



**THE FIRST UNITARIAN CONGREGATION OF OTTAWA**

**VOLUNTEER OPERATIONS HANDBOOK**

***\*Draft: Feb 9, 2008***

***\* This Handbook is an 'ever-green' document – it is intended to grow and change.  
The Volunteer Resource Council welcomes additions or other changes.***

The First Unitarian Congregation of Ottawa  
Volunteer Operations Handbook

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## ***WELCOME***

The First Unitarian Church of Ottawa welcomes you as a member of our spiritual community and as a volunteer! We know that volunteers make almost everything happen in this congregation and we try our best to support all your activities here. We strive to honour your gifts and appreciate your interests. New volunteers are usually oriented and/or trained by a staff member, committee chair or a board member. Orientation and training happen on an as needed basis or through mentoring. This handbook provides a written orientation, which we hope, will help to make your volunteer contribution a positive and enriching experience for all.

## **DESCRIPTION AND OBJECTIVES OF THIS HANDBOOK**

This modular-based handbook provides information on the First Unitarian Congregation's operational activities. It answers many common questions posed by new and old volunteers alike on everything from how to contact someone about using a room for an activity, to how to set up a committee or how to make a donation to the church. The Volunteer Resource Council worked in partnership with various people within the church to put this handbook together. It is meant to be an evolving, living and useful reference tool, which will be updated regularly to reflect the evolution of practices and procedures at the church. Although it is not meant to be a guide to church policy, given the necessary close relationship between practice, procedures and policy, there are references to various policies, both formal and informal, throughout the handbook.

The objectives of this handbook are:

- To provide information and guidelines on operational activities to all volunteers and members of the congregation ...and particularly to newcomers who may benefit most from this 'How To' roadmap;
- To integrate our vision and **UU principles** into operational activities and provide an understanding of guidelines and expectations for involvement in the congregation;
- To support a **lifespan learning** community which intentionally encourages and creates opportunity for spiritual growth and learning at all ages of our lives and all stages of our faith development; and,
- To explore, in practical ways, what a **covenant** means when we work together as volunteers in community.

# ***KINDLING THE LIGHT***

## **OUR VISION AND PRINCIPLES**

“We kindle the light within and inspire courage to nurture the web of life and to create a just and compassionate world”. (Vision statement)

Our principles affirm and promote:

1. The inherent worth and dignity of every person;
2. Justice, equity, and compassion in human relations;
3. Acceptance of one another and encouragement to spiritual growth in our congregation;
4. A free and responsible search for truth and meaning;
5. The right of conscience and the use of the democratic process within our congregation and in society at large;
6. The goal of world community with peace, liberty and justice for all;
7. Respect for the interdependent web of all existence of which we are a part.

As many of the principles suggest, we welcome people of all races, sexual orientation, cultural background, gender or age. We support the dignity and worth of every person and strive to raise awareness and respect for the realities and needs of all. In practical terms, this means respecting and honouring difference in our community and beyond. It means ensuring physical accessibility to the church premises and promoting active participation in activities for all who may require additional supports. For example, headsets are provided for the services as well as Braille and large print hymns (at the Welcome Table). It also means making an effort to be sensitive to things such as food and other allergies (scents such as perfume).

## **WHAT IS A WELCOMING CONGREGATION?**

We are an intentionally Welcoming Congregation. This means we welcome Bisexual, Gay, Lesbian and Transgender people. See the Canadian Unitarian Council pamphlet, *Welcoming Congregation Program* for more information. You can find this pamphlet (and others) at the main entrance to Worship Hall.

## **WHAT IS LIFE SPAN LEARNING?**

The First Unitarian Congregation is in the process of becoming a Lifespan Learning Community through the guidelines developed by the Canadian Unitarian Council. Lifespan learning is all about finding ways to draw out our potential through our religious communities. More information on Lifespan Learning can be found at the following websites: <http://www.cuc.ca/lifespan/IICommunity.htm> and <http://www.uottawa.com>

Through its practical information on operational activities for volunteers, this handbook fosters the conditions which encourage spiritual growth and learning.

## **WHAT IS A COVENANT?**

A covenant is a solemn promise to do or not do something. In Unitarian Universalism, we covenant to affirm and promote our Unitarian principles. We also use covenanting as a process to help create safe intentional communities.

In a volunteer setting, you may call a covenant “committee guidelines”. They define expected behavioural norms and are especially important when working together in a virtual environment or cross-functional team. Groups will be more successful when the guidelines or covenant is written and can be referred to on a regular basis.

In a spiritual setting, a group covenant helps build trust and to provide a safe space to do committee work and explore spirituality. If the members of the committee or group create the covenant, they are more likely to feel ownership of the guidelines, and therefore, they are more likely to follow them.

## ***WHERE AND HOW TO FIND US***

### **Office Information:**

Office hours are 9:30-4:00 Monday to Friday

Phone: 613-725-1066

Fax: 613-725-3259

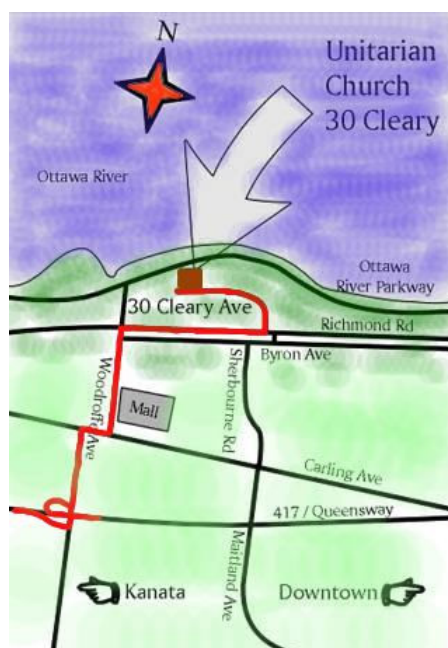
To email: [uuoffice@uuottawa.com](mailto:uuoffice@uuottawa.com)

Website: <http://www.uuottawa.com>

### **LOCATION**

#### **How to get to the First Unitarian Congregation of Ottawa:**

30 Cleary Avenue, Ottawa, Ont. K2A 4A1



Located in the West End of Ottawa about a kilometer east of the intersection of Woodroffe Ave. and Richmond Road, the tall spire of our modern structure is visible from Richmond Road and the Ottawa River Parkway.

