

# **Lafayette Urban Ministry Emergency Shelter Security Staff Training Manual**

## **Overview**

The **LUM Emergency Shelter** provides short-term overnight shelter, meals, and showers in a safe and caring environment to homeless individuals. The LUM Emergency Shelter can accommodate up to 44 adults each night of the year.

Individuals may need shelter for a variety of reasons, including inability to pay rent due to job loss or health problems. Also newcomers to our community sometimes need temporary help while seeking jobs and housing. The LUM Emergency Shelter provides a vital service to the greater Lafayette community.

## **IN CASE OF EMERGENCY please contact:**

David Heckert, Shelter Director 765-588-8155

Or

Pablo Malavenda, Executive Director 765-418-4347

or

Lafayette Police Department --

Emergency: 911

Non-Emergency: 765-807-1200

### **Who Can Stay at the Shelter**

Only those with passes are admitted to our Shelter. Passes are available Monday - Friday from 1:30 pm to 3:30 pm at LUM's office located at 420 North 4th Street. When the office is closed (Saturday, Sunday and holidays), passes are available at the Shelter from 6:00 am - 7:00am.

### **Admission to the Shelter**

Those with passes are admitted between 9:00pm and 9:30pm.

***There is absolutely no admission to the Shelter without a pass or after 9:30pm.***

### **Evening Timeline at the Shelter**

8:00pm -- Shelter Security arrives, walks the neighborhood (3 block area) to be sure no guests are loitering. Please pay particular attention to Centennial Park at North and 6th Streets.

8:00 - 8:15pm -- Volunteers arrive.

8:15 - 9:00pm -- Shelter Security assigns tasks to volunteers and they prepare for guests arrival.

9:00pm -- Door is unlocked and guests may enter.

9:00 - 9:30pm -- Guests arrive and "checked in"

- passes are collected
- belongings are stored
- rooms/bunks are assigned
- chores are assigned
- no hands search is conducted by Shelter Security
- 2 sheets and a pillowcase are provided

9:30pm -- Door is locked for the night. Again, please remember -- ***There is absolutely no admission to the Shelter without a pass or after 9:30pm.***

9:30pm or when last guest is checked in -- the chores assigned to guests are posted in the dining hall.

After being checked in, guests are asked to do the following:

- find and make their bed.
- eat the light meal provided (if they choose to do so)
- shower if they choose to do so. Showers should be brief, 10-15 minutes.
- perform chore assigned (*There are evening and morning chores. The times the chores are to be performed are posted on the chore list posted in the dining hall.*)

10:00pm -- Shelter Security does a perimeter check outside (around the building only)

10:15pm -- showers are closed  
kitchen is closed - *or it closes earlier if all guests have eaten*

10:00pm – 10:30pm – Begin to turn lights in the bedroom halls as guests move from the dining hall to the bedrooms. At 10:30 all lights are turned out. Guests may get up during the night to use the bathroom or get water but otherwise must remain in their room. Guests are expected to be quiet after lights out (and may be reminded to be quiet if not doing so.) **The doors to guest rooms remain open and windows remain closed.**

10:30pm -- Shelter Security does another perimeter check outside (around the building only).

11:50pm – 12:00 midnight – The incoming Shelter Security does another perimeter check outside (around the building only). If Shelter Security works 8:00pm to 7am, then this perimeter check is done before the volunteers go to bed or it is omitted.

12:00 midnight -- The first Shelter Security staff (working 8:00pm to midnight) leaves and is replaced by the second Shelter Security staff (working midnight to 7:00am).

### **Morning Timeline at the Shelter**

5:40am -- Shelter Security wakes volunteers. Coffee is made (if available) and breakfast bars are put out for guests. Shelter Security does a perimeter check outside (around the building only).

6:00am -- Shelter Security wakes guests. Turn the lights on and ask guests to get up. Guests must:

1. strip their beds of sheets/pillowcase (Blankets are changed weekly.)
2. eat breakfast bar and coffee if desired
3. perform morning chores
4. No showers are permitted in the morning.

6:15am -- All guests must be up and out of their room. If a guest refuses to get up, they will be suspended.

