



**CEDAR VALLEY  
UNITARIAN UNIVERSALISTS**

# **CVUU Congregational Handbook**

*Revised June 2024*

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# Overview

This *CVUU Congregational Handbook* provides guidelines about how the congregation operates throughout the church year. It is based on the bylaws adopted by the congregation. The bylaws take precedence over any policies or procedures contained within this document.

This handbook includes:

- **Procedures:** Basic information about the day-to-day operations of each area of the CVUU as determined by the relevant council, committee, etc. and/or the Board. Procedures are provided for general operations and for each council in the main part of the handbook.
- **Policies:** Official guidance adopted by the Board, or in some cases, by both the Board and the Congregation. Policies are described in the Appendix.

This handbook is posted on the CVUU website ([www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations) together with the bylaws and related documents. To request a printed copy, contact the CVUU Office Administrator ([office@cedarvalleyuu.org](mailto:office@cedarvalleyuu.org)).

## Review and Updates

Both the bylaws and this handbook should be reviewed by the Board and updated as needed every two years. Each council is responsible for providing updates related to their council; the remaining information is updated by the Board or a subcommittee of the Board, in coordination with the Board secretary. Final updates to the handbook must be approved by the Board; final updates to the bylaws must be approved by the Board and the Congregation.

This handbook was updated in June 2024. When in doubt as to current procedures, please contact those in leadership positions on the Board or whichever council is responsible for those procedures. A current leadership list is posted on the CVUU website ([www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations).

# Operations

The CVUU is run by members of the congregation who are elected to serve on the Board of Trustees. The Board is responsible for the overall operations and conducting all business of the CVUU. In addition to CVUU Board members, a variety of CVUU councils and committees consist of members who volunteer their time to keep the CVUU running. A current leadership list is posted on the CVUU website ([www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations). The Operations section of this handbook includes general procedures for congregational activities, including procedures related to the operations of the CVUU Board.

## **Annual Meeting**

The order of business for the Annual Meeting shall proceed as follows:

1. Approval of the CVUU annual meeting minutes of the previous year;
2. Acknowledge receipt of annual reports to the Congregation from the minister, president, appropriate staff, committees, councils, and the Board;
3. Review proposed changes to bylaws, if applicable;
4. Election of Board members from the slate of candidates presented by the Nominating Committee. Nominations may also be accepted from the floor. Voting shall be done by secret ballot when requested by any voting member of the congregation;
5. Report on financial status; approve the proposed budget for the next fiscal year by majority vote of the voting members present;
6. Receive verbal reports from the minister and president;
7. Discuss any additional business; and
8. Adjourn.

Every effort is made to limit the Annual Meeting to one hour, by means of prior dissemination of reports, and by giving congregants the opportunity to get acquainted with issues and changes before the meeting.

## **Annual Report**

An Annual Report is compiled by the Office Administrator and Board President prior to and distributed at the Annual Meeting. The Annual Report consists of reports from each council/committee, the Minister, and the Board President, and includes information about progress towards goals established for the year.

## **Archives, Documentation, Recordkeeping, and Storage**

The Congregation strives to document, honor, and inform members, friends, associates and the community of activities and accomplishments of the church. Records may be kept in paper or electronic form, as appropriate. All official documents (e.g., deeds, contracts) shall be maintained in fireproof storage in the church building.

### **Historic Archives**

Paper archives are stored in the cabinet in the hallway by the classrooms.

The following electronic archives are maintained by the Office Administrator and backed up using an appropriate electronic backup system (e.g. a flash drive or online backup).

These items must be stored in an electronic format which is easily accessible to the minister and the president, and to other congregation members upon request. This recordkeeping system shall be regularly updated to reflect current technology, in order to guarantee long-term accessibility of important documents.

- Board meeting minutes
- Newsletters
- Orders of service
- Annual Meeting reports
- Stewardship campaign materials
- Formal yearly budget documents
- Annual reports to the UUA
- Annual membership list
- Service attendance information
- Any surveys/questionnaires sent to the membership
- Other documents as needed

### **Operational Documentation and Storage**

Each council shall develop and maintain their own system for sharing operational documents within their council, e.g. Google docs, Dropbox, or email attachments. All documents needed for day-to-day operations of the CVUU should be accessible electronically by at least 3 people.

### **Board Meetings**

Board meetings are held monthly. The President runs the Board meetings, determines the agenda for each meeting and sends the agenda to the Board members in advance of the meeting. An example of a CVUU Board meeting agenda follows.

1. Call to Order by the president.
2. Approval of Agenda.
3. Approval of minutes from previous Board meeting.
4. Old Business.
5. Reports from Officers and Council Liaisons.
6. Main Agenda Topics.
7. Informational Items.
8. Adjournment.

### **Board Roles: Finance Director**

The finance director shall:

- Report all income and expenses of the Congregation to the Board and the Congregation.
- Maintain financial records that represent the funds, property, or liabilities of the Congregation.
- Serve as chair of the Finance Council.
- Collect proposed budget requests from all councils and committees.
- Submit a draft of the proposed operating budget to the Board.

- Submit a yearly financial report at the annual Congregational Meeting.
- Perform other duties as determined by the Board.

See the Finance Council section and the CVUU Bylaws for more information.

### **Board Roles: President**

The president shall:

- At the beginning of a new secretary's term, work with the secretary and the Office Administrator to complete an updated Registered Agent Change Form.
- At the July meeting of each newly elected Board, ensure the Board reaffirms the Code of Conduct (see the Appendix).
- Preside at all Board meetings and Congregational meetings.
- Hold regular monthly meetings for the Board and schedule additional Board meetings as needed, in consultation with Board members.
- Create each month's Board meeting agenda in consultation with Board members.
- Meet with the minister at least once a month to discuss congregational business.
- Review correspondence from the UUA (Unitarian Universalist Association) and MidAmerica Region (MAR) and bring pertinent issues to Board meetings.
- Delegate responsibilities to Board members and councils/committees.
- Act as liaison between the Board and Congregation members.
- Act as liaison between the Congregation and the MAR and UUA.
- Sign official documents (e.g. rental agreements).
- Submit a monthly Board President's column to the newsletter.
- Submit an annual Board President's letter for the Stewardship campaign packet, if requested.
- Work with the Shared Ministry Council and the minister, with input from the Religious Services Council chair, to review the relationship between the minister and congregation and discuss successes, challenges, and areas for future improvement.
- Preside or delegate someone to preside over the Annual Meeting.
- Work with the Office Administrator to ensure the Annual Report is completed prior to the Annual Meeting.
- Submit an annual Board President's report for the Annual Report.
- Perform other duties as determined by the Board.

See the CVUU Bylaws and ministerial agreement for more information.

### **Board Roles: Secretary**

The secretary shall:

- Act as Registered Agent for the Congregation
  - At the beginning of the first year as secretary, work with the president and the Office Administrator to complete an updated Registered Agent Change Form (found on Iowa's Secretary of State's website) to include the incoming secretary's information and submit the form to the Iowa Secretary of State.
  - At the beginning of every-other year in odd-numbered years (e.g. 2021), file the Biennial Report for Iowa Nonprofit Corporation online with the Iowa Secretary of State.
- Attend and record minutes for all CVUU Board and Congregational meetings and ensure

- that the approved minutes are added to the permanent records of the congregation.
- For Board meeting minutes, email minutes to Board members for review prior to the next Board meeting. After minutes are updated/approved at the next Board meeting, email to the CVUU Office Administrator to be placed on the CVUU website and for historical records.
  - For CVUU annual meetings, email minutes to the CVUU Office Administrator to include in the next annual report for Congregational updates and/or approval. Update if needed and send a final copy to CVUU Office Administrator for historical records.
  - Work with the president to ensure key information from Board meetings is shared with the congregation in the newsletter or other communications as appropriate.
  - Work with the president and Board to update changes to the Congregational Handbook.
  - Perform other duties as determined by the Board.

See the CVUU Bylaws for more information.

### **Board Roles: Trustees**

The Board trustees shall:

- Serve as a liaison to one of the councils and a conduit for communication between the council and the Board, ensuring that the council carries out its functions.
- Attend Board meetings.
- Attend council/committee meetings as necessary and appropriate.
- Encourage coordination among the council and committees.
- Act as troubleshooter when the council/committees experience problems.
- Advocate for the respective council and committees before the Board.
- Review the bylaws and handbook each year to ensure familiarity with current CVUU structure and guidelines.
- Perform other duties as determined by the Board.

See the CVUU Bylaws for more information.

### **Board Roles: Vice President**

The vice president shall:

- Assume the duties of the president in cases when the president is absent or unable to fulfill those duties.
- Automatically succeed to the office of president in the event the office of president becomes vacant.
- Serve as chair of the Personnel Committee.
- Track use of all leave benefits taken by the minister or designate someone to do this.
- Perform other duties as determined by the Board.

See the CVUU Bylaws and ministerial agreement for more information.

### **Budget**

An annual budget with submissions by councils and committees is prepared by the Finance Council and submitted to the Board for approval and adoption by



congregational vote at the Annual Meeting. Each council and committee must follow financial procedures for requesting funds for their council and using the funds allocated to their council each year. See the Finance Council section for details, especially the “Budget” and “Unbudgeted Expenditures” sections.

### **Building Use and Rentals**

All building use for CVUU purposes, including reserving space for small groups, is coordinated through the Office Administrator, to ensure that two groups are not planning to meet in the same space at the same time. When you are done using any room in the building, ensure that lights are out, windows are shut, and doors are left open for air flow. If you are the last one in the building, ensure that all lights are off and both doors are locked.

Building rentals are coordinated by the Office Administrator. For building rental policies and a rental agreement, see the CVUU website([www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations) (<https://cedarvalleyuu.org/rentals>)

### **Bylaws and Handbook**

The bylaws are the legal parameters within which the Congregation functions as a non-profit religious organization. The CVUU bylaws are available on the CVUU website: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations. The bylaws should be reviewed annually by each Board member to ensure familiarity with the current CVUU structure and guidelines. The Board (or a subcommittee of the Board) should complete an in-depth review of the bylaws and this handbook every two years and makes updates as needed. Any proposed modifications are presented to the entire Board at the March meeting for discussion and review. After approval by the Board, proposed changes to the bylaws are to be posted on the CVUU website and in the Fellowship Hall at least 30 days prior to the Annual Meeting. Information about the proposed changes will also be provided in the April and May newsletters and sent via email to the congregation at least 14 days before the Annual Meeting. Proposed changes to the bylaws will be voted on by the congregation at the Annual Congregational Meeting. Changes to the handbook are made by the Board in consultation with the various Councils regarding their sections of the handbook.

### **Calendar**

The CVUU calendar is prepared by the Office Administrator, as described in the Communications Procedures on the CVUU website: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations.

### **Child Care**

Our goal as a congregation is to maximize opportunities for participation by families with younger children. On Sunday mornings the congregation provides child care and religious education for children. Supervised care is also provided for children five years or younger in the nursery. Child care may be provided at other events throughout the calendar year.

Supervision care of children shall be conducted by two (2) child care providers at all times as a safety and security precaution. The upstairs balcony room overlooking the Sanctuary is also

available for use by parents electing to keep infants or small children with them during the service. This room allows the parent to observe and hear the service while minimizing disruption should the child require their attention.

All child care providers shall undergo a background check prior to working with children.

### **Copying and Printing**

The CVUU has procedures for printing bulk materials. Contact the Office Administrator for details. A copier is available on the second floor of the Congregation building for limited use in copying by the Board and councils/committees of the Congregation. CVUU copiers and printers are for CVUU purposes only and not for personal use.

### **Denominational Affiliations**

The Board encourages participation by members of the congregation the UU General Assembly, in regional conferences, and in professional development opportunities offered by the Unitarian Universalist Association (UUA) and the MidAmerica Region (MAR).

#### **Unitarian Universalist Association (UUA)**

The Unitarian Universalist Association is the national organization of Unitarian Universalists and is headquartered in Boston, MA. The Unitarian and Universalist denominations merged in 1961. The Board will identify UUA activities at which the CVUU should be represented. The UUA maintains an extensive website about activities and services: [www.uua.org](http://www.uua.org). The UUA sponsors a national convention annually called the General Assembly, and two publishing houses called Beacon Press and Skinner House Books. The UUA also has the responsibility of admitting qualified UU ministers into fellowship, determining compensation guidelines for ministers and other paid religious professionals, and of coordinating the ministerial search process. The UUA also has grants and loans available to member congregations at various times and for various purposes. Information on these grants may be found on the UUA website.

