

**UNITARIAN
UNIVERSALIST
CHURCH OF
VENTURA CA**



Procedures Manual

Minister-The Rev. Jan Christian

5654 Ralston Street, Ventura, CA 93003

(805) 644-3898 • office@uuventura.org

www.uuventura.org

TABLE OF CONTENTS

Where Do I Start?	3
Calendar Request Guidelines	3
Publicity	4
Newsletter Announcements	4
Order of Service Announcements	4
Communication	4
Requesting a FOB	5
Who to speak to about your budget	5
Requesting a check or receiving reimbursement	5
Mailings/Office Help	5
Copying	5
The Volunteer Room	5
Storage Space	5
Child Care	6
Setting up and cleaning up after events	6
Safety Precautions.....	6
Building Use Policy, Rules and Fees	7
Building Use Agreement Form.....	9
Calendar Request Form (Appendix A)	10
FOB Instructions (Appendix B)	12
Expense Reimbursement Request (Appendix C)	13
Publicity Tips for Other Committees (Appendix D)	14
Newsletter Announcement Form (Appendix E)	15
Order of Service Announcement Form (Appendix F)	15
Request to Schedule Event with Expenses (Appendix G)	16
Income and Expense Reconciliation Form (Appendix H)	17
Fundraising Guidelines/Policy.....	18
Fundraising Proposal Form (Appendix I)	20
Fundraising Budget Form (Appendix J)	21
Incident/Accident Report	22

WHERE DO I START?

You want to schedule an event/class:

- All events have a Sponsoring Committee. Present your plan to that Committee in writing and receive approval. If your event has expenses, fill out a “*Request to Schedule an Event with Expenses Form*” (Appendix G).
- Check the calendar by the mailboxes for a date. Confirm date with Office Manager.
- Fill out and submit a *Calendar Request Form* (Appendix A). The Committee Chair **must** sign the form.
- Arrange access, if necessary.
- Read and Abide by Building Policies.
- Notify Office Manager of any changes in schedule or problems that arise.
- See Section on Publicity to publicize your event.
- Fill out *Income and Expense Reconciliation Form* (Appendix H) if applicable.

You want to schedule a Fundraising Event:

- Check calendar by the mailboxes for available date. Confirm date with Office Manager.
- Present plan to Finance Committee by completing a *Fundraising Proposal Form* (Appendix I).
- Submit approval from Finance and complete *Calendar Request Form* (Appendix A).
- Arrange access, if necessary.
- Notify Office Manager of any changes in schedule or problems that arise.
- See Section on Publicity to publicize your event.

You are a Committee Chair/Church Leader and you need to figure out how to get things done. Read on!!

CALENDAR REQUEST (see Appendix A)

Remember to calendar your regular monthly meetings and any extra and/or special meetings or events that are being sponsored by your committee. Committees may reserve space for their meetings as well as for activities that come under their Committee’s auspices. Whatever the activity is, the reservation should be made by the Committee Chair and the contact person for the Chair is the Office Manager.

1. Fill out a Calendar Request Form which is available in the mailbox slot and on the website. www.uuventura.org (About Us→Our Board→Board Policies→UUCV Procedures Notebook). On page 2, include any special set-up you might need from the caretaker and sound/video engineer.
2. The form **must** be signed by the Committee Chair.
3. Put completed form in Office Manager’s “mailbox” (black bin on top of mail slots by the mailboxes).
4. If there is a scheduling conflict, you will be called to discuss alternatives.
5. The Office Manager will post the event/meeting on the calendar by the mailboxes, website, Newsletter, and notify the Minister.
6. For rentals, contact the Office Manager.
7. **If there is a cancellation, please notify the office as soon as possible.**
8. Please remember to clean up & lock up after your meeting or event! THANK YOU!

Please read, understand and follow the ***Building Use Policy***:

PUBLICITY

COMMUNICATION

The church has a number of ways of informing members about church activities. These include the monthly church newsletter, pulpit announcements, announcements in UUCV This Week, church bulletin boards, the website, and distribution of fliers, etc. **Please do not place fliers on chairs in the sanctuary.** Committees are also free to call or e-mail members with information on activities. For publicizing events open to the public, arrangements should be made with the Publicity Coordinator. (See **Publicity Tips, Appendix D**) If an event is critical and/or thorough advance notice has not been possible using other means, phone trees or mass e-mailing may be used. Either the Minister or the President of the Board of Trustees may authorize these means.

On Common Ground NEWSLETTER ANNOUNCEMENTS Newsletter Announcement Form (Appendix E)

To get an announcement or article relating to your meeting or event in the newsletter:

- A. Complete the form available by the mailboxes. It is also available on the website www.uuventura.org as Appendix E of this document. Place the completed form in the Newsletter editor's mailbox. Please submit a copy to the Office Manager or put in Office Manager's mailbox.
OR
- B. You may Email the editors at newsletter@uuventura.org. Please cc: the Office Manager at office@uuventura.org.
OR
- C. You can fax information to the editors at 805-658-0604. Please fax a duplicate to the Office Manager at 805-644-3926.

