

UU PEACE Fellowship

Leadership and Information Kit

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Philosophy of being a UUPF Leader and sharing your skills

Unitarian Universalist PEACE Fellowship (UUPF) is a congregation of members and friends with different talents and styles. We have always had capable and dedicated people willing to step into positions of leadership, and our continued growth and influence will depend on more members willing to do the same.

UUPF committees have ongoing opportunities to identify and develop new leaders within the Fellowship and to support each other as members accept the responsibility and the privilege of serving the UUPF community.

Important factors are commitment to the tasks at hand — in some cases, technical skills — but most importantly sharing responsibilities and knowledge in ways that allow others to develop as future leaders.

Expectations for Committees — Working at our best

To keep every committee working at its best and moving toward its goals, the chairperson and committee members are expected to consider options that will prepare new leaders.

You are urged to support these leadership-development options:

- Share chairing meetings and periodically switch committee assignments — including setting agendas, preparing minutes or meeting notes

- Provide guidance and encouragement to those who are learning new skills or volunteering their time and efforts to make your committee a success

- Avoid relying on one individual to carry the load or do most of the work

- Invite committee members to attend or represent your committee at Council meetings to gain a broader view of the interconnections, concerns and planning among groups

- Share your skills so that others are prepared to serve as chairperson when you step down or move to other activities

- Be sensitive to remaining as chairperson for an extended period when others would or could be ready to take on the leadership roles. At a minimum of every two years, re-evaluate your transition plans regularly with the understanding that our Articles of Association prescribe that each committee appoints its chairperson. Have new leadership options ready

- Be aware of committee requirements are stated in UUPF's Articles of Association (bylaws)

Why this Kit?

This Kit helps you learn and lead. Its information collection can help you find various things UU PEACE has in place in support of this community. If you are considering a leadership role or are searching for who, what, where and when, this Kit provides high-level explanations and overviews. It is not a procedural document — since those step-by-step instructions are managed by committees or the Council and likely found in other documents.

The Council determines if the Kit needs updating and it sets a periodic schedule for review.

— compiled and edited by Communications

Leadership and Volunteer Opportunities

Officers — what they do

Facilitator

From the UUPF Articles of Association...

1. Presides at Committee of the Whole and Coordinating Council meetings.
2. Ensures that the rules of procedure are followed for conducting the meeting in an open, fair, and timely manner...
3. Assists the Committee of the Whole and Coordinating Council to reach full consensus...
4. Official business-related responsibilities:
 - a) executing all agreements, contracts, mortgages, deeds, or other legal documents on behalf of the Fellowship,
 - b) representing, and speaking on behalf of the Fellowship with the larger civic communities, other Fellowships, and denominational organizations,
 - c) carrying out such other responsibilities as may be required under these Articles of Association, or state law,
 - d) duties as may be assigned by the Coordinating Council or the Committee of the Whole.

What exactly does this mean?

Become familiar with consensus models and voting methods
 Keep meetings topics in focus, on time and use appropriate meeting procedures
 Create meeting agendas with assistance from the Council members, etc.
 Review preliminary meeting minutes at the request of the Secretary
 Help find a home for new ideas brought to your attention from groups like:
 Members, Friends, a committee's idea or Council discussions/initiatives
 Outside inquiries from other congregations, web inquiries,
 Cluster or District initiatives
 Be available to attend Membership Orientations held several times a year
 Attend to any official business as needed

Secretary

From the UUPF Articles of Association...

1. Meeting Minutes — Taking, keeping, and distributing accurate minutes of all congregational and Council meetings
2. Maintaining an accurate and current list of the voting membership of the Fellowship.
3. Maintaining records and documents relating to the Fellowship's affairs.
4. Accepting nominations for the Coordinating Council and recommendations regarding nomination for Facilitator.
5. Providing timely notice of meetings of the Coordinating Council and of Fellowship meetings.
6. Carrying out such other responsibilities as may be assigned under these Articles of Association, or state law,
7. Carrying out such other duties as may be assigned by the Coordinating Council or the Fellowship.

What exactly does this mean?

Recording and distributing meeting minutes (electronically)
 Securely storing official documents (online and hardcopies)
 Insuring minutes and other official document hardcopies are included in the official records
 Providing and recording electronic copies of official documentation

Some other things the Secretary does:

Maintain the official documents and historical archives
 Enroll new members and update our listings with the UUA and Southeast District
 Search records and archives as requested by committees
 Send thank-you notes, welcome notes, or farewell notes as requested
 Updates to the Articles of Association and be familiar with the provisions of the Articles
 Assist the Facilitator, Treasurer, and Committee Chairs when requested

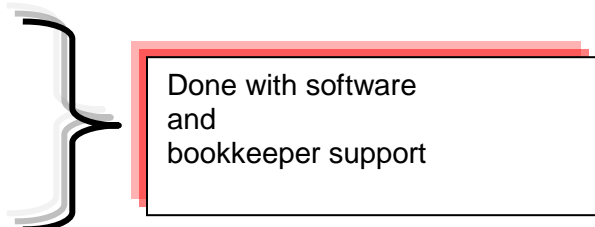
Treasurer

From the UUPF Articles of Association...