#### **MidAmerica Region**

The MidAmerica Region ([www.uua.org/midamerica](http://www.uua.org/midamerica)) is the regional UUA governing body under whose jurisdiction the CVUU falls.

The UUA and MAR offer a variety of services:

- Liaisons for support of congregational functions
- Consultants for specific actions that need to be taken (fees are charged)
- Annual MAR meeting in April
- Annual General Assembly in June
- Resource Directory
- Lending library
- Youth Conference
- Religious Education support

### **Affiliation Dues**

Affiliation dues are assessed annually by the UUA and the MAR. Congregations paying the full amount of the assessed dues are recognized as “Fair Share Giving Congregations.” The CVUU is a fair share giving congregation.

### **Denominational Publications**

The UUA and MidAmerica Region have newsletters and magazines provided to all regular members free of charge. Other publications and resources are available for purchase, and some are available online at [www.uua.org/publications](http://www.uua.org/publications).

### **Insurance**

The CVUU is covered by multi-peril and workers compensation insurance through Church Mutual Insurance Company, 3000 Schuster Lane, P.O. Box 357, Merrill, WI 54452-0357; [www.churchmutual.com](http://www.churchmutual.com); 800-554-2642.

### **Legal Status**

This Congregation is organized exclusively for charitable, educational, religious, or scientific purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and to promote and advance such purposes by any activity in which a nonprofit corporation organized under the Iowa Nonprofit Corporation Act may engage, either directly or by engaging in activities that support or benefit one or more supported organizations as permitted under Section 509(a)(3) of the Code. The Employer Identification Number (EIN) for the Congregation is 42-1168808.

### **Mail and Interoffice Mail**

Each member of the Board, the minister, council, and committee chairs have an “inbox” for the receipt of communications related to their positions within the Congregation, as described in the Communications Procedures on the CVUU website: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations.

### **Newsletter**

The CVUU newsletter is edited and published on an eleven-month basis, as described in the Communications Procedures on the CVUU website: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations.

### **Photographs and Videos**

Sharing photographs and videos of what we do at the CVUU is an important part of documenting our activities and sharing them with the general public. This media may be posted on our website/Facebook or shared with the public through news releases, publications, video productions, or social media.

We understand that some members may not wish to have their images included in photographs/videos. We respect those wishes and plan to not release media including their images to the public. Members who do not wish the CVUU to release their image (or images of their family members) to the public, must complete, sign, and return the CVUU Photo/Image Opt-Out Form to the Office Administrator. The decision of any member to opt out of having their and/or their family members’ photo(s)/image(s) shared with the public is

enduring. Once a member completes the Opt-Out form, it will stay in effect until the member decides to change their decision. The form is available on the CVUU website: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations.

### **Solicitation**

The Board must give prior approval for any solicitation of the Congregation for monetary donations or service assistance to causes other than CVUU, whether such solicitations are made within the church building or through utilization of church email lists or printed directories. The membership list and other CVUU materials will not be used for commercial or solicitation purposes without the express permission of the Board. The Sunday offering is intended solely for the use of our Congregation, with the exception of the monthly Social Action plate collections.

Any other solicitation for a Sunday offering must have prior approval from the Finance Council and the Board. Purposes of such solicitation must be for a Social Action project, or a special event of the Congregation, MAR, or UUA. Additional means of solicitation by councils or committees (e.g., fundraising lunches; Music Committee entertainment) do not require approval from the Finance Council and Board. However, calendar coordination with the Finance Council and other councils/committees is essential to avoid conflict with established fundraising events of the Congregation. Further, councils/committees seeking solicitations from the Congregation for sponsored activities (e.g., Crop Walk, Adopt-A-Family, Iowa Public Radio) must coordinate solicitation efforts with the Finance Council, again to prevent conflict with established fundraising events of the Congregation.

### **Website**

The Congregation website is located at: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org). It is linked to the Unitarian Universalist Association (UUA) and MidAmerica Region (MAR) websites. The use of the website is determined by the Communications Procedures on the CVUU website: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations.

# Councils & Committees

Each Council chairperson is expected to provide a list of their Council member names on or around July 1 each year to the Office Administrator and Board.

## **Building and Grounds Council (B&G)**

As stated in the CVUU Bylaws, the mission of the Building and Grounds Council is to attend to the physical realm of our Congregation. This includes maintenance and improvements of the building, grounds, and equipment. Completion of this mission involves coordination and communication with the Office Administrator, Board, and Finance Council as needed.

### **Custodial**

The Building and Grounds Council is responsible for organizing cleaning.

### **Inventory**

An inventory of Congregation furnishings, artwork, and equipment (purchased, donated, and loaned) has been established and will be maintained. The document, as well as pictures, will be kept in the file cabinet on the second floor.

### **Landscaping**

The front entrance area is maintained by volunteers. Seasonal annual plantings are done in the various planters submerged around the sidewalk. Weeding, watering, and perennial maintenance are done as needed by church members. Tree trimming is contracted as necessary. Other special garden areas are planted and tended as needed. Any additions to the landscaping or grounds must be brought to the Building and Grounds Council for approval by the Board.

### **Lawn Moving**

The Building and Grounds Council is responsible for organizing lawn mowing services.

### **Snow Removal**

The Building and Grounds Council is responsible for organizing snow removal.

### **Other Building Interior & Exterior Responsibilities**

Maintenance, repairs, and/or replacement is noted by Building & Grounds Council and addressed by its members or brought to the Board's attention. The exterior sign is maintained by Council members or others volunteering for the assignment.

## **Technology Committee**

### Purpose

The CVUU Technology Committee is responsible for maintenance of computer hardware, software and audio visual equipment such as monitors, projectors, cameras, TVs, and equipment associated with the soundboards, such as microphones, speakers, amplifiers, etc.

The Technology Committee will be involved in advising the board on the purchase and maintenance of equipment and software used in the building including that used for security of the building or network.

The Technology Committee assists the Religious Services Council and Adult Forum with technology needs for Sunday services and 2nd hour Adult Forum. They also assist other CVUU groups, councils, committees, and other events or services at the CVUU building with technology needs as they are able.

### Organization

The Technology Committee is a subset of the Buildings and Grounds Council. It consists of Network Administrators, Sanctuary Techs, and Zoom Hosts. At least one member of the Technology Committee will also be a member of the RSC.

### Expectations

When an event, service or meeting is scheduled that will use CVUU computers, cameras, projector or sound system the Technology Committee will be notified and given necessary information, such as a program description, order of service, and any video, slides, or audio recordings that will be used. If a member of the Technology Committee isn't available, one may train someone to operate necessary equipment during the time period when it is needed.

On or around July 1st each year the Technology Committee will submit a report to the board including a list of all the Technology Committee members, an updated inventory report of equipment and software, and projections of future technology (needs, costs, or ongoing costs). The projection of future technology portion of the report will also be sent to the Finance Council.

A copy of an inventory list of equipment, purchased software, and documentation for them will be made and stored in at least 2 locations known to the Network Administrators and Office Administrator. A list of passwords will be stored separately from the other documentation in locations known to the Network Administrator and Office Administrator.

The Technology Committee will coordinate with the Buildings and Grounds Council on equipment placement, storage, wiring and other needs.

The use of technology equipment for rentals and services must be cleared in advance by a member of The Technology Committee, the Board president or the Office Administrator.

The Technology Committee is not obligated to attend to or operate equipment for rentals and other non-church related services. The Technology Committee reserves the right to charge a fee to outside groups for this service. All services for non-Congregation rentals are voluntary whether paid or non-paid.

## Congregational Life Council (CLC)

As described in the CVUU Bylaws, the mission of the Congregational Life Council is to promote activities for members and visitors that provide opportunities for spiritual growth through meaningful connection with each other. This includes greeting and welcoming new members and visitors, providing hospitality, and providing informational sessions for those wishing to learn more about the CVUU and what is involved in becoming a member. The CLC also works in collaboration with the Shared Ministry Council (SMC) in caring for each other and developing and communicating opportunities for social interaction (e.g. small groups). See the chart on page 15 for more information about the CLC's partnership with the SMC.

The Congregational Life Council includes two committees: 1) Membership and Marketing, and 2) Caring Connections.

- **Membership and Marketing Committee:** Works with the Office Administrator to promote the CVUU to the community to help the congregation grow. This committee includes several teams to help perform the following functions:
  - New Membership: Conducts new member orientations and works with the Office Administrator to track membership information. Is responsible for keeping records of the numbers of visitors, attendance at services, membership totals, and other such information as needed for annual reports.
  - Marketing: Work with the Office Administrator to organize public relations campaigns designed to obtain new members.
    - The Office Administrator is responsible for managing the CVUU website and Facebook, as described in the Communications Policy and Procedures.
    - The Membership and Marketing Committee is responsible for additional marketing as determined by the committee, both to bring in new members (for example, at Pridefest) and to re-engage with existing or previous members (in collaboration with the Shared Ministry Council).
  - Greeters: Greets new members and visitors on Sunday morning, ensuring that guests and visitors are welcomed and connect with someone when they attend a service at the CVUU and follow-up with them after the service.
  - Hospitality: Ensures that refreshments are available after the service and that the Fellowship Hall and kitchen are cleaned up after the fellowship time; also responsible for ensuring that adequate supplies are on hand to provide refreshments and clean-up.
- **Caring Connections:** The Caring Connections Team identifies needs of members and develops a plan to help meet those needs based on responses from the Congregation. Caring Connections helps notify the Congregation of members who are ill, experiencing the death of a loved one, or are going through any traumatic situation where the Congregation's sympathy and help would be

welcome. Many members of the congregation participate in helping others with Caring Connections or on their own. Some months there are more needs than others, and both the Caring Connections and members of the congregation join in to help as needed. Caring Connections connect members in need of caring with those willing to help, with a different contact person each month. CVUU members who sign up to be part of Caring Connections agree to help out in a variety of ways as needed.

### **Hospitality Teams**

The Hospitality Teams ensure that coffee and other necessary supplies for the hospitality time are available on Sunday morning. The Membership and Marketing Committee arranges for others to sign up for providing treats and preparing the coffee and tea during the year. The Hospitality Teams are responsible for returning the kitchen and fellowship hall to clean conditions after the fellowship time. In addition, the Hospitality Teams prepare a budget each year for the Finance Council to purchase supplies and assure there are adequate supplies of coffee, tea, sugar, creamer, dish soap, dishwasher soap, rinse aide, and garbage bags.

### **Guest and Visitors**

The congregation welcomes guests and visitors who attend our Sunday services. Members of the Greeting Team make an effort to greet visitors when they enter the building. At the appropriate time during the service, guests and visitors are invited to introduce themselves. Each visitor is given a name tag (plastic name tags are provided after the 1<sup>st</sup> visit), brochure, and is asked to fill out an information card. If a visitor makes a request on the information card, the individual is added to the newsletter mailing list.

A postcard is sent to each visitor in the week after their visit. Statistics are kept on the names and the number of visitors each week.

The Committee maintains a supply of brochures that are available from the Unitarian Universalist Association to distribute to visitors.

### **New Membership**

The Congregation is committed to preparing interested people to make the decision to become active members of the Congregation. Prospective members will have had a discussion of Unitarian Universalism with the minister, or designee of the Board and have an opportunity to attend a "New to CVUU" session. A prospective member will formally join our congregation at an "I Want to be a Member" session where the opportunities and responsibilities of membership are discussed, and the prospective member signs the Membership Book.

The Congregation recognizes that each member contributes to the life of the congregation in a number of ways. Each member is encouraged to be an active participant by attending activities, sharing their time and talents, and/or by making a financial pledge.

### **New Membership Procedure**

Upon becoming a member, each individual receives an official informational membership packet, a member name tag, and a subscription to the *UU World*. New



members sign the Membership Book with the minister and members of the Membership Committee during an “I Want to be a Member” session. Attendees are invited to these sessions through notices in the newsletter and the CVUU Weekly Updates. New members are recognized during a special section of a Sunday Service at least once per church year. The names and contact information for new members also are given to the Finance Council.

### **New Member Packet**

- Welcome Letter from the Minister, President, and Congregational Life Chair
- New Member Household Information Form
- A Brief History of UUSBHC and CVUU
- Small Group Opportunity Handout
- Leadership Directory
- Description of CVUU Councils
- A Current Print CVUU Membership Directory
- A Flyer of Information on How to Sign Up for the Online Directory

### **Membership Book**

The membership book holds the handwritten signatures of all members. The book also contains the names of all the Unitarian Universalist ministers who served our congregation. Further, it includes child dedications and other ceremonies.

