

UUCWI Procedure : *How to Capture our Successful Practices as Procedures*

Authored by: *D. Cauffman Revised January 23, 2012*

Owned by: (operating committee or other entity) *Board of Trustees*

Approved by Board on: *pending*

Purpose: *Many of our committees and individuals responsible for our processes and practices have developed effective methods for carrying out the business of the congregation. When the individuals change, these methods are often lost or reinvented. Written procedures, catalogued and centralized by the board (Reference 1), offer a way to capture what works to avoid often frustrating relearning.*

Details: *(Format of this section may be freeform)*

Reference 1 discusses relevant policy.

Anyone may submit a procedure, but the owning entity needs to approve it before it is sent to the Board and Leadership Council (for information) and posted.

The Leadership Council is a convenient means to inform and seek input on prospective procedures, including this one.

Leadership is encouraged to:

- *review new procedures and suggest improvements*
- *capture processes worth preserving as procedures*
- *guide persons new in roles to appropriate procedures*

Topics to cover as applicable:

- *definitions*
- *limits of applicability*
- *related documents, e.g. policies, other procedures*
- *how authority has been distributed*
- *who is responsible for performing the tasks*
- *materials, supplies, tools, equipment required*
- *task steps*
- *contingent actions*

Advice:

- *do look online at what other congregations have done to solve the problem*
- *the shorter the better; keep it simple (1 page is good; 3 pages is too long)*
- *use a clear outline; sequential checklist format is good*
- *balance being thorough with being brief and readable*
- *allow as much discretion as possible*
- *write as if for a brand new helper*
- *try to make it timeless (e.g. identify people by position, not name)*
- *ask for review by all involved*
- *if a new way of doing things, make sure it is feasible*
- *get it right to minimize changes*
- *label versions in the filename*

References:

1. *UUCWI Board Policy on Governance Documents, online at https://docs.google.com/viewer?a=v&pid=explorer&chrome=true&srcid=0B9pTPb972xs4YjRmOTBiNTgtMTFhZS00MTI5LTliYWYtYWI1NGNiNjg0MGM4&hl=en_US*