

Policy and Procedure Document **~~Update May 2020~~** **by Congregational Vote**



Temporary changes may be applied to the document by Church Leadership given that the congregation is notified and the change is approved at the next congregational meeting.

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Overview

Policy and Procedures are a set of principles, rules, and guidelines formulated and adopted by Groveland Congregational Church used for organized and effective Ministry. This document is designed to influence and determine all major decisions and actions, and all activities take place within the boundaries set by them.

Procedures are the specific methods employed to express policies in action in day-to-day operations of the organization. Together, policies and procedures ensure that GCC lives within our Mission Statement to the best of our ability.

Page Format:

Title of Policy From Table of Contents

Policy...

Value and theological principles guiding the work.

Procedures

How to do it. The practical.

Passwords should be included in the electronic copy of this document, but are highlighted in black so that they do not appear in printed copy. Electronic copies shared must be protected so that contents are secure.

Absentee Ballots

This Policy and Procedure was given temporary approval by The Leadership and should be approved by the congregation in May of 2020.

Policy

Bylaws Article VI #5 highlights the circumstances and requirements of an absentee ballot. It is important that all Stewards have the opportunity to cast their ballot and engage in full and active lives.

Procedure

When the Warrant is created and presented to the congregation the Office Administrator shall prepare an absentee ballot to share by request. Absentee Ballots must be completed and submitted by hand, and may not be distributed electronically.

Sample Absentee Ballot

Please complete the following in pen and return to the Clerk before the start of the Congregational Meeting

Member Name _____ Today's Date: _____

Initial Each of the following:

My ballot will be voided if the motion is amended in any way: _____

My ballot will not be counted to determine a quorum: _____

My ballot can not be counted for items not specifically written on the warrant: _____

My ballot must be completely readable to be counted: _____

Warrant Articles:

Article 1: To see if the Church will vote to approve.....

My Vote Yes: _____ No: _____

Article 2: To see if the Church will vote to approve.....

My Vote Yes: _____ No: _____

Article 3: To see if the Church will vote to approve.....

My Vote Yes: _____ No: _____

I attest I am a Steward of Groveland Congregational Church and this ballot is given of my own free will: Signature: _____

I, _____ completed this on behalf of _____, and attest to its accuracy:

Signature: _____

Building Usage

Policy

It is the policy of Groveland Congregational Church to allow various groups or individuals to use the church campus space for events following the regulations below.

Rental/Use of Facilities (January 2000)

Application Form – All non-church-related organizations and/or any individual wishing to use the facilities of the church for special events must file an application form with the Church Office

Scheduling – All meetings and events are to be posted on the church calendar by the Church Office only.

Restrictions – Organizations are limited to the use of **only** the room(s) assigned.

Smoking – Fire laws are to be observed. There will be **NO SMOKING** anywhere on the campus per the church Tobacco Policy located elsewhere in this document.

Parking – Parking is at the rear of the building. **NO PARKING** is permitted anywhere in the driveway (fire lane).

Food – Preparation is to be confined to either of the kitchens and consumption confined to Fellowship Hall or Memorial Hall. Kitchen(s) should be left clean and orderly. No alcoholic beverages are allowed on the premises.

Responsibility – Heads of organizations, whether church or non-church, will be held responsible for the care of the facilities, including breakage. Children are to be properly supervised by adults at all times.

Attachments to Walls – Nothing may be attached to walls without prior consent.

Use of Church Equipment – The set-up of any church equipment by non-church organizations is to be supervised or cleared by the Sexton. Any equipment brought in for use at an event shall be removed promptly thereafter.

Donation Schedule for Use of Facilities (current fees below)

Sanctuary for Weddings/Funerals	NO CHARGE members	\$150.00
Fellowship Hall/kitchen	NO CHARGE members	\$125.00
Memorial (Parish) Hall	NO CHARGE members	\$100.00
Other rooms (at the discretion of Leadership)	NO CHARGE members	Variable

*Immediate family members are defined as those individuals living in the same household as, and/or the offspring of, a contributing active member.

1. Church-sponsored organizations are not required to pay fees of any kind for their special events.
2. Individuals and/or private organizations must pay a sexton's fee of \$50 for all events and building usage.

NOTE: All fees are to be paid in advance.

Procedure

Anyone wishing to use space within the church facility must coordinate this usage with the church office.

Not for Profit organizations Use of Facilities - needs to be addressed

Alcohol Use

Policy: Per the Board of Trustees vote on 12/10/2009, no alcoholic beverages are allowed in any buildings or grounds attached to the church. This policy excludes the building and grounds of the parsonage.

Tobacco Use

Policy: On May 20, 2018, GCC leadership implemented a Tobacco-Free Church Grounds Policy for the overall health and welfare of its members. Tobacco use will not be permitted within church buildings or anywhere on church grounds. This policy applies to all employees, members, and visitors attending events at the church.

Covenants

Communication Covenant:

If you have a problem with me, come to me. If I have a problem with you, I will come to you. If someone has a problem with me and comes to you, send them to me. I will do the same for you. If someone will not come to me, then say to them “let's go together” and see that person. I will do the same for you.

