

# Rites of Passage

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# Weddings

# Wedding Officiant Requests

**Objective:** Streamline the process of handling wedding officiant requests to ensure efficient and appropriate responses to both community members and external inquiries.

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## Step 1: Triage Initial Requests

- **Purpose:** Determine if the requester is affiliated with Foothills or external.
- **Procedure:**
  1. **Form Collection:** Direct all officiant inquiries to fill out the wedding officiant request form. Ensure the form collects necessary personal information and specific details about the wedding.
    - Public form link: [Wedding Officiant Request Form](#)
  2. **Form Submission Review:** Monitor submissions through the admin panel link: [Form Submissions](#).

## Step 2: Response and Workflow Initiation

- **Purpose:** Appropriately respond to the requester based on their affiliation with Foothills.
- **Procedure:**
  1. **Workflow Automation:** Once the form is completed, automatically add the requester to the designated workflow for further processing.
    - Workflow link: [Officiant Request Workflow](#)
  2. **External Requests:**
    - Send a template email with a referral list of officiants and building rental information if they indicate they are not part of Foothills.
  3. **Internal Requests:**
    - Forward the request to the designated minister lead to select the appropriate minister to handle the request.

## Step 3: Workflow Steps for Handling Requests

- **Purpose:** Ensure each request is handled efficiently and by the appropriate party.
- **Procedure:**
  1. **If External:**
    - Step 1 of Workflow: Use the template email to provide external individuals with officiant referrals and necessary rental information.
  2. **If Internal:**
    - Step 2 of Workflow: The designated minister lead discerns the best minister to handle the officiant request based on availability and fit.
    - Step 3 of Workflow: The assigned minister contacts the requester to discuss details and proceed with officiant services.

# Baby Dedications

# Memorial Process

Current Process for transfer

<https://docs.google.com/document/d/1qc0CJr5Gpp7XV2vRssdIZIFkbd9wtw2fjEcAIRvJn5E/edit>

# Memorials

Memorial Officiant Guidance

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## Deceased Database Process

- Congregant Death Workflow (<https://people.planningcenteronline.com/workflows/335347/steps/845118/assignees/26474115/ready>)
  - A minister reaches out to family members/close contacts of deceased to offer condolences and begin memorial planning. Key questions to explore include:
    - Is there an obituary?
    - Is there a memorial service planned? Be sure to share info with Kelsey for congregation notification/calendar
    - Is there a preferred means for reaching out to family (website, calls, cards, etc)?
    - Refer to meal train or other caring support workflows as needed
    - Caring anniversary reminders/invitation to Tangled Blessings or other support as appropriate (refer to Milestones or other workflows, snooze etc)

- Kelsey will reach out to minister/relevant staff to discern if there needs to be an announcement, and to whom.
- General guidelines (adapt as needed for the particular needs and sensitivities of any given situation)
- -Confirm that any necessary personal calls/reach outs from a minister have been made first
- -If the deceased is a member, send an email to all other active members.
- -If it's someone deeply involved in a particular group, also send notice to participants in that group. Death notice processes are very personal and flexible depending on the deceased.
- -Will always appear in next all-church announcement as small blurb
- When a name lands in this step, Lauren will check in with other staff then proceed to move the person through the Inactive/Remove from Membership Workflow as appropriate
- Ask the family if they would like to order a plaque. Allow for 6 week turn-around time.
- Step 1: Ministers are notified of death. Elaine, Gretchen, Sean fully are notified by one another, other staff, family etc.
- Step 2: Add Death Date to Profile (under Pastoral Care Tab)
- Step 3: Outreach from Minister
- Step 4: Communicate to Congregation and Community as Appropriate
- Step 5: Send to Inactive/Remove from Membership Workflow
- Step 6: Memorial Plaque

# Memorial Logistics Process

- Determine Minister Lead and let Jenn know who is taking lead
- Jenn reaches out to Family:
  - 1) to determine the date to meet with the Minister and Jenn for logistics conversation and planning the service. and
  - 2) Jenn shares possible dates for memorials services from looking at their calendars and PCO calendar.
    - Sean <https://usemotion.com/meet/revsean/memorials?d=60>
    - Elaine See Google Calendar
    - Gretchen see google calendar
    - Minister availability
- Jenn adds the memorial date to the calendar in PCO.
  - Minister notifies Music Director of date and presumed music needs/updating after service planning with family
  - With size of service (Estimate)
  - If Simulcast more volunteers
  - Notify Minister of final date chosen