Please note: The deadline for submitting announcements is the third Sunday of the month at noon. The announcement will be published on a space available basis subject to the decision of the editors.

ORDER OF SERVICE ANNOUNCEMENTS Order of Service Form (Appendix F)

All calendared events for the coming week will automatically be listed in the UUCV This Week, which is distributed by email, available as a hard copy on the welcoming table and posted on the community bulletin board each week. For a more detailed announcement or for a more advanced notice complete the form available at the mailboxes or email to office@uuventura.org. It is also available on the website www.uuventura.org (Appendix F of this document) **Please note: The announcement must be approved by the Committee Chair.** Submit the completed form to the Office Manager or put in Office Manager's mailbox. The events or meetings will be included as space allows. You can also fax (644-3926) the announcement.

REQUESTING A FOB

The Chair of the Committee sponsoring the event is responsible for arranging access to the building for the event by ensuring that the Event Coordinator has a fob and is given the necessary security training. Please make sure you have attended a Security Training to learn how use your fob, and get an understanding of the building operations. Training can be scheduled on an as-needed basis with the Office Manager. **FOB INSTRUCTIONS (Appendix B)**

WHO TO SPEAK TO ABOUT YOUR BUDGET

Your budget should be listed in the annual report. Committee Chairs will also be on the distribution list for quarterly budget reports from the Finance Committee. If you have questions pertaining to your budget or about finance in general, please contact the Treasurer or Finance Committee Chair.

REQUESTING A CHECK OR RECEIVING REIMBURSEMENT Expense Reimbursement Form (Appendix C)

Reimbursements: Please complete an Expense Reimbursement Form and place in the Committee Chair's mailbox. In order for the form to be processed, it must have the appropriate Committee Chair's signature. Forms without appropriate approval will be returned.

Advance check requests are handled as *an exception only* on a case by case basis.

Worship Associates should complete an Expense Reimbursement Form a minimum of three weeks in advance of a visiting Minister and submit for payment to the Office Manager.

MAILINGS/OFFICE HELP

With enough advance notice, the office can often be of help with such things as lists, mailing labels, envelopes, postage, data entry and assistance with forms and flyers. Special mailings to all members which utilize any church resources and paid personnel should be approved in advance by the Minister or the President of the Board of Trustees.

COPYING

To control copy costs on the copier in the Volunteer Room, account numbers have been assigned to each Committee Chairperson. You will need to request that number from the Committee Chairperson sponsoring your event. The Finance Committee monitors the number of copies and costs for budget and resource concerns. Your Committee will not be charged for copies but your cooperation in being wise stewards of our resources and the earth's resources is appreciated.

THE MAILBOX AREA

The Mailbox Area is available for copying and printing, stapling, hole-punching, and is stocked with basic supplies. If you have a special need ask the Office Manager. Mailboxes for all Committee Chairs and Trustees are located there. A calendar listing times and activities is there for referencing.

STORAGE SPACE

Space has been assigned to most standing committees. If you need additional space for your committee or temporary space for your church approved activity, please let the Office Manager know and we will try to accommodate your request.

CHILD CARE

If child care is needed for a meeting or event, contact Julia Tyler, DRE for information and arrangement. Childcare is always contingent on enough advance notice to find qualified care-givers.

SETTING UP AND CLEANING UP AFTER EVENTS

Committees are responsible for ensuring that the church is in order following an event. If your event includes food, please remember that we only have a partial kitchen. All trash must be removed from the building and placed in the trash bins in the enclosure at the back of the property. Each lock has a combination set to 3898, the last four digits of the church's phone number. A sign, and a hand crank flashlight to help in the evenings, is posted by the back door with this information. If you bring in food that requires set-up and/or heating elements, please include this information on the Calendar Request Form. Also, if there are special needs, such as tables, chairs, room set-up in Community Hall or Sanctuary, specific lighting or audio requirements, please include on the form or contact our office manager.

FLOWERS AND PLANTS

If you bring fresh cut or potted plants and flowers for an event, you are responsible for seeing that they are properly disposed of (or taken care of) before they wilt or die. Flowers in good condition can be brought to the Office Manager who will decide if they are appropriate for display in the office or entry way and will then assume responsibility for their care and disposal.

DONATIONS

If you have something you would like to donate, contact Dorothy Wootan (654-8503). Please do not bring any donations to the church without checking in with her in advance.

SAFETY PRECAUTIONS

Entering the Building

If you think you may be the first person in the building or that there may only be a few people inside, call out and announce your presence.

Keep all doors locked until at least one other person is in the building with you.

Use caution if leaving doors propped open. Ideally, they should be closed after smaller meetings in the evening begin.

Last One Out

Follow the Instructions for Fob Holders. Always check the entire building and set the alarm before leaving. If you do not have a fob or do not know how to secure the building, do not volunteer to be the last one out.

Ask someone to stay with you to keep you company, especially after dark.

