

Office Procedures

Working with UU Office Administrator

We have worked together to create the following guidelines which should help determine the scope of work and will assist board members in best utilizing her time.

1. Office Hours: Mon. Wed. 8 a.m – 1 p.m., Tues. Thurs. 2 p.m. – 6:30 p.m.

2. Emailing office and all-church emails: To send email to Cathy about anything UU or office related, always send emails to **Office** (uucob@aol.com) Do not use her personal email, (unless you are sending something personal, funny or pretty.)

3. “This Week at UU” our **e-bulletin** is edited by Betty Green and is published every Friday morning at 6 a.m. Deadline for article submission is the Wednesday before. Submit articles to **Weekly Bulletin** (bngreen@fastmail.us)

4. Make appointments with the office administrator for her assistance, so she can plan time for you. Please refrain from calling her at home about office matters. If you can't send an email, call to reach her or leave a message on the office phone system. 386-677-6172. Try to send projects by email two weeks ahead or at least one week, keeping in mind Cathy has a long list of routine jobs each week. Given this notice, she can plan her part-time hours to accommodate the most people and make use of volunteer help on some paper processing jobs. You can provide a committee volunteer to help with bulletin inserts, etc.

5. Sunday bulletin: If you want an announcement added to the Sunday bulletin, get announcement information to her by noon Tuesday for the following Sunday. Please send that copy in an email, using plain formatting, and try to limit to three lines per notice. These can refer to flyers with more detail that you post in the sanctuary or on the table. Please do not expect Cathy to read through a long stream of forwarded emails or full detail attachments to find information and compose brief announcements. She is helping lots of others, and needs to see your request at the top of your email message.

6. The deadline for articles in the Jotter is the 20th of the month and should be submitted by email to editor - **Carolyn West** (westwind273@bellsouth.net) using plain font such as Arial or Times New Roman. Cathy sends Carolyn a

calendar document to include in the Jotter. Cathy also handles distribution of the Jotter. The web team links the Jotter on the web site.

7. Brochures & Fliers about UU events can be placed in the sanctuary on the table or in cabinet. Copies can be made in the office. Let Cathy know if you have problems with the copy machine. Outside, non-UU events are not advertised in the sanctuary or bulletin, but can be posted on hallway bulletin board.

8. Website Team: Joanne Kennedy and Judy Gordon. Please email both of them about Web Site matters or send to **Web Team** (uusormond.fl@gmail.com)

9. Minutes from Board and Committee meetings: Please **email** these to Cathy for office files.

10. Money:

a. **Committee Budget reports** can be requested by committee chairs to keep check on their expenses. Email Janet Hamer (hamerejhamer@aol.com) your request.

b. To use our **tax exempt number** for UU purchases, get a certificate copy from Cathy. UU does not pay sales tax.

c. **Requests for reimbursement.** Send or bring receipt with your name on it, and what budget line you are authorized to use; circle items to be reimbursed, if not all, and show a total amount for each budget line. If it's lengthy, a cover sheet can provide this information. If you are using one of the UUCOB business accounts, you must bring receipts for your purchases to the office as soon as possible, to allow us to pay invoices on time. Forms to request reimbursement are on the table to the left of the file cabinet. Completed forms go into tray to the right of the large printer.

d. Requesting a check to someone else: complete check request form. Include address to send check.

e. If your committee has not spent all its budgeted funds by the end of the fiscal year on April 30, the balance will help to offset any deficit in the church budget for the year.

11. Building

a. **Calendar reservations:** Fill out a building use form to reserve a room for an event and have it put on our UUCOB calendar. "**Building Use Form**" If you have borrowed a key from the church, that does not mean that you can schedule your own meetings without reserving space on the calendar. Forms can be picked up from the office or printed out from a link on our web

site, “**Building Policy.**” Give this to Cathy Jackson for processing. She can help you with questions about the information needed on the form. Information about setup, times, and who is responsible for building security are essential. Once board approval is granted and form signed, events are placed on the calendar.

b. **Secure all exterior doors** after each meeting.

c. **Clean up** your own coffee cups, refreshments, coffeepots etc. leaving sinks, stoves and counters clear. Cleanup supplies are located in the kitchen. This is considerate of others and important for our insurance. Clean spaces are inviting to visitors and potential space renters.

d. **Equipment:** So far, our use of equipment at UU, such as the projector cart and laptop, have been reserved informally, by requesting, informing staff, and arranging how equipment will be placed where it is available when needed. A building use form can also be used to exchange this information. Sometimes members want to borrow UU tables for UU events at home. A building use form should be completed. It is wise to ask around whether these items will be needed at UU for set up for a rental or other UU use during the time period, and make sure to notify all staff who is borrowing, when returning, etc. so that a lost equipment alert does not cause concern.

e. **Rentals** are an important part of our income stream supporting our budget. Requests for free or discounted use for private functions or outside groups are presented to the board by the vice president for their consideration.

f. **Saturday night** use of the sanctuary requires special arrangements for Sunday setup. Ample notice must be given.

12. Maintenance & Cleaning: for questions, ask chairperson Susan Garrison.

13. Security & Keys: If you need a key to the building, such as to open up for a class series, see Cathy to check one out. If you find a door unlocked when the building is empty, please let Cathy or Cliff know.

14. The church’s **photocopier** is available for committee copying during weekday office hours. If you need more than 30 copies, please schedule in advance with Cathy as she may have another project scheduled. To limit the number of copies required, use a distribution list on one copy of a document. This saves on paper and toner, equipment, etc.

15. Mail folders are provided in the office for most **committee chairs**. Please empty weekly.