- Notify leads of the Special Service Volunteer Team to begin recruiting
- Notifies AV team for volunteers
- Minister shares service details with Jenn for logistical set up/simulcasting needs.
  - If we are simulcasting, we need 3 volunteers—one in the sanctuary and one on Zoom. Jenn will fill the roles.
- If the deceased is a member, the Minister writes a letter to the congregation that includes the date and time of the memorial service. This letter is shared with Kelsey, who sends it to members of the congregation and publicizes details.
  
- Jenn's meeting with the family will cover:
  - Make sure all contact info and names of family assisting with the memorial are collected - relationships to the deceased clear.
  - Ask family if there will there be a reception
    - Help family determine what they want to serve/ what we provide
  - Memory tables ?
    - Set up a time to bring items
  - Flowers?
    - Share local florists / preferred vendors
    - Extra flowers for tables? Onstage / guest book table / food tables
  - Ask family for correct DOB and DOD for OOS
    - Ask for a image - high resolution preferred for OOS
    - Show family sample of OOS
  - Logistics of the memorial day
  
- Ask family if they want to have a slide show during the service or during the reception at all / other option is picture on boards etc.
  - If yes to slide show, have family drop it off 2-3 days before the service if possible to make sure it works with our tech
  - Preferred
    - <https://docs.google.com/document/d/1qc0CJr5Gpp7XV2vRssdIZIFkdb9wtw2fjEcAlRvJn5E/edit?usp=sharing> for slides is Google slides or powerpoint
  - Remind the family that multiple images on one slide does not read well to the congregation.
- Guest book? We can make one or family brings one
- \$\$ for musicians - will handle that once Jenn knows what music needs are
- Go over we have volunteers
- Ask if they want a plaque made for \$350 / 6 weeks to manufacture / no guarantee it will be ready by time of memorial
  - Jenn orders plaque
- Share about the family room on day of and go over arrival times for family/flower delivery/caterer delivery

- Minister's meeting with the family will cover:
  - All service details
  - Items on chancel: ashes, photos, etc.
  - Pastoral check-in: How can we support you on the day of the service?
  
- Music:
  - Music slides
  - Securing guest musicians
  - Submitting check requests for musicians (Jenn will hand checks on day of/ or assign someone to)
  - Minister contacts Benjamin about music needs.
  - Benjamin is responsible for:
  
- Program:
  - In "Notes" include:
    - Birth and death dates
    - Name family wishes is used (e.g. )Dick instead of Richard or vice versa....)
    - Donation request (if applicable)
    - Quote
    - Information about reception
    - Obituary
    - Other inserts or songsheets.
  - Minister should have all order of service details entered into PCO Services at least 4 days in advance. E.g. For a Saturday service, Caitlin needs all details by the Tuesday prior. Ping Caitlin when it is ready.

## Add A Memorial To The Upcoming Memorials page on the website.

1. Step 1: Create Event in PCO Calendar
  1. Log into Planning Center Online (PCO).
  2. Navigate to the "Calendar" section.
  3. Click on "Add Event" and enter the necessary details for the memorial service.
2. Step 2: Tag the Event
  1. After creating the event, add the tag "Memorial" to help in categorizing and searching for the event.
3. Step 3: Add Image and Timing Details
  1. Upload the memorial image to the event.

2. Enter the date and time of the memorial service.
3. If the specific time is not yet decided, make it an "all-day" event.
4. Step 4: Make Event Visible on Church Center
  1. Go to the visibility settings of the event.
  2. Select "Visible on Church Center" to make the event publicly viewable.
5. Step 5: Add Additional Information
  1. If there is a Zoom link for the memorial service, add it to the event description.
  2. Add a link to the obituary in the event description.
  3. Provide the address where condolence cards can be sent.
  4. Make a note in the description if the memorial service will be recorded.
6. Step 6: Confirm Event Listing
  1. After a reasonable time has passed, check to see if the event is correctly listed on [foothillsuu.org/memorials](https://foothillsuu.org/memorials).