### **Membership Directory**

The primary directory of CVUU members is published online through the Instant Church Directory service and is kept updated by the Office Administrator. A paper directory can be produced for any member by request to the Office Administrator.

### **Membership and Visitors Database**

The Membership Committee maintains a database with the names and contact information of all members of the Congregation. A spreadsheet with visitor information is kept separately. In December or January, the membership list is reviewed by a team comprised of the Office Administrator, the Minister, a representative of Finance, and a representative of Congregational Life or Shared Ministry Council. Using the method described under Article V (B) Removal of Membership in the Congregation’s bylaws, this team determines the official membership count and forwards this information to the Unitarian Universalist Association.-

### **Budget**

The Membership and Marketing Committee will determine budget needs for the next fiscal year for brochures, newspaper ads, and other expenses at the December committee meeting, or at another time as determined by the Finance Council’s submittal deadline and will give that information to the Finance Council.

### **Congregational Life Council Partnership with Shared Ministry Council**

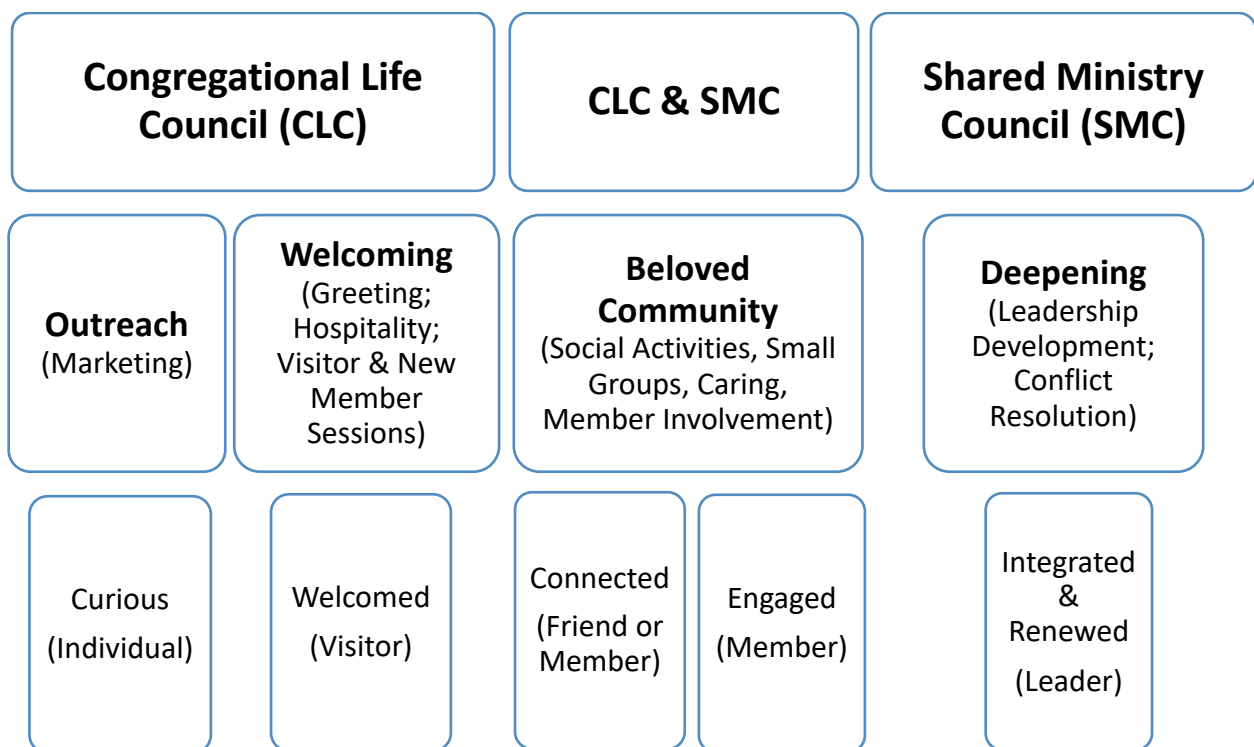
The Congregational Life Council works closely with the Shared Ministry Council on

areas where their missions overlap or are closely connected, for example: new member engagement, social activities for the Congregation, caring for those who are part of our Congregation, and small group planning.

### The CVUU Spectrum of Belonging: From Curious to Leader

The UUA created a spectrum of belonging to help congregations see that there are distinct levels of belonging to our Unitarian Universalist communities. People may move in both directions on the spectrum, and even leave our path. We want to support them in their journey and leave room for them to comfortably return should their path bring them back.

The UUA spectrum has been customized by the CVUU to show the interconnected nature of the work done by the Congregational Life Council and the Shared Ministry Council.



- **Curious & Welcomed:** Get people in our doors and coming back for more.
  - The Congregational Life Council (Membership and Marketing Committee) focuses on activities in these categories.
- **Connected and Engaged:** Help friends and members connect to UUs, UUism, and their own spiritual path.
  - The Congregational Life Council and Shared Ministry Council collaborate on activities that fall in this category.
- **Integrated and Renewed:** Help members engage deeply into the life of the congregation and our faith. Create avenues for leadership development that is valuable for all involved.
  - The Shared Ministry Council focuses on activities that fall in these categories.

## **Finance Council**

As described in the CVUU Bylaws, the mission of the Finance Council is to manage the Congregation's financial resources; to raise funds needed to finance the operating budget of the Congregation; to raise and maintain the funds needed to acquire, maintain, and expand the property and investments of the Congregation; and to ensure the financial stability of the Congregation.

The Finance Council's functions include responsibility for fundraising, budgeting, pledge record keeping, bookkeeping, audit, endowments, and financial investment. The Finance Council also conducts an annual Stewardship Campaign with help from the Stewardship Campaign subcommittee. Committee members include the Finance Director, Treasurer, Collector, Stewardship Campaign Chair, Special Fundraising Events, and Endowment Committee Chair. Members-at-Large may also serve on the Council.

### **Finance Director**

Duties of the Finance Director include:

- Chairing the Finance Council and serving on the Board;
- Preparing the annual operating budget;
- Ensuring that the financial status of the Congregation is reviewed by the Finance Council monthly;
- Coordinating all sub-committees and work groups assigned to the Finance Council;
- Reporting the monthly financial reports of the Treasurer to the Board.

### **Treasurer**

Duties of the Treasurer include:

- Receiving, paying and recording all financial obligations of the Congregation in accordance with standard accounting practices;
- Preparing monthly financial statements for review by the Finance Council and presentation to the Board;
- Maintaining the Congregation's checking, savings, and restricted bank accounts.

### **Collector**

Duties of the Collector include:

- Depositing and recording funds received from the Sunday service, special events, pledge payments or other income received;
- Filing a deposit report with the Treasurer monthly.

### **Fundraising**

Fundraising for the Congregation is essential to its growth and development. The Finance Council will propose to the Board an annual schedule of fundraising events that will include the type of event, dollar goal, and volunteer leader. Congregation committees wishing to hold fundraising events for a specific purpose shall notify the Finance Council of the purpose of the event and how funds will be distributed, and coordinate its implementation so as not to

conflict with a planned fundraising event of the Finance Council.

Aside from the Annual Stewardship Campaign, fundraising events of the Congregation include:

- Treats and Talents Auction, held in the fall, offering talents of members and friends of the congregation in exchange for bids, which are donations to the Congregation;
- Special fundraising events, which are held throughout the year for both social and fundraising purposes.

### **Stewardship**

The Annual Stewardship Campaign sub-committee is responsible for the development and implementation of the annual pledge canvass of all members, friends, and associates of the Congregation.

The Stewardship Campaign sub-committee's duties include:

- Developing a calendar and timetable for canvas activities, and coordinating it with the congregation's master calendar;
- Coordinating activities with Membership and Marketing Committee, Religious Services Council, and Finance Council, to develop canvas materials;
- Planning and conducting canvass gatherings, including campaign kickoffs, canvasser training, and post-campaign celebrations;
- Identifying the dreams and funding priorities of the Congregation and communicating this information to the congregation for the purpose of formulating the annual budget;
- Celebrating the canvass success with the Congregation. Whenever possible, the Congregation should celebrate its ability to fund its dreams. The objective of the event is to present the annual budget and to inform attendees as to how much of the proposed budget will be met by the pledges made to date;
- Convening a meeting of the Stewardship Campaign sub-committee at the end of the year (include both retiring and new members) to review the process and conduct a financial evaluation.

### **Stewardship Campaign Chair**

The Stewardship Campaign chair is responsible for the development and implementation of the annual Stewardship Campaign.

### **Endowment Fund**

The Endowment Fund will be monitored and directed by the Endowment Fund sub-committee. This sub-committee consists of three members appointed by the Finance Council, the chairperson of which shall serve as liaison to the Finance Council. Each sub-committee member shall serve a three-year term and may serve two consecutive terms. Terms are staggered so not more than one new member joins the sub-committee in any given year. More than one member from the sub-committee or the Finance Council shall have access to these funds.

## **Endowment Committee Chair**

The Endowment Committee Chair serves as the liaison for the sub-committee and the Finance Council and filing a monthly report with the Finance Council.

## **Financial Policies and Procedures**

### **Audit**

The general operational and endowment funds of the Congregation shall receive an annual financial review or limited audit by a source external to the Finance Council. The Finance Director shall arrange for the financial review or limited audit at the end of the fiscal year; and shall report to the Board and to the congregation at the next annual Congregational Meeting, by newsletter or other communication in the interim period. The annual financial review or limited audit shall be available for inspection by members of the congregation.

### **Budget**

An annual budget with submissions by councils and committees is prepared by the Finance Council and approved by the CVUU Board of Trustees and presented for adoption by the Congregation at the Annual Meeting.

The fiscal resources of the Congregation are divided into the following areas:

- **General Operational Funds:** General Operational funds are those annually budgeted funds required to perform the usual and customary activities of the Congregation. Unspent general operational funds revert back to the general fund at the end of the fiscal year and are not carried over into the next unless directed otherwise by the Board of Trustees.
- **Restricted Funds:** Restricted funds are those funds received and spent for a restricted purpose only. Restricted funds are ongoing and do not revert back to the general fund if unspent at the end of the fiscal year.
- **Capital Funds:** Capital funds are those funds designated and used for special projects, off budget purchases, or for costs associated with the maintenance or improvement of the property that do not fall within general operational funds, or are not scheduled expenses within the Building Maintenance Reserve Fund.
- **Building Maintenance Reserve Fund:** The Building Maintenance Reserve Fund contains those funds required for the scheduled purchase, repair or maintenance of the Congregation's building, its equipment or grounds.

The Finance Council works with all standing councils and committees of the Congregation to develop a budget. Council and committee budget requests for the next fiscal/program year are due to the Finance Council by a deadline established by the Finance Council with Board consent. When the Finance Council has established a recommended budget, it is referred to the Board for review and endorsement and presented at the Annual Meeting for approval by the membership. Once adopted by the Congregation, the budget sets the parameters for the approved spending of the Congregation and is not to be exceeded.

All Councils, subcommittees and special projects are required to stay within authorized

expense levels contained within the budget. Expenditures exceeding \$500 shall be preapproved with the Finance Council and approved by the Board prior to making the purchase. Requests for additional funding shall be submitted to the Finance Director for review by the Finance Council prior to being presented to the Board for any revision to the approved budget. Authorized line-item budget amounts can be found on the CVUU website. Current balances on individual line items can be obtained by contacting the Financial Director.

### **Unbudgeted Expenditures**

Unbudgeted expenditures must receive prior Board approval and shall be made only after 'off-setting income' has been identified and secured. Off-setting income refers to newly raised funds, in contrast to funds that would need to be shifted from a congregational-approved budget line item to cover the unbudgeted requests.

### **Child Care Services**

Child care services (when offered) that are an ongoing line item expense in the general operational budget are given the following priority:

- funding of Alternative Activities and nursery care during the Sunday service hours;
- funding at times where a variety of events takes place in order to maximize the effectiveness of child care support services;
- single standing events, meetings or activities are encouraged to support child care services at this time through the use of donations or registration fees designed to support the activity.

### **Check Signing/Access to Financial Accounts**

The Treasurer, Finance Director, Endowment Chair and/or Chairperson of the Board will be authorized signatories for the Congregation checking, savings, and restricted accounts. All checks and any transfers, if needed, of the Congregation funds shall require dual approval.