Anytime---Anywhere

See someone/something that makes you uncomfortable?

If you are arriving, get back in your car and leave and call someone.

If you are leaving, go back inside the building and lock the door and call for help.

There are numerous phones throughout the building including the community hall, the conference room, and the volunteer room.

If there is an accident or incident or safety hazard that needs to be addressed, fill out an Incident Report (available from the Office Manager) and put it in the Office Manager's box. If an immediate response is needed, call the Board President or Minister.

PROCEDURES FOR LENDING DURABLE CHURCH ASSETS TO OTHER ORGANIZATIONS

Unitarian Universalist Church of Ventura Board Policy on Lending Church Property for Non-Church-Sponsored Activities provides that non-consumable church property may be lent to other not-for-profit organizations when such cooperation promotes values consistent with those of the church mission and of the Unitarian Universalist Association of Congregations.

This procedure applies to durable goods. Consumable items are considered donations and are not covered by this procedure, except see below, as regards incidental use of consumables such as gas used in conjunction with the loan of a barbecue.

Any loan of church assets to an external organization will be sponsored by and fully monitored by a church program committee or budgeted committee which will guarantee from its budget the safe return of the lent items. The chair of the sponsoring committee shall be responsible for approving such use.

These loans of church assets are intended to promote cooperation and shared effort toward achieving ends consistent with those of the church mission and those of the UUA.

To that end, no rental fees or deposits will be collected. It will be expected, however, that incidental consumption, such as gas for a barbecue, will be replaced at a level meeting or exceeding the level when the property was lent. Moreover, all borrowed items will be returned as clean or cleaner than when they were borrowed, to be confirmed by the responsible party.

The chair of the sponsoring committee or designee shall be responsible for coordinating the use of church assets with the office manager to prevent scheduling conflicts, for monitoring the checking out and return of all lent materials, and for confirming that church assets have been returned in as good a condition as they were lent. These responsibilities **will not be delegated** to church staff. The sponsoring committee will be responsible for ameliorating any deficiencies in church assets resulting from its sponsorship of a church-asset loan.

Board policy allows for incidental, rather than regular or ongoing sharing of church assets. No organization shall borrow the same church assets more than once within 12 months, or more than twice within 36 months. Exceptions to these limits may be petitioned to the Board of Trustees of the Unitarian Universalist Church of Ventura.

Adopted January 2011

BUILDING USE POLICY, RULES AND FEES

Members and pledge-paying Friends (events open to all church Members and Friends): There is no charge for approved building use. Building use is approved by the Leadership of the church (Minister, President, Board of Trustees or Committee Chair). The Rental Coordinator may find it necessary on occasion to move a church-approved activity to another location in order to accommodate rentals or other church activities. Those in charge of the event must assume responsibility for clean-up. For events that require technical support (Sound Engineer), there may be a fee to cover expenses (\$25/hr with a 2-hour minimum).

Committee-Sponsored Events: Occasionally our Committees sponsor events by outside groups. In such cases, building rental fees are to be paid by the Committee or organization or shared by both. Any costs associated with providing a sound engineer/event monitor/caretaker etc. must also be paid. Since there are always indirect costs associated with building use, the Committee is also encouraged to seek donations to help cover those costs. Promotional materials should also indicate that the Committee is sponsoring the event. Ideally, an announcement will also be made at the event indicating that the Committee has sponsored the event and the reason for doing so and encouraging donations to help meet the costs associated with maintaining the building. For example, "The event tonight is sponsored by the Social Action Coordinating Committee of the Unitarian Universalist Church of Ventura. We are delighted to sponsor this event because it is in keeping with our commitment to affirming and promoting the inherent worth and dignity of every person. We extend a warm welcome to you to worship with us on any Sunday at 10:00 and we welcome donations this evening to help us meet our costs in providing this space."

Private use by Members and pledge-paying Friends: The charge for private use by Members and pledge-paying Friends shall be one half the standard building use fees (see below). For events that require event monitor or technical support (Sound Engineer), there will be a fee to cover expenses (\$25/hr with a 2-hour minimum).

Standard Building Use Fees:

There are two large spaces available for rental: the Sanctuary and Berg Hall. They can be rented separately or together. Tables (30 tables; seat 6 each) and chairs (249 padded; 51 plastic) are available for placement in the Community Hall. The Community Hall has a small kitchen with a sink and microwave. The types of uses available are Weddings, Funeral/Memorial Services, Receptions, Parties, Business Meetings and Retreats. All rites of passage, such as weddings, child dedications, funerals and memorial services must have the Minister's approval, even if the Minister is not performing the ceremony.

The rentals for the events in the Sanctuary/Community Hall are for a minimum of four hours. An on-site monitor may be required during the entire event. If one is required there will be a charge of \$25/hour, minimum of 2 hours. Additional support provided by church personnel will be a separately negotiated expense.

Reasonable set-up and clean-up times are not part of the four hour block for the event. The required set-up and clean-up time need to be addressed with the Rental Coordinator prior to the event. If excessive times for set-up and clean-up are required, there may be a cost for on-site Church personnel.