## Post-Memorial Steps

1. Step 7: Upload Recording to YouTube
  1. If the memorial service was recorded, upload the video to YouTube.
  2. Make sure the video is set to "Unlisted".
  3. Add it to the "Memorial Services" playlist on YouTube.

## Guide: How to Upload Recording to the Memorials Playlist

[https://scribephow.com/shared/Memorial\\_Service\\_Archive\\_Process\\_How\\_to\\_Upload\\_an\\_Unlisted\\_Video\\_on\\_YouTube\\_Studio\\_\\_KlehyC1zTSqqYIVkZkobvw](https://scribephow.com/shared/Memorial_Service_Archive_Process_How_to_Upload_an_Unlisted_Video_on_YouTube_Studio__KlehyC1zTSqqYIVkZkobvw)

# Memorial Planning Process (Minister Planning)

- Rev. Elaine contacts the family, secures a date and time for memorial after checking with Jenn.
- Elaine meets with family to discuss the service, eulogy, and music choices.
- Jenn gets details of flowers, catering, desire for an altar, memory tables, and AV needs from Family and Elaine.

# Volunteer Memorial Process

## AV/Simulcast Memorial Process

### Simulcast Memorial Process

#### Template Email Re: Accessing a Simulcast/Zoom Memorial Service

Date and Time:

[Date of Service], [Time of Service] ([Timezone])

Location:

The memorial service will be held in person at Foothills and virtually via Zoom.

#### How to Access the Zoom Memorial Service

1. Go to the Foothills Unitarian Church's Memorials webpage: Foothills UU Memorials ([foothillsuu.org/memorials](http://foothillsuu.org/memorials))
2. Click on the specific memorial service for [Deceased's Name].
3. You will find the Zoom link there, which you can click to join the memorial service.

#### Basics of Accessing a Zoom Meeting

If you're new to Zoom, here's how you can join the meeting:

- Click the Zoom link provided.
- You may be prompted to download the Zoom application. If you already have Zoom installed, the meeting should automatically open in the app.
- Once in the meeting, you'll have the option to turn on or off your video and audio.

- There is a "Chat" function if you wish to send messages during the memorial, if appropriate.

## Recording Availability

We understand that not everyone may be able to attend the live service. A recording will be made available under the "Past Recordings" section on the Foothills UU Memorials ([foothillsuu.org/memorials](http://foothillsuu.org/memorials)) webpage three days after the service.

# Day of Memorial Process

- Pre-Service
  - Plaque is installed ideally a week before by Rich Roberts.
  - Space is prepared 2 hours before the service or the day before.
  - A classroom is set up in RE for the family to gather before the service.
  - Flowers can be delivered the day before or 2 hours before the service.
  - Guestbook is set out to be signed.
- Before Service
  - Family arrives an hour before the service with items for the memory tables.
  - Caterers arrive at least 30 minutes before to set up food.
  - Volunteers arrive 1 hour before.
  - Minister visits family after sound check, about 30 minutes before the doors open.
  - Family takes their seats right before the service begins.
  - Print up eulogy for the family.
- Post Memorial (Day Of)
  - Memorial service takes place.
  - Reception / guests can visit the memorial garden.
  - Checks collected for musicians.
  - Clean up - requires 3+ volunteers.
  - Send the guest book home with family/partner or make copies of pages and send home with multiple family members.
  - Send home flowers and left over foods
  - Send home pictures, memory table items
  - Have a copy of the sermon available for the family
  - A few order of services to go home with family
- Post Memorial Process
  - Pictures taken of event shared in a google album with family

- Video of the recorded service is shared on a private page on our Youtube channel with family members.
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# Memorial Email Templates

## Invitation to fill out Memorial Form

Hi [Family Members],

I want to begin by sharing how truly honored I am to be part of the process of creating a memorial service for [Name of deceased]. It is a privilege to help honor her life and legacy in a way that reflects her spirit and the love you all shared.

As we begin this process, the first step is coordinating the completion of the Memorial Planning Form at [foothillsuu.org/memorialplanning](https://foothillsuu.org/memorialplanning). The form only needs to be filled out once, so you may want to work through it together as a family. We've also produced a short video that will guide you through the process, which you can view at this [link](#). Please don't worry if you don't have answers to all the questions—this is just the beginning of the planning process, and we'll work together to fill in any details later on.