### **Donations**

Members are encouraged to inform the Collector or Finance Director of donations in addition to pledge contributions so a more accurate record may be maintained of the members' financial support. Donors are asked to indicate whether their gift is designated for a use other than their pledge to the general operational fund. Bequests, planned giving donations, and undesignated memorials are directed to the Endowment Fund Committee for administration.

Donations received specifying a particular area or project of the church will be considered with the caveat that if a special project does not come to fruition, the balance/entirety of the donation can be moved to the CVUU Endowment Fund. Donors will sign a document agreeing with the above caveat at the time the donation is received.

Committees or individuals proposing to donate start-up equipment or services shall coordinate the donation or purchase of the equipment or service with the Finance

Council. This will ensure its inclusion into the Building Maintenance Reserve for future replacement purposes, or for inclusion into future planning and/or funding through the general operating budget.

### **Reimbursements**

The Congregation is particularly dependent upon the time and talent of volunteers. A volunteer may be reimbursed for authorized purchases made on behalf of the Congregation. Reimbursement shall only be obtained when a volunteer submits an authorized reimbursement request form and documentation.

Reimbursements for expenditures on behalf of the Congregation should be submitted to the Finance Director. Reimbursement forms can be found in their respective mail slot above the copying machine in the alcove on the second floor and in the Resources section of the CVUU website. The form should be filled out with originals of the receipts attached. Expenses for officers, officers-elect, and staff who attend UUA and/or MAR functions need approval in advance of the meeting, unless the expenses are included as a line item in the budget.

### **Review of Policies and Procedures**

Financial policies and procedures shall be reviewed every two years by the Finance Council with all revisions or changes submitted to the Board for its approval and inclusion into the CVUU Congregational Handbook.

## **Religious Education and Programs Council (REAP)**

As described in the CVUU Bylaws, the mission of the Religious Education and Program (REAP) Council is to coordinate religious education programs that offer opportunities for CVUU members, their children, and friends to learn from one another and experience spiritual growth in a supportive environment. Programs offered speak to the diverse backgrounds and draw upon the areas of expertise of those attending the CVUU and of the past, present and future UU leaders while enhancing the understanding and importance of the Unitarian Universalist Principles.

### **Organization**

The Religious Education and Programs (REAP) Council includes the Children and Youth RE (Religious Education) Committee and the Adult Forum Committee. The REAP Council will include, in addition to other interested members: the DCRE serving as the RE Council Chair; the Board liaison, and other interested parties from the Congregation as the Council deems appropriate. The Minister and the Director of Children's Religious Education (DCRE) shall serve as ex-officio members of the REAP Council.

### **Adult Forums**

The responsibility of the Adult Forum committee is to ensure Congregation members have multiple opportunities to interact in small groups for the following purposes:

- To enhance their spiritual growth;
- To enhance their knowledge about Unitarian Universalism and other religious traditions;

- To enhance their knowledge of the religious journeys taken by other members;
- To enhance their knowledge of relevant social and political issues with which UUs may be concerned;
- To enhance fellowship and a sense of community among members by providing them opportunities to interact and share ideas in informal settings; and
- Intellectual stimulation or skill development on other topics of interest to members.

The committee offers adult forum sessions during the second hour on Sunday morning, conducted by members, invited speakers, or the minister. The minister and/or RSC will work closely with the team to plan, develop, and present Adult RE options. The committee also plans adult RE activities at other times of the week, as Congregational needs and interests emerge. The committee also coordinates its activities with the Religious Services Council.

### **Adult Programs**

There is no one organizer for adult program offerings at times other than Sunday morning (e.g. Wednesday evenings). Offerings may include small group courses or activities. Anyone wishing to establish or lead adult programming should contact the Sunday morning adult forum organizer and the Administrator to ensure there would be no scheduling conflicts.

### **Children and Youth Programs**

The Director of Children's Religious Education is responsible for implementing a curriculum for children and youth, in collaboration with the REAP Council. The curriculum for each year is researched from already available material or newly purchased materials and is reviewed by the REAP Council.

Religious education for children and youth is held Sundays during the school calendar unless previously announced. Every child should be registered in the Religious Education program so that the DCRE and the REAP Council can maintain communication with parents or guardians, especially in the case of health emergencies like food allergy reactions or mental health crises.

### **Nursery**

This is a program held in the Cowley Room for ages 0-5 years, during Sunday Service.

### **Classrooms**

The classrooms in use for Sunday morning RE include the Grant Room, the Herman Room, the Koehring Room, and the Page Room, all upstairs above the sanctuary. Supplies are contained in the RE closets in the hall and in the classrooms. Teachers are responsible to assure that their rooms are straightened up at the end of class. A list of clean-up guidelines is posted in each room. Finally, teachers need to coordinate that all classroom lights are out, windows shut, and doors left open for air flow at end of RE. The hall lights and stairwell lights should be turned off.

### **Discipline**

If a child in the RE program on Sunday has difficulty participating appropriately, the child's parent will be asked to come to the RE space and at that time a decision will be made as to



whether the parent will stay with the child during the remainder of the RE program or have the child leave with the adult.

### **Nursery and Classroom Supervision**

All nursery and RE classrooms shall have two caregivers or adult supervisors present at all times that children are present for classrooms, nursery, and other RE activities.

## **Religious Services Council (RSC)**

As described in the CVUU Bylaws, the mission of the Religious Services Council is to plan, coordinate, and/or present religious services for the Congregation, in collaboration with the minister, music director, and others. This includes Sunday services, weddings, memorial services, and other religious services sponsored by the Congregation.

### **Organization**

The religious services council includes the chair, the Minister, lay ministers, the Music Director, the Board liaison, at least one member of the Technology Committee, the worship associates, and others who are interested from the congregation.

A Sunday Worship Team is the minister or guest speakers, music director, worship associates, chalice lighters, other speakers, sanctuary tech and online video host.

### **Services**

Worship services are held every Sunday at 10:00 a.m, unless otherwise publicized, at the CVUU, located at 3912 Cedar Heights Drive, Cedar Falls and are also broadcast online. The Religious Services Council has responsibility to offer a religious service, chapel service, or other program for the congregation every Sunday morning.

### **Chalice**

The current tradition is for the worship associate to light the chalice or request a member of the Congregation light the chalice at each Sunday service.

### **Order of Service**

The Minister (or guest speaker in the minister's absence) and the Worship Associate are responsible for deciding the order of the elements for each service. Most weeks will approximately follow a template order as prepared by the Religious Services Council, though the order can vary at the discretion of the person who is preaching and the Worship Associate. All information regarding order of service elements (if differing from the established template), service music, and any other audio or visual media to be used in the service must be transmitted to the Office Administrator no later than 8:30 a.m. on the Wednesday 11 days before the service.

The Office Administrator prepares all of the following materials related to the Sunday service:

- 1) the official large-print Order of Service, which is both emailed to the worship team and delivered in hard-copy in the sanctuary for the worship team's use;

- 2) the congregational Order of Service, which is professionally printed and delivered to the building before Sunday morning; and
- 3) any needed song sheet handouts, by prior arrangement with the music director.

Any PowerPoint presentation should be emailed to the worship team on the Wednesday prior to the service by the music director or other designee.

### **Programming Schedule**

The schedule for the church year (from August through May) should be completed as early as possible after the Board decides the yearly theme. The schedule should be posted at the church, and reside with the minister, Director of Religious Education, REAP Council, and the Religious Services Council.

The Religious Services Council is responsible for having the Sunday service titles to the newsletter editor by the newsletter deadline each month.

The Religious Services Council is responsible for transmitting detailed information about Sunday services 2 months in advance to REAP (Children's RE and Adult Forum) in person or by email so they have a chance to coordinate their programs with the services when appropriate.

The Worship Team is responsible for supplying any audio or visual media needed for the service on a Wednesday 11 days before the service to the Administrator and to the Sanctuary Tech. The Worship Team will not attempt to add audio or visual media after the Worship Team coordination meeting on the Thursday before the service unless it is an emergency.

### **Thursday Worship Team Coordination Meeting**

Each Thursday the Worship Team will have a short coordination meeting reviewing the order of service, checking the slides and other media for accuracy, mic and camera settings, and reviewing any other logistics necessary. If it is a simple service those on the worship team can elect to participate in the coordination meeting online by video or communicate some other way with the Worship Associate about their role before Sunday. If there are new members of the worship team, or it is a complex service or Festival Sunday then the coordination meeting will be an in-person rehearsal.

### **RSC Chair Duties**

Plan and run the following meetings:

Bi-Annual meetings for planning a framework of services for the year based on the year theme, specifically including the dates for Festival Sundays, Holidays and other special services. One in the Fall for the church year (August through May) and one in the Spring for the rest of the year until September. Representatives of Adult and Child RE, Membership and Marketing, and other committees or groups will be invited to attend and plan the year or submit dates when they want input or coordination with a Sunday Service.

Monthly RSC meetings to plan services 2 months ahead and work on RSC goals. Submit Sunday service titles and other information to the Administrator for inclusion in the Weekly Congregational Email, and to the newsletter editor each month.

Submit an annual budget request to the Finance Council.

#### Back up the Worship Associate

Read the weekly emails from Worship Associate and any on the Worship Team needed to confirm Order of Service and get the information to the Administrator 11 days before the service and assist with any issues that arise.

Arrange for training of new Worship Associates until they feel comfortable with the role.

#### If needed or wanted

Attend the coordination meeting with the Worship Team Thursdays before the service.

#### Meet or email or arrange someone on the RSC to contact:

The Minister - brief weekly check-in

Adult Forum Committee - monthly sharing and coordinating plans for the next 2 months

Children's RE - monthly sharing and coordinating plans for the next 2 months

### **Worship Associate Duties**

#### **Worship Associate Duties Before Sunday**

##### By Tuesday night 12 days before the service

Send email to the Worship Team (cc the Administrator and RSC Chair) to confirm Order of Service details.

If there is a special service, like Christmas Eve, requiring multiple practices or many people this will need to be done earlier.

##### By Tuesday night before the service

Check The Spreadsheet

Send a reply to the Order of Service email to confirm there are no more changes by 8:30 a.m. Wednesday morning.

##### Thursday before the service

1. Meet with the Worship Team to review the Order of Service
2. Cues for music, camera, mics, and slides
3. Check accuracy of slides
4. Arrange for any unusual placement of chairs or props
5. Check RSC email for announcements
6. Put out hymnals if nothing else happening before Sunday

### **Sunday Worship Associate Duties**

#### **Before the Service**

1. Check sidewalks for ice/snow or obstructions - alert Building & Grounds if necessary
2. Lights on

3. Air Filter on
4. Chairs Tidy
5. Hymn numbers set in display
6. Hymnals set out
7. Check Chalice oil levels and lighter or matches
8. Water at pulpit for preacher or self if wanted
9. Mic and camera check with Sanctuary Tech
10. Check RSC email for announcements
11. Final review of Order of Service with Worship Team if needed.

### **After Service**

1. Count offerings from the offering box with another person, fill out the envelope, both sign and put in cash box upstairs.
2. Tidy sanctuary
3. Hymnals put away
4. Order of Service into recycling basket
5. Return water cup to kitchen
6. If Pastor left papers on pulpit return them to their office

### **If last in the building**

1. Turn off air filter
2. Turn off lights
3. Make sure doors locked

## **Music Committee**

The Music Committee is responsible for supporting the Director of Music, in coordination with the Religious Services Committee, to provide appropriate music for Sunday services and other religious events throughout the church year. The Music Committee further encourages participation by the entire congregation in the musical offerings.

In addition, the Music Committee:

- Organizes concerts, luncheons, and music for other fundraising and outreach events;
- Provides feedback and assistance to the Director of Music in planning, organizing, recruitment, and performance.

The Music Committee is open to anyone who is interested in joining. It is not necessary to be able to sing, play an instrument, or read music. The Music Committee typically includes the Director of Music (who acts as Chair of the Music Committee), the church pianists, and other musicians and non-musicians who enjoy planning musical events.

The Music Committee meets once a month. Members remain in contact with each other (via phone, email, and ad hoc meetings) to help plan music in collaboration with the Director of Music. In addition, a member of the Music Committee (the Director of Music or an appointed delegate) acts as a liaison to the Religious Services Committee and attends all of those Meetings.