**OC Transpo Buses:** The #2 and #18 buses go right by Cleary Ave on Richmond and #'s 50, 87 and 156 go to the corner of Woodroffe and Richmond (a short 2 block walk from the Church).

**By Car:** From the Queensway (Hwy 417): Take the Woodroffe North exit; continue on Woodroffe (with a jog to the right then left at Carling), past Carlingwood Shopping Centre to Richmond Road. Turn right, and then at first traffic lights turn left onto Cleary Ave – we are at the end of road. There is ample free parking.

**Access for Disabled Persons:** The intersection at Cleary and Richmond has audible aids for the visually impaired. The church is at the end of Cleary Avenue; all sidewalks are wheelchair accessible and the church has an elevator.

## ***WHO DOES WHAT?***

### **OFFICE STAFF**

**The Director of Support Services** is responsible for the management of all day-to-day congregational and church operations that are not of a spiritual or program nature. The Director of Support Services supervises and enables the work of all administrative staff and contractors, VSOPs (Volunteer Support Office Personnel) and the Head Custodian (who in turn supervises Assistant Custodians). She/he has the authority to exercise appropriate control of all office and custodial work including requests from the Board, Minister, staff, committees, volunteers, members and friends.

**The Administrative Services Officer** maintains the membership database; issues tax receipts; and manages all room bookings and rentals, and any associated chaplaincy services. She/he provides logistics support for rites of passage services and performs reception & administrative duties. She/he also supports various committees and programs including: the Stewardship Committee, the Membership Committee, the Welcome & Integration Committee and the Religious Education, Youth and Adult Lifespan Programs.

**The Publications Officer** supports the Congregation in its creation, production and dissemination of a variety of electronic communication vehicles through the following roles and activities: Editor-in-Chief of the monthly newsletter, (*The Parkway Spire*); produces the weekly *Order of Worship* and *Announcements* insert and the *euottawa* (an electronic announcements publication) and other communications material; manages the website; supports publication volunteers and the Communications Committee; and maintains up-to-date lists of the names and contacts of all Committees, Task Forces, and interest groups, in cooperation with the Volunteer Resource Council.

**The Custodian(s)** ensure that there is a safe, comfortable and welcoming environment for all those who attend the church; ensure that the facility equipment are maintained in safe and proper working order; and carry out maintenance work as needed. A custodian must be present for all rental activities and ensures the security of the building at all times when other staff members are not present.

**Volunteer Support Office Personnel or Very Special Office Persons (VSOP's)** are volunteers who fill morning and afternoon shifts in the office. They perform administrative tasks such as answering the phone, sorting mail, photocopying, maintaining records, etc. as well as a variety of other tasks (i.e. watering plants, tidying the pews and bulletin boards) as required, to support the staff and congregation.

### **PROGRAM STAFF**

**The Minister** is the religious leader of the congregation. The Minister's primary role is to provide spiritual leadership and animation to the life and outreach of the congregation. The Minister is also accountable for the overall effectiveness of both the Program and Support Services groups (see Organizational chart).

**The Director of Music** contributes to worship, life long learning and fellowship through direct leadership of music programs and by working with the Music Committee.

**The Director of Religious Education** is responsible for the Religious Exploration program for children in the congregation.

**The Director of Youth Programming** is responsible for the Religious Exploration program for youth in the congregation.

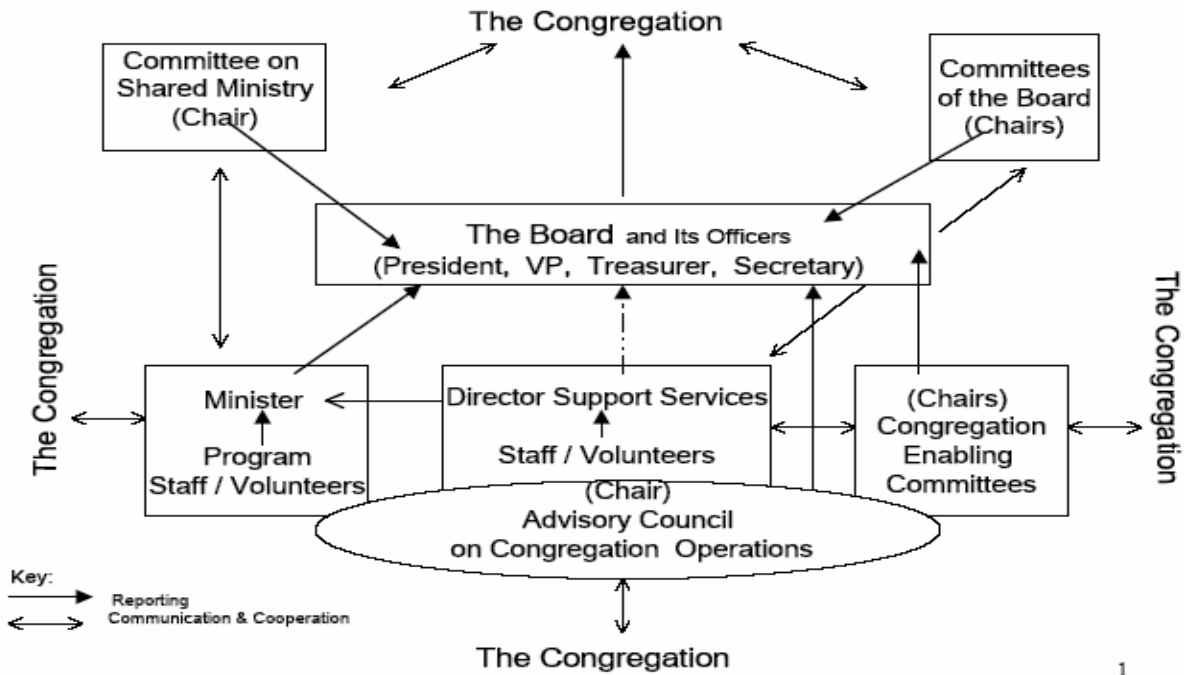
**The Pastoral Visitor** provides pastoral services and chairs the Pastoral Care Council.

