



First JUSTICE WITH
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**Unitarian
Universalist**
SOCIETY OF SYRACUSE

Policy #: 018
Policy Name: **Creating, Revising and Maintaining Policies, Procedures, Statements and Forms**

Purpose: To describe process and procedures for creating, revising and maintaining First Unitarian Universalist Society of Syracuse (First UU) Policies, Procedures, Policy Statements and Forms used in the day to day operation of the Society.

Original Date: **2/26/2017**

Written By: Valoree Suttmore 12/26/2016

Revision Dates: DRAFT

Revisions By: Valoree Suttmore 9/29/2019

Reviewed By: Jennifer Hamlin-Navias 1/3/2017

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Jennifer Hamlin-Navias _____

Approved By: 2019-2020 FUUSS Board of Trustees _____

A. General

1. All policies/procedures, policy statements and forms will be developed, revised, approved and maintained according to this policy.
2. One final approved master copy of each document will be maintained both in hard copy and electronically. The electronic version of the master copy will be password protected and will have limited access.
3. All policies/procedures, policy statements and forms are maintained in a designated section of the Operations Manual.
4. All policies/procedures, policy statements and forms will be reviewed on a regular basis and revised as needed.
5. All policies/procedures, policy statements and forms must be approved by the First UU Board of Trustees (BOT) prior to being implemented.
6. All policies/procedures, policy statements and forms must be reviewed by at least one other person who has knowledge about the information contained in the document prior to it being reviewed and approved by the BOT.
7. All policies/procedures, policy statements and forms must be on current First UU letterhead and be assigned a number.
8. Three separate table of contents will be maintained for policies/procedures, policy statements and forms.
9. For the purposes of this policy, all policies/procedures, policy statements and forms may be referred to as "documents".

B. Procedure-Creating New Documents

1. When a need is identified for there to be a new policy, procedure, policy statement or form created, a request is made to the Operations Manual/Document Administrator by email.
2. The request needs to contain basic information about what is needed or a draft of the actual document(s) being requested and the names of who will be reviewing the draft document(s) once it is created.
3. If the document is a policy/procedure that mentions the use of specific forms, those forms also need to be drafted and sent along with the policy/procedure being created. Alternatively, the request to the Operations Manual/Document Administrator needs to include the request for the creation of a form(s) in addition to the policy/procedure.

4. The Operations Manual/Document Administrator will put the information into the proper format for whatever document(s) is being requested and will assign it a number and a draft date.
5. The Operations Manual/Document Administrator will send the draft document(s) to the individuals who will be doing the review and will request feedback from the reviewers. Once all feedback has been received, the Operations Manual/Document Administrator will incorporate all changes/revisions and create the final draft(s).
6. The Operations Manual/Document Administrator will send the final draft(s) back to the reviewers for a last review before sending it to the BOT for review and approval at their next monthly meeting.

C. Procedure- Revising Documents

1. When a need is identified for there to be a revision to a policy, procedure, policy statement or form, a request is made to the Operations Manual/Document Administrator by email.
2. The request needs to contain basic information about what is to be revised and the names of who will be reviewing the draft document(s) once the revision is complete.
3. If the document is a policy/procedure that mentions the use of specific forms, a review must be done of those forms as well to determine if they also require revision. If form(s) revisions are also necessary, they should be sent to the Operations Manual/Document Administrator along with the request to revise the policy/procedure.
4. The Operations Manual/Document Administrator will place the document(s) into "draft" status along with a date and will make the revisions.
5. The Operations Manual/Document Administrator will send the revised draft document(s) to the individuals who will be doing the review and will request feedback from the reviewers. Once all feedback has been received, the Operations Manual/Document Administrator will incorporate all changes/revisions and create the final draft(s).
6. The Operations Manual/Document Administrator will send the final draft(s) back to the reviewers for a last review before sending it to the BOT for review and approval at their next monthly meeting.

