

HOW THINGS WORK AT UUCB

For Lay Leaders, Active Members, and Anyone Curious
As of 07/15/24

Drafted by Ann Harlow, active UUCB volunteer and co-chair of Communications Team and Kitchen Team. Contributions from Tess O’Riva, Executive Director, Charis Domador, Connections Coordinator, and Janae Heard, Office Administrator. Any questions or suggestions may be addressed to ed@uucb.org.

Who’s Who at UUCB

- Staff: see <http://uucb.org/connection/church-staff/>, <http://uucb.org/connection/family-ministry/> and <http://uucb.org/connection/music-staff/>
- Board of Trustees: see <http://uucb.org/about-us/governance/board-of-trustees/>
- Executive Advisory Team: see <https://uucb.org/about-us/governance/executive-advisory-team/>
- Program Council: see <http://uucb.org/about-us/governance/program-council/>
- Leaders of other committees and groups: <https://uucb.org/about-us/governance/program-council/program-council-clusters/>
- If you know of any changes to these, please inform the [Webmaster](#) and [Office Administrator](#).

How Our Governance Works

- Summary: The congregation elects a Board of Trustees to serve as its governing body and calls a Minister to serve as its spiritual leader and head of staff. The Board sets broad goals and policies, delegating management to the senior staff team. Staff members work collaboratively with lay leaders from the congregation. Leaders at all levels are expected to practice open decision-making, healthy conflict management, and mutual support in their respective roles.
- See the Governance Manual (available on website under [Governance/Church Documents/Board](#)) for more information.
- Also under [Church Documents](#) on the website are agenda packets for Board meetings, which are open to all members.

How UUCB Works Financially

See <http://uucb.org/about-us/give/how-uucb-works-financially/>

How to Get Involved

Most committees and groups warmly welcome new people—just contact the person listed for that group on this page to find out when they meet and whether there are any restrictions:
<https://uucb.org/about-us/governance/program-council/program-council-clusters/>

Each committee and program can provide a volunteer description and time commitment specifications.

Google Drive

We encourage committees and groups wishing to share files to use Google Drive. Please contact Executive Director (ed@uucb.org), Tess Snook O’Riva, for instructions on saving to the appropriate folders.

Email Forwarding

Many groups at UUCB have an email address, e.g. landscape@uucb.org, that forwards to members of the group. The Office Administrator maintains these lists; be sure to submit updates to administrator@uucb.org.

How to Propose Something New

- An event: see “[How to Organize an Event](#)”
- A group or committee: find at least two others who are interested and submit the [New Group Application](#) to the Program Council Convener
- A class or workshop for adults: submit to Program Council’s Adult Religious Education Representative
- A social justice project or “Good Neighbor” recipient: The Social Justice Council has processes and forms for submitting these. Contact the Social Justice Council chair.
- Other projects: propose to an appropriate committee chair, minister, or staff member.

How to Deal with Challenges

- Emergency procedures: see [UUCB Safety Policy](#) under Church Documents/Operations.
- Equipment needing repair: Fill out a [Facilities Request Form](#).
- If you urgently need to reach the Facilities Manager, his cell phone number is 415-961-7342.
- Complaints/criticism/suggestions: You can email revmarcus@uucb.org. Do not contact any other staff person.
- Interpersonal conflicts or disruptive behavior: If you feel safe to do so, address your concerns directly with the person with whom you have a conflict. If that is unsuccessful, contact the minister revmarcus@uucb.org for advice. A person or team will be designated to explore possible solutions.
- Personal challenges/pastoral care emergencies: Contact the minister as above or pastoralcare@uucb.org.
- Remember the UUCB Covenant of Right Relations:

Love guides this church. The quest for truth and justice is its common purpose. To give thanks, listen deeply, speak with care, honor our differences, and seek and grant forgiveness: These things we covenant with one another.

How to Organize a Special Event (UUCB Sponsored Events)

Before You Start . . . A Few Things to Consider

The information below only applies for program events sponsored by UUCB (e.g. Social Justice Sunday, Messiah Sing-Along, etc.)

- What do you want to achieve with your event?
- How does your event support the mission of UUCB?
- Is there enough time to thoroughly organize and promote it?
- Do you have a group of people willing to help? (We recommended at least 3 for planning and 10 for before, during and after the event; some require more than 20 helpers.)
- If it's a fundraiser, have you read the [Fundraising Policy](#) (page 18) and cleared it with the Executive Director at least 6 weeks in advance?
- How many people are likely to attend?
- Is your event:
 - Geared to the public or only for UUCB members and friends?
 - A one-time event or a series?
 - A new event or an annual/regular event?
 - Formal or informal?
 - Family oriented, or will any childcare be provided?
 - Cost-effective in terms of the demands it will make on the facility, staff, and volunteers?
- Do you plan to serve food? Alcohol?
- Have you looked into whether there are reports on file from similar events with recommendations for the future? Will you be willing to write such a report after your event?