Sanctuary Rental – \$300 for four hours plus \$75 per hour for each additional hour. \$40 per hour is charged for any clean up that is necessary and will be deducted from the deposit.

Community Hall Rental – \$300 for four hours plus \$75 per hour for each additional hour. \$40 per hour is charged for any clean-up that is necessary and will be deducted from the deposit.

Combination Sanctuary and Community Hall Rental – \$450 for four hours plus \$100 per hour for each additional hour. \$40 per hour is charged for any clean-up that is necessary and will be deducted from the deposit.

Reservations and Deposits: The building space may be reserved 9 months in advance by paying a non-refundable reservation deposit of \$100. The remaining building use fees are due 30 days prior to use. Upon payment receipt, building use fees are non-refundable.

Ministerial Support - Any Ministerial support (and corresponding stipends) must be agreed to and negotiated separately.

Classroom Rentals: The classroom spaces generally accommodate a group of 10-12. They can be rented for a one-time or on-going basis. The cost will be negotiated with the Rental Coordinator and is determined by frequency of use. A 6-month contract may be required.

Building Use Rules:

1. Children must be supervised at all times by a responsible adult of the renting party. The playground and children's classrooms shall not be used without authorization from the Event Monitor.
2. Building use shall be between the hours of 8:30 am and 10:00 pm.
3. There shall be no smoking in the building. There shall be no smoking within 20 feet of the building.
4. No hard liquor. Beer, wine and champagne only.
5. Rentals do not include use of the piano in the Sanctuary and it is not to be moved except by church staff. Use of the piano must be negotiated separately. There will generally be a minimum fee of \$50. Nothing shall be placed on the piano and organ.
6. Participants shall not enter any offices in the building. Participants shall not enter any classrooms without permission of the Event Monitor. There shall be no use of church phones, FAX machine, copy machine, computers or any other church equipment (other than kitchen appliances) or supplies without the express permission of the Event Monitor.
7. **For commercial use of the building space, proof of liability insurance is required.**
8. **No food or drink is allowed in the sanctuary.** Trash must be emptied in outside trash container following event.
9. Unless otherwise instructed, rooms should be left as they were found (this includes chair and table set-up).
10. Use of the sound system or adjustment of the HVAC system may only be done by someone trained and authorized to use these systems.

8/08

Building Use Agreement

Name: _____

Organization: _____
(If applicable)

Address: _____

City _____ Zip _____

Phone: (____) _____ Cell (____) _____

E-Mail _____

Event _____

Date of Event _____

Time From _____ To _____

Building Use: Sanctuary, Community Hall or Sanctuary + Community Hall (circle one)

Building Use Fee: _____ (for first four hours)

Additional Building Time _____

Additional Costs _____ Reason _____

Set-up/Clean-up Time _____

Deposit _____

TOTAL _____

Non-refundable deposit of \$100 due upon signing.

Signature of Responsible Party

Signature of UUCV Representative

Date

Date

APPENDIX A



CALENDAR REQUEST FORM

Name of Event/Group _____

Briefly Describe Purpose: _____

Date of Event _____ Time from _____ to _____

Preferred Meeting Location _____

Estimated Attendance: _____ Church member coordinating the event: _____

Daytime contact # _____

Sponsoring Committee: _____ Chairperson Signature: _____

(Note: Committee approval is required)

Duration of event:	Weekly	_____
	Bi-weekly (every 2 weeks)	_____
	Semi-monthly (2x/month)	_____
	Monthly	_____
	Quarterly	_____
	One-time	_____

Anticipated Start Date: _____ Anticipated End Date: _____

(Please Note: Committee Chair Responsibilities)

Building Access/Fobs

The Chair of the Committee sponsoring the event is responsible for arranging access to the building for the event by ensuring that the Event Coordinator has a fob and is given the necessary security training. If the event is a standard on-going event, that person may be supplied a fob by the office upon approval from the Minister and President.

If your event requires more than general notification and access to the building (category A), **please complete the second page of this form in its entirety to ensure that it has necessary set-up and staff coverage.**

Room Assignment

We will make every effort to accommodate your room preference. However, standing events may make this prohibitive. If you are co-sponsoring an event with an outside organization or group, *building rental fees are separate and may apply.*

(SEE OTHER SIDE)

Please choose the category for your event and supply the requested information.

____ **Category A.** The sponsored event is primarily for or exclusively for church members. No special set-up is needed (or the sponsor will leave set-up as it was found) and no staff presence is required for entry, lock-up, sound or building monitoring (e.g. Meditation).

____ **Category B.** The event is primarily for or exclusively for church members. It does require some limited special set-up by staff (e.g. Movie Night) but no staff presence is required.

Room preference is _____.

Describe desired set-up. On another piece of paper, please draw a diagram and specify number of chairs and tables, direction they should face. If you need a DVD/VCR or flip chart, please indicate where.