**THE BOARD:** is a policy and governance board: it makes policies and delegates the implementation of these policies to the staff and committees. The Board decides what we will do and empowers the staff and committees to figure out how to do it.

**THE COMMITTEES:** work individually and collectively to run the congregation. These committees include Standing Committees (such as the Finance, Personnel, Property, Campus Planning and Nominating committees) that perform specific legally required functions on behalf of the congregation. They also include Enabling Committees (such as; Membership, Stewardship, Volunteer Resource Council, Caring Committee, Welcoming and Integration, Communications and Denominational Affairs) that work to further the welfare of the congregation at large. See the Getting Connected brochure for more information about specific committees.

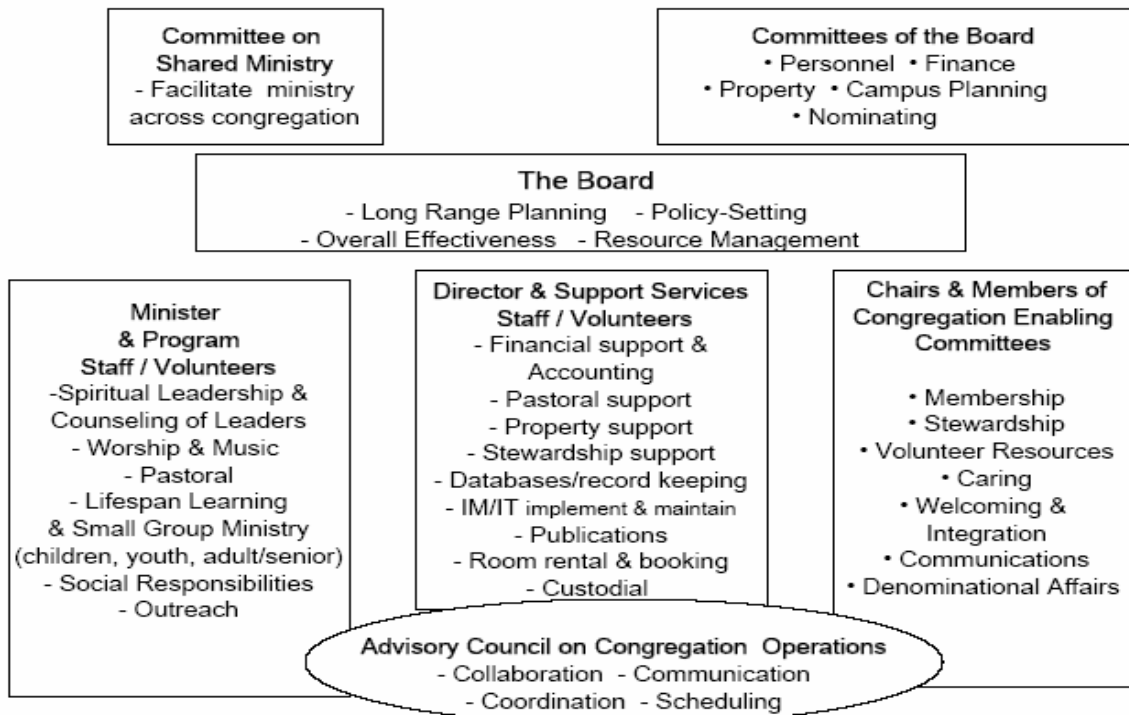
# ORGANIZATION CHART AND RESPONSIBILITIES

2007 – 2008 First Unitarian Congregation Organization Structure



1

2007 – 2008 - First Unitarian Congregation Responsibilities



2

## ***GETTING THE WORD OUT***

### **PUBLICATIONS**

**The Monthly Newsletter, *The Parkway Spire*** is distributed both electronically and in hardcopy to members and friends of the congregation (circulation approx. 550).

- To put a notice or other information in *the Spire* please send an email to [parkwayspire@gmail.com](mailto:parkwayspire@gmail.com)
- The maximum word count for notices is 300 words, although shorter notices are appreciated
- If you would like to receive the *Spire* you can:
  - find it online at <http://www.uuottawa.com/>, or
  - ask at the Welcome Table at the back of Worship Hall after a Sunday service -- if you are a congregant in good standing, it's free; if not, you will receive a complimentary copy for three months

***The Sunday Communiqué*** provides a weekly calendar of upcoming events and announcements.

- To put information in *the Communiqué*, provide a written submission to [UUannouncements@gmail.com](mailto:UUannouncements@gmail.com) or deliver to the office by Wednesday at 4:00 pm for the following Sunday service.
- The maximum word count for notices is 80 words
- Given the number and diversity of activities as well as the time constraints in services, announcements are shared through the *Sunday Communiqué*.
- Announcements will be put in *the Communiqué* for a maximum of three weeks so the requested dates should be included in your submission.

The ***e-UUOttawa bulletin*** is a weekly electronic communication tool which provides another opportunity to share information on upcoming events and activities.

- To put information in the *e-UUOttawa bulletin*, provide a written submission to [UUannouncements@gmail.com](mailto:UUannouncements@gmail.com) or deliver to the office by Wednesday at 4:00 pm
- The maximum word count for notices is 80 words
- Announcements will be put in *the bulletin* for a maximum of three weeks so the requested dates should be included in your submission.

**Monthly calendars** of activities and events are also available at the Welcome Table at the back of Worship Hall after Sunday service. These calendars include information taken from the Room Booking Calendar located in the office.

**The Lifespan Learning Guide** is published seasonally by the Lifespan Learning Council and is available at the back of Worship Hall. If you wish to submit an item for a future version, please contact a member of the Council (see Telephone Directory or the Getting Connected Brochure).