1. ...Keeping accurate financial records of all income and expenditures by the Fellowship,
2. ...Preparing periodic statements for individual contributors,
3. ...Making regular financial reports to the Administrative Committee and the Coordinating Council,
4. ...Reconciling bank statements with the Fellowship's financial records,
5. ...Collecting, maintaining, and disbursing funds belonging to the Fellowship,
6. ...Coordinating membership rosters with the Secretary
7. ...Carrying out such other responsibilities as may be required under these Articles of Association, or state law,
8. ...Carrying out such other duties as may be assigned by the Coordinating Council or the Fellowship.

What exactly does this mean?

Keeping the financial records
 Preparing financial reports
 Tax record statements
 Authorize payments
 Checkbook balancing
 Keeping pledging records confidential
 Membership roster validation with the Secretary
 Treasurer is an ex-officio member of the Finance Committee
 (asset management, stewardship, pledging initiatives)
 Process [reimbursement requests](#)



Done with software
and
bookkeeper support

For the treasury-related timeline of tasks, also see the **Timeline of Events** and **Appendix** sections.

Committees, Their Teams and Task Forces**Standing Committees**

Committee requirements and obligations are described in the Articles of Association. Each committee also provides its goals and objectives in the Three-Year Plan annual updates.

In addition, all committees are expected to provide the Council with copies of their monthly meeting minutes/notes so that all committees are aware of activities and events being planned by other committees and can evaluate any impact to their own plans and goals.

Committees are expected to contact each other for any clarifying information and between them resolve any conflicts or issues, and bring unresolved issues or broad-based items to the attention of the Council.

Committees work with their members, task forces and teams to provide input to the annual update of the 3-Year Plan.

Task Forces and Teams (formation and uses)

These groups are formed and always aligned or assigned to a committee, the Facilitator or the Council. The groups may have both members and friends of the fellowship participating.

Neither teams nor task forces are expected to meet on an ongoing basis, keep minutes or submit annual reports. But they are expected to keep the committee to which they belong informed, so that their activities may be included in the committee reporting and their expenses are captured, acceptable and factored into committee budgets.

Committees should insure they have any equipment, manuals, instructions and building access they need to complete their work.

Task force and team communications:

- Communicate amongst themselves as needed

- Report results or recommendations to their respective committees. They may also request that information/instructions be sent to the larger community via the list serve distributions.

- May be charged by the Council/Committee to have some report or other items as a deliverable.

- Examples include: Three-Year plan task force; building-renovation task forces; or a fact-finding report or evaluations; nominee list for officer positions

Task forces

typically are formed then disband after their action or mandate is completed. Examples include: the 3-yr plan task force; major-event task force; special-project task force, etc.

Teams

typically manage ongoing tasks, but their volunteers and leader participation may be more fluid than a task force's. Teams often follow predetermined processes and tasks that are the same regardless of the team composition. Members may migrate on and off teams as they sign up or rotate schedules.

The team leader maintains the communications with its committee chairperson.

Teams include:

- Aesthetic Team (Building and Grounds)

- Hospitality Team (Membership)

- Caring and Pastoral Care (Membership)

- Library Team (Communications)

- Rental (Building & Grounds)

- YRE teams (Youth Religious Education)

- e-news and Sunday News (Communications)

- Member/Friend Phone directory (Communications & Membership)

Timeline of Events during the Year

Timing is impacted by bylaws or other processes/agreements		Rev 3b1 Effective 4/1/2013										
EVENTS	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
Council meetings (Committee chairs/ reps)												
Committee reports sent to the Council												
3-year Plan: TF appointed; compiled/presented			TF formed	info collected	info collected	Council review	Input to Budget					Annual Meeting
Budgets collected / Council review approval							Budgets Requested	Budgets compiled	Budgets compiled	Final Budget compiled	council review	Annual Meeting
Pledge Drive / Stewardship/Canvass /								SERVICE	canvass	Pledges compiled		
Delegates assignments; GA Assembly/SED								GA/SED delegates identified		SED Annual Mtg		General Assembly
Nomination Leaders — officer slate/election									TF formed	compiled	council review	Annual Meeting
Annual Committee Reports prepared											due date	Annual Meeting
Committee of the Whole Meetings (min. of 1 per year)									GA/SED delegate assignment		council review	Rqrd Annual Meeting

with 3-4 additional as called)										ts		w	
Service Contracts prepared & renewed		docs signed											
Membership count certified (UUA)													
Membership records updated (UUPF records)													
UUA Fair Share Funds sent to UUA	invoice rcvd												
SED District dues sent to the District	invoice rcvd												
Web Domain license expires - invoiced/paid currently paid from Holahan credit card then reimbursed	JULY – If not-paid, UUPF will lose its web site domain											payment rqr	
Other events that may be scheduled													
PC e-files: backup, resets, update list serves	update access					system tuning			system tuning				
Vision and/or Mission Reviews (Vision approx every 3 years; Mission annually)	council tbd												
Facility Review — insurance, safety, equip. etc.													
Leadership Kit													

review/updates												
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Affiliated Organizations

Unitarian Universalist Association of Congregations (UUA)

UU PEACE is a member of the UUA. Each congregation in the Unitarian Universalist Association is democratic in polity and operation, governing itself. Congregations affiliate in the Association to receive services that individual congregations cannot provide for themselves and to strengthen the denomination.