____ **Category C.** The event requires the presence of the sound technician or monitor *and/or* extensive staff set-up/take down or presence for the event. *Please note that many of these events (fundraisers, committee-sponsored community events) will be charged \$25 an hour (a minimum number of hours may apply) for set-up/take-down and staff presence on-site unless the fee is waived. All events using the sound system require the presence of staff or a member of the Sound Team.*

Does this require staff presence? _____ If so, in what capacity? _____

Out of what budget will staff be paid? _____

What room(s) do you want to reserve? _____

On a separate piece of paper:

A) Describe the overall event (number of participants, what it is, etc.) and the various elements (musicians, speakers, talk/back with microphone, panel discussion, transmissions to outer space etc.)

B) Provide a detailed diagram of set-up needed in each room.

Additional equipment requirements: (check if appropriate and indicate # if known)

Microphone(s) / sound system	_____	Video playback?	DVD	_____
Riser(s)	_____		VHS	_____
Podium	_____	Flip chart easel #		_____

Other (describe) _____

____ **Category D.** The sponsored event is primarily for or exclusively for church members. The event will be held OFFSITE.

FOB INSTRUCTIONS (Appendix B)

FOB Instructions

A FOB has been assigned to you. Please do not lose it as it must be returned. Your FOB has been individually programmed regarding access times and identity. Your FOB will identify to Dial Security the dates and times this specific FOB was used. By accepting the FOB, you are agreeing to abide by the security and building use policies.

Entering the Church

The FOB only unlocks the entrance door at the back of the Ralston facility. There is a rectangular shaped box to the left of the door that “reads” the FOB. Simply place the FOB next to the “reader”. A LCD light on the “reader” will change from red to green. You will hear a beep tone indicating that the FOB has been “read”. Within a period of a few seconds you will also hear a “click” sound coming from the lock. The door will then be unlocked and the security alarm automatically turned off. You will be able to open the door and enter the building.

The door will automatically lock behind you upon closing. Anyone else wishing to enter the building will be unable to do so without a FOB or a door key. The door is not locked to anyone exiting the building, only to entering.

Leaving the Church

Complete all items on the checklist posted on the backdoor entry way. There is a security keypad on the wall. It has a display that will read, “System Ready”. If it says “System Not Ready” this will be due to a door being left open. In that case, re-check the doors.

Errors: These are common error codes. They will appear on the display instead of “ALL SYSTEM ON”. Stop arming the building. Find the source of the error code and correct it. **DO NOT OVERRIDE THE ALARM SYSTEM.**

S.E. HALL DOOR - SOUTHEAST DOOR
FRONT DOOR - ADMINISTRATIVE OFFICE DOOR
ALL BAY DOORS - THE GARAGE DOORS
E. HEATER DOOR - THE EAST UTILITY/ AC / FURNACE ROOM
W. HEATER DOOR - THE WEST UTILITY ROOM / AC / FURNACE ROOM
STREET EXIT DOOR - DOOR BY ALCOVE IN SANCTUARY
DBL DOORS - DOUBLE DOORS AT THE ENTRY
RALSTON DOOR - DOOR OFF THE COMMUNITY HALLN.W. MOTION
DOOR - NORTHWEST DOOR BY VIDEO LIBRARY
INT DOOR HALL - DOOR INTO THE ADMINISTRATIVE OFFICE
GARAGE INT DOOR - DOOR INTO THE GARAGE FROM THE HALL
MAG LOCK - ON/OFF SWITCH AT COUNTER IN THE ADMINISTRATIVE OFFICE

Problems

If you are encountering a problem in entering or exiting the building call Dial Security at 389-6700 and ask the Operator to contact the RP for the UUCV. Give the Operator your name and phone number. You can use your cell phone number or the church number with is 644-3898. You should receive a return call in 15 minutes. If you are leaving the building and have not received a return call then verify that the doors are closed and locked and leave. For other emergencies, there are names and numbers posted at the exit.

Date: Committee Chair Approval:

Payable to:

Address:

Expense Incurred For:

Acct. #	Committee	Description	Amount
2775	Fair Trade Resale Coffee		\$
5650	B&G Routine Maintenance		\$
5710	Worship/Flower Expense		\$
5721	R.E. Children's Programs		\$
5722	R.E. Adult Programs		\$
5731	Choir Music		\$
5740	Kitchen Cabinet/Hospitality		\$
5770	Caring Committee		\$
5790	Personnel Committee		\$
5910	Stewardship		\$
5921	Leadership Development		\$
5922	Training for Staff		\$
5940	Board Expenses		\$
5950	Endowment Committee		\$
6010	Public Relations/Publicity		\$
6020	Social Action		\$
6030	Membership/Nametags		\$
6040	UU Service Committee		\$
6120	Postage		\$
6140	Office Supplies		\$
6190	Contingency		\$
4210	Service Auction		\$
4220	Concerts/Public Events		\$
4290	Misc. Fundraising		\$
	Other: (describe)		\$
	Reimbursement Total:		\$

PUBLICITY TIPS FOR OTHER COMMITTEES (Appendix D)

UU External Publicity Coordinator

The Coordinator is prepared to help your Committee get publicity out into the neighborhood and community.

