

## **UUCR Policy for Considering New Programs or Initiatives**

### **Background**

UUCR strives to provide high quality programs for its members and the community. With the available resources, UUCR can support only a limited number of programs and projects and often must choose from among many worthy alternatives. Decisions on new programs, projects or other significant initiatives proposed by members of the congregation will be made using transparent and inclusive procedures and guided by the Covenant of Right Relations.

### **Policy Overview**

This policy describes the process by which major new programs, projects or initiatives will be evaluated. Major programs, projects, or initiatives include the following:

- A program, project or activity that would require several hundred dollars of new funding or considerable volunteer time from 3 or more volunteers.
- A collaboration with a non-profit group, congregation, or coalition outside of UUCR.
- A program, project or activity that involves a legal agreement or memorandum of understanding and mutual obligations with an outside organization.

This Policy does not include fundraising, Congregation-Wide Social Justice Programs, which are covered by a separate policy, ministerial-led initiatives, which are reviewed by the Board of Trustees, or new programs initiated by existing committees within their existing budget levels.

### **The Lay Ministry Council is Responsible for Reviews of New Initiatives**

The Lay Ministry Council (LMC), whose members have had training in congregational leadership and lay ministry, have knowledge of UUCR's priorities and resources and are involved in many of UUCR's program areas, shall have the responsibility for considering new initiatives. Its evaluation of new initiatives will be based on factors such as the following:

- How well the proposed initiative supports UU principles and liberal religious values
- The extent to which the initiative is consistent with UUCR's strategic plan and supports or advances its mission
- How well the initiative addresses an unmet need in the congregation or in our community
- The level of support UUCR members are willing to provide
- The level of resources required (funding, facility use, and staff and volunteer time) and the effect of the initiative on existing programs
- For activities involving outside organizations, the extent to which UUCR members support the values and goals of the outside organization, and
- Possible risks to UUCR, including legal, safety, and security risks.

## **Process for Reviewing New Programs, Projects, or Initiatives**

The process that the LMC uses to review a major new program, project or initiative will vary slightly depending on its nature and scope of the major new program, project or initiative but will generally follow the steps listed below. Further information on some of the steps is provided in the Appendix.

1. The individuals or groups seeking evaluation of a new program, project or initiative submit a written proposal to the LMC.
2. The LMC will assign a lay minister as a point of contact to work with the proposer(s) throughout the process.
3. The LMC will discuss the proposal and decide whether to proceed with further evaluation.
4. If the proposal warrants further review, the LMC will evaluate it using the factors listed above.
5. If the LMC gives preliminary approval, the proposal will be described in an E-Weekly and a Quest article. In addition, the proposer(s) will be available at a lobby table for several weeks to answer congregant questions.
6. The LMC will organize a Congregational discussion of the initiative to gain input from the congregation.
7. The proposer will consider all of the input received from the Congregation and meet with the LMC to discuss any remaining issues.
8. If the LMC approves the initiative, it will recommend an appropriate committee to carry it out.
9. The leader of the initiative will work with the LMC and the designated committee to develop implementation plans. The final plans will be described in Quest and the E-Weekly.
10. If the LMC does not approve the program, project, or initiative, it will explain the rationale for the decision in a letter to the congregation. The proposer(s) may submit a revised proposal one year after the LMC decision.

Approved by the Board of Trustees

02/21/2017

## Appendix

Further information on some of the steps is provided below.

Step 1: The written proposal must be submitted at least 10 days in advance of a scheduled LMC meeting so that it may be distributed along with the agenda for the meeting. The proposal should address:

- the goals of the program, project or initiative and how it fits with UU Principles and Purposes, existing UUA resolutions, UUCR Mission, Vision, and Strategic Plan
- a demonstrated need for the program, project or initiative
- other relevant considerations, such as resources (including free or reduced rental; See Rental Policy), staff and volunteer time, and estimated costs, and
- who will lead the program, project or initiative, including the names of at least five other UUCR members committed to supporting it.

Step 4: If the LMC decides that the proposal merits further review, it will normally organize meetings between the proposer(s) and the minister(s) and the committee that has responsibility for the area covered by the program, project or initiative. For example, a program, project or initiative dealing with children or youth, the Religious Education Committee would be the appropriate committee. The purpose of these meetings is to ensure that the LMC and the leader of the program, project or initiative a) receive feedback and counsel from the ministers(s) and an established committee, and; b) learn whether the established committee would consider including funding for it in its future budgets request, if applicable.

Step 7: If there are significant issues, the proposal may need to be revised. Following receipt of the final proposal, the LMC in consultation with the ministers(s) and the Board of Trustees (for initiatives involving agreements with outside organizations) will then discern whether the initiative will go forward and will make its decision at its next meeting. No commitment of human or financial resources may be made prior to the LMC approval.