Each congregation that joins the UUA invests in the growth and advancement of Unitarian Universalism with each contribution it makes to the Annual Program Fund (APF). As covenantal partners, all member congregations are expected to contribute annually to the APF in support of the UUA, and to work cooperatively with other UU congregations. Funding is determined as a percentage of our congregational budget.

All member congregations are required to complete the annual Certification of Membership report each year by February 1. The certified membership number is used to calculate the congregation's Fair Share contribution to the Annual Program Fund, total district dues, and the number of voting delegates who may represent the congregation at General Assembly.

UUA electronic news and resources

Web site: www.uua.org

Annual General Assembly broadcasts

Via their web site, view business sessions, workshops, lectures, and worship services.

RSS: [Headlines and Updates](#)

RSS feeds provide updates when fresh content appears on UUA.org.

Flyers: [Monthly Bulletin for Congregations](#)

Monthly collection of announcements from the staff groups and committees of the UUA.

Email: [UUA News Announcement List](#)

Subscribe to UUA-L to receive news from the UUA by email. The UUA hosts a variety of different [email lists](#) for specialized announcements or discussions.

Articles: [InterConnections on Denominational Connections](#)

[InterConnections](#) publishes tips and stories about vital congregations for lay leaders and the professional staff who work with them.

South East District of the UUA (SED)

Southern
Region



UU PEACE is a member of the SED District (formerly named the Thomas Jefferson District). In 2012-13, the UUA collected four districts into a larger regional ones that also includes Florida, Mid-South, and Southwest districts. The merger allows the region and its districts to consolidate services and increase efficiencies in serving their member congregations.

Working together, the region develop organizational and governance strategies that will strengthen Unitarian Universalist congregations and communities.

Southern Region Web site: www.uusouthland.org/ (Florida, Mid-South, Southeast, Southwest)

District Web site: merged into the Southland web site

Regional calendars: www.uusouthland.org/calendar.html (Then select the District to display that calendar.)

We are a vibrant, diverse faith community of healthy congregations that is a prophetic model of anti-racism and anti-oppression. We are called to collaborate with other faith and community groups to transform our society.

UCCNC Cluster — UU Congregations of Central North Carolina

UU PEACE is a founding member of the **UCCNC Cluster**. This is a volunteer-led group of Unitarian Universalists representing large, small, established and emerging congregations from Raleigh, Durham, Chapel Hill, Greensboro, Greenville, Fayetteville, Hillsborough, and Sandhills.

Each congregation has one or two people acting as its liaison and insuring a member from UU PEACE is attending the cluster's quarterly meetings. They maintain contact via an email distribution list and quarterly meetings rotating locations at various congregations.

There are other cluster groups in the SED District across all the states. Each works independently for its cluster congregations but may be also work cooperatively for larger initiatives according to their resources and commitments.

The UCCNC Mission:

We are forward thinking, committed Unitarian Universalists representing the interdependent and independent congregations of Central North Carolina. We come together to grow our Unitarian Universalist denomination by sharing our resources and ideas.

Through our partnership we will grow our community and its impact, and through working together, we will grow our individual congregations. We come together in community to focus on communicating our principles, promoting our congregations, networking and sharing our efforts while always reflecting our Unitarian Universalist values and working together to grow the beloved community

Web site: www.uccnc.org

Universalist Convention of North Carolina, Inc. (UCONCI)

UU PEACE joined ten other UU congregations as members of UCONCI which was organized in 1895 to promote the coordinated growth of Universalism in eastern North Carolina. UCONCI maintains an historic facility in Burgaw, NC. It holds various youth camps and offers a very moderately priced location for congregational meetings and retreats.

Web site: www.shelterneckuucamp.org

Miscellaneous — not in use

Governance Document Collection

Articles of Association/ Bylaws

The words “Articles of Association” and “bylaws” are often used interchangeably. However, the official document is called the “Articles of Association.”

The current Articles of Association are posted on the UUPF web site in the Member Resource section: <http://uupf.org/docs/UUPF-Articles-of-Association.pdf> .

Articles of Incorporation, State of NC

This 7-page document filed with the State of North Carolina establishes UU PEACE Fellowship as an official non-profit religious organization.

The document uses both PEACE (all caps) and Peace (initial caps).

A Federal Tax ID assignment was obtained from the US Department of Treasury. UUPF is also under the tax -exempt umbrella of the Unitarian Universalist Association of Congregations.

Federal and State and UUA documents are in the UUPF Secretarial records.



