, 2004, format only – Bob Spinney

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SECTION C-5: POLICY ON PRIVACY FOR ALL CHURCH DATA

This policy was developed by the Administration Committee and submitted to the Board for their approval. The policy was approved on Wednesday, November 10, 2004 at the regular board meeting.

This Policy was revised in October 2009 and the new revised policy is now listed in D2 of the Policy Handbook.

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SECTION C-6: POLICY TO LIMIT ACCESS TO CHURCH PROPERTY BY THOSE WHO HAVE BEEN CONVICTED OF A CRIMINAL OFFENCE AGAINST A MINOR

The Unitarian Church of Calgary wants to do all it can to ensure the safety and well-being of its children, youth and adults. As a result, its Board of Trustees moves the following policy:

All persons who have been convicted of a criminal offence against a minor will not be allowed to participate in or attend any children or youth activities or programs (whether at our church or at another location).

All persons who have been convicted of a criminal offence against a minor will not be allowed into the children and youth religious education wing and other locations where children and youth are having programs while there are children and youth in those locations of our church.

The Board will ensure that steps be taken to monitor the movements of all persons who have been convicted of a criminal offence against a minor while they are on church property.

This policy was adopted at the Wednesday, May 15, 2005 Board Meeting.

Added to the Church Reference book by Eric Leavitt on November 7, 2005.

SECTION C-7: POLICY ON CONFLICT MANAGEMENT

Unitarian Church of Calgary Conflict Management Process Adopted by the Board, October 7, 2009

Any group of people in a community will experience similarities and differences. It is normal for conflict to arise. It is what you do to manage the conflict that makes all the difference. We want to avoid destructive conflict and help create proactive approaches to facilitate constructive conflict within our congregation. We believe that creating processes to manage conflict is best done from the grassroots up. Until we have gone through a congregational process to create these procedures, we propose the following as interim documents to use until we have our own UCC process and accompanying documents.

A. Taking a Proactive Approach – Congregational Guidelines

In a healthy congregation, it is useful to have some agreed upon ways of relating to one another. Until our congregation has developed our own guidelines, we are going to use the Beacon Unitarian Church's Guidelines (see Appendix A). By using these guidelines, we aim to uphold a set of promises about how we will behave toward one another and to various groups and individuals within the congregation. The ultimate objective is to foster a climate that is courteous, supportive, respectful of others, open, honest, and, above all, safe.

B. When Conflict Occurs

1. Interpersonal Conflict

What do you do when you have a conflict or a difference of opinion with someone? The best thing is not to avoid the conflict but to find a healthy way to attempt to resolve your differences. Attached is Appendix B, an "Interpersonal Conflict Resolution Model" (from the Justice Institute of B.C.'s Centre for Conflict Resolution Training). This document offers a process people can use to walk through the stages for resolving their conflict. It offers ways for people to talk about their views of the issues and interests in the area to be resolved, as well as how to problem solve.

2. Where do you go in the congregation with your concern?

Often people do not know the appropriate place to take their concern and instead talk to others about it, rather than to the person/people who needs to hear about it. Appendix C, "Compliments and Concerns and where to take them" offers some direction as to who to talk to for what.

3. What is an appropriate process for handling conflict in our congregation?

Appendix D "Conflict Management Process for the Unitarian Church of Calgary--a Transitional document" is a process for us to use while we are educating ourselves about conflict, and considering other models. The Safe and Healthy Congregation Task Force will be asked to work out a process that the congregation can use in the long-run. Until this time, this document can be used.

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Appendix A

**BEACON CHURCH GUIDELINES FOR
DISCUSSION AND BEING IN RELATIONSHIP**
Adapted for use at the Unitarian Church of Calgary
Recommended for all UCC Meetings

SHOW EACH OTHER RESPECT

- Honour the diversity of opinion in the group.
- Honour the differing abilities and disabilities in the group.
- Listen until the other person has finished. Give people the space to finish their own thoughts.
- Avoid put-downs, blaming or labeling. People have the right to be wrong or to make mistakes.