The following free services can be available at the discretion of the media:

- Print announcements, and newsworthy press releases, in the *Ventura Star*, *Hope Dance*, *VC Reporter*, *Ventura Breeze*, and *Happenings*. (Two to four week lead time.)
- Radio announcements on KCLU, KKZZ, KHAY, and others. (Two to three week lead time.)
- Posting on the CAPS TV-6 Bulletin Board (Seen by City of Ventura cable subscribers only). (Two week lead time.)
- Internet listings on *Your News* (VC Star), KCLU.com, and Ventura craigslist.com (One week lead time.)
- Email messages to the four neighboring UU churches. Attachments 2 MB or less, please.

Your committee should do these things as early as possible:

- For an event, have the written approval of the appropriate UUCV Committee Chair.
- Do your own announcements for *On Common Ground*, UUCV This Week, pulpit announcements, signs or banners to be posted at or near church, leaflets on cars in parking lots, posters, flyers, etc.
- For announcements, press releases, emails, etc., draft the copy, remembering "Who, What, When, Where, Why, and How Much".

**Newsletter Announcement Form
(Appendix E)**

Description of Announcement _____

Event or Group _____
Day & Date of the Program: _____ Time _____
Location: _____
Chairperson: _____ Submitted by: _____
Contact Phone: _____

**Order of Service Announcement Form
(Appendix F)**

Description of Announcement _____

Event or Group _____
Day & Date of the Program: _____ Time _____
Location: _____
Chairperson: _____ Submitted by: _____
Contact Phone: _____

Unitarian Universalist Church of Ventura
Request to Schedule Event with Expenses¹

Note: this form is to be turned into the office manager prior to the event and is an estimate of Income and Expenses expected. If there are no anticipated expenses for the event (including staff time) this form is not necessary.

(Please print)

Name of Event _____

Desired Date _____ and Time _____ and Room _____

Sponsoring Church Committee _____

Signature of Committee Chair approving event² _____

Event Coordinator and / or contact person filling out this form _____

If additional information is needed: Phone # _____ Email _____

Describe specific room and set up requirements (with sketch if needed) on reverse side

Total Expected Income from Donations or Ticket sales: \$ _____

Expected Expenses: Please itemize in general categories

Item	Amount
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
7. _____	\$ _____
8. _____	\$ _____
Use other side if additional space is needed Sub-Total Expenses	\$ _____

Expected Expenses to be paid by church from the proceeds:

- 1. Caretaker set up time: _____ hours at \$25/ hour = \$ _____
 - 2. Event Monitor or Sound Tech time: _____ hours at \$25/ hour = \$ _____
 - 3. Other church staff time: _____ hours at \$_____/ hour = \$ _____
- Sub-Total Church personnel Expenses** \$ _____

EXPECTED TOTAL EXPENSES = \$ _____
EXPECTED FINAL INCOME – EXPENSES = \$ _____

¹ These are committee sponsored events which may request donations or ticket sales but are expected to break even or are funded directly from the committee's budget.

² Note that any positive income over expenses goes into the Church's general fund to cover overhead costs (e.g. utilities) that are not specifically listed. Any deficient will be charged against the sponsoring committee's budget to the extent needed to pay for the time of church staff and for additional expenses not donated by the event planners.

Signature of Person filling out this form _____

+++++

To be filled out by Church Staff: date and time are available and event has been scheduled as requested (date event placed on calendar) _____

Church staff requested has been notified and are available _____

Room Reserved _____ Other comments: _____

Unitarian Universalist Church of Ventura Income and Expense Reconciliation Form¹

Note: this form is to be turned into the office manager after the event and is not to be used to schedule the event. Please print

Name of Event _____
Date and Time of Event _____
Event Coordinator _____
If additional information is needed:
Phone _____ Email _____
Sponsoring Church Committee _____

Total Income from Donations or Ticket sales: \$ _____

Expenses: Already paid:

Item	Reimbursement to	Amount
1. _____	_____	\$ _____
2. _____	_____	\$ _____
3. _____	_____	\$ _____
4. _____	_____	\$ _____
Use other side if additional space is needed Sub-Total Expenses		\$ _____

Expenses to be paid or reimbursed by church from the proceeds:

Item	Reimbursement to	Amount
1. _____	_____	\$ _____
2. _____	_____	\$ _____
3. _____	_____	\$ _____
4. _____	_____	\$ _____
Use other side if additional space is needed Sub-Total Expenses		\$ _____

- 1. Caretaker set up time: _____ hours at \$25/ hour = \$ _____
 - 2. Event Monitor or Sound Tech time: _____ hours at \$25/ hour = \$ _____
 - 3. Other church staff time: _____ hours at \$_____/ hour = \$ _____
- Sub-Total Church personnel Expenses** \$ _____

TOTAL EXPENSES = \$ _____

FINAL INCOME – EXPENSES = \$ _____

Note that any positive income over expenses goes into the Church's general fund to cover overhead costs (e.g. utilities) that are not specifically listed. Any deficient will be charged against the sponsoring committee's budget to the extent needed to pay for the time of church staff and for additional expenses not donated by the event planners.