Policies, Procedures and Guidelines

Yes, UUPF has them. Most of these are available to view or download from the Member/ Visitor Resource web page <http://uupf.org/membership.htm>. Their use follows general business practices:

Policies: High-level statements that define a community-wide guiding principle. Policies are supplemented (when appropriate) by separate guidelines or step-by-step procedural documents that provide the methods to implement a policy. Example(s) of a UUPF Policy include:

- Right Relations Policy
- Alcohol, Drug and Tobacco Policy

Procedures: A companion to a policy, these typically describe step-by-step instructions and define roles and responsibilities related to a specific policy. While a policy typically remains in effect over a long period of time, procedures often need detailed and/or frequent revisions to reflect changes in techniques, steps, equipment and ownership, etc. Example(s) of a UUPF procedure include:

- Building access/ security instructions; cleaning and maintenance checklists;
- Fire-code compliance inspections; library loans, calendar updates; kitchen use

Guidelines: Recommended practices that allow some discretion or leeway in interpretation, implementation, or use. Guidelines help provide a consistent view for how certain activities are implemented. In some cases, a guideline may include step-by-step procedures or instructions. Example(s) of Guidelines at UUPF include:

- Disruptive Behavior Guidelines; Communications Guidelines; Building-Use/Rental Guidelines;
- Bulletin Board Guideline; Financial Aid Requests; Survey Guidelines; Programming Guidelines,
- Pastoral Care Guideline

Three-year Plan — annual updates

At or before September, the Council convenes a task force to collect each committee's input into an updated three-year plan. The task force reviews the compilation using a prescribed method before sending it to the Council for review. The congregation receives a Council-approved plan in advance for presentation and approval at the annual meeting. The plan includes a timeline for compiling and presenting the plan to the Council and membership (December /January).

Reports—Committees / Council / Congregational Meetings

Monthly Committee Reports

Committees have made a commitment to distribute their monthly meeting notes/minutes to the Council in advance of the monthly Council meeting. The Council minutes and all received committee reports and financial documents, are compiled into a PDF version and sent for distribution to the Council members. Communications can assist in creating this PDF for routing.

Annual Committee Reports

Each committee prepares an annual report which is presented to the congregation, along with the agenda, for the annual Congregational meeting.

Getting items on the Council agenda

Committee leaders should contact the Facilitator or Secretary to have an item added to the Council agenda. Teams and taskforces work with their committee (or if aligned to the Council, the Facilitator) to recommend items for the Council agenda. Anyone presenting an agenda item should provide any advance documentation; and at a Council meeting, have someone present to give an overview/point of view, and respond to any inquiries.

Getting items on the Committee of the Whole agenda

Follow the instructions in the Articles of Association; and consult with the Secretary. These agenda items have both logistical and time-sensitive requirements such as time to assemble and prepare documents and agendas and notification requirements.

Facility (Building, Grounds, Parking, Space Rental)

Building Security and your role

The Building and Grounds committee oversees the maintenance, security, safety and care of our facilities. They often enlist volunteer teams for short-term projects related to grounds and building upkeep. Various teams, committees and task forces are in the building at various times and someone needs to open and/or close the building — but no one person has that responsibility.

Securing the building when leaving

Until UUPF has the service of onsite staff or ongoing maintenance crews, the first line of defense for keeping the building secure are Committee chairpersons, Teams or Task Forces who for whatever reason are on site and are the last to leave the building. Those persons will ultimately be responsible for the lockdown.

Here are the minimum Building-closing requirements:

Heating/AC: Any changes to the heat/AC two thermostats (Sanctuary and classroom hallway) are set to revert to their auto settings. Follow instructions posted nearby.

Food is removed from counters and sealed or trashed; Trash removed

Lights “out”; Stove and electrical appliances “off.”

Doors: Front doors are bolted close; Sanctuary's door is secure (leave by the Classroom hallway door and check that it slams securely).

Gaining access into the building(s)

Front Door Key in stored on the front lock box:

This button-punch box requires a code to unlock. And the combination is managed by B&G who changes the code periodically. If you must get into the building (or the storage shed) and no one in your group has access, contact a B&G committee member for assistance.

Events requiring non-member access to the facility are coordinated through B&G or the Program Council. Generally, non-member access would be limited to those with a rental agreement or an organized event with a member on site during the building use; or to a Friend of the Fellowship who is tasked with a Committee/Council assignment.

Equipment Instructions / Warranty papers

Documentation

Electronic copies:

Communications when able, creates or downloads electronic copies of equipment instructions, etc. These electronic files reside on UUPF's data repository (as of 07/2012, uupeaceoffice@gmail account).

Hardcopies:

If available, please make arrangements to add any new manual/user guide, etc. in the **Instruction** binder located in the kitchen.

Heating and AC thermostats

B&G presets temperatures to go on/off at certain times of the day and makes all the seasonal adjustments. If you or your group changes the settings (cooling or heating ups and downs), you'll be expected to return the temp to the original setting. Look for an Instruction guide posted near each unit.

Building and/or Site — Rental inquiries

Rentals of our facility follow a process managed by the B&G committee on behalf of the Council and in coordination with the Finance Committee. Requests may include hourly, daily, short term and long-term use of our building or grounds. Please refer rental inquiries to the B&G committee chairperson or the assigned rental agent via rentals@uupf.org.

In the absence of administrative staff, the B&G group assigns one person to be the lead "Rental Agent" to evaluate inquiries, coordinate requests and prepare the rental agreement for review and signature. The agent coordinates with other committees groups as needed before any rental inquiries become official agreements in the form of a contract. For some high-use/impact rental requests, B&G will seek Council guidance prior to any rental commitment — but most requests will not require this.

Contractual rental agreements are presented to and executed by the Facilitator and when not available, refer to the UUPF Articles of Association for alternate approval options. Ongoing rental arrangements are a written amendment to contract and do not require Facilitator. For significant changes create a new contract.