Rather, speaking the truth in love, we are to grow up in every way into him who is the head, into Christ from whom the whole body, joined and knit together by every joint with which it is supplied, when each part is working properly, makes bodily growth and up-builds itself in love. -Ephesians 4:15-16

Be careful how you interpret me. I will be careful how I interpret you.

Make your ear attentive to wisdom and incline your heart to understanding...Proverbs 2:2

I will keep confidences. A confidence is not a secret, it's the sharing of information only with people who need it. I will not read unsigned letters or notes, nor listen to gossip. I will take ownership of information I share.

*For everything there is a season, and a time for every matter under heaven.....
a time to tear, and a time to sew; a time to keep silence, and a time to speak...Ecclesiastes
3:1+7*

I will only speak from my personal experiences. As a forgiven people, I will choose to forgive others.

Be kind to one another, tenderhearted, forgiving one another, as God in Christ forgave you...Ephesians 4:32

Here we promise to care about each other.

*For just as the body is one and has many members, and all the members of the body, though many, are one body, so it is with Christ. For in the one Spirit we were all baptized into one body—Jews or Greeks, slaves or free—and we were all made to drink of one Spirit....1
Corinthians 12*

We, the people of Groveland Congregational Church promise to live these words to the best of our ability; adopted by Congregational Vote in March 2019.

Open and Affirming Covenant

For I was hungry and you gave me food, I was thirsty and you gave me drink

I was lost and you comforted me

I was a stranger and you welcomed me

I looked and sounded different and you invited me in

I was struggling and you supported me

I was naked and you clothed me,

I needed a safe harbor and you sheltered me

I was sick and you visited me,

I had a story and you listened

I was in prison and you came to me.

I needed justice and you stood with me.

We the people of Groveland Congregational Church pledge to be a community that starts from a place of love, that joyfully welcomes all people into the full life and ministry of this church. We affirm that each individual is a beloved child of God, and recognize that we are called to be like one body with many members. We promise to embrace you in your joys and sorrows as we walk together in action and faith. Let us journey in the path of Christ's footsteps with others of every race, ethnicity, creed, class, culture, age, gender, family structure, physical or mental ability, sexual orientation, gender identity, and gender expression.

...just as you did it to one of the least of these who are members of my family, you did it to me.'

Phoenix Rising and GCC Covenant

(to be approved by the congregation on June 7, 2020)

Groveland Congregational Church and Phoenix Rising are both members of the United Church of Christ and therein part of the same body of Christ; recognizing the same call to testify to the deeds of Jesus Christ, to sing to the God who calls the worlds into being and share the one whose love will to save all people from aimlessness and sin. Together we hear God's call to partner with one another so as to strengthen our individual and mutual ministries.

Groveland Congregational Church will do the following...

1. Provide Phoenix Rising use of the Fellowship Hall and Kitchen weekly on Sunday Nights from 4:00pm to 9:00pm.
2. Provide meeting space for 2 support groups during the week.
3. Provide additional meeting space as needed.
4. Pray for the wellbeing of Phoenix Rising.
5. Offer hospitality and a safe place.
6. Proudly display outdoor signs that share Phoenix Rising's presence, additionally mount a TV in Fellowship Hall above the piano and hang the "Cracked Pot Cafe" sign above the service access between the hall and kitchen.
7. Provide storage space for worship and sound equipment.
8. Occasional access to the copier as needed, recognizing that Phoenix Rising has their own equipment for regular use.
9. Provide 5 to 10 keys for building access, each signed out to individuals.
10. Provide a communication box in the office.

Phoenix Rising will do the following....

1. Place 60 chairs in the care of Groveland Congregational Church.
2. Give 9% + (1% for Sundry) of their monthly donated income (Excluding any grants, awards, or bequests) as a donation to Groveland Congregational Church.
3. Pray for the wellbeing of Groveland Congregational Church.
4. Allow Groveland Congregational Church to use the PA system and screens.
5. Label any items that are left in the refrigerator for their own use.
6. Move any furniture needed to use the room and return it after use, and clean up.
7. Feel free to use any dishes, mugs, plates, utensils, or kitchen equipment and clean after use.
8. Share any concerns about building or equipment safety or items in need of repair.

Together we acknowledge

1. ***☆ There are numerous opportunities for us to nurture and support one another and that we are foolish if we fail to accept these gifts from God. Particularly as our world is filled with more division than ever before, and our call to lead our nation and planet towards restoration is louder than our ears can bear, we pray this partnership will lead us into new opportunities to our repair the brokenness of our world. ☆***