6:15am - 6:45am -- All guests are checked out, taking all belongings with them.

6:45am -- kitchen is closed.

7:00am -- Guests must be out of the Shelter and off of the property.

6:15am - 7:00am -- Guests and volunteers complete final chores. Volunteers are dismissed as soon as the final chores are done.

**7:00am - 7:30am -- Staff must inspect all shelter areas for cleanliness and safety. Staff is expected to initial beside all cleaning tasks on the cleaning checklist located in the shelter office as an acknowledgment that these item are completed for that shift. The shelter director will inspect all rooms before the beginning of the next shift to verify that the cleaning tasks are completed.**

## RESPONSIBILITIES OF SHELTER SECURITY STAFF

### 8P – MIDNIGHT SHIFT

1. Please arrive on time and change into yellow security shirt. (**Security shirts stay at the Shelter; please leave in the laundry room at the end of your shift.**) Then make the first outside check (walk the neighborhood). *See specific notes on **Shelter Security Outside Security Checks.***
2. Review list of Shelter guest with passes for the evening. Hard copy may be available or it can be viewed on the Caseman email account.
3. Check for phone messages (if any, there will be a red light on the telephone receiver). *The message code is 1234#.* Make note of the calls, note the date, and sign your name. **Always respond to a call from the police.** Most calls are informational only (volunteer not coming in).
4. Read the **nightly report** back to the last time you worked.
5. Plan for the evening meal. If no volunteer is bringing the evening meal, look at what leftovers are available and plan what to serve. Backup food is always in the freezer. Please note – *if there is no food readily available, then it is acceptable to provide a granola bar at dinner.*
6. Have volunteers sign in/out on the **pink Volunteer Sign-In sheet**. Make volunteer assignments and review responsibilities with volunteers. See **Volunteer Responsibilities** section.
7. Unlock the door at 9:00, admit guests.
8. Perform no touch security check.
9. Lock door promptly at 9:30p. **No one is admitted without a pass or after 9:30p.**
10. Be sure guests needing a wake up call have the time marked on the registration sheet.
11. Maintain a safe, secure, and calm environment for guests and volunteers.
12. Circulate throughout the Shelter, all areas including hallways, bedrooms, restrooms, office. Monitor guests for appropriate behavior.
13. Interpret Shelter policy for guests and volunteers.
14. Supervise and assist volunteers as needed.
15. Inspect and close showers and kitchen at 10:15.
16. Monitor evening chores and inspect that they have been done appropriately.
17. Monitor volunteer tasks are being completed, including taking out trash/recycling, bring clean linen carts upstairs, and doing laundry.
18. Make an outside check (walk the perimeter) at 10:00pm.
19. Make an outside check (walk the perimeter) at 10:30pm.
20. Keep things on schedule. As guests leave the dining hall and go to their rooms, begin to turn lights off in the bedroom hallways. All doors to guest rooms remain open. Remind guests who remain in the dining hall to keep their voices down as some guests are trying to sleep.
21. Lights are out at 10:30. If guests are talking in their rooms, remind them that after lights out they need to be quiet so others can sleep.
22. Make all decisions about emergency care (medical, fire, police). If needed, call the Shelter Director for consultation.
23. **Make sure all cleaning needs are addressed. If chores are not done or additional cleaning is needed, use the time between 7am-7:30am to complete these items.**