Once the form is completed, we can find a time to meet via Zoom to continue planning the service. Please let me know if there are times you are all generally available to meet.

Jenn Powell will be in touch soon to coordinate logistics, but I will take the lead on planning the service itself.

Again, I am deeply grateful for the opportunity to help honor [name of deceased]'s life, and I look forward to walking with you through this process.

Warmly,  
Rev. Sean  
Foothills Unitarian Church

[These are the questions](#) asked of the family to plan the memorial

# SOP: Memorial Notification

## Purpose

To ensure timely, compassionate communication to members who wish to receive memorial service notifications.

This process also standardizes how notifications are managed by:

- Using a single, consistent memorial notification form for all services
  - Eliminating the need to update or create a new link for each individual memorial
  - Automating updates and outreach to ensure no one is missed
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## 1. Update Memorial Notification Custom Field in PCO People

### Update Custom Field

- Go to **PCO People** → **Custom Fields Options** → **Communication Preferences tab**
- Locate the "**Memorial Notification**" custom field
- Add a new checkbox with the **name of the deceased**
  - Example: `Jane Doe – Memorial Notification`

### Create List

- Go to **Lists** in PCO People
  - Create a new list titled: `Memorial Notification – [Name of Deceased]`
  - Set Conditions:
    - `Communication Preferences → Memorial Notification → includes: [Name of Deceased]`
  - Set the list to **refresh daily**
- 

## 2. Notification Email Automation

# Manual Send When Memorial Date Is Public

When a memorial date is public and cleared for communication:

- Draft an email including:
  - Service date, time, and location (in-person and/or Zoom)
  - Obituary or additional details (if available)
  - The **standardized memorial notification form link**
- Send to the **corresponding notification list** created in Step 1

## Automation for Future Sign-Ups

- Set up automation to send a confirmation email to anyone added to the list after the initial email goes out

### Trigger:

- When a person is added to the  list

### Action:

- Send them a template memorial notification

## Add Email Template to PCO

To create an email template:

- Go to: <https://people.planningcenteronline.com/people>
- Click the **gear icon (⚙)** in the upper right corner
- Select **“Manage Email Templates”**
- Click **“+ New Email Template”**

### Template"

Dear [First Name],

We invite you to join us in remembering and celebrating the life of **[Full Name of Deceased]**.

### Memorial Service Details:

**Date:** [Insert Date]

**Time:** [Insert Time]

**Location:** [Insert In-person Address or indicate if online only]

### Join via Zoom:

[Insert Zoom Link]

Meeting ID: [Insert ID]

Passcode: [Insert Passcode]

You are welcome to join us in person or online. We honor your presence in whatever way is most accessible and meaningful to you.

**[If recording]** A recording will be posted a few days after the service at <https://foothillsuu.org/caring-ministry/memorials/>

Thank you for being part of this circle of memory and care.

With tenderness,  
The Foothills Unitarian Ministry Team

## 4. Remove Name from Memorial Notification Custom Field After the Memorial

Once the memorial service has concluded and all communications have been sent:

- Go to **PCO People** → **Custom Fields Options** → **Communication Preferences tab**
- Locate the "**Memorial Notification**" custom field
- **Remove the checkbox with the deceased's name** to prevent future unintended notifications
- Confirm that any associated **Lists** (e.g., "Memorial Notification - [Name of Deceased]") are no longer needed
  - If so, **archive or delete** the list to reduce clutter and confusion

# Approved Officiant List

[Rev. Christopher Watkins Lamb, Hospital Chaplain](#) and Foothills Affiliated Minister  
[christopherwatkinslamb@gmail.com](mailto:christopherwatkinslamb@gmail.com)

[Rev. Roger Butts, Hospice Chaplain](#) and Foothills Community Affiliated Minister  
[rogerbutts80905@gmail.com](mailto:rogerbutts80905@gmail.com)

[Lenny Scovel, Life Cycle Celebrant](#) and Foothills Lay Minister  
[lennyscovel@gmail.com](mailto:lennyscovel@gmail.com)