COMMUNICATE FOR UNDERSTANDING

- Use “I” statements: “I think... I feel... I need...” Own your own feelings and opinions. Speak your own thoughts. Let others speak for themselves.
- Describe the behaviour you are reacting to.
- Check out assumptions. Ask for clarification. Do this for both ideas and feelings.
- Bring your good will. Hear the content through your heart.

PARTICIPATE WITH TRUST AND COMMITMENT

- Ask for what you want or need.
- If you are a talker, limit your own contributions so that you can make room for others; invite others to speak.
- Hang in there when the going gets tough. With trust you will be able to hear each other and come to resolution.
- Avoid negotiating with threats.

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[Developed at a Community Building Workshop on 17 Sept. 1994 and recommended for all Beacon Meetings. Now adapted for use at the Unitarian Church of Calgary.]

Appendix B – *Short Form*

Interpersonal Conflict Resolution Model

STAGE 1: Establish a positive environment.

Timing

Location

Listening Attentively

Expressing motivation to resolve differences

STAGE 2: Clarify the issues.

State your own point of view with respect to the differences

- Use 'I' statements
- Be brief

Invite the other person to state their point of view

- Listen actively when he/she is speaking
- Repeat back the essence of what you have heard, to be sure you have heard correctly

STAGE 3: Clarify Interests.

Explore probe the other persons interests (hopes, expectations, fears, concerns)

- Listen actively and restate his/her interests
- Ask open ended questions

Ask other person to now listen to your interests (hopes, expectations, fears, concerns))

- Use 'I' statements
- Use assertive expression

STAGE 4: Problem solve.

Clarify desired outcome and goal.

Invite mutual generating of options

Check standards of fairness; keep in mind that you want to meet both your interests and theirs.

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Prioritize options.

Forms action plan.

If a solution is not becoming apparent, you need may need more information, more trust or energy.

- You may need to break and come back to the discussion.
- You may agree to disagree or agree that you cannot reach an agreement at this time and set a time for future discussion.
- You may obtain the needed information or work to increase the trust.

Appendix B – Long Form

Interpersonal Conflict Resolution Model

It is important from the outset to recognize that conflict arises because issues or events trigger negative feelings. These feelings have likely gotten in the way of being in right relationship and successfully accomplishing shared goals. It is highly unlikely that this came about through intent – neither person acted or spoke with the express purpose of causing hurt or anger. It is very likely that both people are unhappy about what happened or was said.

Conflict resolution activities need to take place face-to-face and involve both of the people who are central to the conflict.

The decision to involve a mediator depends on the seriousness and breadth of the conflict. If the conflict is somewhat limited, a mediator may still be of use – but – should be involved only with the advance agreement of those people central to the conflict. The Committee on Ministry can provide you with a list of trained mediators. If mediation is not needed, it can be useful for a trusted third party to attend as witness. The role of the witness is, in a gentle manner, to keep all involved reminded of the steps in this conflict resolution model.

The process of conflict resolution rests on the principles of:

- 1. ‘no surprises’ – what occurs is known and agreed to by both parties – in advance. Conflict resolution requires an ‘up-front’ agenda and must happen without even the slightest hint of a hidden agenda;*
- 2. confidentiality – what is said in this process must not be shared with those outside the conflict resolution process without the explicit permission of all those involved;*
- 3. equity – all aspects of this process are conducted in an environment of fairness and respect. One of the important ways this is done is for people involved to commit to taking turns talking and listening.*

STAGE 1: Establish a positive environment.

Timing – Set a time that is as soon as possible after the conflict arises and as convenient as possible for both of you.

Location – Set a location that is ‘neutral’ (a place where neither of you is ‘in control’ or substantively more comfortable). A place where privacy is possible is also important.

Listening Attentively – This serves two purposes: (1) you may learn something that reduces the impact of the conflict, and/or (2) it honours the other person. By listening you begin to build trust.