## MIDNIGHT TO 7:30A SHIFT

1. Please arrive on time and change into yellow security shirt. (**Security shirts stay at the Shelter; please leave in the laundry room at the end of your shift.**) Verify your presence with the 8pm – midnight Security Staff. Then make the first outside check (walk the perimeter). *See specific notes on **Shelter Security Outside Security Checks**.*
2. Read the **nightly report** back to the last time you worked.
3. Keep the door locked. **No one is admitted without a pass or after 9:30p.**
4. Maintain a safe, secure, and calm environment for guests and volunteers.
5. Circulate throughout the Shelter, all areas including hallways, bedrooms, restrooms, office. Monitor guests for appropriate behavior, even during sleeping hours. Guests may get up to use the restroom or get water but otherwise must remain quiet and in their assigned room.
6. Interpret Shelter policy for guests and volunteers.
7. Supervise and assist as needed.
8. Look at the registration form for guest wake up calls and then wake the guests up at the appropriate time. *You might want to set an alarm on your phone so you don't forget.*
9. Record the temperatures on the kitchen temperature chart (freezer, refrigerator, air). Look at leftover food in the refrigerator to be sure it has been labeled with a date. Food older than 2 days should be discarded.
10. Keep things on schedule in the morning.
11. At 5:40 wake volunteers and make a final outside check (walk the perimeter).
12. Have volunteers make coffee (if available) and put out breakfast bars guests. Only one breakfast bar per guest please!
13. At 6:00am wake guests. Turn the lights on and ask guests to get up. Guests must:
  - strip their beds of sheets/pillowcase (Blankets are changed weekly.)
  - eat breakfast bar and coffee if desired
  - perform morning chores
  - No showers are permitted in the morning.
14. At 6:15am all guests must be up and out of their room. If a guest refuses to get up, they will be suspended. Don't touch or shake the guest. Speak calmly to them and remind them to get up.
15. Monitor morning chores (guests and tasks volunteers will perform) and inspect that they have been done appropriately.
16. Keep things on schedule. As guests rooms are vacated, **inspect and be sure they are clean.**
17. At 6:45am the kitchen is closed.
18. From 6:15am - 6:45am guests are checked out, taking all belongings with them. Volunteers complete final morning chores including taking out trash/recycling and taking the linen carts to the basement.
19. On Saturday, Sunday and holidays (when the office at 420 North 4<sup>th</sup> is closed), distributed passes during the morning for guests who want to stay that night. **Always check the suspended list before giving a pass to a guest!** This list is on the bulletin board.
20. At 7:00am guests must be out of the Shelter and off of the property.
21. Complete the **nightly report**.

22. Have volunteers sign out on the **pink Volunteer Sign-In sheet**. Volunteers are dismissed as soon as the final tasks are done. Record hours for community service in the **Community Service Hours notebook**.
23. Do a final walk-through of all rooms to be sure the Shelter is left neat, clean, and tidy. **Utilize the checklist and initial each for completion.** Be sure all cleaning supplies and dirty laundry hampers have been returned to the laundry room, the chairs are folded and on the tables, the office is tidy, and that the kitchen is clean and organized. Lock the laundry room and volunteer room (old Coordinator Apartment) making sure the lights are off in those rooms.
24. Before leaving turn all lights off in the Shelter except the restrooms (to leave the fans on).
25. Maintain a safe, secure, and calm environment for guests and volunteers.
26. Circulate throughout the Shelter, all areas including hallways, bedrooms, restrooms, office. Monitor guests for appropriate behavior.
27. Interpret Shelter policy for guests and volunteers.
28. Supervise and assist as needed.
29. Make all decisions about emergency care (medical, fire, police). If needed, call the Shelter Director for consultation.

### **Security Staff Suspending Guests**

Guests are suspended from the Shelter for violating Shelter rules. **Please be familiar with the rules provided to guests on the back of their pass.** The most frequent violation is guests who do not show respect for every person in the Shelter!

Most violations are progressive - first violation, 3 days; second violation 7 days, and third violation 6 months. Two violations result in an automatic 6-month suspension - any smoking in the building or outside the building during or after check-in and any fighting/stealing. Security Staff will tell a guest he/she is suspended and to see the office. In the office, we will tell them how long (based on the violation and any past violations). After their days of suspension, they may be given a pass only after meeting with the Shelter Director.

### **Security Staff Chore Duties**

Shelter Security may delegate chores to volunteers but it is their ultimate responsibility to see that all chores are completed. They include:

- clean volunteer room - wipe down beds with bleach water, sweep/vacuum
- vacuum floor mats
- roll sheets - generally this is done in the evening by the volunteer staying in the office before lights out
- sweep and mop the office (as needed, at least weekly)
- laundry - this is the responsibility of both shifts. Please start promptly after showers are finished and keep doing laundry until all laundry is washed, dried, folded, and put away.
- recycling - please recycle! Recycling goes out daily.
- trash - all the trash (from all the trash cans in all the rooms) goes out daily. It's always good idea to take out food trash at night.
- linen carts - bring clean linen up, and take the soiled linen (tied in blue laundry bags) down
- kitchen duties:
  - a. monitor kitchen temperatures, record temperatures daily