## **Music for Sunday Services**

Music for Sunday Services is typically planned by the Director of Music, in coordination with the minister and worship associate for a given Sunday. Every effort is made to follow the theme of the service in all musical selections. However, music is chosen well in advance, and is normally rehearsed for at least two Wednesday evenings prior to a performance. In addition to ensemble and solo performances, the Director of Music will advise the Minister and/or Worship Associate on possible hymns to include in a given service.

### **Musical Ensembles**

The Congregation currently has an Adult Choir and the Burning Heretics that rehearse on Wednesday evenings, with a break of no rehearsals in January or other times the Music Director sees a need for a break. Each ensemble performs 1-4 times per month, depending on the musical selections, availability, and needs of the service. Membership in ensembles is open to all, and talent is not a requirement.

Other musical ensembles that rehearse and perform on an ad hoc basis include string and brass ensembles.

Anyone who wishes to perform a solo or with an ensemble should contact the Music Director.

## **Shared Ministry Council (SMC)**

As described in the CVUU Bylaws, the mission of the Shared Ministry Council is to enhance the overall quality of the shared ministry of the CVUU by working with the minister and the Congregation to collaborate and support each other in shared leadership. This includes having regular meetings with the minister, assessing the health of the Congregation through surveys or other means, resolving conflicts for members who cannot do so on their own, and facilitating opportunities for members to develop the necessary skills to participate in shared leadership (e.g. any training needed to help resolve conflicts).

The day-to-day operations of the CVUU rely on a concept known as “shared ministry.” Shared ministry is the mutual responsibility that the congregation, the minister, and the professional staff share, committing them to work together to support and promote the growth and well-being of the CVUU congregation in all aspects of its community life. Shared ministry means that we each play our part to help keep the CVUU running by putting our own skills, experience, energy, and passion into playing the role that is best suited for each of us.

At the CVUU, the councils and their corresponding committees work separately, yet together, as part of an interdependent web to help keep the CVUU alive and thriving.

The Shared Ministry Council works with the minister, councils and committees, and members of the Congregation to collaborate and support each other in shared leadership. It helps members discover their personal shared ministry at the CVUU, with an ultimate goal of enhancing the overall quality of the shared ministry of the CVUU.

Here are some of the ways that the Shared Ministry Council works to achieve this goal:

- Reaching out to new members to help them find their shared ministry at the CVUU.
- Working in concert with the councils and committees as needed to match church members with appropriate volunteer opportunities.
- Facilitating opportunities for members to develop the necessary skills to participate in shared leadership; for example: new Board member training or conflict resolution training/coaching.
- Regular meetings with the council and the minister, to discuss new member engagement, training needed for the Congregation, and other current issues that may affect the shared ministry of the Congregation.
- Providing support to the minister, president, and Board as needed. For example, this council may help plan for Board retreats or Congregational retreats.
- Using surveys or other means to assess the health of the Congregation as needed.
- Helping resolve conflicts for members who cannot do so on their own (as described below).
- Helping “acclimate” a new minister by informing them of CVUU context and procedures.

### **Shared Ministry Council Relationship with the Minister**

The Shared Ministry Council acts as a confidential advisory council to the Minister, both to provide input to the Minister and collaborate in identifying and addressing issues within the congregation. Key aspects of the relationship between the SMC and the Minister are listed below. See the current CVUU Ministerial Agreement for details.

- Each year, the SMC works with the minister, with input from the Religious Services Council chair and Board president, to review the relationship between the minister and congregation and discuss successes, challenges, and areas for future improvement.
- Each year, the SMC collaborates with the Board and Finance Council on annual compensation and benefit packages recommended for the Minister.
- Throughout the year, the SMC is responsible for tracking the Minister’s leave time (vacation, study, sick, etc.)
- Each year, the SMC ensures that the Minister’s paper file is updated with the current contract, any addendums, and a written copy of any annual review documents.

### **Shared Ministry Council Role in Conflict Resolution**

The first step in any potential conflict is to encourage anyone who has a complaint to talk directly to the person with whom they have a concern (see the Code of Conduct, Conflict Resolution Policy, and Covenant of Right Relations in the Appendix). If the individuals involved cannot resolve the concern themselves, they may contact the minister and/or the Shared Ministry Council to begin a process of facilitated open dialogue between the two parties. The minister takes the lead on resolving conflicts that may arise among church staff or any member of the Congregation. The Shared Ministry Council provides support for the minister as needed and takes the lead on resolving any conflicts involving the minister.

For any complaints involving the church staff or any member of the Congregation:

1. The minister listens to the complainant to determine whether the member has directly approached the church staff or other member of the Congregation to discuss the concern. If not, the minister encourages them to do so.
2. If the issue is not resolved by direct conversation, the minister offers to act as moderator in assisting the member in meeting with the church staff or member of the Congregation to discuss the concern.
3. The minister asks the Shared Ministry Council for support in this process as needed.

For any complaints involving the minister:

1. The council chair or other designated member of the council listens to the complainant to determine whether the member has directly approached the minister to discuss the concern. If not, the council member encourages them to do so.
  - a. Note: The Shared Ministry Council will not respond to anonymous complaints.
2. If the issue is not resolved by direct conversation, the council member offers to act as moderator in assisting the member in meeting with the minister to discuss the concern.

### **Shared Ministry Council Partnership with Congregational Life Council**

The Shared Ministry Council works closely with the Congregational Life Council on areas where their missions overlap or are closely connected, for example: new member engagement, social activities for the Congregation, caring for those who are part of our Congregation, and small group planning. See the Spectrum of Belonging chart at the end of the Congregational Life Council section for more information about the CLC's partnership with the SMC.

### **The Roles of other Councils and Committees in Shared Ministry**

Although the Shared Ministry Council is available to help individuals determine their own path for their personal shared ministry at the CVUU, each council and committee is ultimately responsible for finding its own council/committee members and council/committee leaders. Each council/committee is encouraged to inform the Shared Ministry Council of needs within their council/committee so that the SMC can help promote involvement (volunteer) opportunities at the CVUU and be aware of them when connecting with members, especially new members. Here is a summary of roles:

- **Councils/committees:** Recruiting for the work of each council/committee and leadership (e.g., council or committee chair) for the council/committee is done from within the council/committee. For example, the Membership & Marketing Committee finds volunteers to help with hospitality and greeting; the Religious Services Council finds volunteers to help with Sunday services.
  - **Note:** As described in the Congregational Life Council section, caring for those who are part of our Congregation does not fall solely on Caring Connections, but rather is the responsibility of the entire Congregation. See page 12 for details.
- **Nominating Committee:** The role of the Nominating Committee is to find Board members for the upcoming slate of Board nominees at the next annual meeting. Their role is not to find new council/committee chairs.

- **Note:** In the case of the Finance Council, the Nominating Committee helps find a liaison other than the Finance Director, if one is needed, but the Finance Council finds a new Director, when needed.
- **Shared Ministry Council (SMC):** The SMC helps communicate to the congregation the needs of each council/committee (if informed of needs by the councils/committees). This includes recurring information in each weekly update about what help is needed at the CVUU and who to contact to help in each area, with signup links and information as available. The SMC also provides information and reminders about volunteer involvement opportunities in various newsletter articles throughout the year, announcements several times a year during Sunday services and/or adult forums, and direct emails to new members.

## **Social Action Council (SAC)**

As described in the CVUU Bylaws, the mission of the Social Action Council is to inform and educate members and the public in areas of social and environmental concern; to find ways and means to address social injustice; to sponsor and support groups organized to deal with social problems, and to develop a comprehensive program to address environmental awareness within the congregation.

### **Social Action and Justice Committee**

The Social Action and Justice Committee is charged with the following tasks, to:

- Plan and carry out the monthly Social Action Plate Collection;
- Conduct an annual fund drive through the Guest at Your Table program for the Unitarian Universalist Service Committee (UUSC);
- Coordinate CVUU participation in the Cedar Falls Community Meals;
- Monitor qualifications of being a LGBTQ+ Welcoming Congregation;
- Identify and encourage specific efforts to live out our values of Justice and Equity, and our previously adopted 8th Principle;
- Provide opportunities for members and friends of the Congregation to participate in other social action activities, such as the Cedar Valley PrideFest, a Circle of Support and Accountability, mentoring and other assistance for local refugee populations, and attending Lobby Day for One Iowa in support of LGBTQ issues.

### **Social Action Plate Collection**

An essential charge of the committee is stewardship of a special plate collection, taken on the last Sunday most months of the year, to benefit a specific charity or agency that promotes social justice. Based on suggestions from CVUU members, the committee prepares a ballot each year containing a list of nominated organizations and presents it to members at the annual meeting. Only organizations clearly in accord with UU principles are selected for the ballot. Members vote at the annual meeting or by sending in a ballot if they cannot attend. Results of the voting determine eight groups to receive the proceeds of a plate collection the next year.



To emphasize to the Congregation how a particular social action plate collection reflects UU values, a Congregation member may introduce the collection on the Sunday it is taken by speaking from personal experience about the organization. Alternatively, the children's story on that Sunday may address its importance.

### **Guest at Your Table (UUSC Fundraiser)**

At the CVUU, Guest at Your Table typically is initiated on the Sunday before Thanksgiving. The start of the campaign is announced and its goals described during the service by a member of the Social Action Committee or a worship associate or minister. Boxes are handed out to families as they leave the sanctuary.

The assistance of children from the CVUU middle school class is encouraged throughout the campaign: for example, they may give brief talks about the featured stories during a service, or pass out and collect donation boxes.

The length of the Guest at Your Table campaign may vary; collections have been taken on Christmas Eve and in January on other years. The CVUU has been designated a member of the Creating Justice Banner Society, an award for Congregations with UUSC membership in the 25 to 49 percent range.

### **Community Meals**

The August special plate collection is designated to benefit Cedar Falls Community Meals, a program operated cooperatively with First Christian, St. Luke's Episcopal, United Church of Christ, Community of Christ, and First United Methodist Church, to provide a free community meal each Tuesday. The CVUU joins the others each month that has five Tuesdays. A CVUU member coordinates efforts with the other groups, and members and friends volunteer to help set up, serve food, and clean up on the day of the dinner. In the event that the plate collection does not yield enough to fully cover our costs, the Board has guaranteed that CVUU will make up the difference.

### **Little Free Food Pantry**

The CVUU little food pantry is located in the circle driveway of the CVUU, across from the mailbox. CVUU members provide financial contributions and food donations that are used to help feed neighborhood families in need, particularly kids coming home from school hungry.

Food donations are kept in the storage locker in the Fellowship Hall on the wall by the minister's office. Food donations should be placed in the storage area instead of directly in the pantry, so the food pantry coordinators can decide which items to place in the pantry.

### **Green Living**

After several years of planning and putting ideas into practice, our congregation was officially recognized as a Green Sanctuary Congregation at the 2009 General Assembly. In commitment to our 7<sup>th</sup> UU principle, the CVUU continues to strive to be a Green Sanctuary congregation. In keeping with past Green Living initiatives, the CVUU recycles paper, plastic, and metal, and maintains a pollinator garden.

## **Advisory and Ad Hoc Committees**

In addition to the 7 councils, several ad hoc and advisory committees perform specific functions and report directly to the Board. See the CVUU bylaws for details about advisory and ad hoc committees.

# Appendix: CVUU Policies

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## Building Key Issuance Policy and Agreement

This Policy & Agreement were provisionally put in place as of 9/2022, and officially approved by the Board in October of that year.

Keys to the exterior doors of Cedar Valley Unitarian Universalists will be granted under the following conditions:

1. Keys will automatically be issued to all paid staff, the members of Building and Grounds Council, the Collector, and the President of the Congregation. Upon leaving their position, these individuals must turn in their key to the office.
2. A key may be issued to the head of each committee or council, and to the leader of each small group, if the council, committee, or group plans to meet in the CVUU building during a time when the office is closed.
3. Keys may be issued under other circumstances, as deemed appropriate by the staff. Keys may only be issued by staff, and the issuing staff member will ensure the communication of this policy and agreement, as well as the completion of relevant paperwork. In case of emergency, a staff member may deputize another member of the congregation to issue keys for a limited time.
4. Building rentals or use of the building by outside groups may be issued one key per group, to be signed out to the sponsoring member if applicable. If no member is sponsoring, a key may be issued with a deposit. For one-time building use, the key should be returned to the office within 5

business days. For ongoing building use, the key should be returned if the group ceases to meet for a period of more than six months.

