

AUUA CERTIFICATION PROGRAM OFFICE MANAGEMENT MODULE

Section 1

Goal/Area of Focus:

Membership Records Management

Level 1: Describe current practices for membership records in your organization (including certification with the UUA).

Level 2: Analyze these systems and determine what additional needs the organization may have that are not being met and how the process can be improved.

Section 2

Goal/Area of Focus:

Electronic Records Management

Level 1: Describe current practices and policies regarding electronic files, including their naming conventions, backup processes. How is this communicated to others who may need access to the files?

Level 2: Investigate what best practices for files and back up options are available. Write a document recommending how these are to be implemented in your organization.

Section 3

Goal/Area of Focus:

File & record Retention, Access & Confidentiality Policy, Archives & Current Files

Level 1: Describe the policies regarding access to confidential organizational records (both hard copy and electronic). Describe current safeguards to protect personal information of employees and congregants.

Level 2: Investigate best practices and legal requirements and recommend how they can be implemented in the organization.

Section 4

Goal/Area of Focus:

Current Files and Archives

Level 1: Describe your record retention policy and procedures. Include information regarding archives, current files, HR/financial records and permanent corporate documents.

Level 2: Research best practices and legal requirements and write guidelines for your organization.

Section 5

Goal/Area of Focus: Master/Work Flow Calendar: Annual Reports, Directory Production, Key Event Dates & Deadlines, Unitarian Universalist Association Certification

Level 1 & Level 2: Create a chart describing the processes and events that occur on an annual basis within the organization. Include the planning and development time lines (target dates), responsibility for planning and/or input, and possible leadership development needs.

Suggested Reference Materials

This list reflects only a small portion of the possible resources available on this subject and the candidate is encouraged to find and cultivate other resources for their use. Please note the resources used when submitting final material.

Time Management

Covey, Stephen R., A. Roger Merrill, Rebecca R. Merrill. *First Things First*. New York: Fireside. 1994.

Davidson, Jeff. *The Complete Idiots Guide to Managing Your Time*. New York: Alpha Books. 1995.

www.FranklinCovey.com, www.FindaSeminar.com. Any Franklin Covey, SkillPath, or other seminar or class on time management.

Reference Materials

AUUA, *AUUA Guidebook*. AUUA, 2000

The Chicago Manual of Style 14th ed. Rev. University of Chicago Press, 1993.

Records Management

[Church Treasurer Alert. Church Records – How Long to Keep Them. Matthews, NC: Christian Ministry Resources, Vol 2. No 2. Feb 1994, p3.](#)

[Church Treasurer Alert. Personnel Records - - How Long to Keep Them. Matthews, NC: Christian Ministry Resources, Vol 3. No 5. May 1995, p4.](#)

[Jacobs, Jerald A. and Kelly P. Hackett. Continued. American Society of Association Executives, 1998. E-doc at \[www.Amazon.com\]\(http://www.Amazon.com\)](#)

[Jacobs, Jerald A. and Kelly P. Hackett. Record Retentions Policies \(Information Storage na dRetrieval Policies of Associations.\)](#)

[The General Commission on Archives and History. Guidelines for Managing Resources of the Annual Conference and the Local Church.](#)

[The General Commission, continued. Madison, NJ: The United Methodist Church, 2005. Downloadable at \[www.gcuh.org/Resources\]\(http://www.gcuh.org/Resources\) . See also Archival Leaflets and Manuals.](#)

UUA. *The Congregational Handbook*. Maintaining Records and Archives. Boston: UUA, www.uua.org

www.cokesbury.org. *Church Historian. Remembering the Past and Inspiring the Future*. Abingdon Press, 2004.

www.ecofilm.org *Memory and Ministry*. 30 Minute Video on Starting, Running, and Using Local Church Archives.

File Management Systems

Dorff, Pat. *File. . . Don't Pile. A Proven Filing System for Personal and Professional Use.* NY: St. Martin's OPress, 1986

Hemphill, Barbara. *Taming the Paper Tiger at Work.* Kiplinger Books, 1998.

www.pendaflex.com (filing tips)

www.thepapertiger.com (filing software)

Office Policy and Procedure

Welch, Robert H. *The Church Organization Manual. Polices and Procedures for the Local Church.* Ft. Worth, TX. NACBA Press, 1999. (National Association of Church Business Administration.)

Systems Theory: Understand Your Congregation as a System

Friedman, Edwin H. . *Generation to Generation. Family Process in Church and Synagogue.* NY: The Guilford Press, 1985.

Steinke, Peter L. *Healthy Congregations. A Systems Approach.* Bethesda, MD: The Alban Institute, 1996.

Steinke, Peter L. *How Your Church Family Works: Understanding Congregations as Emotional Systems.* Washington, D.C: The Alban Institute, 1993

www.LMPeaceCenter.org

Group Process

Jacobson, Dorothy and Margaret Randall. *Effective Participation. Leadership for Committees and Small Groups in UU Societies.* Unitarian Universalist Fellowship of San Luis Obispo County, CA. 1994

Peers Lawrence X, ed. *The Congregational Handbook.* Pp. 89-91. Boston, MA: UUA, 1995 or latest edition.

Price, Gaylord. *Church Meetings That Work.* Bethesda, MD: The Alban Institute, 1994.

Accessibility

A mini audit by the UUA Accessibilities Committee. May be found at

www.uua.org/programs/justice/accessibility/howaccessible

Davie, Ann Rose, and Ginny Thornburgh, *That All May Worship: An Interfaith Welcome.* Washington, DC: National Organization on Disability, 2000. Available at www.nod.org \$10.00

Patterson, Elizabeth A. and Neal A. Vogel. *Accessible Faith. A Technical Guide for Accessibility in Houses of Worship*. Chicago, IL: Retirement Research Foundation, 2003. Downloadable at www.rrf.org

Data Preservation

AUUA. *AUUA Guidebook*. AUUS, 2000. Section on computers, systems, and software

www.ACStechnologies.com

www.churchwindows.com

www.powerchurch.com

www.QuickVerse.com (Membership Plus)

www.Shelbyinc.com