Signature of Person filling out this form _____

Signature of Committee Chair approving the above information _____

¹ These are committee sponsored events which may request donations or ticket sales but are expected to break even or are funded directly from the committee's budget.

FUNDRAISING GUIDELINES

FUNDRAISING POLICY

BACKGROUND:

Most fundraising at UUCV is intended to support the annual church Operating Budget, since it sets our priorities for how church funds are to be spent each year. From time to time, however, permission is sought to ask members to give funds or goods to support activities or causes outside our adopted Budget. The purpose of this policy is to clarify how such proposals are to be acted upon.

Fundraising Policy

Definition: Fundraising is defined as any effort to raise money, collect goods, or sell a product on behalf of our church or within our congregation, for the benefit of our church, its congregants, or another authorized person or organization.

Responsibility: The Board has given the Finance Committee responsibility for overseeing and approving fundraising efforts. The Finance Committee may delegate specific aspects of fundraising oversight to staff or committees, as stated in this policy.

Fundraising Designation: Fundraising efforts fall into three possible categories:

- | | |
|-----------------|---|
| Budget-UUCV | Projects to support the UUCV annual budget via its annual fundraising target.
(Examples: auction, rummage sale) |
| Off Budget-UUCV | Projects to support specific UUCV functions, outside the adopted Budget.
(Examples: Purchase of hymnals, Inreach/Outreach Fund.) |
| Community | Projects sponsored by UUCV to benefit the community at large, another organization or a non-congregant. |

General Policies:

Generally speaking, most church fundraising shall be in support of the UUCV annual Budget.

Off-Budget fundraising to provide added midyear support for individual line items in the budget or other off-Budget purposes is generally discouraged. Preferably, if additional funds are needed mid-year, appropriate income and expense adjustments can be pursued through amendment of the Operating Budget.

All fundraising efforts must reflect and relate to the Principles and Purposes of the UUA and serve the Mission of UUCV.

Fundraising to support community projects require the approval of the Finance Committee, with the following exceptions:

Worthy fundraising programs may be conducted on an informal basis between individual congregants or staff. This would include a member seeking pledges to participate in a fundraiser such as an AIDs bike ride pledge or a child in the congregation selling cookies to benefit an outside organization. The Finance Committee reserves the right, however, to withdraw this privilege if it becomes necessary.

Proposals from Children's Religious Education which are small in scope (gross income goal less than \$500 and minimal impact on staff and congregation resources) may be approved by the Religious Education Committee without seeking Finance Committee approval.

Proposals from Social Action which are small in scope (cumulatively less than \$500 per year and with minimal impact on staff and congregational resources) may be approved by the Social Action Committee without seeking Finance Committee approval.

The sale of items by a Sunday morning worship speaker or participant to benefit solely or partially that person, if approved by the Minister or Worship Associates.

Collection of goods or asking pledges from members to benefit an outside organization, if approved by the Minister. (Examples: Project Understanding, CROP Walk).

Proposals by or from the denomination may be approved by the Minister or Board President.

Committees may approve events which ask for donations intended solely to cover the event's staff, building use, and other related costs. Committees are responsible for preparing an accounting of expenses and receipts for each such event on the form provided for that purpose.

Approval Responsibility:

Budget-UUCV: The Finance Committee is responsible for fundraising efforts in support of the Annual Budget. Proposals by individuals to coordinate these activities may be brought directly to the Finance Committee for discussion.

Off Budget-UUCV: Fundraising to benefit individual Budget line items or other off-Budget purposes is generally discouraged, except in unusual circumstances as approved by the Finance Committee and the Board.

Community Fundraising: A standing committee or the Minister may request authorization to raise funds for purposes other than in support of the adopted Budget. Proposals from individuals or other

informal or ad-hoc groups within the Church must obtain the “sponsorship” of a standing committee prior to submitting a proposal to the Finance Committee.

Approval Process for Fundraising:

1. Obtain a “Guidelines for Fundraising Activity” info sheet and a “Fundraising Proposal Form” from staff or a member of the Finance Committee. When completing the “Fundraising Budget” portion of the Proposal Form, please remember that expenses related to the fundraising activity must be covered by proceeds from the activity, not from church funds.

2. Complete all sections of the form and turn the form into the Finance Committee.

3. Applications received within five days of a regularly scheduled Finance Committee meeting will be considered at that meeting. It is the responsibility of the submitting group to allow sufficient time for this oversight process, because while it may be possible in special cases to expedite the process, this option cannot be expected.

1. If there are substantive changes to the event once initially approved, the submitting group is responsible for advising the Finance Committee or authorizing person or Committee.