2. All space usage flexes for the 7 days before Snowflake Fair the second Friday and Saturday of November.
3. That conflicts will arise within our relationship, and the below identified leadership will promptly meet to openly discuss and resolve problems. This team will meet no less than every quarter.
 - a. A designated team for this purpose
 1. Pastor Chris Hart 774-318-6006
 2. Pastor Donna Spencer-Collins 781-910-0284
 3. Jen Petersen (Not required to attend quarterly meeting) 978-372-3463
 4. Shawna Kelley (Not required to attend quarterly meeting) 978-361-0433
 5. Ron Mertens 978-204-6578
 6. Bob Hill 781-244-4095
4. That the building's handicap accessibility is not adequate for our ministries.
5. All building usage must be coordinated with the Groveland Congregational Church Office Administrator.
6. That this covenant may be modified as mutually agreed upon by our respective leaderships and should be reviewed yearly. Upon review the covenant will be enacted within the context of shared worship experience. Our shared Worship Experience will normally be in November
7. As members of the same body of Christ, should members of Phoenix Rising need or want to rent or use space for personal use at Groveland Congregational Church they would be offered the member rates. IE Weddings, Funerals, Hall Rental.
 - . The Pastor of Phoenix Rising will have access to the church (including the Sanctuary) for ecclesiastical events outside of normal building usage (coordinated via the GCC office Administrator). There will be no additional charges beyond the attached building usage fees (Wedding & Funerals). No other clergy beyond the pastors of Phoenix Rising and Groveland Congregational are authorized for ecclesiastical events on the property without direct invitation of the Pastor of Groveland Congregational Church.
8. Though members of the same body we are each different parts therefore each will maintain our separate identities, bylaws, tax exemptions, and insurances. Additionally Phoenix rising will keep a PO box for mail. PO Box 748 Haverhill, MA 01831-0948

Employment/Human Resources

Job Descriptions

Office Administrator

The role of Office Administrator is to provide a multitude of supports to both the Pastor of the church and the membership. The church Office Administrator role is a part time position accountable to the Pastor for daily supervision and to the Board of Trustees.

Responsibilities and Duties:

Schedule: Maintain regular office hours as mutually agreed upon by the Pastor, the Church Leadership Team and the Administrator to ensure that all necessary duties can be accomplished.

Pastoral Support:

- Maintain Pastor's appointment and schedule calendar, if requested
- Prepare Pastor's correspondence, if requested
- Return calls for the Pastor, if requested
- Assist Pastor as needed
- Assist in planning of baptism – provide shawl, rose and certificate. Relay information to the clerk.
- Assist Pastor on any projects as requested.

Communications:

- Weekly Sunday Worship Program/Bulletin- rough draft from template from Pastor, using components provided by pastor, music staff and relevant church leaders. Edit according to Pastor's corrections, print, copy, fold and stuff as required.
- Bell- components provided by pastor and church leaders, and from church calendars. Compile, edit, proof, format, print, fold, staple, label and mail out quarterly.
- Website- update using content provided by various teams, Pastor, calendars and other the church organizations and members
- 'Church Switchboard': facilitate better communication intra-church by making groups/individuals aware of overlapping tasks/functions/events.
- Send out/ receive correspondence as requested or required; channel to appropriate people; file as necessary.
- Post board and committee minutes on the church's bulletin board and upload onto Google Drive. Reach out to various groups for minutes.
- Maintain social media accounts to promote church activities.

Calendar/Facility Use:

- Maintain unified church calendar to minimize usage conflicts
- Inform leadership of church usage requests and keep them apprised of actual building usage
- Keep records of those using building
- Ensure that building users are aware of church use policies/procedures (see Building Use Policy located elsewhere in this document)
- Hand out/receive keys and maintain a record of owners (see Key Receipt Policy located elsewhere in this document)
- Update church calendar on Google calendar.

Record Keeping

- Receive and file all essential church records: i.e. minutes, warrants, etc.
- Follow Historians' guidelines in vault for long-term storage
- Maintain active, as up-to-date as possible database of church members, boards, officers, groups, committees, coordinating work with church clerk.
- Receive, copy-edit, prepare for printing the Annual Report. Distribute as requested.
- Maintain an indexed ring binder that contains the latest church policies and procedures, job descriptions, forms etc.

Public Face of Church

- Receive visitors/phone calls with courtesy and sympathy. Route to Pastor/staff member/ church leader where relevant; give directions; change message on office answering service; take reservations for church events.
- Refer aid applicants as appropriate. Liaise with Missions Team to be the 'front line' aid person, and with the pastor.

Team Support

- Provide minutes or agendas and any other requested documentation for meetings.
- Maintain records of minutes in a central location.
- Prepare mailings (labels, stamps, envelopes, supporting documentation, letters) for teams as requested.
- Locate and order supplies as requested by teams or groups.
- Assist teams with any photocopying as requested.
- Assist Faith Formation Team or employees in maintaining a database of Sunday School participants, maintain records for FF (attendance, registration), prepare mailings for FF when necessary
- Support teams with special projects as needed (church directory project, annual membership review, any Capital Campaign projects, Snowflake Fair

clerical support, Taizé Services, etc.). This may involve handling press releases, typing, mailings, and/or supply ordering.