### **The Telephone Directory:**

- Is a list of staff, volunteers and committee contacts
- Committee chairs receive a free copy
- Others can get a copy at the welcome table or in the office for a small fee

- To be listed you submit your name, phone number and address to the Office (you do not have to be a member)

**Privacy guidelines re email:**

- You may only use personal information (i.e. an email address) for the purpose it was given
- Permission to publish an email address is required
- Use “bcc” when emailing a group to protect individual privacy

**BULLETIN BOARDS AND POSTERS**

There are various Bulletin Boards around the Church to provide opportunities to sign up for and advertise events and activities. Please check with the related committee (if there is one) before putting something up.

**In Fellowship Hall:**

**South Wall (kitchen):**

- Volunteers Sign-up sheet for coffee (to the left of kitchen door)
- Religious Exploration for children and youth (to the left of kitchen)

**West Wall (adjacent to Worship Hall):**

- Community Events
- Welcoming Congregation
- Noble Birds
- Seniors
- Program Committee and Program Sign Up (to the right of the kitchen)
- The Board of Directors

**North Wall (adjacent to patio):**

- Social Responsibilities

**East Wall**

- Denominational Affairs

**In Volunteer Support Room:**

- Unitarian Service Committee information

**In West Lobby Area:**

**Across from name tags:**

- Information varies – Religious Exploration, Lifespan Learning and the Volunteer Resource Council are responsible for this space

**Next to little kitchen near Office:**

- Program bulletin with Sign Up sheets

**Next to washroom near office:**

- Music Program

**Right of Main Office:**

- The Board of Directors

**Downstairs:**

- Religious Exploration
- Lifespan Learning has a small poster space outside Room 6

If you wish to put up a **poster**, check with the Office for an appropriate place. Sometimes the upstairs washrooms are appropriate spaces for posters. Please do not put anything on the walls in Worship Hall as this space is meant to provide a calm and uncluttered space for reflection and spiritual growth.

Please limit posters to “special events” and only print as many as you will need so as not to waste paper. Posters should be removed immediately after the event.

There are also free-standing signs available, which are kept in the Volunteer Support Room, to put at the back of the church when there are current posters to display.

## ***PUTTING IT ALL TOGETHER***

### **USING THE BUILDING**

#### **How to book a room for church related activities:**

- First check the calendar on the Reception desk in the Office for room availability
- Then fill out a Room Booking Memo (see Appendix C)
- If you need equipment (i.e. multimedia projector, flip chart, etc.) you can request it as you fill in the booking form
- If you wish to set up a **table** to display something (i.e. to sell) on Sunday morning please put a reservation request into the Office using the Room Booking Memo

#### **Renting space:**

- Space may also be rented for non-church related activities
- Call the Office or email [rentals@uuottawa.com](mailto:rentals@uuottawa.com) or go to [http://www.uuottawa.com/rental\\_index.html](http://www.uuottawa.com/rental_index.html) for more information

#### **The Volunteer Support Room (VSR) is located at the back of Worship Hall:**

- There are two sets of mail boxes (slots): the one on the right as you walk in is for staff and standing committees and on the left corner are slots for various other committees and groups
- A lost and found is just inside the door
- The photocopier located in the VSR is to be used only for official church business; an account # is required (the chair of your group should have it) or ask the office
- A phone for public use is in the Volunteer Support Room; select any of the three lines and dial the 10 digit number

#### **Using the elevator:**

- The elevator is for those who need assistance in reaching or lower floors
- If the elevator is not there, hold the button until the elevator comes
- When inside, turn the key ON (to the right), press and **hold the button** until the elevator arrives at the floor you want – light goes on, then turn key OFF
- If you don't turn the key OFF before you leave the elevator, the call buttons won't work for the next person

#### **Closing Up:**

- The rooms should be left clean and tidy, any dishes washed and put away and chairs/tables as they were when you arrived, with lights turned off
- Groups that meet in the evening are expected to close up
- The last one out should turn lights off and close door securely when they leave
- The custodian will let the group know when he/she is leaving and will make sure the door is locked from the outside

#### **Building Maintenance:**

- Ask the custodian for any building related problems (i.e. heat adjustment, light bulbs, etc.)

- If you notice something needing repair or attention in the building, tell the custodian (cell phone: 613-355-4830) or fill in a form available in the office or in the Volunteer Support Room to report maintenance requests (see Appendix C)

### **Emergencies:**

- For safety/medical emergencies Dial 911
- For building related emergencies – call the custodian on his cell # (see Directory)

## **HOW TO START A NEW GROUP OR ACTIVITY**

Most new groups require some form of approval:

- Social responsibility groups need a minimum of six congregants and require approval by the Social Responsibility Committee
- Groups such as those on covenanting, introduction to Unitarian Universalism or religion require approval from the Life Span Learning Council
- Any new committees of the Board are approved by the Board of Directors
- Anyone who is interested in starting a course or activity should complete the 'Proposal For Adult Lifespan Learning Event' form (in Appendix C), which is also available at the office or from the Lifespan Learning Council – the Council will consider all requests

## **HOW TO PUT ON AN EVENT**

*(Yet to come... in development....)*

## **INFORMATION ON COMMITTEES**

Setting up a committee involves developing a mandate with a statement of purpose, scope, and key responsibilities. A chairperson and minute taker are appointed and partner groups identified. Chairs must be members of the congregation. The board approves new committees and their chairs. Committees usually meet monthly but frequency is up to the discretion of the members. Meetings are held when most convenient for everyone involved.

Minutes should be taken at every meeting. The minute taker shares draft minutes with all members for changes, then incorporates changes and distributes final copies to all members. The chair gives a copy to the office to ensure accurate records and history.

The chair submits an annual committee report, which includes a list of committee members and a summary of activities completed as well as money spent, to the office. This report is due by the end of June.

The chair drafts the agenda and invites members to submit items well in advance of the meeting. The chair prioritizes the items, allots time for each item and helps the committee stay on track within this timeframe.

At meetings, all committee members are responsible for listening well, staying on topic and participating fully in discussions. The chair will use her/his facilitation skills to support the committee in participating, listening, handling conflict, and decision making. (See Tips for Successful Meetings in Appendix B at the end of this handbook for further ideas on Facilitation.)