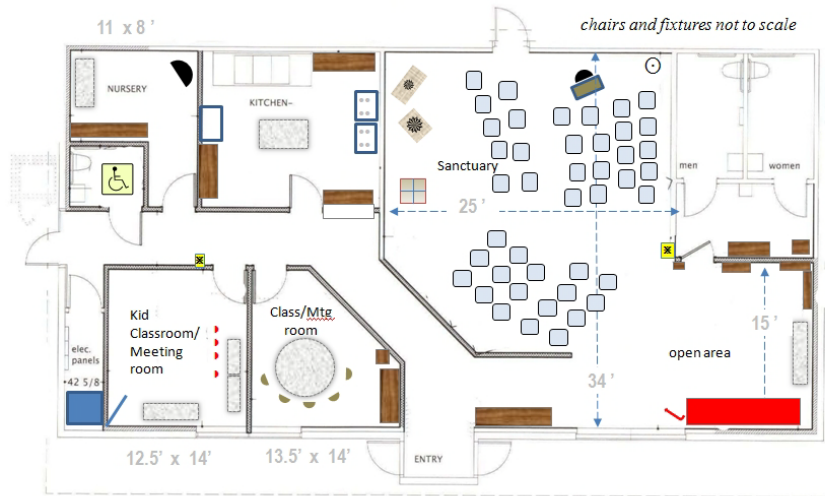
The [Building Use and Rental Agreement Guideline/Form](#) outlines the process, fee structures and rental requirements generally included in rental contracts.

Rental postings on Event Calendar

B&G posts any rental day/time/ use details on UUPF's Event Calendar. All committees and potential users of the facility need to consult the Event Calendar to avoid booking conflicts.

Building Layout illustration & measurements

not to scale. Sanctuary layout varies. Below is a typical layout



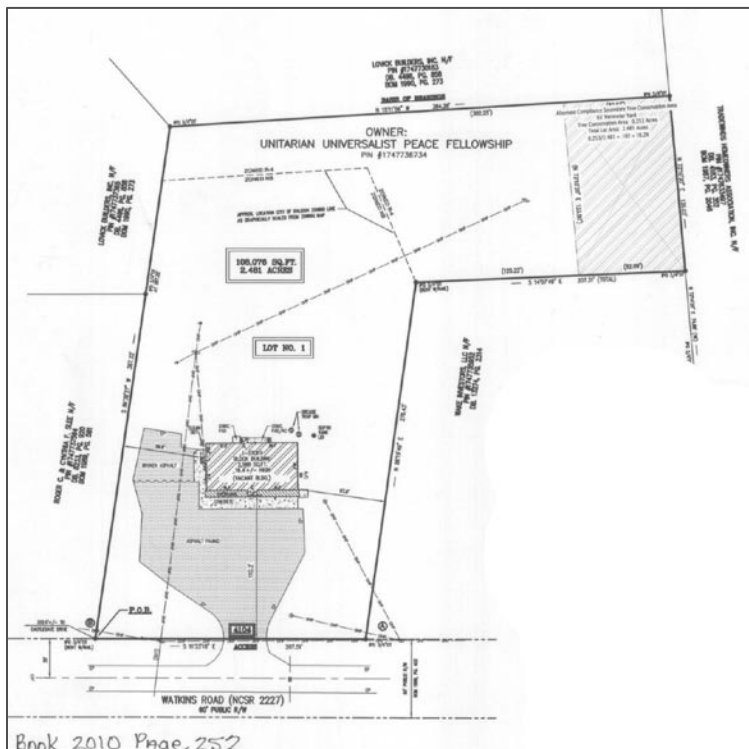
Approximate measurements:

- Sanctuary main: 34' by 26'
- Reception area: 11' by 14'
- Classroom 1: 13' x 5' x 14'
- Classroom 2: 12' by 14'
- Nursery: 11' by 8'

Floor Plan r0 2013

- stationary tables/cabinets
 - movable tables/cabinets
 - folding-table storage
 - thermostats
 - movable podium
 - extra chairs
 - folding chairs
 - stackable cushioned chairs
 - keyboard and bench
- UU PEACE Fellowship
4104 Watkins Rd. Raleigh, NC 27616

Site Layout illustration

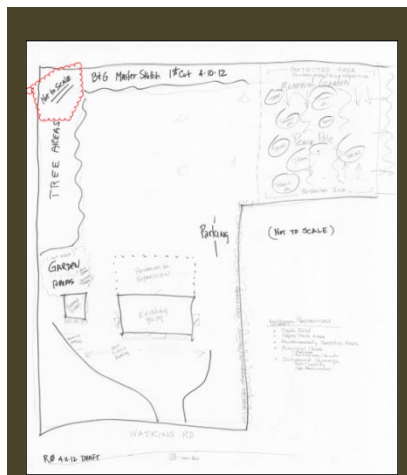


Urban Forest segment:
Approximately .25 acres in the upper right corner is committed to being an urban forest as mandated by Wake County.

The Fellowship can use this land, but the urban-forest designation limits uses and structures.
Building & Grounds can provide additional information.