Administrative

- Keep track of and order all office supplies (paper, stamps, UCC supplies, etc.) Order any items church members request.
- Maintain all office equipment (toner, repairs)
- Interact with various vendors or inspectors: fire extinguishers, AED, boilers, health inspector. Contact maintenance as requested by B and G (plowing, appliances, etc)

Human Resources

- maintain records for all employees
- payroll
- handle workers comp claims
- interact with The Pension Boards
- maintain all files as required by law
- Make sure labor law posters are up to date

Safe Church

- Maintain all safe church policies in central location.
- Maintain all records for safe church (CORI forms, permissions slips, trip request forms, driver forms).
- Assist members in filing CORI forms

Marketing

- Maintain websites with current information
- Social media - reach out to community with opportunities at GCC
- Send press releases to local papers for events at church (Taize, Snowflake Fair, Faith Circle fundraisers, other events)
- Seek out other opportunities for online promotion of GCC,
- Bell - create newsletter articles in absence of strong board or committee.

Membership

- Maintain current address and telephone information for members and friends of the church.
- Stay current on status of membership-health, attendance, deaths, etc. and report changes to Deacons and Team Spirit for prayer.
- Maintain prayer list for church.

Requirements:

Clerical and Office Skills: Typing, word-processing, filing, maintaining calendars, sorting mail, maintaining records.

Organizational Skills: This includes skills related to planning, motivating, decision-making, managing, delegating, and administering. These skills are often associated with executive positions. However church office personnel need these skills for two reasons:

- They often work with and recruit volunteers
- Many times, the only person at the church is someone in the office.

Ministry Skills: Anyone who works in a church must be able to relate to people at some level of spirituality. The telephone is most often answered first in the church office, and so office administrators become part of the "pastoral" and/or "counseling" team.

Communication Skills: both verbal and writing communication skills are necessary. Related tasks include publishing a newsletter, preparing weekly bulletins, handling phone calls, composing correspondence, editing, creating social media content and responding with verbal effectiveness to other staff, members of the congregation, and the wider community.

Human Relations Skills: this position interacts with people representing many different needs. Therefore intuition, sensitivity, the ability for reflective listening, maintaining confidentiality of all information, trustworthy of confidences, relating well to people, maintaining high moral standards, commitment to serve God's people in love, ability to organize and administer information, ability to follow through with details, and patience are skills which are necessary.

Technical Skills: Office personnel must be able to use an increasing array of equipment. If sophisticated equipment does fail, office personnel must be able to make arrangements for repairs within the Buildings and Grounds guidelines.

Music Director - still need

Adult Choir Director - still need

Youth Choir Director

Duties:

- Conduct weekly rehearsal for the Youth Choir: grades 3-8
- Prepare the Youth Choir to sing during morning worship service once a month (generally the 3rd Sunday of each month) and during special/holiday worship services.
- Coordinate rehearsal and singing schedule with the Music Director and Senior Choir Director.
- Work under direction of the Music Committee to prepare for special events and worship services.

- Review and select liturgically appropriate music for the choir's ability.
- Organize and maintain a youth music library.
- Report to Music Committee
- Encourage membership in choir through marketing information (i.e. Website, emails, phone calls, worship, church newsletter, bulletin, annual summer mailing).

Requirements:

- Previous choir directing experience preferred.
- Ability to play piano and/or musical instruments for accompaniment helpful.
- Applicants will be CORled (i.e. background check)
- Agree to and comply with the Groveland Congregational Church UCC Personnel Policies & procedures.
- This is a salaried position (\$1,000-\$1,200 annually, negotiable) paid monthly September-May.

Chime Choir Director

Duties:

- Conduct Tone Chime Choir in weekly rehearsals.
- Prepare choir to play during morning worship services periodically throughout the year (Coordinating with the Music Director and Sr. Choir Director).
- Work under the direction of the Music Committee to prepare for special events and worship services.
- Review and select liturgically appropriate music for the choir's ability.
- Organize and maintain the Tone Chime library.

Requirements:

- Previous ringing experience preferred
- Agree to and comply with the Groveland Congregational Church UCC Personnel Policies & Procedures.
- This is a salaried position, to be paid monthly, September – June.

Sextons - still need

Personnel Policies

Still need

Payroll

Still need

Elected Position Descriptions

Church Clerk - still need

Financial Secretary

- Receive the Sunday, special service offerings, church fair income- all church income save for Perry Park Preschool and invested funds.
- Prepare checks and cash for bank deposit; record pledges and all other forms of income save the two previously mentioned; report deposits, broken down into main accounts, to Treasurer.
- Prepare monthly/weekly income report for Treasurer.
- Prepare and send out pledge statements as needed.
- Record donations of memorial funds; send out thank-you letters.
- Work with stewardship team: provide essentials for mailing; receive and record new pledges and update committee as requested.
- Provide detailed analysis of giving to the Stewardship team and Trustees as requested.
- Serve on the budget team.

Moderator - still need

Treasurer - still need

Gift Acceptance Policy

Trustees voted in 2012. Need draft.