- b. monitor food in the refrigerator - leftovers need to be marked with content and date and used within 3 days. DO NOT ALLOW OLD FOOD TO STAY IN THE REFRIGERATOR.
- c. wipe down appliances (fridge, freezer, microwave, stove - especially burners) and counters

## Shelter Security Outside Security Checks

Two types of outside checks will be done by Shelter Security:

1. **Walk the neighborhood** – this is the 3-block area around the Shelter and is done to be sure no guests with passes are loitering in the 3-block area before check-in at 9:00pm. They are instructed not to loiter, and that restriction is in writing on their nightly pass.

The route to walk –

- from Shelter up Cincinnati to 6<sup>th</sup> Street
  - right on 6<sup>th</sup> Street and past Centennial Park (at 6<sup>th</sup> and North Streets)
  - right on North Street
  - stay on North Street past 4<sup>th</sup> Street and then right on the alley past 4<sup>th</sup> Street
  - stay in the alley behind 4<sup>th</sup> Street until Cincinnati and return to the Shelter
- 
- 8:00pm - When reporting to work, Shelter Security should change into a security shirt and immediately **walk the neighborhood**.
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2. **Walk the perimeter of the building** – this is to be sure no one is on LUM Shelter property at 525 North 4<sup>th</sup> Street. The (approximate) times for these walks are:
    - 10:00pm
    - 10:30pm
    - 11:50pm – 12:10 midnight. This should be done by the incoming Shelter Security who should come into the building, change into a security check, and let the on-duty Shelter Security know he/she is making a perimeter check. *Note – if one Shelter Security staff works from 8:00pm to 7:30am, this final evening check should be moved back earlier and done before volunteers go to sleep. Shelter Security should never leave volunteers and guests sleeping inside and go outside.*
    - 5:40am – This is done after waking volunteers. Again, *Shelter Security should never leave volunteers and guests sleeping inside and go outside.*

Final Outside Security Notes:

1. Do not leave the door unlocked when making an outside check. Always carry a key!
2. Carry the flashlight!
3. Wear a security shirt.
4. If you find people in the area, ask them kindly but firmly to please move along. Do not make physical contact. Someone on the property after hours can be reminded how get a pass the next day (and reminded instructions are posted on the door). Someone in the 3-block area before check-in can be reminded that LUM asks them not to loiter so we can be good neighbors to the residents/businesses in the area.
5. Do not leave volunteers and guests sleeping inside and do an outside check.

6. Finally – these checks are a high priority but if there are issues inside to be managed (an unruly guest who is being suspended for instance), then managing the inside is always the higher priority. The nightly reports include check boxes for the outside checks. Any omissions/deviations should be noted in the report.

### **Security Staff Conduct and Expectations**

1. Please be on time!
2. No sleeping while on duty.
3. Leave all valuables and money at home as well as any sharp objects or anything that could be used as a weapon.
4. You may not be under the influence of alcohol or drugs or use alcohol or drugs during your time at the Shelter.
5. You may not use headphones, earbuds, or ear plugs when on duty. You may not download movies on LUM's computer. Limit your personal cell phone usage when on duty. You need to be alert to your surroundings and engaged with guests.
6. Please be focused on the guests and the activities occurring at the Shelter.
7. Please don't consume food or drink in front of guests.
8. The identity of Shelter guests is confidential. If someone calls or comes to the Shelter asking about a guest, take a message but do not confirm/deny that the guest is at the Shelter.
9. You may not bring a friend with you to the Shelter.
10. Be careful to enforce all Shelter rules and policies, even if they don't make sense to you. LUM strives to be fair and consistent. Our rules and policies have been thoughtfully and intentionally established. Talk to the Shelter Director if you have questions.
11. It is our goal to treat all guests with dignity and respect. Security Staff contribute to a safe and professional environment for our guests and volunteers by modeling for them calm and courteous behavior.
12. Be aware that some guests have mental health and/or substance abuse issues which can sometimes create behavioral problems. Remember to deal with inappropriate behavior in a manner consistent with Shelter rules and policies.
13. You may be asked to perform various tasks while on duty (such as helping with bulk mail projects during the night).
14. While chores are assigned to guests and various tasks are assigned to volunteers, you are ultimately responsible for the completion of all of these. On occasion some chores will not be assigned to guests (for instance when many guests have early wake-up calls and/or there are few guests at the Shelter). When that happens, please ask volunteers to help you and get those chores done yourself.