Site-Use Sketch — for building and land

Illustration only. Not to scale



The Building and Grounds Committee has created an oversized rough sketch of possible land and building uses or ideas that have been mentioned at meetings, the visioning session, at brainstorming sessions and by canvassing members. This sketch (and its associated list) captures some of those ideas while noting typical factors such as physical limitations, city/county ordinances, aesthetics, safety and environmental constraints and best-use needs that impact those choices.

Some future land and building uses may be temporary; and other options might create a great expense to remove/replace something to pursue alternate uses. This sketch does not represent committed plans or agreements.

When considering uses of the land or building, please start by contacting the B&G committee for information.

Communicating — Who and how

Official Spokesperson role

Our Articles of Association identify the Facilitator as the congregation's spokesperson for making official statements to media contacts such as newspapers, television and radio reporters; and to coordinate approval for other media requests such as filming/interview access to our grounds and facility (except for public events).

For other press/media related contact, follow the Communications Guidelines to avoid confusing the listener if you are speaking personally, or on behalf of a defined group as opposed to the congregation.

Publicizing events

Your group has many options, but you must plan your timing to make sure the Communications persons or team has adequate time to post the item in electronic venues. **Please allow at least three days for your item to be received, read, and prepared to be sent (mostly electronically). For example: If the e-news is distributed on Friday morning, your copy should have arrived sometime no later than Wednesday.**

Newsletter deadline: Posted in the newsletter, and often in e-news or announcements.

Electronic Communications

Communications Guideline —privacy, phrasing, ownership ...

UUPF follows this Guideline (<http://uupf.org/docs/UUPF-Communications-Web-Guidelines.pdf>). It covers areas such as privacy, video/photo use, owner identification, copyright obligations, editing standards and other best practices recommended for information distributed or displayed by the congregation. Communications adjusts wording or content to meet the guidelines and when needed contacts the author to discuss options for rewrites before publishing.

Bad Weather Cancellations

The Facilitator (or assignee) consults with B&G when bad weather may impact a Sunday Service, program, or event. If they decide that the gathering should be cancelled, an electronic message is sent to various TV stations so that the cancellation will appear in their revolving banner or in the TV's online "Closing" list.

Unitarian Universalist PEACE Fellowship, 4104 Watkins Rd, Raleigh, NC December 2014
 A Quick-Guide for posting to TV and radio stations is maintained by Communications and a copy is also kept in the Secretary's official documents. It includes login and password information and options for posting notices using a phone. The guide is stored with the official UUPF documents in the uupf office Gmail repository and with the Secretary.

Calendars of events

Through Internet access, two calendars provide event information. Both are seen by the public.

Sunday Calendar lists worship service details provided by the Sunday Service Committee (SSC).

(Updated by the webmaster from information supplied by SSC)

Event and Program Calendar, lists a broad collection of facility events, rooms, uses (including private-rental uses), UU related events such as district conferences, UUCNC events, local area church and UU organization events. (See Event Calendar instructions in the Appendix)

(Timely updates are the responsibility of any officer or committee chairperson/designee)

This Google-based calendar displays on the UUPF web site. How-to instructions and password information sheet is available from Communications (the account administrator). The password is changed periodically.

E-mail accounts

E-mail accounts are listed on the website in the Contact Us section. UUPF maintains a collection of @uupf.org and @gmail.com e-mail addresses in addition to its main e-mail address uupffellowship@yahoo.com. Communications manages password resetting and re-routing of messages to other accounts. In addition, some committees self-administer e-mail accounts for communicating within themselves. For example: Social Action and YRE have/had separate email accounts for this purpose.

Most uupf.org address are using a companion Gmail account that actually stores the e-mails and attachments and then automatically reroutes mail to its assigned committee/officer contact (changed as needed by Communications or a committee assigned admin). UUPF's Internet package annual fee provides up to 10 of these email alias accounts. Other can be added for addition fees. Contact web links are updated to use the gmail addresses instead of the main address.

The list includes:

Function	rtpnet master email ADDRESS	redirected, managed and stored at:
Bookkeeper	bookkeeping@uupf.org	uupfFinanceRecs@gmail.com
Building & Grounds	— <i>reserved for future use</i> ¹	—
Rental Inquiries	rentals@uupf.org	uupeaceRentals@gmail.com
Communications	communications@uupf.org	uupfcommunications@gmail.com uupffellowship@yahoo.com ²
Congregational Health	congregationalHealth@uupf.org	uupfCongregationalHealth@gmail.com
Membership	— reserved for future use	—
Music	musicprogram@uupf.org	uupeacemusicpgm@gmail.com
Office	office@uupf.org <i>reserved for future use</i>	uupeaceoffice@gmail.com

¹ Committees without unique e-mail addresses can receive mail via the uupf yahoo account or other addresses they supply.

² uupffellowship@yahoo.com is the official e-mail address and is managed by Communications.

Rentals rentals@uupf.org uupeace rentals@gmail.com

Event Calendar updates — *used by Council and Committees* uupeacecalendar@gmail.com

Programming programs@uupf.org uupfprograms@gmail.com

Secretary secretary@uupf.org uupfSecretary@gmail.com ³

Social Action socialaction@uupf.org uupfsocialaction@gmail.com

Sunday Services sundayservices@uupf.org uupfsundayservices@gmail.com

Treasurer treasurer@uupf.org uupeacetreasurer@gmail.com

Youth RE yahoo e-mail not in use

List Serves

Communications is the administrator for a collection of distribution lists⁴. Committees, task forces, and teams send items to Communications to post. Topics must be related to UUPF or UUA and other communication guidelines.