A committee chair may want to, or be asked to present an issue to the Board. The presentation should include a brief written summary of the issue, highlight any decisions which need to be made, and include background notes (in bullet form) to assist the Board in understanding the issue before them. The Board asks that written reports are submitted 3 days in advance of the meeting, so the Board can prepare.

Each committee is responsible for interacting with the Congregation on financial matters. A member of the committee should connect with the Treasurer to determine financial resources needed and expected revenues and expenditures to be included as part of the Congregational budget. Monies should be handled using the Church's financial process: deposits are identified and placed in the floor safe in the Volunteer Support Office; cheques for expenditures are issued by the Church after expense forms are submitted.

## **FINANCIAL INFORMATION**

### **Expense Claims:**

- Expense claim forms are available in the Expense Forms slot in the Volunteer Support Room and should be submitted in the "Payables" mail slot
- Expenses must be approved on the form by the chair of the activity based on the budget for that activity
- Please complete and submit expense claims in a timely manner, typically in less than a month.
- It is very important to attach any original receipts (with GST) to the expense claim
- The bookkeeper only works Tuesday and Thursday, and cheques are normally signed on Thursday by two Executive Board members

### **Donations and Tax Receipts:**

- Donations may be made by cheque, cash or pre-authorized debit (not credit card) at the Sunday church service, to the office by mail or in person, or put directly into the safe in the Volunteer Support Room; they may also be made by credit card through CanadaHelps.org
- A Canada Helps link exists on the Congregation's website to permit donations to the Congregation using a credit care. Any tax receipt is issued by Canada Helps which deducts a service charge
- Any donations (cheque or cash) that are identifiable (with name and address) and are over \$10 qualify for a charitable tax receipt which is sent out in February for donations made in the previous calendar year. To be eligible for a tax receipt, a donation must be made either to the church, an identified CRA charity, or an approved activity of the Congregation. If the donation indicates it is for a non charity, no tax receipt is provided

- Tax receipts may also be given for in kind donations worth more than \$10, such as those for the Time and Talent or the Silent Auction, if the item is recorded (attach your name to the item) -- the receipt is based on the amount for which the item sold (market value)
- Tax receipts are not available for services
- Tax receipts may also be given for in-kind donations based on the appraised value under special circumstances – contact the Treasurer
- Donations can be directed to the Operating Fund or to other special funds (i.e. the Endowment Fund) – contact the Treasurer (see directory) for more information on Funds

## ***DEEPENING YOUR CONNECTIONS***

Getting more involved in the congregation is a great way to deepen your social and spiritual connections in the community. There are so many possible ways to become involved... if you would like to find out more about the various activities, the Volunteer Resource Council would be happy to speak with you (see Telephone Directory for contact information).

## **WORKING WITH CHILDREN AND YOUTH**

To ensure a safe and healthy environment, a police reference/screening check is required for those who wish to volunteer with children and/or youth. The reference will be reviewed by the Director of Religious Education or the Director of Youth Programming and held in confidence.

## **TRAINING OPPORTUNITIES FOR VOLUNTEERS**

- The Canadian Unitarian Universalist Leadership (CU-UL) School is an annual residential program [http://www.cuc.ca/programs/cuul/CUULSchool\\_overview.pdf](http://www.cuc.ca/programs/cuul/CUULSchool_overview.pdf)
- Canadian Unitarian Council offerings - for more information go to: <http://www.cuc.ca/programs/leadership.htm>
- Annual and Regional Unitarian Universalist meetings
- First Unitarian programs and courses of relevance
  - Our Whole Lives (OWL) facilitator training (usually held in fall)
  - Youth Advisor Training
  - Chaplain Training workshops

Look for other training opportunities on the Unitarian Universalist Association of Congregations website: <http://www.uua.org>, the Our Whole Lives (OWL) Calendar, or the Canadian Unitarian Council Lifespan Learning site: <http://www.cuc.ca/lifespan/index.htm> Also see announcements in the Parkway Spire, *the Communiqué*, etc.

## **FEEDBACK WELCOME**

All volunteers are encouraged to share suggestions or concerns with their contact person whether that is a Board member, committee chair, staff, Minister or volunteer coordinator.

Likewise, the contact person will bring issues of concern to the volunteer privately. If a volunteer is leaving, exit interviews are encouraged so that we may learn from each other and improve future volunteer experiences.

The First Unitarian Congregation will shower volunteers with praise and appreciation in as public a manner as is appropriate.

## ***STILL HAVE QUESTIONS?***

### **ANSWERS TO COMMON QUESTIONS**

#### **How do I request a caring card?**

- Contact the Caring Contact listed in the Order of Service or Newsletter for that month or contact the office
- The Caring Contact will call the potential card receiver to ensure they would like a card

#### **How do I make or change a donation?**

- Call the office (also see page 13)

#### **How do I request a service (wedding, funeral, welcoming)?**

- Call the office

#### **How do I arrange a pastoral visit?**

- Call the office

#### **How do I contact the Minister?**

- Call the office

#### **How do I get a Telephone Directory or get listed in the Directory?**

- Copies are available for sale at the Welcome Table after service
- To be included in the next Directory, submit your name and contact information to the office

#### **Where can I find The Getting Connected brochure?**

- Ask a member of the Volunteer Resource Council (see telephone directory) or the office

#### **Where can I find minutes of past committee meetings?**

- The office has copies of many committee minutes...or contact the committee chair

#### **What is the church website?**

- <http://www.uuottawa.com>

## OTHER RESOURCES

- Getting Connected Brochure – contact the Volunteer Resource Council
- Committee lists – at back of the Telephone Directory
- Online Resources – on the website: <http://www.uuottawa.com/>
- Lifespan Learning Guide - at back of Worship Hall and on the Church website
- Membership Information Kit and membership application - at Welcome Table
- The First Unitarian Congregation of Ottawa By-Laws –ask the Office
- Handbook for Leaders in Religious Exploration, First Unitarian Congregation of Ottawa, 2007-2008 - contact the Director of Religious Exploration
- Youth Program Handbook:  
<http://www.uuottawa.com/pdf/YouthProgramHandbook-071212.pdf>
- Canadian Unitarian Council: <http://www.cuc.ca>
- Unitarian Universalist Association of Congregations: <http://www.uua.org>

## Videos

Did you know that the church office has about 40 videos available for borrowing? Titles & descriptions are listed on the Video Tape Directory, posted in Fellowship Hall on the Program Committee board (to the right of the kitchen) and on the Religious Education bulletin board, downstairs

## PARKING LOT ITEMS

These items include things which have yet to be decided upon at First Unitarian, however, they have been identified as potentially useful information for volunteers. These items will be incorporated into this handbook once they have been clarified and a decision has been made (i.e. a policy or procedure is developed).

