# The ~~Gospel Tao Chant Book Policy~~
# Procedure for Developing UUFC Policies and Procedures

Created, Drafted, Reviewed, Edited, Analyzed, Revised and Approved by A Committee More Than Once

## Purpose:

This procedure generally outlines the format and process for developing and managing UUFC policies and procedures. It describes the general format for a policy, the policy process, and tips for policy and procedure writing. See Policy 1.1: Policy on Policies.

## General Format

**Summary**:  This provides a preview of the most important policy statements. It is written so that if readers only read this section, they will understand the policy's general direction and determine whether they need to read on.

**Purpose and Goals**: This is a crucial element for every policy because it explains the need for the policy and the change it attempts to effect. The purpose is the overall, big-picture reason for creating the policy.  The goals are the specific improvements or desired change as a result of implementing the policy.

**Definitions** (optional): This offers the option to provide definitions for technical terms and set up abbreviations to be used in the body of the policy.

**Policy Statements**: This section details the general, high-level policy principles that govern the policy topic. This section excludes procedural elements. A quick way to determine the difference between policy and procedure is to look at Table 1 below, which explains that policies provide framework and the general direction of the guidance, the "why" we do things. Procedures generally deal with specifics, the "who," "when," "how often," etc.  Policy statements stand the test of time, while procedure steps may change frequently depending on business needs.

*Table 1:  Distinguishing between policy and procedures*

| Policy Statement | Procedure |
|---|---|
| Framework/general direction | Implementation steps |
| "Why," sometimes "who" | "Who," when," "how," "how often," etc. |
| Long-lasting | May change frequently |

Policy statements should be as simple as possible, easy to understand and follow a natural order; e.g. from general to specific, from simple to complex, etc.

**Exceptions** (optional): In some cases, there will be exceptions to the rule. These exceptions are necessary because they address the reality of doing business in a complex, frequently changing environment. They may also be necessary in order to timely and effectively respond to business needs.

**Related policies**: List other policies that cover related topics.

**Approval history**: List dates of approval or amendments of previous board policies on this topic.

# Process

Policies have a life cycle, which starts with an idea that develops into a policy and ends when a policy is repealed. Each policy goes through several stages while progressing along its life cycle.

**Idea**: Any individual or committee can identify and propose a new policy.

**Analyze**: The proposer shall conduct preliminary research to determine whether UUFC has guidance on the topic. This analysis will develop preliminary policy goals and preliminary policy outcomes.

**Research and input**: There are two paths to develop a policy: modifying an existing policy or creating new policy.  This stage includes:
     1,  Assemble a team. Form a representative team that includes people who have the knowledge, ability and desire to contribute to the discussions.
     2. Finalize research. Research can be extensive or narrow depending on the complexity of the topic and its perceived risk. Potential sources of research include but are not limited to
          -- other UUFC policies.
          -- guidance from UUA and other religious and charitable organizations.
          -- state and federal laws, rules and regulations.
          -- user opinions.
     3.  Seek input. Identify policy users that will be most affected and engage them early in the discussion. Offer them the opportunity to provide details about the current situation/challenges, the desired change and suggestions on how to achieve change.
     4.  Consider whether policy changes are necessary or whether new or revised procedures will accomplish the goals.
     5.  If policy changes are necessary, refine policy goals and desired outcomes.

**Draft**: Consult this procedure and other materials that provide guidance about content and general format in drafting or revising policy.

**Approval:**  If not already contacted, contact the UUFC President about how the policy proposal can be presented to the Board of Trustees. Generally, the Board will not adopt a policy at the same meeting that the topic is introduced to them. At its first meeting about the draft, the Board will examine and debate the proposal. It may also request additional research or additional input,

amend the proposal, postpone consideration of the topic or make other decisions related to the proposed policy. The Board will usually wait for a second meeting before it adopts your draft or a draft reflecting its consideration of it.

# Tips for Policy and Procedure Writing

**Basic Principles**
1. Write clear standards and procedures. The people who use them must understand what is expected of them. Clarity is the most important goal.

2. Use good English. Follow recognized rules for grammar and sentence structure. Use simple and familiar words. Keep sentences short.

3. Organize based on logic, importance and use. Address general ideas first and specific ones second. Move from the most important to the least important standards, and write the most frequently used provisions first, and the least frequently used ones later.

**Group Terms**

Because there are dozens of informal and formal groups in the UUFC, your proposal's terms for a group should match existing use and policies. Here are current terms for groups and how they are used:

*Councils:* These are coordinating umbrellas for the 8-10 major areas of congregational life. They are organized by the minister in her role as administrator.

*Committees:* These groups relate to the responsibilities of the Board of Trustees or requirements of the bylaws. Examples include By-Laws, Stewardship, Investment, Personnel, and Nominating committees. They are often governed by specific requirements of the bylaws or policy.

*Task Forces or Teams:* These groups focus on projects with goals and timelines within the context of the UUFC mission. Examples include addressing climate change, homelessness, racism, etc. They may or may not be governed by a specific policy.

*Circles:* These groups are relationship-focused (building connections), with or without topical or affinity frameworks. They typically are not governed by a specific policy.

**Principles of Clear Writing**

1. Avoid the passive voice.
2. Use the present tense when needed.
3. Replace negative subject and positive verb with positive subject and negative verb.
4. Avoid use of exceptions.
5. Be consistent. Do not use different words to mean the same thing.
6. Cross reference and incorporate by reference. Use cross-references to flag related bylaws, policies, and procedures.
7. Use examples to simplify or illustrate a concept.

**Choice of Language**

Writers must avoid ambiguity. An ambiguous sentence is a sentence that a reader can interpret in two or more ways. Ambiguity has at least three common sources: word order, word meaning, or needless words.

1. Avoid misplaced modifiers.
2. Avoid indefinite pronouns used as references.
3. Avoid grouping together two or more prepositional phrases. Confusion may occur when two or more prepositional phrases are grouped together in a sentence. For example, the sentence "Each subscriber to a newspaper in Monmouth" could be read to mean either "Each newspaper subscriber who lives in Monmouth" or "Each subscriber to a newspaper published in Monmouth."

**Word meaning**

1. Use the singular noun rather than the plural noun.
2. Draft an expression of time as accurately as possible.
3. Use "shall," "must," and "may" appropriately and careful of "shall not," "must not," and "may not." Avoid "will," "would" or "should."
4. Use concrete words. Put instructions into simple, concrete words. Avoid abstract words that can be vague and have multiple interpretations.
5. Avoid gender-specific terminology.

**Needless words**

1. Uncover and eliminate buried verbs. A "buried verb" is really not a verb at all but a noun created by a verb. For example, the verb buried in "administration" is "administer." Use the verb rather than the buried verb.
2. Minimize prepositional phrases. Prepositional phrases contain prepositions such as "to," "in," or "of." Use them sparingly.
3. Eliminate redundancies. Some examples are "mutually agree," "full and complete," and "close proximity." Instead, use "agree," "full," "complete," or "proximity."
4. Avoid surplus words. For example, instead of "excessive number of" say "too many."
5. Avoid noun sandwiches. "Noun sandwiches" are groups of nouns "sandwiched" together. For example, instead of writing "Church staff safety protection procedures development…," write "Development of procedures for the safety of church staff…"

*Guidance Effective March 2017.*