The Committee will notify applicants of their decision or need for additional information within five days of the meeting.

Event-Specific Policies:

Community Fund Raising (including Committee Breakeven events):

1. The applicant must coordinate scheduling with the church calendar, and appropriately provide notice of the event to church members.

2. Fundraising project chairpersons are responsible for providing a full accounting of money raised or goods collected and to whom proceeds are distributed. Summary reports are to be prepared and submitted to the Finance Committee and appropriate staff within one month of the completion of the event

Concerts: In general, the congregation will receive no less than 40% of net proceeds.

Inreach/Outreach Collection: The Finance Committee and Board have designated that all non-pledge monies collected on the first Sunday of the month and at Christmas Eve services will be deposited in the Inreach/Outreach Fund. At least half of the collections each year will go to an organization or effort

designated jointly by the Minister and the Social Action Steering Committee. Undesignated money in the fund may be disbursed at the discretion of the Minister. When used to benefit members of the congregation, their confidentiality will be protected by the Minister unless they have waived confidentiality.

Special Collections: Special collections at the Sunday worship service will be made only with advance approval of the Finance Committee and the minister.

UUA: These projects will be held according to the guidelines provided by the UUA or affiliate organization, if applicable. The Minister or Board President will decide whether to participate in UUA sponsored fundraising efforts.

(Appendix I)

Fundraising Proposal Form

Today's Date: _____

NAME of ACTIVITY:

Activity is: Existing _____ New _____

Activity is: One-Time _____ On-Going _____

Committee Sponsoring the Activity: _____

Signature of Committee Chair: _____

Name and Contact Information for Coordinator: _____

Note: Coordinators are responsible for taking care of calendaring and publicity and ensuring that building use policies are observed (including clean-up and lock-up). They are also responsible for all financial accounting and for submitting a final budget.

Nature of Event (Who, What, When, Where, How etc.):

Anticipated Date and Time of Event (please check church calendar first):

Please indicate the recipient of the net proceeds:

Budget-UUCV _____

Other _____ (NOTE: Off Budget fundraisers are discouraged)

If "Other," specify designated recipient:

Please estimate the following:

• Time (people power) requirements by congregants:

Minimal _____ Average _____ Extensive _____

• Time (people power) requirements by staff:

Minimal _____ Average _____ Extensive _____

Will the actual event require paid staff (e.g. sound technician)?

If so, please note that there will be costs associated with this and charged to the event. See the Office Manager or Finance Committee Chair for information.

How does this Activity serve our Mission?

Is there anything else you would like us to know or to take into account?

Please sign below to indicate that you have read our Fundraising Policy and that you are familiar with our Building Use Policies and that you agree to the terms in both! Thanks so much for your energy and enthusiasm.

Coordinator Signature _____

Please attach a Fundraising Budget Form.

FUNDRAISING BUDGET FORM

This form is to be used for Projected Budget and for Final Budget. Final Budget is to be submitted within 30 days.

Event:

Coordinator:

REVENUES

Ticket Sales _____
Merchandise Sales _____
Donations _____
 Grants _____
 Other revenue _____
Total Revenue _____

Explain:

EXPENSES

Fees for Speakers/Performers _____
Church Staff Costs _____
Travel _____
Postage _____
Printing & Copying _____
Equipment _____
Other expenses _____

Explain:

Total Expenses _____
NET PROFIT/LOSS _____
Signature of Coordinator _____

Please use this document for reporting accidents or incidents. Submit it to the Office Manager and it will be referred to the appropriate person or committee.

Unitarian Universalist Church of Ventura
5654 Ralston Street, Ventura, CA 93003
(805) 644-3898

INCIDENT / ACCIDENT REPORT

For internal use only to document event

Date of occurrence _____ Time _____ Reported to _____
Location of Incident or Accident (give specific street or other location information if not on church property): _____

Police Dept. reported to (if any) _____ Report No. _____
Description of Incident or Accident – Describe fully – include rough sketch if possible (use other side or additional paper if necessary): _____

Name of Injured or Owner of Damaged Property _____ Age _____ Sex _____
Parent / Guardian of minor child _____ Phone No. : Home _____ Work _____
Address (street) _____
City _____ State _____ ZIP Code _____
Are you insured under any medical accident policy? No Yes If yes, what company _____

Describe injuries or damage to property _____
Physician's Name _____
Address (Street) _____ Phone No. _____
City _____ State _____ ZIP Code _____
Name of facility where injured was taken _____ Phone No. _____
City _____ State _____ ZIP Code _____
Was injured transported by Ambulance? No Yes

Witnesses (use additional paper if necessary)

It is critical to give full name and address of every person who knows anything about the incident.
Name _____ Phone No: Home _____ Work _____
City _____ State _____ ZIP Code _____
Name _____ Phone No: Home _____ Work _____
City _____ State _____ ZIP Code _____

Use this space for additional details as needed:

For Office use only

Referred to (i.e. specific committee or church officer) _____

Follow up taken: _____

Resolution to solve problem if indicated: _____