Investment Policy

GROVELAND CONGREGATIONAL CHURCH UNITED CHURCH OF CHRIST

Groveland, Massachusetts

INVESTMENT POLICY

The purpose of this policy is to set forth guidelines for the management of Endowment Funds, as defined below, of the Groveland Congregational Church "the Church". The primary investment objective for the management of these gifts is to maintain and grow the purchasing power of the principal on a long-term basis while providing income in such amounts as may be determined on an annual basis by the Investment Committee and Board of Trustees. The Investment Committee will communicate the Church's income needs to the Investment Advisor. Should income needs exceed the amount that can be reasonably generated by the investments, the Board of Trustees may authorize the Investment Committee to use a "total return" concept, whereby all income, as well as a portion of capital gains can be utilized for budgeting purposes. "Total Return" will be used only in special circumstances and only if the Investment Committee is unanimous in the need to do so. Board of Trustee authorization to utilize the "Total Return Approach" will automatically expire at the end of each calendar year in which Board of Trustee authorization is given.

Definitions

Endowment funds -are gifts and bequests to the church whose principal is intended to be preserved indefinitely or until the occurrence of a specific event. Endowment Funds may consist of Restricted Funds and Unrestricted Funds. The Endowment Funds shall be pooled for investment purposes, except when a donor's written instructions require separate investment of an asset. Assets will be invested according to the Investment Committee's recommendation and this Investment Policy. The Statement of Investment Policy, United Church Foundation, Inc. shall govern any portion of the Endowment Funds that are invested with the United Church Foundation, Inc., which is incorporated by reference herein.

Restricted Funds are funds received from a donor and which either the donor or the church has placed restrictions on the use of principal and income. Such restrictions shall be adhered to in the use of any income and/or principal. The Maddock Fund is a restricted fund. A maximum of 80% of the interest from Maddock Funds can be used for scholarship. The Maddock Fund itself cannot inure to the benefit of Groveland Congregational Church.

Unrestricted Funds are funds received from a donor and which neither the donor nor Church has placed any restrictions for the use of either principal or income. The income from these funds shall accrue to the general funds of the church as determined by the Board of Trustees and the annual budget process. The guidelines and instructions herein are intended to give flexibility to the donors and to the custodian in establishing a variety of uses. The Groveland Church Fund is for GCC use.

Income is the interest and dividends paid from investments of principal in accordance with this policy.

Principal is the amount of money to be invested which then generates income and represents the

"historic dollar value" as defined in the Massachusetts General Laws, Chapter 180A. Principal includes (a) any unrealized appreciation or depreciation in the market value of the assets of an endowment fund over the historic dollar value of the endowment fund, and (b) any realized gain or loss on the disposition of money invested.

Appreciation is the increase in the value of principal realized through investing in capital assets such as stock in a company whose management is able to increase the worth of the company for the investor stockholders.

Depreciation is the decrease in the value of the principal realized through investing in capital assets.

INVESTMENT GOALS AND OBJECTIVES

The **Investment Goals and Objectives** shall be:

- ✓ Investment of principal in order to satisfy the objective of each fund as specified by the donor.
- ✓ Safety of principal
- ✓ Diversification of Risk
- ✓ Satisfy the current and long-term financial needs of the church

INVESTMENT GUIDELINES

- ✓ **Management - The Endowment Funds** will be managed in manner consistent with prudent investing for endowment funds. Endowment Funds may be managed by an Independent Investment Manager, which must be approved by the Investment Committee and Board of Trustees.
- ✓ **Asset Allocation** - The Investment Manager is authorized to utilize portfolios of equity securities (common stocks, preferred stocks, and convertible securities), fixed income securities, and short-term (cash) investments. The targets and ranges are as follows:

Equity	Target 55%	Range 40-60%	Benchmark S&P 500 Stock Index
Fixed Income	40%	30-50% 2-20%	Barclay's Government/Credit Index for Fixed Income.
Cash	5%		90 Day US Treasury bill
Total	100%		

- ✓ **Diversification - Endowment Funds** will be diversified both by asset class (equities, fixed income securities, cash equivalents) and within asset classes to have reasonable assurance that no single security or class of securities will have a disproportionate impact on the total **Endowment Funds**. Investments in the total securities position (debt and equity) of any one company will be limited at the time of purchase to 10% of the market value of the **Endowment Funds** when the security is purchased. No single major industry shall represent more than 10% of the market value of the **Endowment Funds**.

- ✓ **Performance Measurement** - The investment performance of the **Endowment Funds** will be expected to earn a total rate of return net of fees in excess of the Benchmark indices **identified** above over a complete market cycle, which is customarily three to five years. The Investment Committee does not wish to have its Investment Manager take undo risk in order to meet this objective on an annual basis.
- ✓ **Asset Quality**
 - ✓ Common Stock — Must be listed on a recognized stock exchange.
 - ✓ Fixed Income Securities - The quality rating of the bonds and notes must be A or better as rated by Standard & Poor's or Moody's, with maturities of ten years or less.
 - ✓ Short-term reserves (Cash) - Money market funds or Treasury Bills must be used as investments for short-term reserves.
 - ✓ International Investments — constrained by the above limits. Mutual funds may be used for diversification at the Investment Manager's discretion and limited to 10% of portfolio.
- ✓ **Marketability** - Holdings should be of sufficient size and held in issues that are traded actively to facilitate transactions at minimal costs.