Purpose - Keep in mind that you’re there to resolve differences. This is the whole purpose -- to re-solve differences. It is not a time to lay blame (or receive it), not a

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chance to erase what has happened; it's not even to necessarily come to agreement on a subject. The task is to understand how conflict arose, process the resulting discomfort and find a way to reduce the likelihood it will happen again.

STAGE 2: Clarify the issues.

Remember; this process is about issues, not about personalities. Clarify that each of you will have a turn to speak and agree not to interrupt the person speaking.

As a speaker:

1. Calmly state the issue that has upset you, from your own point of view. Try to stay focused on one issue/event.
2. Describe what you remember happening, in chronological order, if possible.
3. Use 'I' statements.
for example: "When ... happened, I felt and I reacted by..." or even "When you, I interpreted it to mean ... and so I felt ... and (did or said)"
4. Use objective and non-inflammatory language. Tone of voice and body language are also important because they affect how the information is received.
5. Be brief.
It is not necessary to belabour or repeat a point. Assume the other person is listening as carefully as you intend to listen to them.

As a listener:

1. Listen actively when the other person is speaking.
Keep your body relaxed, look at the other person most of the time, nod when they say something that is true for you, and don't respond at all if you disagree with them because it's not your turn.
2. Once the speaker has finished, summarize the essence of what you have heard, to be sure it was heard correctly.
To do this, ask permission first by saying something like – "I want to be certain I understand what you've just said. I heard that Am I correct?"

Use a mild, non-judgmental tone of voice.

This is neither an opportunity to argue, nor to correct the speaker's view or memory. The only reason you, as a listener, speak is to ensure you understand what the speaker is saying.

STAGE 3: Go deeper into the event / issue and discover what triggered the problem.

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This stage takes courage – but it is the key to success of the conflict resolution process. If a mediator or witness is present they may help by facilitating.

1. Take some time to think about the issue/event in light of your hopes, expectations, fears, and concerns.
2. Consider how these hopes, expectations, fears, and concerns are involved in what happened.
3. Take turns telling each other what you have discovered. Use ‘I’ statements and active language.

Active language uses yourself as the subject and an active verb, not a passive verb with you being acted on. Passive language would be ‘A mistake was made.’ Active language would be ‘I made a mistake.’

4. Seek to fully understand the other person. Once they’ve finished speaking ask open-ended questions.

Open-ended questions lead a person to explain things more fully. A closed-ended question leads to a ‘yes’ or ‘no’ answer. For example: “What are your fears and concerns?” is an open-ended question; whereas, “Are you concerned that I’m not telling you everything?” is a closed-ended question.

STAGE 4: Problem solve.

Again, take turns doing the following. If a mediator is present, they could facilitate. Remember, this is about ‘resolution’ – not ‘winning.’

1. Come to consensus on the desired outcome and goal.
It would be ideal if both people shared a single outcome and goal, but that is not a requirement for problem solving. Initial positions may need adjustment so as to allow consensus. By definition, consensus means that goals and outcomes do not conflict and that they are tolerable to both people.
2. Mutually generate options that help achieve the desired outcome(s).
Use creative thinking techniques such as brainstorming. If you get stuck, try thinking of options that definitely wouldn’t work; then focus on their opposite.
3. Check standards of fairness. Keep in mind that you want to address both your hopes and concerns and theirs.
4. Prioritize options.
5. Form an action plan and a timeline for its implementation.

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6. Act on the plan.

If a solution is not becoming apparent, you may need more information, more trust or more energy. This may mean that the resolution process cannot be completed in a single meeting.

1. You may need to obtain more information and set a time for further discussion.
2. You may need to take a short break and come back to the discussion.
3. You may agree to disagree, if this will not adversely affect future interactions. If you cannot reach an agreement at this time, you may set a time for future discussion.
4. If both of you do not feel that the problem has been adequately addressed, it may be time to approach the Committee on Ministry to request their help.