By signing out a key to the CVUU, I acknowledge that I will be playing an important role in the security of the CVUU building. I take the responsibility upon myself to take the following actions:

1. To reserve my group's meeting space in advance through the CVUU Office Administrator. This is important for security because it allows us to know who has been in the building, when, and can therefore help us create a timeline when an incident occurs.
2. To clean up after my group, including taking out the trash if applicable.
3. To ensure all exterior doors of the building are secure and lights are off upon leaving the building.
4. To return the key promptly after it is no longer imminently needed.

## **Building Use and Rental Policy**

Building rentals are coordinated by the Office Administrator. Please go to <https://cedarvalleyuu.org/rentals>.

## **Code of Conduct**

The following *Code of Conduct*, adopted by the Board on February 24, 2008, will be re-affirmed at the July meeting of each newly elected Board.

We, the members of the Board, affirm:

1. To treat our staff, minister, members of the Congregation, and visitors with dignity and respect at all times;
2. To establish a cooperative and constructive relationship with our staff, minister, one another on the Board, members of the Congregation, and visitors;
3. To expect there will be disagreements within our congregation but will endeavor to resolve these disagreements in the best interests of the Congregation as a whole;
4. To encourage anyone who has a complaint to talk directly to the person with whom they have a concern, or to contact the Shared Ministry Council, to begin a process of facilitated open dialogue between the two parties. We will not respond to anonymous complaints.

## Communications Policy

The Communications Policy was adopted by the Board on May 13, 2021.

### CVUU Communications Policy

The CVUU communicates to members, visitors, and the general public using a variety of methods, including a Weekly Update email, monthly newsletter, calendar, website ([www.cedarvalleyuu.org](http://www.cedarvalleyuu.org)), public Facebook page ([www.facebook.com/cedarvalleyuu](http://www.facebook.com/cedarvalleyuu)), and private Facebook discussion group ([www.facebook.com/groups/cvuus](http://www.facebook.com/groups/cvuus)). The CVUU Office Administrator is responsible for most CVUU communications. The minister and those in leadership positions also help with communications as needed, in accordance with the current CVUU communications procedures. Members of the congregation, especially those in leadership positions, are encouraged to contribute content to communications such as the Weekly Update email, the calendar, and the monthly newsletter.

Contributions to the Weekly Update and the calendar should be sent to the Office Administrator at [office@cedarvalleyuu.org](mailto:office@cedarvalleyuu.org), and contributions to the newsletter should be sent to the Newsletter Editor at [newsletter@cedarvalleyuu.org](mailto:newsletter@cedarvalleyuu.org). Members of the congregation are also encouraged to participate and post within the private CVUU Facebook group.

Specific procedures related to CVUU communications are subject to change, and current procedures are posted on the CVUU website: [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations.

When changes are made to the communication procedures, the Office Administrator works with Board president, minister, and others in CVUU leadership as needed to update the communications procedures posted on the website and notify the Congregation of changes.

### CVUU Communications Procedures

The following procedures apply to communications at the CVUU.

- Email list
  - The Office Administrator, working in conjunction with the Membership and Marketing Committee, maintains an address and email list of members, visitors, and associates of the Congregation. These mailing lists and their distribution will be used only for Congregation, MidAmerica Region (MAR), and Unitarian Universalist Association (UUA) communication, and will not be sold or shared with other organizations.
  - The email list is used for:
    - Congregational matters, including Weekly Update emails and the digital distribution of the newsletter, and special announcements of immediate interest to the Congregation.
    - Communicating about organizations endorsed by the CVUU or with which CVUU has an affiliation.

- The minister's communications to the Congregation.
- The email list is not used for political statements or solicitation, or for other solicitation or uninvited mass communication.
- Weekly Update email
  - The Weekly Update email is a primary, regular method of communication to the congregation that is sent to individuals who have signed up to be on the email list described above.
  - As the name implies, this communication is sent once a week. Pertinent information from members of the congregation should be submitted by the end of the day on Tuesday to be included in the current week's Weekly Update, which is sent on Wednesday. Any submissions that are not received by the deadline may be included in the next week's Weekly Update if they are still timely.
  - Special update emails may also be sent to the email list from time to time, but only in very rare situations, to be determined by the Office Administrator together with the president and/or minister.
- Newsletter
  - The newsletter is edited and published on an eleven-month basis. There is a June-July issue of the newsletter during the summer months. The newsletter contains a regular column from the minister and the Board president, a description of Sunday Services, and a calendar of services and activities for the upcoming month. Other columns that typically run each issue include Children's RE, Adult Forums, Green Living, Joys and Sorrows, and Social Action. Upon request, it is sent to friends, members, associates, visitors, other congregations, and the MidAmerica Region.
  - To receive current newsletters as they become available, contact the Office Administrator in the church office at [office@cedarvalleyuu.org](mailto:office@cedarvalleyuu.org). The newsletter is available in various formats: by email from the office; in paper form at the church; or a paper copy can be mailed via USPS upon request.
  - Submissions of articles are due on the Friday before the next to the last Sunday of the month to the Newsletter Editor and should be emailed to [newsletter@cedarvalleyuu.org](mailto:newsletter@cedarvalleyuu.org). Calendar submissions for the month are due to the Office Administrator by the Wednesday before the newsletter deadline and should be emailed to [office@cedarvalleyuu.org](mailto:office@cedarvalleyuu.org).
- Calendar
  - The CVUU calendar is prepared by the Office Administrator.
  - All events of committees or open CVUU groups, whether they occur on- or off-site, should appear on our calendar. All events of closed CVUU groups that occur on the CVUU property should also appear on our calendar, to avoid scheduling conflicts in the building.
  - To be published in the paper calendar that goes with the newsletter, CVUU leaders should submit all events by email to the Office Administrator by the above stated deadline. If an event is not planned by the deadline, it should still be scheduled with the Office Administrator and added to our public Google

Calendar.

- The Google Calendar is available for viewing at all times by members, visitors, and the public and is the most accurate and up-to-date source of scheduled CVUU events. At the time of this publication, the calendar can be found at [www.cedarvalleyuu.org/news/events](http://www.cedarvalleyuu.org/news/events).
- Website
  - The CVUU website is [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org).
  - The Office Administrator is the webmaster.
  - CVUU members, especially those in leadership positions (e.g. council and committee leaders and Board members), are encouraged to notify the Office Administrator if they notice content on the website that is outdated and provide phrasing suggestions for updated information.
- CVUU Facebook Page
  - The public CVUU Facebook Page is like an online “flyer” for the public, and is available at: [www.facebook.com/cedarvalleyuu](http://www.facebook.com/cedarvalleyuu). Make sure to “Like” our page and visit it at least once a month (or more) so that it will continue to show in your Facebook feed. The Office Administrator and minister manage the CVUU Facebook Page, and the minister also monitors the page, especially when the Office Administrator is off duty.
- CVUU Facebook Discussion Group
  - The private CVUU Facebook Discussion Group is for in-church discussion, and is available at: [www.facebook.com/groups/cvuus/](http://www.facebook.com/groups/cvuus/). Make sure to request to “Join” our group and visit it at least once a month (or more) so that it will continue to show in your Facebook feed. The Office Administrator and minister moderate the CVUU Facebook Discussion Group, but most content is created by members of the community.
  - Each person who requests to join the CVUU Facebook Discussion Group will be asked to affirm the following covenant, which is available as a pinned announcement in the group: *This is a space for members and friends of the Cedar Valley Unitarian Universalists in Cedar Falls, Iowa, to gather in online community. All those who join here in beloved community agree to abide by this covenant, and those who breach the covenant will be asked to make amends or, if amends cannot be made, will be removed from the group. We gather together in the spirit of love. Acknowledging the inherent worth and dignity of one another, we engage in respectful discourse and refrain from ad hominem attacks of any kind. We hold no space for trans antagonism, heterosexism, racism, sexism, misogyny, transmisogyny, ableism, classism, fat-shaming, or any other dehumanization of others based on identity. When we disagree, we disagree with respect and kindness.*
- Other Social Media Platforms
  - YouTube: The CVUU’s YouTube channel is managed by the Office Administrator and is primarily a means to distribute the messages from the CVUU Sunday services. The YouTube channel can be found here: <https://youtube.com/@cedarvalleyuu>.

- Instagram: The CVUU's Instagram, much like the Facebook page, is a public flyer for the CVUU. It is managed by the Office Administrator and can be found at [www.instagram.com/cedarvalleyuu/](http://www.instagram.com/cedarvalleyuu/).
- Sunday Messages Podcast
  - Some of the messages from Sunday services are published through the Sunday Messages Podcast. The minister and Office Administrator work together to select messages for the podcast. The Office Administrator hosts and edits the podcast. It can be found through most major podcast distributors, and more information can be found on our website: [www.cedarvalleyuu.org/sunday-services/sermon-recordings/](http://www.cedarvalleyuu.org/sunday-services/sermon-recordings/).
- Mail and Interoffice Mail
  - The mailing address of the Congregation is: 3912 Cedar Heights Drive, Cedar Falls, IA 50613.
  - Each member of the Board, the minister, council, and committee chairs have an “inbox” for the receipt of reports, mail, messages and other communications related to their positions within the Congregation. The mailbox is currently located on the second floor, opposite the balcony. It is the responsibility of the minister, Board members, and council/committee chairs to check their respective mailboxes on a regular basis.
- Directory
  - The CVUU directory is designed to provide information for personal communication among church members and other people associated with the Congregation. It is designed for convenience when conducting church business. This information is not designed for solicitation or uninvited mass communication.
  - The Office Administrator oversees the development of the CVUU directory.

## **Conflict Resolution and Disruptive Behavior Policy**

The initial *Conflict Resolution Policy* was adopted by the Board on April 20, 2010, and was approved by the congregation at the May 2, 2010, Annual Congregational Meeting. Updated and adopted by the Board February 8, 2024. Amended by the Board June 13, 2024.

### **Conflict Prevention Through Communication**

The best way to prevent conflict issues before they arise is through clear and consistent communication. It is highly recommended that all members of the CVUU review and follow the CVUU Communications Policy and Procedures, which are posted on the CVUU website (About > Leadership & Operations page).

Conflict prevention should not be confused with conflict avoidance. Preventing conflict through clear communication is a good thing. However, completely avoiding conflict because it's uncomfortable is not good for maintaining healthy relationships. It's better to address uncomfortable situations than to completely avoid conflict.



## **Conflict Resolution**

The overarching principle in Unitarian Universalist congregations affirms and promotes the inherent worth and dignity of every person. It is imperative that any conflict within the church community be resolved in a manner which protects the members of the congregation.

Conflict resolution among members, guests, and visitors can be defined as two different types of interactions:

- A. Interpersonal conflict** between two or more members.
- B. Disruptive behavior** of an individual within or towards the community of the church.

### **A. Interpersonal Conflict**

Conflict is a part of most every interpersonal relationship. Managing conflict is the responsibility of all members, guests, and visitors within the church. Within a Unitarian Universalist church, different views and beliefs are discussed in a free and supportive environment. Conflict arises when one person perceives that another individual is restricting or suppressing their personal freedom or dignity in a manner which results in a defensive climate, characterized by these qualities:

- Evaluation: judging and criticizing other group members.
- Control: imposing the will of one group member on the others.
- Strategy: using hidden agendas.
- Apathy: demonstrating indifference and lack of commitment.
- Superiority: expressing dominance.
- Certainty: being rigid in one's willingness to listen to others.

It is the responsibility of all members, guests, and visitors to be supportive of one another. Every person has responsibility to attempt to establish effective communication pathways with other people with whom you have a conflict. Conflict can be damaging, because it can lead to greater problems in the future. Individuals involved in conflict may blame the other party or parties. Further, individuals may go beyond the specific behavior in question and blame the character of the other person. A final problem that is often encountered in conflicts is a win-lose mentality. Instead, the steps below focus on each individual's goals/outcomes in order to promote a win-win outcome.

### **Steps for Resolving Interpersonal Conflict**

- Examine your own role in the conflict. Why is this matter important to you? Do some soul searching.
- At this step, and at all succeeding steps that become necessary, own your issue. Anonymous complaints are not acceptable.
- Get a reality check from a trusted third party. Compare your perceptions. Did they see it or hear it in the same way?
- Based on your telling of events and your feelings about it, would they feel the same way?

- Talk directly with the person with whom you have the disagreement.
- Agree on a mutually acceptable time and place to talk in private and as soon as possible after the incident.
- Use “I” statements in your discussion (“I feel...” not “You did...”); use active listening.
- If a direct conversation is too difficult, consider putting your thoughts into writing. Be available to hear the response.
- If you feel that safety is an issue, use an appropriate third party or the Shared Ministry Council to provide a safe environment for the discussion.
- If the conflict is more with how a person is performing a job (staff, religious educator, etc.), address the concern to the proper supervisor so that the individual does not feel “supervised” from all sides.