Moderated Lists

These moderated lists are set up to **push** UUPF information out to the respective groups and do not accept responses. Some editing, formatting may occur or be requested. The lists are:

Announcements —

(People who signed the guest book and provided an email address, plus all members and all friends of the fellowship.) Communications updates the list from information supplied by the committee who monitors the guest book additions and requests from individuals.

Members —

Friends —

(Those who have met the bylaws criteria for being called a “Friend.”

Members and friends are receiving the same e-mailed information.

(Avoid sending e-mails to the Friends category, if the content/wording could cause confusion). For example: explaining specific instructions for members. If not specified, Communications will decide to send or bypass sending an item to the Friend group.

Unmoderated List

Council of Committee Chairpersons

(Committee Chairpersons an Officers, plus the Bookkeeper and Hospitality Team Leader)

E-mails flow freely among those on the list. Communications updates the list as alerted.

News —Bulletins and Newsletter

Items of interest regarding UUPF, UUA, or UU community are welcomed from members and friends. Teams from the Communications Committee format, edit, and/or write various articles for the weekly e-News, the Sunday News bulletin insert, and the monthly Newsletter. These adhere to the **Communication Guidelines** regarding editorial requirements, privacy, and relevancy content. In particular, any publication available to the general public has personal contact information removed, and permissions obtained before using photographs of any minors.

³ Secretary and/or Communications also send official versions of documents to the uupeaceoffice@gmail.com — which acts as a repository for the congregational records.

⁴ Lists must be UUPF relevant, and follow Communication guidelines and be sensitive to privacy concerns.

Phone Directory (Members and Friends)

Communications (in the absence of automated software and office staff) maintains and periodically publishes the phone directory with assistance from the Membership Committee.

Telephone (v-mail via Google Voice)

Emails to the UUPF Google voice mail number (919 435-4802) is administered and routed to Communication contact's e-mail address. The message and transcript is respond to or forwarded to a person/committee. We do not use the Google phone number to make outbound calls.

Internet Service and Network access

In August, 2012, a password-protected **wireless** Internet service was installed at Watkins Road. On personal computers, one must set up a network connection and use a UUPF-supplied password to connect via the facility's Local Area Network (LAN). Technical support to individuals or renters will be nominal except for UUPF hardware issues. Building and Grounds will manage the physical issues and be the technical support contact with the service provider.

A volunteer Computer Administrator(s) will manage the network-password changes and notifications and the password will be added to the master registration list maintained by Communications in the absence of office support staff.

This network-connection access password will change regularly.

And, when using the UUPF PC or your own equipment, you are expected to have your computer's antivirus protections activated.

Renters, on request, will be given the web password when access needed by their group.

Social Media (Face Book, and beyond)

Face Book

Postings follow the UUPF Communications Guidelines and content is monitored by a member of Communications. Two (2) Face Book accounts are maintained:

Our (awkwardly called by Facebook) "secret group" which is their way to designate a site that only those invited by the UUPF moderator to be included to see or post content. People may also call this the "private" page. We use this for members and friends to communicate informally among themselves. Topics should be generally relevant to congregational life and to member/friends activities thought others in the group would like to know.


Our "Page" where anyone with a Facebook account can add or respond to posts, add photos, etc.

Twitter

UUPF has a Twitter account "**uupf**" but as of 2012 it remains unused. Currently administered by Communications

Web site Administration

Domain Name — keeping it alive and belonging to us:

 Prompt fee payment is critical to preventing cancellation of the Fellowship's Internet domain name (www.uupf.org) Lapsed domain name fees results in the name being almost instantly purchased by a third party who then attempts to resell back to the former owner at a high cost. Currently, the domain-fee invoice is charged to a personal credit account of the Communication's chairperson who then submits a reimbursement.

Communications manages the web site, including technical issues, layout and editing.

The current ISP provider is **rtpnet.org**, a local non-profit organization that manages Internet access, the daily backup of web pages and provides technical support. UUPF pays an annual fee for a service level that provides online storage, up to ten list serves distribution options, and up to ten @uupf.org e-mail alias addresses. Annual invoices go to the fellowship's e-mail.

Web page content follows the UUPF Communications Guidelines for posting, privacy and content options.

Bulletin Board and Room bulletin boards

Follow the UUPF Bulletin Board Guidelines for posting and relevancy. Members, friends, committees, task forces and teams can post items related to the fellowship, its members and the UU community. Time-sensitive postings are subject to a 3-month limitation and are monitored by a member of Communications or others who can reasonably determine that something should be removed.

Library

Books are both purchased and donated to UUPF's Library. The collection is cataloged and available for loan. CD's and other media items are also part of the collection.

APPENDIX:

Forms and document access

Forms and other paperwork are available from the Member Resource web page <http://uupf.org/membership.htm>. And, will be stored on the office PC or online. In some cases, committees create and update their own forms.

