

# Policies for the UUCPA Database of Members, Friends, and Sunday Morning Participants (ACS Realm)

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## Policies for People

- Definitions: each person in the database is assigned a Member Status. The list of statuses includes: Member, Friend, and Sunday Morning Participant (known informally as “visitor”). A Member is someone who has requested to be a member, made a pledge to the church, and been affirmed by the Board of Trustees. A Friend is someone who has requested to be placed in that category. The Board is informed of new Friends each month, but Board action is not needed. A Sunday Morning Participant is someone who has come to Sunday services and shared their contact information at the Information Desk or Realm Database table.
- Children show up in the database with “Child” as the “position”. Their member status can be Child, Child/Youth Participant, Member, or Youth Member.
- Church members, friends, and visitors may all have accounts with passwords on ACS Realm.
- Individuals will only be able to create an account if “invited” to do so. A Realm invitation can be sent by members of the Realm staff. An invitation will be sent to individuals who have visited the church at least 3 times and who have filled out a green visitor information sheet. Visitors can also ask for a Realm invitation (before or after 3 visits) by filling out a card that the church will have available for that purpose at the Information Desk.
- All users with accounts will be able to see information about other people in the database (but only the information that is shared, see below).
- The family position known as “Head” in PowerChurch will henceforth be known as “Contact” in ACS Realm.
- Realm users will be allowed to update their own information and information of their family members. However, even where technologically feasible, children will not be able to update information about their parents.
- To be added to a group, any Realm user can send an email to a leader of the group or to the office staff. Special care should be taken with the membership of groups containing children and youth; for example only approved adults should be able to add themselves to the group for the Senior High Youth Group.
- It will be possible for individuals to control what information is shared or kept private, including email, address, and phone number. Pledge amount is private by default and cannot be made public.

## **Policies for Group Leaders**

- A group leader may ask to have a Group added to Realm by sending an email to Jeff Cashdollar. Jeff will ensure that the group is appropriate, that it is added in the correct place, and will make sure that rooms are requested for group events, if needed. The request for a new group should include: the group name, and one or more initial group leaders.
- Once a group is created, the group leader should add a descriptive paragraph and an optional decorative image. The group leader is also encouraged to specify the dates of upcoming events and add a roster of group members.
- When a group meets, group leaders are encouraged to record attendance in one of three ways:
  - Click on the names of attendees in Realm
  - Record the number of attendees in Realm, without individually recording which participants were there
  - Record the names of attendees of each event/meeting in Realm or on paper so that the office staff can enter them into Realm.
- Group leaders or Realm Administrators can add new members to groups in realm. For groups that are closed such as some men's groups, women's groups, or chalice circles, administrators should only add new members with the approval of the group leader. Group leaders should mark closed groups as "Staff Only" and include words such as "currently full" in the group description to make the status clear to Realm users.
- Group leaders can also remove members from groups. Members wishing to be removed from a group should ask the group leader to do so.

## **Policies for Administrators**

- Make sure group leaders are informed that their group has been created and ask them to provide information including a paragraph describing the group, and any available information on when and where the group meets.
- Only an Administrator may change a person's church membership status.
- If any member, friend or visitor with access to Realm, resigns, relocates away from the church's locale, becomes inactive for a known reason, or has not engaged with any congregational activities for three years, an Administrator shall cancel that person's login and password. Access by a person whose affiliation with the church has been revoked for cause under church Bylaws shall be removed immediately by the Congregational Administrator or by a UUCPA Minister.