### **Notes on Volunteers**

The Shelter is open 11 hours/day 375 days a year – that's 4,015 hours a year! We couldn't keep the Shelter open without our many, many volunteers - so **please treat them kindly and thank them for their work.**

1. Have volunteers sign in/out on the **pink Volunteer Sign-In sheet**. Before they leave, record hours for community service in the **Community Service Hours notebook**.
2. In general community service volunteers will be asked to work an 11-hour shift. Any change will be made at the discretion of the Shelter Director.
3. Some volunteers will choose to work 8pm to midnight. Those who stay until 7am may sleep until 5:40.



4. Assign tasks as follows to the volunteers available each night. You will need to direct and monitor them. Jobs for the 3 volunteer jobs are:

#### **Kitchen Volunteer**

1. Prepare the kitchen to receive guests.
2. Turn on the dishwasher so it can begin heating up 30 minutes before use. See instructions posted on the wall above the machine.
3. Put away clean dishes from the night/morning before.
4. Verify with Security Staff what food is planned.
5. If there is no Meal Volunteer staying to serve, then serve appropriate portions so that all guests receive a share.
6. Announce that seconds are available once all guests have been served (or close to the end of check-in).
7. Clean kitchen at the end of conclusion of the evening meal.
8. Store leftovers (in plastic but not metal), label and date.
9. Dispose of any leftovers more than 2 days old.
10. Store liquid refrigerated items on lower shelves, solids above.
11. Supervise dishwashing (a chore usually assigned to a guest). Instructions are posted above the sink. The sink set up is:
  - Sink 1 – hot soapy water
  - Sink 2 – warm rinse water
  - Sink 3 – bleach water (1 capful bleach per gallon of water)
  - After washing, place dishes in dishwasher to sanitize.
12. Set up for the morning meal (coffee, breakfast bars) at the end of the evening.
13. Be sure things are put away and counters clean, and then close the kitchen in the evening at 10:15.
14. In the morning make coffee.
15. Serve breakfast bars – one per person please!
16. Clean up the dining area and kitchen.
17. All counter tops must be cleared of everything except appliances.
18. Do not submerge coffee pot into water or dry upside down.
19. The kitchen is closed in the morning at 6:45.

#### **Check-In and Check-Out Volunteer**

1. Review the pass list. If a hard copy is not available, it can be found on the Caseman email.
2. Ready the registration sheet by first determining how many females have passes and assigning specific room(s) to females. **Males and females are always in separate rooms.**
3. As guests arrive, take their pass (verifying it's for the current date and their name is on the pass list).
4. Print the guest's name on the registration form and have the guest sign. Complete the ethnicity and sex.
5. Assign a bunk and chore(s) to each guest.
6. Rooms and bunks are first-come first-serve. Use good judgment in making top/bottom bunk assignments – i.e., elderly and/or heavy guests should be assigned to lower bunks.
7. The number associated with the line on the registration form corresponds to the number on the cubby and hanger where the belongings of each guest are stored. Wallets/cell

phones may be placed in the square plastic containers and marked with the guest name, then stored in the desk drawer.

8. **Guests may take with them a change of clothing, a comb/brush, a toothbrush, and an inhaler.** All other items must be left at check-in.
9. Guests are provided with a bedroll (2 sheets, one pillowcase). These must be used – it's not optional! Blankets may be on the beds or we may need to give them to guests. Sheets/pillowcases are changed daily but blankets are changed weekly.
10. Allow guests to obtain items from their belongings (medication, deodorant). Take their backpack/bag out of their cubby and let them retrieve it. They must do this at the front desk with you observing, and then their backpack/bag will be re-stored in their cubby.
11. Remain in the office at check-in until 10:30 or lights out. Do not leave the office unattended for any reason.
12. Facilitate morning check-out – noting the time each guest leaves. Be sure they retrieve all their belongings.
13. On Saturday, Sunday and holidays (when the office at 420 N. 4<sup>th</sup> is closed), issue passes for the evening.