STAGE 5: Recognize the work the two of you have done together.

Regardless of whether everything is settled, the two of you have each given it ‘your best shot’ and that is an accomplishment! Even though we may not solve every disagreement, at least we have gained a better understanding of what happened, from both perspectives.

Both of you need to try to let go of the conflict. Otherwise, things build up over time.

Conflict happens in human community. It is what we do with it and afterwards that can impede or help build the health of our community.

[Developed by the Unitarian Church of Calgary from the document
‘Interpersonal Conflict Resolution Model’ by the Centre for Conflict Resolution Training, Justice
Institute of BC, 1991]

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Appendix C

***Compliments and Concerns
and Where to Take them***

At the Unitarian Church of Calgary, you may have compliments to offer for things well done and concerns to express about things you wish had gone differently. We want to offer you suggestions about where to go for what.

Compliments that are never heard by those who need to hear them are missed opportunities to offer encouragement and support. They can help people feel good about what they have done and give them feedback on what may be helpful to others. Similarly, new ideas cannot be acted upon if no one knows about them. If you have an idea about some improvement or initiative that our church community might benefit from or profitably undertake, , please talk with someone about it.

Concerns, too, are important ways that we learn about what is valuable to you. However, the expression of concerns, and even conflict, can help each of us, only when it is respectfully engaged in and skillfully managed. Concerns that degenerate into destructive conflict can hurt the fabric of caring community that many come to our congregation to find. So, if you have a concern about some issue or committee, or with the behaviour of someone in the congregation, here are some ways to reduce the hurt to everyone.

Enhance the skills and insights *you* bring to the situation.

- Learn how to express your concerns by expressing yourself using sentences beginning with “I” (“I am upset about what happened the other day” rather than accusing others by stating “You hurt my feelings the other day”). Learn how to use “I” statements about the issue itself, as well as about your own feelings toward it.
- Ask to hear the other side – and be prepared to really listen when you hear the story.
- Wherever possible, look for constructive solutions together with whomever you have the concern about.

Although what follows makes reference to concerns, the same advice applies to those with positive comments.

If it concerns the Minister (or the President)...

- Talk to the Minister (or the President) privately.
- If that doesn't work, talk to a member of the Committee on Ministry.

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If it concerns a Staff Member...

- Talk to the staff member privately.
- If that doesn't work, talk to the chair of the Committee that works with the staff member (for the Administrator, talk to the Administration Committee chair; for the Director of Religious Education, talk to the Religious Education Committee chair; for the Choir Director, talk to the Church Services chair; for the sexton, talk to the Physical Plant Chair).

If it concerns a Committee Member...

- Talk to the Committee member privately.
- If that doesn't work, talk to the Committee chair.
- If that doesn't work, talk to the Board Liaison for that Committee (the liaisons are listed on the inside cover of the Church Directory).

If it concerns a Board Member...

- Talk to the board member privately.
- If that doesn't work, talk to the board President.

If it concerns another member of the congregation...

- Talk to the member privately.
- If that doesn't work, talk to a member of the Committee on Ministry for advice or redirection.

If it concerns a Committee not doing its job...

- Talk to the Committee chair. You may need to try this more than once. Remember that all committee members are volunteers and the chair may not have the time to address your concern as promptly as you may wish.
- Offer to work with the Committee to resolve the issue.
- Don't preempt the Committee's responsibility. If you wonder what their mandate is, you can check any committee's terms of reference in the Church Reference binder in the office.
- If none of this works, talk to the Board Liaison for that Committee.

If it concerns an action taken or not taken by the Board of Trustees...

- Talk to a member of the Board to be sure you understand the Board's position.
- If that isn't enough, outline your concerns in writing to the Board.
- Run for office so you can help to shape church practices in the direction you think appropriate.

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Quite apart from these guidelines, conflict can still happen, or the possibility of serious conflict may arise despite everyone's best efforts to keep it manageable. If this is what you are facing, and you're not sure how to proceed, contact the Committee on Ministry. They will have more current information about a conflict resolution process that is being developed.