D. Procedure- Approving Documents

1. Once a newly created or revised document(s) is ready for BOT approval, the draft document(s), along with any mentioned forms or other policies/procedures (even if those others mentioned are not being revised) are sent to the BOT President or Vice President via email by the Operations Manual/Document Administrator with a request for them to be reviewed and approved at the next BOT meeting.
2. If questions arise during BOT review of the document(s) prior to approval, those questions are sent back to the people who developed, revised or reviewed the document to clarify and resolve. If necessary, the document(s) approval may be delayed in getting approved until all details and questions have been addressed and answered.
3. Once the BOT approves the document(s), an email notifying the Operations Manual/Document Administrator of the approval is sent by a member of the BOT.
4. The Operations Manual/Document Administrator will move the document from “draft” to “approved” by entering the date on the cover page of the document (if applicable) of BOT approval and by changing the document footer to also reflect the approved date as the “effective date” and removing the word “draft”.
5. The Operations Manual/Document Administrator will update the appropriate table of contents to show the document(s) new Effective Date (BOT approval date).
6. The Operations Manual/Document Administrator will then email the final approved document (policy, procedure, form) to the Office Administrator for uploading to the electronic version of the Operations Manual located in the Members Only section of the First UU website and for storage on the on the First UU office hard drive. A hard copy of the new document(s) will also be printed and placed into the appropriate binder/section of the Operations Manual.
7. The Office Administrator will be responsible for ensuring that new and revised document(s) are posted on the Member Only Area of the First UU website and old versions are removed, if applicable. The Operations Manual/Document Administrator will notify them by email when this can be done.

E. Procedure-Maintaining Documents

1. The final BOT approved version of any policy/procedure, policy statement, or form will be maintained electronically on the Members Only Area of the First UU website and on the Society office computer hard drive. The Operations Manual/Document Administrator also maintains a copy of these documents on their computer hard drive and on a separate flash drive. The Society office hard drive and the Members Only Area of the First UU website are password protected and access is limited to the Operations Manual/Document Administrator, the Office Administrator and the Minister.
2. In order to ensure that all documents are current, no document(s) is able to be created or revised without utilizing this procedure. When a new document(s) is approved it will be made available as soon as possible. The new document(s) will be placed into the hard copy of the Operations Manual, located in the Society Office, as well as electronically uploaded to the Operations Manual located in the Members Only Area of the First UU Website.
3. All current copies of forms will also be available in hard copy in the Operations Manual in the Society office and also electronically in the Operations Manual located in the Members Only Area of the First UU website. To avoid using incorrect or outdated forms, individuals should not print and keep their own forms. When a form is needed, it should be obtained by going to the Operations Manual on the First UU website and printing the form or obtaining the hard copy of the form from the hard copy of the Operations Manual located in the Society office and making a copy.
4. All policies/procedures, policy statements and forms need to be reviewed at least every three (3) years. The Operations Manual/Document Administrator will review the document(s) and send it to applicable individuals for review and possible revisions. Documentation of this review will be done on the "Document Review Form", Form # 012 located in each applicable section of the Operations Manual.

F. Procedure-Rules for Creating Document(s)

1. Font
 - a. The font of the entire document (cover page and document body) will be Ariel.
 - b. The body of the document will be Ariel pt. 12.

- c. The Cover Page will contain the current First UU logo. In addition, the following on the Cover Page will be in Ariel pt. 14 font and will be bold unless otherwise specified:
- Policy/Procedure #: Along with the actual Policy/Procedure #
 - Policy/Procedure Name: Along with the actual Policy/Procedure Name
 - The word “Purpose:” the actual purpose will be in Ariel pt.12 font and not Bolded
 - Original Date: Along with the actual Original Date
- d. The rest of the following on the Cover Page will be in Ariel pt.12 and will not be bolded:
- Original Written By:
 - Revision Dates:
 - Revisions By:
 - Reviewed By:
 - Approved By:

2. Cover Page

- a. The Cover Page is meant to tell the history of the document, from original date through the revisions to present. As space permits, there should be 1-2 spaces between the Policy/Procedure #, Policy/Procedure Name, Purpose, Original Date.
- b. There should be no spaces between the following:
- Original Date:
 - Original Written By:
 - Revision Dates:
 - Revisions By:
- c. There should be one space between “Revisions By: and Reviewed By: and one space between Reviewed By: and Approved By:
- d. As documents are revised more often, there may be a need for additional cover pages to track the history of the document.

- e. Each document must have a footer. The footer will be in Calibri pt.11 font, not bolded, and will also have page numbers in the 1 of 2 format.
- f. Each footer will state the following:
 - Policy/Procedure #: Actual number
 - Effective Date: Either “Draft” or the Date of BOT approval is the Effective Date
 - Page Numbers ___ of ___ on the right hand side
- g. Even though the official abbreviation used in all documents for First Unitarian Universalist Society of Syracuse is “First UU”, the Approved By: on the Cover Page will always be the actual initials of the Society, FUUSS.
- h. The Original Date of a document is the first time the document is created.
- i. The “Approved By” date, “Effective Date” in the footer and either the “Original Date” or “Revision Date” must all match.