Prohibited Investments - Investment Managers shall have full discretionary authority in the selection and retention of investments, subject to law and this investment policy as it may be amended from time to time. In addition, the following investments will not be used without the express written approval of the Board of Trustees:

- a. Direct mortgages or real estate investment trusts
- b. Commodities
- c. Short sales and margin purchases
- d. Oil, gas, mineral and other types of leases
- e. Lettered, legended, unregistered or other restricted stock
- f. Speculative use of futures or options
- g. Derivative securities
- h. Options other than the writing of covered calls
- i. Transferable certificates of participation in business trusts and limited partnerships.
- j. Securities of the agent's firm, affiliates, or parent company

Total Return-Total Return is defined as follows.

- ✓ **The expenditure from Unrestricted Endowment funds is allowed wherein a percentage of all income, as well as a portion of capital gains can be utilized for budgeting purposes. The spending policy percentage is reviewed and authorized by Trustees annually.**
- ✓ **If authorized by Trustees and Investment Committee, the funds may be withdrawn in twelve separate monthly transfers. This amount is a current estimate only for management purposes, and the actual amount may be altered each year through the church's annual budgetary process without revision of this policy.**
- ✓ **Large unscheduled withdrawals from the funds are not anticipated, but could occur under unique or unforeseen circumstances by vote of the Board of Trustees.**

AUTHORITY AND APPROVAL

This investment policy shall be reviewed by the Investment Committee annually and approved by the Board of Trustees.

Approved by the Board of Trustees: January 14, 2016

Marketing and Social Media Policy

Still need

Membership/Partnership

Membership Status

Policy

Article IV in the bylaws outlines Membership. In 2019 we created 2 types of membership. We want all the people of our community to feel like this is their church. We strive to make sure that the terms in the bylaws “Stewards” and “Partners” are never a barrier to relationship with Groveland Congregational Church.

Procedures

The church has two types of membership, both are vital. Fees for church usage and services will be set the same for Stewards and Partners. Additionally the following sample letter is provided to explain the status change. It is recommended that this letter be sent annually to all Members.

(Sample Letter)

Greeting Friends,

The Groveland Congregational Church, maintains a historic and deeply engaged history in our community and we thank you for your participation in that ongoing legacy. As you may or may not know we have two designations that describe formal membership each having their own responsibilities; both are vital. These designations are needed for our legal protection, and the health of our organization.

Steward Duties (at least three of the following)

Pray for the well being of the Church

Attend Church Services

Tithe or provide financial support regularly

Share in the work of the church

Attend and Vote at the annual meeting and or special meetings

Partner Duties (at least two of the following)

Pray for the well being of the church

Occasional attendance

Claim Groveland Congregational of your Church

Give of your talents and treasures

Some church services (weddings, funerals, and building usage) carry a structured fee; Stewards and Partners are both vital membership titles and thus there is no difference in the fee structure for these designations. We have classified your status as a Partner. If we have made a mistake please contact us at your earliest convenience.

Missional Organizations

Faith Circle - still need

Scouting/BSA

The Scouting program is delivered through civic, faith-based, and educational organizations called chartered organizations, which operate Scouting units to deliver the programs to their youth members, as well as the community at large. Responsibilities of chartered organizations include providing quality leadership and adequate meeting facilities and for the Scouting unit, as well as appointing a chartered organization representative to coordinate all Scouting unit operations within the organization.

As an organization whose objectives, mission, and methodologies are compatible with Scouts BSA, Groveland Congregational Church holds the charter for Troop 87, Pack 113 and Venture Crew 113 in relationship to the Spirit of Adventure Council. These charters allow GCC to operate the Scouting program and provides them with needed literature, training, support materials, and direct professional service.

Every year the Church appoints a volunteer as its Chartered Organization Representative to represent it as a member of the district committee and as a voting member of the local council. The primary responsibilities of the Chartered Organization Representative are to help units be successful and to provide coordination between the chartered organization and Scouts BSA.

Our Pastor serves as the “Head of the Chartering Organization” sometimes called the “Scout Executive” and has the responsibility to support the Charter Representative as well as the Pack and Troop. There are position specific trainings available through Scouts BSA. The Pastor should oversee the work of the Charter Rep and maintain a relationship with scout leadership.

Yoga needs more

Snowflake Fair needs more

Thrift Shop needs more

Perry Park Preschool

Perry Park Preschool is an historic and vital mission founded and maintained by Groveland Congregational Church. The Director of Perry Park Preschool shall provide a set of Policies and Procedures that shall be stored in the Perry Park Preschool Director’s office. The Perry Park Preschool Policy and Procedures Document specific responsibilities and duties of the leadership related to the daily operation of Perry Park Preschool and shall be reviewed annually by the leadership with the Director.

Office Administration

Policy:

It is the duty of the Office Administrator to manage the business operations of the church. Duties include office management (mail, telephone, email), communicating with members of the church as well as the greater community (via newsletter, social media and the weekly worship program), maintaining church records and personnel files, ordering and stocking office supplies, maintaining the church calendar, keeping computer files backed up and maintaining office equipment and assisting with financial management of the church.