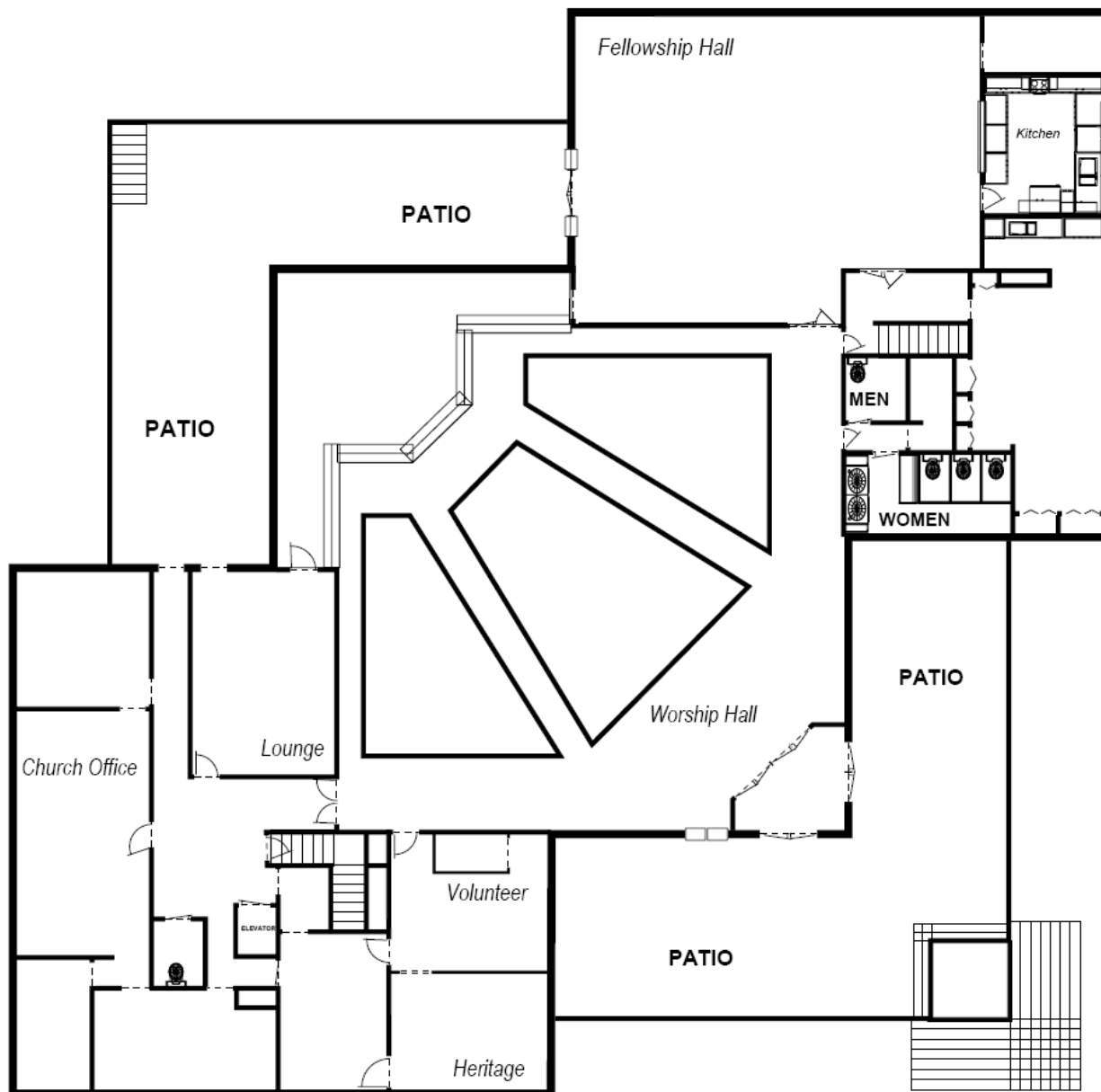
The following items have been identified so far:

1. Putting on an event: What steps and approvals are necessary and who should be consulted?
2. Fees for Groups – should (all or certain) groups be asked to contribute \$ when they meet at the church
3. Who approves new social groups?
4. Selling items in Worship Hall – guidelines to be developed?
5. Can the minister be reached in an emergency when the office is closed? If so, how?