Event Planning Procedures

[Click here for the recommended event planning timeline](#)

- **All major events** should be scheduled by the Calendaring Summit (typically early June) for the following church year.
- **Name and schedule** your event.
 - If you are planning an event during the current church year, check the calendar on uucb.org/calendar for potential dates and other major church events already scheduled for that month, then enter the information in the calendar (or ask your program lead for help.)
 - Please be sure to add the room for your event to ensure there are no conflicts. Events in the calendar without a room selected run the risk of losing that room to a different booking. Submit as much information as possible in the description and fill out a [Green Sheet](#) for room set up.
 - [Follow the instructions on this video](#) for entering your event in the calendar.
- **Request approval and identify relevant policies.** First, get approval from an existing committee chair, the Program Council Convener, or the Executive Director. If it is a musical event, get the Music Director's approval. They are likely to have the overview that will help evaluate how your

event would fit into the year's plans, what has and hasn't worked in the past, and issues that might arise. Initiative is encouraged and most ideas are approved, but there needs to be some coordination besides getting the event on the calendar. Writing a proposal, possibly using the questions above, will help you formulate what you want to do. Established annual events do not require approval each year.

- **Publicity** is essential. See "[How to Get the Word Out](#)" below and the Communications Procedures for more details.
- **Announce your event to the general public** (if they are invited).
 - Each month, the Connections Coordinator sends out a press release to the Kensington *Outlook* with a list of upcoming UUCB events. You can add your information to this press release by sending to connections@uucb.org the particulars of your event by the fifth of the month preceding the month of your event's date.
 - For other printed and online news media, you may wish to create and distribute your own press release or fill out online forms. Ask the Connections Coordinator (connections@uucb.org) for current instructions for Internet publicity.
 - The Connections Coordinator (connections@uucb.org) can also give you instructions for requesting space on the Kensington Improvement Club's signboard on Arlington Ave. (There is a small fee charged to UUCB each time we do this.)
 - If you want people to make reservations or buy tickets, you may wish to list the event on brownpapertickets.com or eventbrite.com. We now also use our Church Management system, Breeze, to sell tickets and it's more cost effective. Ask the Connections Coordinator (connections@uucb.org) for more information.
 - You can charge admission, but always include a phrase like "no one turned away for lack of funds."
- **Publish event flyers**
 - Although most publicity is now done online, you may want to create a flyer to put in the display rack on the Info Table in the Atrium (10-15 copies). Please consult with the Office Administrator about best practices and to make an appointment to run the copies. Help from staff is available, as needed. If you also have a color version of the flyer, submit it to connections@uucb.org and beacon@uucb.org for the website and the Beacon.
- Host an **information table** on your event on Sundays. Hand out flyers, sell tickets and/or display a snazzy sign and a sign-up sheet one to two months before your event. You may want to sign up volunteers this way, too. (Note: You will need to determine in advance your policy on whether volunteers pay full price, discounted price, or nothing to attend the event.) Submit a "[Green Sheet](#)" Room Setup Form online (found here: <https://forms.gle/sqFjYC3gaiAMAEju9>) for a table at least 2 weeks before the first Sunday you will need it.
- **Comply with Liquor Laws and Policies** if serving alcoholic beverages. Please advise the Office Administrator at least a month before your event of your plans to serve or sell alcoholic beverages. If you plan to sell any alcoholic beverages, you will need a letter of authorization from the church so you may apply for a daily liquor license (ABC Form 221). If you are serving

but not selling beer, wine and/or champagne, a liquor license is not required. Arrange for room setup and equipment via the [Room Setup Form \("green sheet"\)](#) at least two weeks in advance. The form notifies UUCB's Facilities staff of what you will require for your event, such as coffee service, layout of tables and chairs, audio/visual equipment, or an easel.

- If you will need **childcare**, submit the **Request for Childcare Services** form early on, and no later than three weeks in advance. See policies and instructions accompanying the form.
- Schedule **setup and cleanup** with your volunteers. Cleaning up is just as important as setting up! Check in with the Facilities Coordinator about whether and when the Facilities staff can do furniture setup, whether you'll need help running A/V equipment during the event, and what parts of cleanup they will and will not handle. Your volunteers will be responsible for setting up dishes, glassware, etc. and returning them to the kitchen. Some volunteers should plan to stay until all the dishes are washed and event paraphernalia are put away. With the Facilities Coordinator's permission, you may be able to use the stage for short-term storage of materials before and after the event. Remember to recycle paper, glass, plastic, cans and foil, and compost food scraps. Bins are labeled.
- **Reimbursement** of expenses: Save receipts and submit by email with the [Check Request Form](#).