[The above was adapted from Beacon Unitarian Church's *Bouquets and Brickbats and Where to Take them* and their source Unitarian Church of Vancouver's Guidelines entitled *Conflict Can Hurt.*]

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Appendix D

**Conflict Management Process for the Unitarian Church of Calgary
---a transitional document---**

An otherwise constructive conflict situation can degenerate into a destructive one unless it is managed properly. The following are steps to follow when conflict occurs within our church community.

Step 1 – Have a face-to-face conversation.

Talk to the person with whom you are having a conflict. If you are not sure how to do this, review the document “Interpersonal Conflict Resolution Model.” Although you may feel anxious talking to someone about conflict; you may find its ideas on how to proceed will give you courage. Remember, if someone had a concern about something you said or did, wouldn’t you prefer they speak to you directly (rather than triangle by talking to someone else)? We encourage people to speak to one another as soon as possible after conflict occurs, so that it doesn’t fester and escalate. Speaking to someone within 2 weeks is a useful guideline. That way, what triggered the conflict may still be in the other person’s short-term memory.

Step 2 – If the conflict isn’t resolved, approach the Committee on Ministry.

Sometimes people aren’t able to resolve difficult issues on their own and need a third person to help facilitate their conversation. Both parties have to agree to this for it to work. If this is the case, then approach the Minister or a member of the Committee on Ministry. The Minister or committee member may recommend that you have a volunteer mediator assist you. The Committee has a list of names of volunteers in the congregation who have mediation training, as well as the name of an organization that offers free mediation to non-profit organizations. If a volunteer mediator cannot be found, the Minister may be asked to play this role. This mediator of the conversation is there to help you hear one another, not to take sides or offer suggestions but to further your conversation with each other. We suggest that this mediated conversation and any subsequent follow-up be done within 30 days of the conflict so that people can then move on to other things.

Step 3 – If the conflict isn’t resolved yet, ask the Board of Trustees to accept a grievance.

If the matter is considered of a serious enough nature that it infringes on the well being of a member or the health of the overall congregation, then lodge a formal, written grievance to the Board of Trustees. The Board will decide if any action is warranted (e.g., to bring in an outside mediator or arbitrator, or in extraordinary circumstances, to strike a 3-person arbitration task force of the Board). All parties must agree with those selected to be on this task force; one of whom will be a Board of Trustees member. This arbitration task force is to hear from all those involved and provide a written decision as to the most appropriate resolution to the conflict (with copies for all involved) within 30 days of receiving the written grievance. Once the Board’s arbitration task force has made its decision, that concludes the conflict management process within the congregation.

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[Please note: if the conflict concerns sexual, physical or verbal harassment, the UCC procedure that deals with harassment is the one to be followed.]

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SECTION D: POLICIES ARE POLICIES APPROVED BY THE ADMINISTRATION
COMMITTEE.

SECTION D-1: THE UCC/CYPT SAFETY POLICY FOR EMPLOYEES WORKING
ALONE

SECTION D-2 UCC PRIVACY POLICY

This page should be followed by the,

**THE UCC/CYPT SAFETY POLICY FOR EMPLOYEES WORKING ALONE, as found
in the UUC Property Committee /Reference Manual**

Format modified by Bob Spinney, April 28, 2004

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FINAL Version

THE UCC/CYPT SAFETY POLICY FOR EMPLOYEES WORKING ALONE

Basis: Working Alone Safely - A Guide for Employers and Employees

EMPLOYEE TRAINING

Hazards associated with working in isolation away from public view:

HAZARDS	REMEDIAL ACTION
a) Prowlers	Keep doors locked
b) Falling	Minimize tripping hazards by good housekeeping Take care on stairways Carry a portable phone to summon help
c) Objects falling upon	Practice good office safety - neatness Open only one file drawer at a time