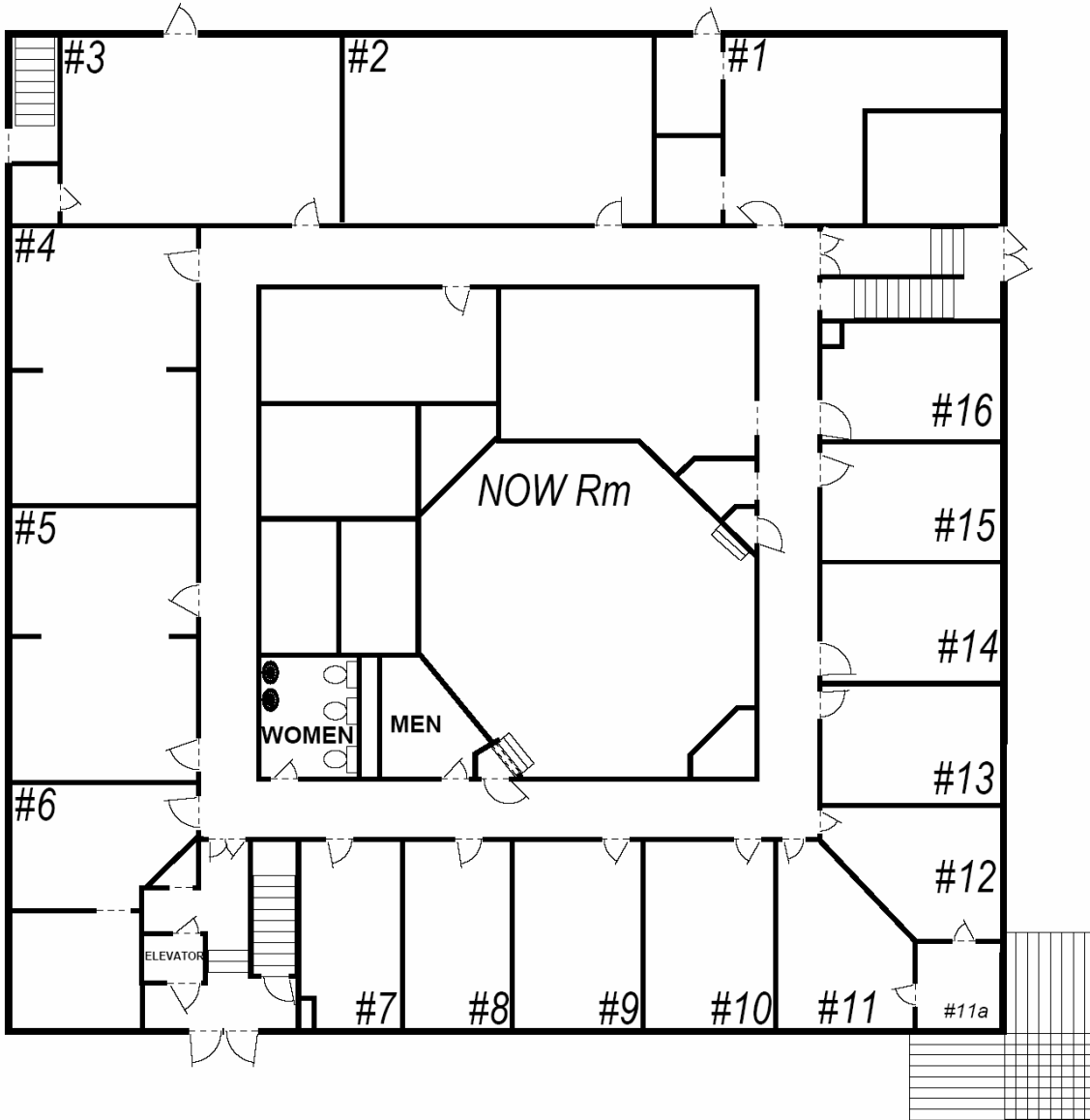
**APPENDICES**

**APPENDIX A - MAP OF BUILDING**

**UPPER FLOOR**



**LOWER FLOOR**



## **APPENDIX B – TIPS FOR PRODUCTIVE MEETINGS**

1. Develop group guidelines or a covenant between members and post at each meeting. This helps to build an atmosphere of trust and safety.
2. Start on time and end on time.
3. The facilitator or chair prepares an agenda and circulates prior to the meeting, welcoming additions.
4. A minute taker records decisions along with any assigned tasks and timeframes. These minutes should be sent to all members for approval before they are kept as formal records.
5. Allot time frames for agenda items.
6. Include an opening reading and a brief check-in at the beginning to share how everyone is doing.
7. The facilitator/chair usually leads the discussion, however all participants can help the meeting stay on track by being prepared and attentive.
8. The facilitator/chair focuses on both the task (getting through the agenda items) and the process (making sure everyone has a chance to participate and be heard).
9. Sharing these tasks can help all members learn new skills. Different individuals could be asked to be time-keeper or pay attention to the process to make sure everyone participates equitably. Meetings can also be co-chaired by two people.
10. If the facilitator/chair has strong feelings about a particular item, they may ask someone else to facilitate for the duration of the discussion.
11. It may sometimes be useful to have time at the end of the meeting to evaluate the process or do a quick check-out to see how are members feeling about the meeting?

## **STEPS IN MAKING DECISIONS**

1. Posing the problem or question
2. Looking at alternatives and discussion of relevant points
3. Choosing the best alternative or asking for agreement
4. Action resulting from decision
5. Checking back or evaluating the decision

## GROUP MEETING CHECKLIST

### PROCESS (things to watch for)

- Focus, clarity
- Equal participation
- Time frames
- Group energy
- Power imbalances
- Side talking
- Topic jumping
- Interrupting
- Some not being heard
- Withdrawing

### TASKS (things to do)

- Guide the agenda
- Clarify discussion versus decision-making
- Paraphrase
- Test for agreement or consensus on decision
- Make clear statement of decision and make sure it is recorded
- When implementing a decision:
  - State tasks to be done
  - Make sure they are allocated
  - Make sure there is agreement on time required and deadlines
  - Make sure these are recorded
- Summarize what's been covered
- Move to process if difficulties arise
- Let members know that feelings are valid

## **APPENDIX C - SAMPLE FORMS**

### Office Forms

- Room Booking Memo
- Request for Ceremony
- Maintenance Report Form

### Financial Forms

- Request for Payment or Transfer of funds
- Travel Expense Voucher

### Other Forms

- Proposal For Adult Lifespan Learning Event

## ROOM BOOKING MEMO

(Have you checked room availability in the office calendars yet?)