#### **Hall, Dining Room, Laundry Room, Bathroom Volunteer**

1. Check laundry and keep it going! All laundry should be washed, dried, folded and put away.
2. Prepare bathing areas - putting out the cart with towels and bath products.
3. Replenish toilet paper, soap and paper towels in guest bathrooms.
4. Place the cleaning buckets, bins for cleaning rags, and laundry baskets for soiled towels and rags out.
5. Make three bleach solutions (3 caps of bleach to filled bottle of water).
6. Direct guests to their rooms.
7. Monitor and enforce shower rules.

#### **Notes on Boundaries**

1. Do not give personal information to guests.
2. Do not give money or items of value to guests or allow them to use your phone or computer.
3. Guests are not allowed in the office or in the volunteer room for any reason.
4. Do not make physical contact with guests and be sensitive to their personal space.
5. Do not allow guests to invade your personal space.
6. Do not give preferential treatment to some guests over others.
7. Do not accept gifts of a personal nature.
8. If you don't know the answer to a question, let the guest or volunteer know that you will ask the Shelter Director and get back to them with an answer.

#### **Health Precautions**

The LUM Shelter is one of the cleanest, most sanitary Shelters in the state. We have high standards in maintaining a well sanitized building and it is our goal to minimize exposure to infection and illness for our guests and volunteers.

Please take common health precautions seriously and pay attention to basic preventative measures such as hand washing, coughing or sneezing into your bent arm, using gloves when cleaning at the Shelter and showering after your night at the Shelter. Hand sanitizer is available in the Shelter - please use it often!

**LUM Emergency Shelter Pass** - *sample provided*

Please note Shelter Rules for Guests on the back of the pass provided to guests. *The pass may be modified from time to time as needed.*

## Winter Warming Station

The Winter Warming Station will operate between November 15th and April 15th each year. The Winter Warming Station is a second chance for a guest experiencing homelessness to get off of the street and warm up. A valid ID and background check are required to use the Winter Warming Station.

### RESPONSIBILITIES OF WARMING STATION SECURITY STAFF

1. Arrive promptly at 11:55 pm before your midnight shift begins . Go into the building, put on a security shirt, get the flashlight and search around the building.
2. You are responsible for enforcing the **LUM Warming Station Rules** posted for guests. Please read them and follow them closely.
3. Unlock the outer door at midnight. The inside door should be locked. Guests will be able to come into the vestibule and then let into main office by unlocking the door. The outside door will remain open until leaving at 7 am.
4. The phone at the front office should be placed on day service upon arrival. The phone should be turned back to night service in the morning before leaving. Instructions are written next to the phone.
5. Guests may not loiter outside in the parking lot after arriving but must come inside and stay inside. If a guest leaves before 7 am, he/she may not re-enter again.
6. Guests may not smoke on LUM property (including the parking lot).
7. Do a hands off search of each guest. Backpacks and bags are to remain in the vestibule. Guests may keep his/her cell phone, wallet and coat with them. Be sure they remove all items from their pockets and that nothing inappropriate has been concealed. Coats may be hung on the coat rack or kept at their chair.
8. Have guest read the rules, then write their name on the **registration form** and have them sign it. Also ask them to complete the half-sheet **information form** (name, date of birth, date).
9. Guests may use the restrooms at the back of the office but may not go into roped off areas or locked offices. There are offices without locks which should remain open. Guests may not go into those officers either.
10. Guests may not rearrange the chairs and they may not lay on the floor.

11. Guests may be assigned chores such as sweeping the rugs in the waiting room, cleaning the bathrooms, or mopping the floor (as needed, such as bad weather).
12. Cleaning supplies are kept in room 118. This door uses the key to 525 (square key). A powder to put on vomit/fluids/blood is kept in this room. Always use gloves when dealing with bodily fluids.
13. Guests may not bring any pets or animals except for service animals.
14. If a family or anyone under 18 years of age arrives, call the Director immediately.