### **Additional Process for Conflict Resolution**

If the steps above are unsuccessful in resolving the conflict, the following process should be undertaken:

- Talk with the minister for counseling regarding the issue.
- If all parties involved in the conflict agree that the minister is neutral and appropriate, the minister may act as mediator.-
- If the minister believes she/he is not the appropriate mediator, the minister will direct you to the Shared Ministry Council for mediation.
- If the minister is the other party in the conflict, go directly to the Shared Ministry Council for support and mediation.

The Shared Ministry Council is empowered to achieve compromise, make recommendations, behavioral agreements, and make judgments. Council members can recommend counseling, limits to participation in church life, or other behavior changing strategies when behaviors are harmful to the church, or not expressive of our collective values. When one or both of the parties refuse to participate in the resolution process, the behavior is unchanged and/or the behavior is a threat to the church, the matter will be considered to be one of disruptive behavior.

### **B. Disruptive Behavior**

Within the context of establishing and maintaining beloved community at the CVUU, congregational leaders and members have the responsibility to provide a safe and welcoming environment for any adult or child. It is essential that all CVUU members, especially leaders, are familiar with what constitutes destructive behavior (to recognize it when it occurs), and the processes to address it, as outlined in this policy. In the case of an individual who exhibits disruptive behavior with or towards any individual within the CVUU or with or towards the church community at large, the church leaders need to act to ensure a safe and welcoming environment. Disruptive behaviors may have an impact on the safety of the church community at large. This results in a disruption of church activities and affects potential growth and current membership. When any person's physical and/or

emotional well-being or freedom to safely express his or her opinions is threatened, action must be taken by the church leaders, as described in this policy. The guidelines provided by this policy require that all members, guests, or visitors are held to the same set of standards. The policy provides a process that leaves less room for singling out a person based on stereotyping or personality conflicts.

**Disruptive behavior** includes any behavior that results in perceived threats to the physical safety or emotional well-being of any individual, the disruption of church activities, or the diminishment of the appeal of the CVUU to its potential and existing membership.

The following is the policy of the CVUU in dealing with disruptive behavior:

- If immediate safety is a concern, the behavior must be addressed immediately by the Minister or Shared Ministry Council (SMC) member, if available, and/or the leader of the group involved. This may include asking the offending person or persons to leave, or suspending the meeting or activity until such a time as it can safely be resumed.
  - a. If the offending person causes physical harm or refuses to depart from the premises, the police department may be called as a last resort (with the input of anyone who is harmed); contacting the police results in an immediate escalation of the issue, reducing our ability to reach a peaceful resolution that will be to the satisfaction of all parties involved.
  - b. Anytime immediate action is taken without the Minister being present, the Minister and/or SMC chair should be notified ASAP, with a follow-up email detailing the offense and any immediate action taken, so that the Minister and SMC can follow up as described below.
- Situations not requiring an immediate response will be referred to the Shared Ministry Council (SMC) and the Minister. Since each situation is unique, there is no way to outline in advance the specific steps to take for every imaginable scenario. The SMC and/or Minister will collect all necessary information and respond to problems as they arise, on a case-by-case basis. Persons identified to have exhibited disruptive behavior will be dealt with as individuals; stereotypes will be avoided. The SMC and/or the Minister will respond in terms of their own judgment, considering the following:
  - a. The Minister or any congregation member serving on the Shared Ministry Council or Board may recuse themselves from a disruptive behavior discussion or proceeding if one of the parties involved in the conflict is a family member, or for any reason which prevents the Minister or member from being fair and impartial.
  - b. To aid in evaluating the situation, the type(s) of behavior will be considered:
    - **Dangerous or destructive:** Is the individual the source of an apparent threat to persons or property?
    - **Disruptive:** What is the level of interference with church activities?

- **Inappropriate or offensive:** Is the behavior likely to drive existing members and visitors away?  
**Note:** If determination of inappropriate or offensive behavior is in question, refer to the UU values for guidance.
- c. To determine the necessary response, the following points will be considered:
- **Cause(s):** Why is the disruption occurring? Is it a conflict between the individual and others in the church? Is the individual experiencing mental illness, stress, or other emotional factors that led to the behavior?
  - **History:** What frequency and degree of disruption has the individual caused in the past, if any?
  - **Probability of change:** How likely is it that the problem behavior will diminish or increase in the future without intervention?
  - **Scope:** How widespread is the disruptive behavior? Is it towards one specific individual, or were several people impacted by the behavior? Was/were those impacted CVUU members, friends, visitors, staff, or the Minister?
- Note:** If disruptive behavior is towards the Minister, the SMC and Minister should involve the President as soon as possible and determine together if a [Good Offices Person](#) from the Unitarian Universalist Ministers Association should be consulted for guidance.
- d. The following three levels of response will be considered:
- **Level One:** For situations involving a low level of disruption with no threat to personal safety, the SMC and Minister shall inform each other of any problems that arise, and the Minister and/or a member of the SMC shall meet with the offending individual to communicate the concern, following the processes outlined at the beginning of this policy in Section A: Interpersonal Conflict.
  - **Level Two:** For situations involving a medium level of disruption or any potential threat to the personal safety of others, the SMC and Minister shall inform the Board president of the situation and consider consequence(s) as appropriate to the situation, in consultation with the Board president. Consequences at this level would likely be temporary/for a specific timeframe and/or limited to specific situations. Consequences, rationale, timeframe (if applicable), and conditions required to return to previous activities will be made clear verbally and in writing (with a copy going to the offender and a copy going into a confidential congregational file). Examples of potential consequences may include, but are not limited to:
    - The individual may be asked or required to sign a behavioral agreement outlining specific restrictions and/or steps to take towards resolution.
    - The individual may be restricted or removed from specific CVUU activities.
    - The individual's building key may be taken away.

- The individual may be removed from one or more leadership position(s).
- The individual may be temporarily suspended from participation in all CVUU activities.
- If mental health or other personal issues are involved, assistance may be sought by contacting resources such as 988 for Suicide and Crisis Lifeline or 211 for local community services.
- **Level Three:** For situations involving a high level of disruption or threat to the personal safety of others, the offending individual may be permanently excluded from the church premises and all church activities, and their membership may be revoked. As stated in the CVUU Bylaws, Article V – Membership, Section B. Removal from Membership: *“A member’s name shall be removed from the Membership Roll... by the Board for actions that threaten the well-being of the Congregation, in accordance with the Congregational Handbook.”* Before this is carried out, the SMC and/or Minister will consult with the Board President. If it is agreed that expulsion is necessary, in keeping with the confidential nature of such issues, the President will share this recommendation with the Board for them to consider in a closed session. The Board may vote to approve the expulsion of the member from the CVUU. If the Board votes to approve removal from membership, a letter will be sent by the Minister, SMC, and/or Board President to the individual, outlining the expulsion, the individual’s rights, and any possible recourse.
- The Shared Ministry Council will document steps taken and keep copies of documents related to any disruptive behavior conflict.

## **Covenant of Right Relations**

The following *Covenant of Right Relations*, adopted by the Board on December 15, 2009, was approved by the Congregation at the May 2, 2010, Annual Congregational Meeting.

Our Covenant is a statement of promises for mutual support accepted by members of the Cedar Valley Unitarian Universalists. Membership in our church community carries with it benefits, expectations, and responsibilities. We build our church on a foundation that:

- Permits us individually and collectively to explore our values and to honor our diversity as a source of communal strength;
- Expects us to accept responsibility for our individual conduct;
- Encourages us to communicate with one another in the spirit of respect, kindness, and support, even during times of disagreement;
- Enables us to serve our personal and congregational needs with compassion and commitment.

## **COVID-19 Guidelines**

Current COVID-19 Guidelines are posted on the CVUU website ([www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > About > About Us > Leadership and Operations OR [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) > COVID-19).

## **Credit Card Policy**

The following *Credit Card Policy* was adopted by the Board on February 15, 2011.

As the Board agent, the Finance Council will supervise the use and distribution of all credit cards issued under the auspices of the Congregation. When a credit card is issued to the minister or employees, the individual shall sign an agreement, including but not limited to the following:

1. The credit card will be used for Congregation expenses only;
2. The receipts from all credit card transactions will be submitted to the treasurer within fifteen (15) working days of the charge and no later than five days of the end of the month for reconciling with the monthly statement;
3. The credit card will be returned to the Congregation upon termination of employment or services.

If the Congregation credit card is used for inappropriate expenses, or the required documentation for charges made are not submitted, the individual's access to use of the Congregation credit card may be suspended or revoked pending review and resolution of the matter.

## **Endowment Fund Policy**

The following *Endowment Fund Policy* was adopted by the Board on March 14, 2024.

### **1. Statement of Purpose**

The Cedar Valley Unitarian Universalists (CVUU) Endowment Fund offers an opportunity for members and friends to donate gifts or bequests of money or property to CVUU, confident in the assurance their donation will provide continuing and lasting support for CVUU's mission, ministry, and services.

### **2. Administration of the Endowment Fund**

The Endowment Fund will be monitored and directed by the Endowment Fund Subcommittee. This Subcommittee will consist of three members of CVUU, to be appointed by the Finance Council no later than the beginning of each fiscal year and approved by the CVUU Board. Members of the Subcommittee will elect a

chairperson to serves as leader and as liaison to the Finance Council. No more than two of the members of the Subcommittee shall simultaneously serve as members of the Finance Council. Each Subcommittee member shall serve a term of three years, with appointments staggered so not more than one new member joins the Subcommittee in any given year. Subcommittee members may be reappointed to a maximum of two consecutive full terms.

Duties of the Endowment Fund Subcommittee include:

- a) Educate CVUU members and friends about the opportunities and benefits of donating to the Endowment Fund.
- b) Help members and friends prepare donations to the Endowment Fund.
- c) Coordinate all financial transfers of donations to the Endowment Fund.
- d) Record and promptly acknowledge all donations to the Endowment Fund.
- e) Track the ongoing balances of both principal and income earned by the Fund.
- f) Provide quarterly report of the Fund balance, income earned and assets to the Finance Council and CVUU Board.
- g) Assure that the Fund is invested in a manner consistent with the "Fund Investment Guidelines" as outlined in the Endowment Fund Policy.

The Subcommittee's work shall be funded from the Finance Council's annual appropriation. At the end of each calendar year, the Subcommittee will identify financial needs for the next fiscal year and submit a financial request to the Finance Council.

The Subcommittee may be authorized by the Finance Council to employ or obtain professional assistance for the investment of funds, the management or sale of property, attorney services, or other professional services.

Approval from two signatories approved by the CVUU Board shall be necessary for all Endowment Fund financial, non-financial and legal transactions.

### **3. Types of Endowment Fund Donations**

The Endowment Fund will receive money or property from donors, including any person, corporation, partnership, trust, foundation, or other organization.

Donations may include:

- a) Cash Donations;
- b) Bequests;
- c) Gifts of real estate;
- d) Gifts of stock or annuities;
- e) Life insurance gifts;
- f) Charitable Remainder Trusts;
- g) Pension Plans, Individual Retirement Accounts or Commercial Annuities;
- h) Charitable Gift Annuities;
- i) Or any other legally qualified source.

All memorial gifts, and all other gifts and donations (except Sunday collections) to CVUU which are not designated for a specific purpose shall be deposited into the Endowment Fund. Donors will be encouraged to make gifts and bequests to the Endowment Fund with no restrictions attached to the donation. Any gifts or bequests with restrictions shall be referred to the CVUU Board for acceptance or rejection.

Income generated by Endowment Fund principal will be automatically deposited into the Endowment Fund, and accounted for separately. These income funds may be used as outlined in the "Use of Income Generated by Endowment Fund" section of this document.

With prior approval from the Finance Council, members of the Endowment Fund Subcommittee may organize additional fundraising events or personally solicit members or friends with the intention of generating additional principal for the fund.

#### **4. Fund Investment Guidelines**

The investment goals for the Endowment Fund are preservation of the principal and long-term growth. The Endowment Fund Subcommittee will assure that the investment guidelines for the Fund are followed. Effective June 5, 2013, the CVUU Endowment Fund is invested with the UUA Common Endowment Fund (UUCEF). The UUCEF will manage the CVUU Endowment Fund using a variety of investment options including separately managed accounts, mutual funds, comingled funds and hedge funds. The fund managers of the UUCEF identify socially responsible investments which reflect Unitarian Universalist principles.