SAFEWORK PROCEDURE

HAZARDS	REMEDIAL ACTION
a) Confronted by a prowler	Be non-confrontational Politely challenge his/her justification for being in the church. If the prowler is aggressive, let him/her have their way then quietly depart to phone the police. Carry a portable/cell phone Do site check before and after work

SITE SECURITY

Site safety items for employees working alone to be well maintained:

- a) Intercoms/door bells at main entrances.
- b) Ground level windows blocked or equipped with safety bars and screens.
- c) Self locking main entranceway doors.
- d) Newly installed high security doors.
- e) Fire extinguishers professionally maintained.
- f) Exit lights
- g) Emergency lights
- h) Flashlight in office
- i) Portable/cell phones
- j) UCC Administration office mirror to scan main entranceway.
- k) Good entranceway lights.
- l) The Sexton does a regular, evening site safety/security check.

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m) Stairwells are well lit.

There is no security system, no video surveillance, no remote alarms, no security patrol nor are any contemplated as there is nothing in the church history that suggests they could be justified.

COMMUNICATION

Effective means of communication for employees to contact persons capable of responding as needed.

- a) There are three telephone lines into the building.
- b) The UCC Administrator has a portable phone. The CYPT Executive Director has a cell phone.
- c) Co-workers/church members visit the building regularly and there is intensive phone traffic. It is estimated that the occurrence of no church member visits during office hours would be less than 5 of the time.
- d) The UCC Administrator has a "Key Person" call list available.

This Policy was Approved by the Administration Committee on Wednesday, November 28, 2001.

SECTION D – 2 Unitarian Church of Calgary Privacy Policy – Final Version – Revised Oct 7, 2009

At the Unitarian Church of Calgary, we keep personal data so that we may conduct our shared ministry effectively and respectfully. In the following sections we describe the types of data we collect, why we need the data, how we store the data, and how we protect it.

General Personal Data

We collect General Personal Data so that we may carry on the operations of the church. For example, we

- create a directory of contact information for members, friends and their children
- create listings of voting members for general meetings
- create class lists for Religious Education classes, which for safety include allergies
- create mailing labels for church newsletters and other mailings
- maintain an email list for recipients of email bulletins and the Quest by email
- record the dates when individuals passed police checks, as they need to be re-checked periodically

General Personal Data includes name and address data, children's birthdates and allergies, membership status, photographs, emergency contact data, committee membership, activities, skills, and other such information relating to families and family members in our congregation. General Personal Data is shared outside the congregation when church members' name and address information is passed on to the Canadian Unitarian Council (CUC) for its operations. The CUC does not share this information with outside bodies.

To protect the privacy of our members and friends, General Personal Data is not published on the church's website unless contact information is referenced in the Quest (with permission). People can confirm their General Personal Data, and can specify that certain parts of their data not be published in the Church Directory. Only contact information is published in the directory. Other information, such as ages and medical information, is used only by staff and committee members who have a need to see it. The Directory is published only on paper, not electronically, and is made available only to staff, members and friends.

This data is stored in the Church Information Management System, which uses PowerChurch software. The Administration committee implements decisions on who can access General Personal Data – the list may be seen in Appendix A of this policy. We use the access control system, with password protection, within PowerChurch to ensure that only people who have been authorized to read and change this data are allowed to do so. The relevant Committee chair decides who can access the data.

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Personal Financial Data

We keep Personal Financial Data so that we may manage the finances of the church. For example, we

- collect and maintain information on pledges, for budgeting
- collect and maintain information on donations, to create charitable donations receipts
- send letters to pledgers showing the donations they have made against their pledges
- retain information about donors' bank accounts, for preauthorized payment of donations

Access to this information is tightly controlled, because of its sensitivity.

This data is stored on paper and in the Church Information Management System, which uses PowerChurch software. We use the access control system within PowerChurch to ensure that only people with a need to know, and who have been authorized to read and change this data, are allowed to do so.