**Record Keeping Policy** - Records will be kept for seven years for the Community Development Block Grant.

**Client Intake Procedures** - To be put on the list for intake into the shelter a client needs to be at the administrative office, located at 420 N. 4th Street, Lafayette, IN 47901 from 1:30 pm - 3:30 pm Monday - Friday and check in with the Shelter Director to be put on the list for the night. On Saturday, Sunday, and Holidays clients are to check in the shelter located at 525 N. 4th Street, Lafayette, IN 47901 between 6 am. and 7 am.

Guests that have completed the check in process are to arrive at the shelter located at 525 N. 4th Street, Lafayette, IN 47901 from 9:00 pm. to 9:30 pm.

**Client Grievance Policy** - If a shelter client has a grievance they will first take the grievance to the Shelter Director, if the client is unsatisfied with the decision, the Shelter Director will take the grievance to the Executive Director who will respond in a timely manner.

## **Lafayette Urban Ministry Fiscal & Procurement Policies**

### **Financial Oversight**

LUM's fiscal policy is established by its bylaws (article 8) and is overseen by the Executive Council and Board of Directors. Fiscal oversight is provided by the Executive Council of the Board of Directors. The Executive Council meets monthly to review financial statements, monitor the budget to actual, and to approve non-budgeted expenditures. An annual budget is prepared by the Executive Director and approved by the Board of Directors.

An audit is done annually by a certified CPA

### **Purchasing Authorization**

The Executive Director approves all purchases. Staff send Purchase Order requests to the Executive Director by email. Approval is made by email, copied to the Bookkeeper.

If expenditures fall outside the approved budget guidelines they are reviewed and approved by the Executive Council.

### **Bid Policy**

Vendors and service providers are chosen based on cost and quality of work. LUM provides full, free and open competition for all vendors and, when all other requirements are equal, will make efforts to use small minority-owned, veteran-owned and women-owned businesses whenever practical.

Any expenditure in excess of \$25,000 for the purchase of a single item has bids from three (3) suppliers if possible. These bids are reviewed by the Executive Director and the bid award must be specifically approved in advance by the Executive Director.

No disbarred or suspended contractors will be hired.

Any property purchased is appraised to insure that the cost is in line with local prices.

When funding sources such as donors or grantors have specific requirements such as obtaining bids and or estimates, those requirements are fulfilled.

### **Invoice Approval and Payment**

All invoices received are opened by the Executive Director who reviews and approves them, then gives them to the Bookkeeper. Payment is made on or before it is due.

Costs that cross programs are allocated based on the percentage used by each program.

Checks written by the Bookkeeper are signed by the Executive Director and by the Board Treasurer. After signature, checks are returned to the Bookkeeper for mailing.

The Executive Director and the Board Treasurer review monthly bank reconciliations. They also have on-line access to the bank accounts and to the accounting system and periodically review transactions in both of them.

To the extent it is possible for us to determine, Lafayette Urban Ministry does not do business with companies that have financial interests in Iran.

### **Income**

Income is assigned to the program for which it is designated. Undesignated gifts are assigned to the total program to cover overhead costs and unmet program expenses.

In kind donations are valued by the donor.

### **Additions to Fiscal Policies**

1. Vendors and service providers will be chosen based on cost and quality of work. Program personnel are encouraged to use minority, women or veteran owned businesses when possible.
2. Any expenditure in excess of \$25,000 for the purchase of a single item should have bids from three (3) suppliers if possible. These bids will be reviewed by the Executive Director and the bid award must be specifically approved in advance by the Executive Director.
3. No disbarred or suspended contractors will be hired.
4. Any property purchased will be appraised to insure that the cost is in line with local prices.
5. No Federal Grant monies will be used for lobbying
6. Costs that cross programs will be allocated based on the percentage used by each program.
7. Income will be assigned to the program for which it is designated. Undesignated gifts will be assigned to the total program to cover overhead costs and unmet program expenses.
8. In kind donations will be valued by the donor.
9. An audit will be done annually by a certified CPA.