Procedures:

Mail

Incoming mail generally falls into the following categories:

- bills →bookkeeper mailbox
- donation or other type of income→bookkeeper via the locked wall safe in the middle office
- solicitation for support→Minister of Outreach mailbox
- anything specifically addressed to the Pastor should go into his/her mailbox
- anything aimed at youth (Sunday School, youth group, VBS, etc) → Minister of Faith Formation or Youth Coordinator mailbox

Telephone

The church telephone number is 978-372-3463. Call that number to retrieve messages by using the code xxxxxx. You can also use this system to update the outgoing message.

The Thrift Shop phone number is 978-372-6617.

Perry Park Preschool phone number is 978-374-6678.

Email

The church's email address is gccucc@gmail.com. It is set up currently on Microsoft Outlook. To access the church's google account use the email and password xxxxxxxx.

Church Communication

The Bell - currently the church's newsletter, The Bell, is published on a quarterly basis in March, June, September and December with submission deadlines of the 15th of the previous month (2/15, 5/15, 8/15 & 11/15). It is a Microsoft Word document found in "documents and settings/gccucc/mydocuments/Bell" and then arranged by year.

The Bell is currently formatted to be printed (double sided flip on the short side) on tabloid sized paper (11X17). The newsletters are folded in half and then in half again. The post office requires that they be sealed on the right hand edge (with one wafer tab) as well as the top (two wafer tabs). The mailing list is located in the CDM program and directions for printing the labels can be found in the "Outgoing GCC mailings" procedure.

Weekly program - the program/bulletin is located in Microsoft Word “documents and settings/gccucc/mydocuments/bulletin” and then arranged by year. Each week the updated information can be found on google drive under “Groveland Themes”.

- The pastor inputs the weekly scripture reading, the Call to Worship, Prayer of Confession & Assurance, sermon title (if any), offering invitation, prayer of dedication and any other pertinent details about the weekly worship service to be included.
- The Music Director and/or Choir Director input the hymns, the organ prelude/offertory/postlude, the anthem and any other special music to be included.
- The lay leaders and lay reader schedule can be found on google drive “worship schedule”.
- The flower dedications are emailed to the office on the monthly basis by the Flower Coordinator. If there isn’t room for this on the program/bulletin, it can go on the weekly announcement insert.

The program is printed at the end of the week and compiled along with the weekly announcements insert. The number printed is based on current attendance trends. Generally 4 or 5 oversized copies are printed on tabloid sized paper for vision impaired worship attendees.

Weekly announcements - the announcements document is located in Microsoft Word “documents and settings/gccucc/mydocuments/bulletin” and then arranged by year, with the weekly bulletin. Generally folks will email announcements that they wish to have included in the insert. This is also where the most up to date prayer list is.

Weekly email - at the end of each week, the announcements are sent via email to the congregation via mailchimp. The login is username: gccucc@gmail.com password: **xxxxxxxx**. By using a “campaign” from the previous week’s email, duplication of efforts can be avoided. The date will need to be changed and the prayer list updated. Old messages with dates that have passed should be deleted. By using information from the weekly announcements, new messages can be created. The email can be scheduled to go out whenever the sender wishes it to arrive in the recipients’ inboxes.

Other email - the entire church mailing list is kept on mailchimp. Whenever an email needs to go out to the entire group, use this website.

GCC Social Media - currently the church uses facebook and instagram. Currently the admins on the facebook account are the Minister of Faith Formation, the church’s Historian and the Office Administrator. The church’s Social Media policy is still being created.

Automated Phone Calls-

Church Record Maintenance

Membership - Groveland Congregational Church's membership records are kept in a couple places. The Church Clerk maintains a written record of members, baptisms, deaths, etc. In the church office records are also kept in the CDM program. The login password for CDM is "xxxxxxx". This is where pledge data is recorded, weekly deposits are processed and records of membership are maintained.

Personnel - all church personnel files are kept in the church office in a locked file cabinet.

Financial - the church's financial records are kept in the church office. The bookkeeper is responsible for bill payment and payroll processing (to include payroll tax payment and submission of necessary state and federal reports). The financial secretary (currently the same person), is in charge of receiving all income for the church to include donations, pledges, payments of rent (from Verizon cell tower). The financial secretary also keeps records related to all of those either on Quickbooks or CDM. The FS provides the church membership with giving notices for the previous tax year each January which are generated by the CDM program.

Ordering Church Supplies

Staples: Most of the church office supplies are ordered through Staples. The account is under the email address (gccucc@gmail.com) and the password is "xxxxxxxx". This includes paper (of several different sizes and colors), pens, envelopes, staples, tape, etc.

Cameron Office: The church has a contract with Cameron Office for the printer toner. Call 1-800-783-2674 and give them the machine number. It is suggested that there be a backup toner cartridge on hand whenever possible.