The Endowment Fund Subcommittee shall liquidate any property, including real estate, personal property and securities, promptly upon receipt, but may retain such terms for a sufficient period of time to avoid sacrificing them at a less than normal value or to realize additional income, or to accomplish some particular advantage or specific purpose.

#### **5. Use of Endowment Fund Principal**

Endowment Fund principal is to be preserved for long-term use by the CVUU. Therefore, principal monies shall be withdrawn only for a specified amount linked with an identified, specific purpose which receives two-thirds approval by voting members at an officially called congregational meeting.

The Endowment Fund Subcommittee may recommend and the Finance Council may approve a loan of principal to the CVUU Board for purposes benefiting CVUU. Loan interest rate will be agreed upon between the Subcommittee (lender) and the CVUU Board (borrower).



## **6. Use of Income Generated by Endowment Fund**

The Endowment Fund principal will generate income including interest, dividends, capital gains, etc. The Finance Council, with CVUU Board approval, may designate income monies for one-time expenditures, including but not limited to: seed money for special projects, scholarships, and pastor or employee search process. Income may be utilized only when the total of income and Endowment Fund principal monies exceed the original basis level of Endowment Fund donations.

## **7. Modification of Endowment Fund Policy**

This Endowment Fund Policy may be amended by approval of a voting majority of the Finance Council and the CVUU Board.

## **8. Dissolution of Endowment Fund**

Dissolution of the Endowment Fund must be conducted in a manner consistent with Article XVIII of the Bylaws of CVUU.

# **Generosity Fund Policy & Procedures**

A Generosity Fund is available at the CVUU to help members of the CVUU and people within the wider Cedar Valley community who are in need, e.g., for medication, heating assistance, food, etc. Money in this fund is used at the discretion of the minister and is considered “restricted funds”, which means it does not revert back to the general fund if unspent at the end of the fiscal year.

## **Oversight of the fund**

- The Shared Ministry Council (SMC) is responsible for ensuring the Generosity Fund is replenished as needed and for reviewing and updating procedures as needed.
- The Finance Council is responsible for maintaining the Generosity Fund and for fund distributions to the minister when requested (as described below).
- The Minister is responsible for identifying those in need of receiving money from the Generosity Fund and following the procedures below to give money to recipients and request reimbursement from the Finance Council.

## **Fund distributions**

- The Minister has complete discretion to distribute money from the fund as they see the need to do so. However, the Minister should keep in mind that funds are limited, and this fund should be used sparingly. Here are some considerations for the Minister:
  - Distributions are limited to a maximum of \$200 each time. If an additional amount and/or ongoing help is needed, the minister should consult with the Shared Ministry Council.

- At the minister's discretion, distributions may be made directly to an individual, or paid directly to a creditor (e.g., landlord or utility company).
- No distribution may be made to the minister or to any member of their family.
- No distribution may be made to CVUU staff (money given to staff by the CVUU must be paid through payroll, so that taxes and reporting to be correctly calculated and reported). Instead, if a staff member needs additional support, the CVUU (Minister, Shared Ministry Council, Finance Council, and Board, as needed) will pursue options to help them through other means.
- After distributing funds, the Minister shall submit a reimbursement request from the fund using CVUU reimbursement form, indicating only the amount needed, not why.
  - The Finance Council shall use the reimbursement request forms to track disbursements from the fund for auditing/financial review purposes.
  - Reimbursements will be made to the Minister in cash, or using another method that makes it easy for the Minister to prove that these reimbursements are not income.
- While the recipients of emergency funds from the Generosity Fund are held confidential between the recipient and the Minister, the Minister shall maintain a confidential log of disbursements to recipients for accountability purposes. This log shall record the date funding is given, the amount given and the general purpose of the funds (i.e., furnace repair, utilities, etc.). Recipients of the emergency funding shall be identified by first initial and last name (i.e., Smith, R., McDonald, W, etc.) or by code (i.e., A-1, B-10, etc.), with recipient's actual name and coding assignment kept separate from the confidential log of disbursements.

### **Fund replenishment/contributions**

- Contributions to the fund can be made by individuals, through special collections, or by the Board through the operating budget.
- No contribution may be designated for the benefit of any particular recipient.
- Donations to the fund should be designated on the check memo line, through the Tithely process, or in a letter documenting the donation.

## **Lay Minister Policy**

Approved by the CVUU Board on December 14, 2023.

### **Purpose**

The purpose of this policy is to establish a process by which a member of the CVUU could be prepared and approved to serve the congregation as a Lay Minister. CVUU Lay Ministers will support the minister in caring for the needs of the congregation. The Lay Minister will also develop their own spirituality, service, and talents in new ways. Over time the congregation would like to have a team of lay ministers, some who may

specialize in different aspects (such as pastoral care, officiating, etc.) of congregational life.

### **Performance Standards**

1. Demonstrate proficiency in preaching.
2. Demonstrate proficiency in pastoral care.
3. Demonstrate proficiency in carrying out UU rites and rituals.
4. Demonstrate proficiency in knowledge of policies, processes, and practices of the CVUU.
5. Demonstrate proficiency in the following areas.
  - a. UU history
  - b. UU theology-the sources and the articles
  - c. Develop own spiritual statement
  - d. UU polity
  - e. UUA and regional structures
  - f. Leadership
  - g. Moral code and religious ethics
  - h. Trauma informed care
  - i. Conflict Resolution
  - j. Self-care and boundaries
  - k. Effective communication

### **The Process**

The expectation is that depending on previous knowledge and experiences as well as the time and energy they can devote to preparation, the initial preparation process should occupy no less than six months but also no more than two years. The idea is that the preparation would be substantial but doable without requiring an extensive outlay of funds. A lay minister will become a licensed wedding officiant within the state of Iowa. The five areas of proficiency will be developed and assessed as described in detail below. Overall mentoring of the candidate will be by the CVUU minister, with some assistance from at least one other person, ideally a seasoned lay minister or another ordained minister. The Assessment Team consists of the Minister and the chair or designee of the Shared Ministry and Religious Services Councils. The Assessment Team reports to the CVUU Board, who is also responsible for its creation and management. The Assessment Team will work with each candidate to craft the best mix of activities from the list below to meet their needs and will consult with the Finance Council in regards to training expenses and the covenant service and gift.

1. Demonstrate proficiency in preaching.
  - Read relevant materials
  - Shadow a minister
  - Guided experiences: 3-5 times
  - Assessment (using a rubric)

2. Demonstrate proficiency in pastoral care.
  - Read relevant materials
  - Shadow (when appropriate)
  - Guided experiences
  - Choose an experience among alternatives such as (a) 1 CPE unit in crisis care, (b) boundaries/ethics module, (c) course in trauma informed care, or (d) other similar trainings as approved by the Assessment Team.
  - Assessment (using a rubric)
  
3. Demonstrate proficiency at carrying out UU rites and rituals appropriately.
  - Read relevant materials
  - Shadow
  - Develop own formats for rituals
  - Guided experiences: baby blessing, flower/water communion, or Winter Solstice service
  - Assessment (using a rubric)
  
4. Demonstrate proficiency in knowledge of policies, processes, and practices of the CVUU.
  
5. Demonstrate proficiency in the following areas.
  - a. Develop own spiritual statement
  - b. UU history
  - c. UU theology-the sources and the articles
  - d. UU polity
  - e. UUA and regional structures
  - f. Leadership
  - g. Moral code and religious ethics
  - h. Trauma informed care
  - i. Conflict Resolution
  - j. Self-care and boundaries
  - k. Effective communication

All of these elements will be developed through (a) reading relevant materials; (b) discussions with mentor(s); (c) relevant coursework; and/or (d) other alternatives as approved by the Assessment Team.

Once the Assessment Team makes a positive assessment of the applicant, including a positive background check, they make a recommendation to the Board. If approved by the Board, the applicant's name then goes to a vote by the congregation, that needs to be passed by an 80% vote, at the next annual meeting or a Congregational Meeting called for that purpose. After approval by the congregation, the Lay Minister would sign the lay minister covenant, preach, and have their commissioning ritual within six months. Lay Ministers will sign a standard Covenant shared by all CVUU Lay Ministers. Lay Ministers are in Covenant with the Minister, the CVUU Board, and the congregation. New

Lay Ministers will formally Covenant during a Sunday service through spoken word, lighting a chalice, and presentation of a small gift (such as a pin or a name tag).

#### Continuing Status

A Lay Minister's approval is for one year at a time. If they desire to continue serving during the following year, there will be an annual review and assessment by the Assessment Team. It is expected that a Lay Minister will continue to develop their knowledge and skills each year they serve. In addition, the Assessment Team may make recommendations to help the Lay Minister in using best practices. Any needed remediation should be carried out and approved by the Assessment Team in time for the applicant to be voted on at the Annual Meeting. If a Lay Minister needs to be excused between Annual Meetings, this will fall to the Board.

#### Scope of Practice

The Lay Minister serves at the request of the CVUU congregation and the Minister. The Lay Minister works under the direction of the Minister. Any rites, services, and other formal functions, to be carried out by the Lay Minister will be done with the knowledge and consent of the Minister. If there is no serving professional Minister, the Lay Minister(s) would work under the direction of the Board.

## **Memorial Policy**

Amended on June 12, 2023.

### **Undesignated Memorial Donations**

- All undesignated monetary memorial donations shall be deposited into the Endowment Fund.

### **Cremation Ashes**

- Ashes may be spread anywhere outside on the CVUU grounds. They shall not be spread inside the building or on any paved areas on the grounds.
- Burial of ashes are not allowed on CVUU property.

### **Memorial Tree or Shrub Requests**

If the CVUU is approached by a donor with a request to plant a tree or shrub in honor of a deceased Member or Friend, the following process shall be followed:

- The donor shall be instructed to contact directly the chairperson of the CVUU Tree Committee. The Tree Committee will work with the donor to decide on the type of tree or vegetation appropriate to meet the current need of the CVUU. The expense of the tree/shrub and its planting will be covered by the donor, and the donor will be responsible for making planting arrangements and informing the Tree Committee of the planting date and time. No plaque or

notice will be placed at the site of the planting. If the Tree Committee is not functioning, the donor shall be directed to the chairperson of the Building & Grounds Council.

- If agreement is reached with the donor, the Tree Committee shall forward a specific recommendation to the Building & Grounds Council for approval, modification, or rejection.
- If approved, the Building & Grounds Council shall forward the request to the Board for final approval, modification, or rejection.

### **Memorial Bench or Other Requests**

If the CVUU is approached by a donor with a request to place a bench or other object on the grounds, that donor shall be directed to contact the chairperson of the Building & Grounds Council. The Council will ask the donor to provide a specific plan, including the style, material, base, and other details. All expenses, including installation of any object, will be covered by the donor. If approved, the Building & Grounds Council will forward a recommendation to the Board for final approval, modification, or rejection.

### **Memorial Plaque**

- Recognizing the desire to memorialize CVUU members and family members, the CVUU will offer the option of a Memorial Plaque to remember and honor loved ones. This plaque will be located in the Fellowship Hall, and will feature individual nameplates which will include the name and birth/death dates of the person being memorialized.
- Any former or current member, their immediate family members, or individuals who have been active in our congregation may be memorialized with a nameplate on the Memorial Plaque. Requests for a memorial nameplate should be delivered in writing to the Building and Grounds Council, along with the desired name and birth/death dates of the person to be memorialized. Engraving and installation of individual nameplates will be handled by the Building and Grounds Council, and payment for engraving must be received in advance from the party requesting the nameplate.
- Any questions regarding the Memorial Plaque policy should be directed to the Building and Grounds Council, who reserve the right to forward any final plaque decisions to the Board. This Memorial Plaque policy will be in effect beginning July 1, 2023.

## **Severe Weather Policy**

The following *Severe Weather Policy* was adopted by the Board on January 18, 2011.

It is possible that inclement weather may occur during regularly scheduled church activities. This may cause the need to cancel services or programs or hold them online only. In such instances the sponsoring individual, council, or committee shall determine whether it is safe for members to attend church. Likewise, the minister and worship associates who are in charge of the particular Sunday service shall determine whether it is safe to hold a service. The news media (KWWL) will be notified of the cancellation or change to online only, and this information will be posted on the [www.cedarvalleyuu.org](http://www.cedarvalleyuu.org) website and CVUU Facebook page. An email will also be sent to everyone on the CVUU email list. Anyone needing further information may contact the Board president.