Below is a list of some of the documents that are available. Others, if they exists, can be requested by sending an e-mail to the main address or contacting the appropriate committee: uupfellowship@yahoo.com

Committees can request assistance from Communications in designing and formatting forms and other documents. Most have a PDF version and some are also available as a WORD document.

Alcohol-Drug-Tobacco-Gun policy

<http://uupf.org/docs/UUPF-Alcohol-Drug-Tobacco-Policy-R0.pdf>

Building Use and Rental contract forms

A contract to rent the facility or rooms incorporates the Building-use guideline.

<http://uupf.org/docs/UUPF-Building-Use-Agreement-TEMPLATE.docx>

Bulletin Board use and updates

<http://uupf.org/docs/UUPF-Community-Bulletin-Board-Guidelines.pdf>

Pastoral Care Guidelines

<http://uupf.org/docs/UUPF-Pastoral-Care-Guidelines.pdf>

Reimbursement Form

<http://uupf.org/docs/UUPF-reimbursement-FORM.pdf>

Use this to:

Request a repayment for expenditures by completing the form and submitting it to the appropriate committee along with any receipts. You will receive a reimbursement check.

or

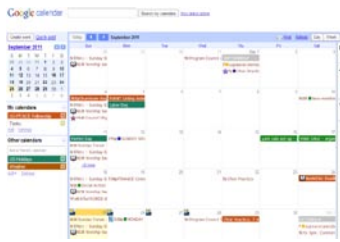
Ask that the expenditure amount that you incurred not be repaid but instead be credited as a non-pledge donation to the Fellowship. *IRS rules apply that do not allow services to be considered a donation.*

In both cases, submitting these expenditures greatly improves the Fellowship's ability to budget and forecast

Youth Religious Education Forms

The YRE Committee provides forms for enrollments, or for other permissions. Consult the YRE group for details.

Event & Pgm Calendar—Instruction sheet [upeacecalendar](http://upeacecalendar.com)



Committees have made a commitment to update this public gmail calendar so that other committees and program planners can know what dates are available and who to contact for additional information. But, most importantly to avoid event/meeting schedule conflicts. The public – including our congregants — will look at this calendar for any number of reasons including glimpsing at program offerings and activity diversity; and for details regarding a specific event.

Logon instructions - Ref: v3

Committee Chairs are given access to the Google-based **UUPF Event Calendar**.

In the URL, type [www.mail.google.com]

User login name: ---Communications will supply ---

Password: ---Communications will supply --- (case sensitive)

From the top Google menu, select the **Calendar** option. Find your date, and click in the box.

Select your date; add your entry using these basic guidelines. Provide Event name in the main box and list more details in a Description box.

Provide enough details; and guard private information

The viewer must know if this is an open-to-the public event, a UU event, or a congregation- related meeting; and give start/end times as needed, is it a child-friendly even, etc.

Indicate if there is any expense or requirements for attending an event

Privacy

To make event entries to be visible **only** to those with login privileges (committee/ council reps who do updates, change the default **Privacy** setting from Public to Private (e.g. private rental uses)

Never list UUPF contact's full names, email addresses or phone numbers without permission; but do provide any organizational email , phone numbers or web links as needed

Do not allow guests to update the calendar (a feature listed on the right section of the Edit screen)

Verification – check the uupf web site

The Google calendar you see on the uupf web site is a view-only **display** via a link. After you make an Google calendar entry, you should look at it from the uupf website [<http://uupf.org/calendar-EVENTS.htm>]. If you have added additional details in the More Details box and you want to make sure it displays the way you want.

Uses of this Google account

Use only the calendar option. Do not use upeacecalendar's data storage/email features, etc.

Account “Owner” – Communications Committee

The Communications Committee is the owner of this account and will change the password on a periodic basis. Report any issues to this committee.

Treasurer — Timeline of Tasks

Also see the **Officer—What They Do** section for high-level description of the Treasurer role. The description below provides a timeline of typical tasks done or managed by the Treasurer.

Weekly:

- Collect and distribute mail from PO Box
- Count collections (with bookkeeper) and make bank deposits
- Review requests for reimbursement, and forward to bookkeeper for check preparation and recording.
- Sign and mail checks prepared by the bookkeeper.

Monthly:

- Attend Coordinating Council meeting
- Open and review bank statements and inquire about unusual or unexpected activity. Send statements to bookkeeper for reconciliation.
- As ex-officio member, attend Finance Committee meeting and report as requested by the chair of that committee.

Quarterly:

- Ensure that bookkeeper has sent pledge statements to contributors on a timely basis. With Finance Committee chair, reconcile any discrepancies.
- Ensure that the bookkeeper has prepared and distributed financial statements to the Coordinating Council on a timely basis (before its next monthly meeting).
- Review and approve the bank reconciliation prepared by the bookkeeper.
- Attend congregational meetings, and answer member questions about financial records if necessary.

Annually:

- With the Secretary, verify membership roster for submission to UUA and SED.
- Assist Finance Committee chair in preparation and presentation of budget for approval by congregation.
- Submit any reports (prepared by bookkeeper) required by IRS, including 1099's to vendors as needed.

— end of document —

r5b: March 2014

r6a: December 2014