How to Get the Word Out

- "[The Week Ahead](#)" weekly email announcements (Minister or Worship Associates draw from these for Sunday service announcements). Submit announcements, 75 words or less, by Wednesdays, 5 pm, to weekahead@uucb.org.
- Monthly [Beacon](#) newsletter, published the last week of the previous month. Submit to beacon@uucb.org by the 15th of the month. Announcements should be as brief as possible.
- Website: pages for ongoing information; home page "features" for special churchwide events (submit text and images for either to connections@uucb.org)
- UUCB_Discuss list (http://groups.google.com/group/uucb_discuss/about) (reaches many of our active congregants; you must be a member of the list to post)
- Specialized email lists, e.g. Family Ministry, Humanists, Social Justice, Choir/Music list
- Big posters on easels in Atrium
- Table in Social Hall or Atrium on Sundays
- Flyers (and mini-flyers):
 - on members' info table (left of office door)
 - on other tables on Sundays
 - on kiosk near office door
 - on "Welcome" board outside front doors
 - handed out to people
 - on public bulletin boards around town for public events
- Occasionally a short "skit" or "flash mob" style announcement/reminder is allowed in service before major events (contact Minister)
- Congregational meetings and information sessions are sources of info from leadership
- Word of mouth
- Announcements to groups, e.g. Humanists
- Social media: UUCB uses Facebook. Contact connections@uucb.org for details.
- To reach the public outside our congregation, UUCB posts special events on the websites

Nextdoor, Patch, Eventbrite, and Berkeleyside. You are encouraged to post the events on these sites so you can manage questions about the event. If you need assistance, you can contact the Connections Coordinator (connections@uucb.org)

Event Planning Timeline

Due	Step
2-3 months before (earlier if possible!)	<ul style="list-style-type: none"> • Develop name and written description of event • Identify funds and develop a budget • Find available date(s) • Request Executive Director approval • Submit Calendar Request Form or ask your Program Council cluster lead to enter the event on your behalf • Establish a core leadership team
At least 2 months before	Develop graphic image to use in promotional materials
2 months before	<ul style="list-style-type: none"> • Solidify time, pricing, description, etc. and start publicity efforts • Recruit volunteers, including one who can create graphics for promotional materials • Create flyers and the various electronic announcements needed (different formats)
6 weeks before	Create a large poster or banner and begin hosting an information table for your event after Sunday services
1 month before	Obtain a liquor license if needed (notify staff to get approval and ensure it is reflected in the contract)
1 month before	Submit childcare request form if needed
2 weeks before	Submit "Green Sheet" Room Setup Form online found at this link .
1 week before	<ul style="list-style-type: none"> • Review final setup arrangements with Rentals Coordinator. • Finalize volunteer schedule. • If you are taking in money at the door, read the "Procedures for Handling Money" found at this link. • If taking money electronically, set up Square payment port with office administrator.
Day/evening of event	Slide completed \$ deposit envelope(s) through slot in office door for safekeeping. Get everything cleaned up.
1 week after	Evaluate event, make recommendations for future; celebrate success, thank volunteers, complete any other necessary follow-up

How to Handle Finances and Money

- Annual budgets are prepared each spring. Check with the Executive Director for a request form.
- Reimbursement of expenses: Save receipts and submit by email with the [Check Request Form](#) to an authorizing person, who forwards it to the Finance Administrator
- Procedures for counting and depositing money are in “[Procedure for Handling Money.](#)”

How to Use the Kitchen

- Check church [calendar](#) on website to see if it’s likely to be free, and if you need it for a big project please reserve it through the calendar reservation process.
 - [Follow the instructions on this video](#) for entering your event in the calendar.
- Be considerate of others if space is being shared.
- Leave it at least as clean as you found it.
- See Kitchen Handbook for details (red binder in kitchen, or request a copy from the Kitchen Team). The binder includes an inventory of quantities of plates, glasses, silverware, etc. If you are new to use of the kitchen, request an orientation from a member of the Kitchen Team.
- Keep allergens in mind in planning and serving food, and clearly label items with common allergens. Also label vegetarian, vegan and gluten-free items.

Additional Resources for Being a Well-Informed Lay Leader

- UUCB Lay Leaders’ Lending Library (shelf by mailboxes)
- [Administrative Policies](#) (some need to be updated)
- UUA website, <http://www.uua.org>
- UUA discussion lists—see <http://www.uua.org/lists>