FROM: \_\_\_\_\_ Is this a fundraising event? \_\_\_\_\_  
(Please PRINT first and last name)

GROUP: \_\_\_\_\_ EVENT TITLE: \_\_\_\_\_

DATE(S) REQUESTED: \_\_\_\_\_ # OF PEOPLE EXPECTED: \_\_\_\_\_  
(if needed use back of form)

START & FINISH TIME: \_\_\_\_\_ PREPARATION TIME: \_\_\_\_\_  
(not including preparation time) (if required, eg ½ hour)

ROOM CHOICE: \_\_\_\_\_ 2nd CHOICE: \_\_\_\_\_

SET-UP REQUIRED: (eg. How many tables, chairs, etc.? Other instructions?)  
\_\_\_\_\_  
\_\_\_\_\_

### SERVICES AND EQUIPMENT REQUIRED:

\_\_\_ Sound Booth Operator    \_\_\_ Overhead projector    \_\_\_ Viewing screen  
\_\_\_ Microphone(s) only    \_\_\_ Cd/Tape player    \_\_\_ TV/vcr/dvd player(upstairs)  
\_\_\_ Now Room fan turned off    \_\_\_ Flip chart(s)    \_\_\_ TV (downstairs)  
\_\_\_ Conference phone (works in Heritage Room or Lounge only)    \_\_\_ Digital camera

When complete, please place this form in **Sylvia Furman's** mail slot.

We'll confirm your request as soon as possible.

### INFORMATION FOR CONFIRMATION:

HOME PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_

DATE OF BOOKING: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

## REQUEST FOR CEREMONY

VSOPS: When people call in to book or cancel a wedding or child dedication, please give the caller the price information posted. Then complete the following slip and pass it to the Administrative Services Officer, Sylvia Furman. Thank you.

Request for:         Wedding                       Child Naming

Request for:         Booking                       Cancellation

Name of caller: \_\_\_\_\_

Name of couple or family involved: \_\_\_\_\_

Phone numbers: home \_\_\_\_\_ work: \_\_\_\_\_

Date requested: \_\_\_\_\_ time: \_\_\_\_\_

Place:  Worship Hall               If off site, where? \_\_\_\_\_

Date and time of message: \_\_\_\_\_

VSOP name: \_\_\_\_\_

# MAINTENANCE Report Form

Please use this form to report any maintenance problem or request.

Date: \_\_\_\_\_ Reported by: \_\_\_\_\_

Phone or e-mail contact: \_\_\_\_\_

Location of the problem (Please specify room(s) and exact location):

\_\_\_\_\_

Describe the problem (include names and telephone numbers of people identifying the problem or with whom this problem was discussed):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Check box if this is this an urgent problem  Check box if it impacts safety or security

WHY?

\_\_\_\_\_  
\_\_\_\_\_

Recommended solution:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Problem resolved by:

\_\_\_\_\_  
\_\_\_\_\_

On date: \_\_\_\_\_ Signed: \_\_\_\_\_

Use the back of this sheet if you require additional space.  
Place completed forms in the Custodian's mail slot.

## Request for Payment or Transfer of Funds

Date: \_\_\_\_\_ Amount: \_\_\_\_\_

Make cheque payable to: Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Postal Code: \_\_\_\_\_

Expense Details:

\_\_\_\_\_  
\_\_\_\_\_

Charge to what account:

\_\_\_\_\_

Items Purchased: (Please list each receipt. Receipts must be attached to this requisition.)

<u>Supplier or Store</u>	<u>Total Cost</u>	<u>GST incl. In cost</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____
7. _____	_____	_____
Total	_____	_____

Submitted by: \_\_\_\_\_

Committee chair: \_\_\_\_\_

Name of Committee: \_\_\_\_\_

Do not write in this space For Office Use Only	
A/C Number & Name	Amount
<b>TOTAL</b>	
Cheque no: _____	
Approved for payment by: _____	
Account no. _____	

# Travel Expense Voucher

Note: Items marked \* must have receipts attached to this form.

Request Date: \_\_\_\_\_ Travel Dates: From: \_\_\_\_\_ To: \_\_\_\_\_

Purpose of Trip: \_\_\_\_\_

Please reimburse me for the following expenses:

## REGISTRATION FEES

\_\_\_\_\_

## TRANSPORTATION

Airfare\*

\_\_\_\_\_

Ground Transportation\*

\_\_\_\_\_

Private Car \_\_\_\_\_ km @ \_\_\_\_\_ ¢

\_\_\_\_\_

Parking\*

\_\_\_\_\_

Other\* (specify)

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## ACCOMMODATION

Public\*

\_\_\_\_\_

Private

\_\_\_\_\_

## FOOD

\_\_\_\_\_ Days @ \$21.

\_\_\_\_\_

\_\_\_\_\_ Meals @ \$7.

\_\_\_\_\_

OR

Meals purchased\*

\_\_\_\_\_

## INCIDENTAL EXPENSES

\_\_\_\_\_ Days @ \$5

\_\_\_\_\_

OR

Taxis\*

Other\* (specify) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## BABYSITTING/HOUSEKEEPING\*

\_\_\_\_\_

## TOTAL EXPENSES

\_\_\_\_\_

Less: Travel advance or subsidy

\_\_\_\_\_

## TOTAL REIMBURSEMENTS

\_\_\_\_\_

Make cheque payable to: \_\_\_\_\_ Signed: \_\_\_\_\_

Address: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Approved for payment by: _____	Do not Write in this space For Office use only	Paid by Cheque # _____ Charge to Account # _____
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## **PROPOSAL FOR ADULT LIFESPAN LEARNING EVENT**

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### **Your Contact Information**

Name:

Phone:

Email:

I am a Member of the First Unitarian Congregation of Ottawa.

I am a Friend of the First Unitarian Congregation of Ottawa.

### **Name of Your Event:**

### **Description of Your Event:**

**Do you anticipate a fee for participants?** *If yes, please provide details.*

**Proposed-** Meeting Time:

Place:

Number of Sessions:

Number of Participants Expected:

*\*Please come into the Main Office to check the monthly calendar and fill out a Room Booking Form. The volunteer receptionist can assist you with this if needed.*

**This event is intended for:**  Members and Friends of the Congregation only

All interested participants

*(Please check one or provide other details.)*

### **How does this event relate to Unitarian Universalism?**

### **Could this event be Intergenerational?**

*Thank you for your initiative in offering this learning opportunity!*