Other: Supplies for special events can be ordered from anywhere. There are several companies that sell special holiday bulletins. Typically these are ordered for Thanksgiving, the 4 weeks of Advent, Christmas and Easter. The companies include Christian Book Distributors, Concordia, Hermitage Art, and Cokesbury.

Church Calendar

The working calendar is on google. This is available to all members of the church via the church member website. All church events and church usage is recorded on the calendar. The pastor records his/her schedule here as well. All requests for church use need to come through the office to ensure availability.

Use of Facilities - if a person or group would like to use space in the church for a private event, once the date has been determined to be open, a "Use of facilities" form should be completed

with all the pertinent details. The church's Facilities Use Policy is located elsewhere in this document.

Key Receipt - if someone needs access to the church building during off hours, they will need to borrow a church key. In this case, a "Key Receipt form" should be completed. Once they are no longer in need of access, the key should be returned to the church office.

Church Finance:

Bookkeeper (under Treasurer):

Policy:

It is the duty of the bookkeeper (or Treasurer in the absence of a bookkeeper) to manage the financial operations of the church. Duties include bill payment, reconciliation of church checking accounts, payroll and payment of payroll taxes to the Federal and State governments, quarterly Unemployment reporting to the State of Massachusetts (although we do not pay into the unemployment system as a non profit, we do need to report to them quarterly) and quarterly Federal tax filing. On a monthly basis the bookkeeper/Treasurer must report the church's financial position to the congregation.

Procedures:

Monthly Federal Tax payment:

EFTPS: Taxpayer EIN 04-2311442

PIN: xxxxx

Password: xxxxxxxxxxxxx

Filing form 941

Quarterly Federal reporting:

Done via Quickbooks under the Payroll heading "File Forms". Choose "Quarterly Form 941"

Pastoral Office

(Taken from GCC Profile document of 2019)

Community Engagement

- Community engagement and leading the way for the church
- To be an ambassador of God's love
- Participate in wider church activities such as conference and association meetings as time permits
- Administration responsibilities (unless delegated) such as email, website, church supply purchasing, more
- Responsibility for supervision of staff
- Availability to wider community for funerals, weddings, special worship programs, and as a representative of the church to local organizations and attending community events

Faith Formation

- Faith formation and vitality through prayer, Bible study, service, identifying helpful resources and opportunities and helping lay persons take advantage of them
- Faithful financial development and stewardship
- Study and prayer to increase faith and to improve [pastoral]skills so as to lead, teach, preach better
- Energizing and deepening the spiritual connections and faith understandings of others in all they do

Pastoral Leadership

- Leadership development by working with people in the church to create ministry and programs
- Strategic planning for current and new directions in ministry
- Attend meetings and give leadership as needed to church programs, in collaboration with lay leadership
- Processing healthy conflict
- Revitalization or Turnaround

Pastoral Services

- Pastoral care in collaboration with lay people
- Weddings and funerals; Baptisms for participants in the worshipping community
- Counseling, listening and referral; other unspecified services

Worship Services

- Preparation and leadership of Sunday worship including scripture study, crafting of liturgy and bulletin, sermon
- Preparation, planning of music in coordination with musical staff, preaching, offering of prayers, etc.

Safety Plans- Emergency

Still needed

Teams

Nominating Team

Safe Church Team (needs more)

CORI

Two certified CORI officers assist in the safety review process for all church employees and authorized volunteers (those who work with children and youth) including:

Implementing and confidentially maintaining CORI reports. A CORI report is a record of an individual's criminal court appearances in Massachusetts, including arrests, convictions, dismissals, and serious violations. Completed CORIs are secured in a locked file cabinet in the Office Administrator's Office and are kept for no more than seven years. CORIs are renewed at least every three years.

Verifying completion of reference checks.

Verifying completion of required training.

Snowflake Fair Team

Trustees

The Trustees are volunteers made of two groups The Ministers and The Shepherds; both equal but have distinct responsibilities.

Policy

Trustees will function as Christian stewards of property God has entrusted to the congregation and as leaders who seek to empower the congregation for mission while remembering that "The governance of this church is vested in its members".

Duties and Responsibilities

1. Act on all requests from the Office Administrator for the use of church facilities. (see Office Administrator).
2. Accept and manage all funds of the church, including the planning and raising of funds for the church program, and shall keep the church informed of its finances.
3. Prepare a proposed expense budget for the ensuing church fiscal year, based upon the proposals by the various Ministries and the prospective income for the coming year, and publish the same at least one (1) week prior to the Annual Meeting.

4. Approve disbursements by the Treasurer of funds for the budgeted expenses of the church.
5. Authorize the Treasurer to execute a note or loan in the name of the church whenever necessary.
6. Invest and reinvest all legacies prudently as described in state law for non-profit organizations with an emphasis on preservation of principle following the Uniform Prudent Management of Investments Funds Act (UPMIFA), unless otherwise stipulated by the donor.
7. Name a Trustee as an alternate signatory for all church checking accounts.
8. Make an annual survey of all church properties, maintaining an inventory of the same for insurance purposes.
9. Supervise, and complete performance evaluations and salary recommendations of personnel.
10. Contract on behalf of the church.