Pledge data is collected by the canvass committee and worked on by them during the canvass. When the canvass is complete, pledge data is entered into PowerChurch. The chair of the canvass committee decides who will have access to pledge data, basing the decision on need to know.

Paper documents containing Personal Financial Data are stored in the Treasurer's locked storage at the church.

The Administration committee implements decisions on who can access Personal Financial Data (both in electronic form and in locked storage) – the list may be seen in Appendix A of this policy.

Confidential Personal Data

We keep Confidential Personal Data so that we may manage our staff and protect our congregation. For example, we

- maintain staff appraisal data
- record people, if any, who have NOT passed police checks

Confidential Personal Data is kept only on paper, in locked storage.

Minister's Files

The Minister keeps notes and other information regarding congregants and staff in his/her files. S/he is bound by professional standards to protect this information, but the present policy does not address this information.

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Appendix A

At the date of issuance of this policy, here are the lists of positions having access to General Personal Data and Personal financial Data. Current lists can be obtained from the Administration Committee.

The following positions have access to **General Personal Data**

	Position	Incumbent	Access
Administration			
	Administrator	Elsie Sinha-Roy	Read, change
	Treasurer	Bob Pond	Read, change
	Receiver	Bob Spinney	Read, change
	Accountant	Bob Willson	Read, change
	Bookkeeper	Charles Mak	Read
	System administrator	John Michell	Full access to CIMS
	System administrator	Jeff Webber	Full access to CIMS
CC	Caring Community Committee	Not assigned	Read
Membership	Membership Committee	Not assigned	Read, change
Minister	Minister	Meg Roberts	Read, change
Others	Members and Friends of the church		Paper directories only
RE	Director of Religious Education	Sandy Cooper	Read, change
RE	Youth coordinator	Erin Stjarne	Read, change

The following positions have access to **Personal Financial Data**

Position	Incumbent	Access
Treasurer	Bob Pond	Read, change
Receiver	Bob Spinney	Read, change
Accountant	Bob Willson	Read, change
Bookkeeper	Charles Mak	Read, change
Administrator	Elsie Sinha-Roy	Paper for transfer to locked storage
Canvass Committee	several	Canvass data during collection
System administrator	John Michell	Full access to CIMS
System administrator	Jeff Webber	Full access to CIMS

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SECTION E-1: POLICY ON RETENTION OF CHURCH DOCUMENTS

UNITARIAN CHURCH OF CALGARY
HISTORY AND ARCHIVES COMMITTEE
ARCHIVES RETENTION POLICY

1. All recorded information, in all media, that is created or accumulated as a consequence of any activity of the Church, is considered to be property of the Church. This includes the Constitution, By-laws, Membership Book, minutes and correspondence of the Board of Trustees and of all committees, and office records of the Church administration. However, records created or accumulated by the Minister in the course of his or her duties are his or her private records.
2. All records are to be deposited into the custody of the Church Archivist, and will be retained on the Church premises.
3. The Church Archivist may destroy materials, if, in his or her opinion, they are (a) duplicates of existing records, (b) not created by the Church, or (c) inconsequential.
4. After five (5) years from the date of creation of records, the Church Archivist may donate them to the Glenbow-Alberta Institute, which is the Church's designated archival repository.
5. Records of a confidential nature may include (a) records pertaining to the relationship between the Church and its employees, (b) records of financial contributions to the Church, and (c) any other records which may compromise the personal privacy of individuals. Precautions will be taken to ensure that such records will not be disclosed in such a manner that individual privacy is compromised.

February, 1996

Revised by Eric Leavitt on November 7, 2005.

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SECTION F-1: ON BEING AN HONOUR SOCIETY

The Unitarian Church of Calgary has a Policy that we will continue to be an Honour Society. This means we will pay our dues to the CUC in full, and on time, each year. There does not appear to be any written record of this, but it has been repeated at a number of Budget Meetings.

Format and file reference revised on April 28, 2004 by Bob Spinney