



# Sri Siva Vishnu Temple



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## OPERATIONS MANUAL

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## 1. INTRODUCTION

The constituting documents of Sri Siva Vishnu Temple (SSVT) Trust provide that the responsibility and authority for all decisions and all matters relating to the management of the Trust Properties and governance of the Temple are vested with the Board of Trustees (BOT), the Governance Council (GC), and the Governance Board (GB) as described in the by-laws and supporting documents. The BOT may establish appropriate committees and task forces to delegate specific administrative functions and powers, consistent with the objectives stated in the Deed of Trust. This manual describes the following:

- i. Various committees and task forces that have been set up according to the by-laws,
- ii. Responsibilities and interrelationships of committees and task forces to give a clear picture of the working of the Temple to the congregation, and
- iii. Organization and functioning of the committees and task forces and the decision making process in the day to day operations of SSVT.
- iv. Duties of trustees and those of officers of the BOT.

Management of the Temple is a complex and labor intensive operation, because of its size, the growing number of services offered, and the increasing importance of formal accountability in the decision-making. The incorporation of seventeen shrines as a result of the Ishta Devata concept adopted by SSVT presents special challenges. All this requires a large organization, which is mostly run by volunteers, a deliberate strategy adopted by the BOT.

## 2. BOARD OF TRUSTEES

### 2.1 ROLE OF BOARD OF TRUSTEES

The Role of the SSVT Board of Trustees (BOT) is delineated in Para. 5 of the SSVT Bylaws (October 2011). The BOT has the responsibility and authority for final decisions on all matters. . These include from Para 6. of the SSVT Bylaws:

- i. Function and establishment of committees by the BOT
- ii. Creation and maintenance of the Procedures Manual, Policy Guide, and Operational Manual for the operations of the Temple

With respect to all committees and task forces established by the BOT, the Chairperson is an ex-officio member of every committee and task force.

### 2.2 SPENDING AUTHORITY GRANTED BY BOT

The spending authority granted below is to ensure that the Administrative Committees of the Temple have the necessary funds to ensure the smooth running of the organization.

- A. The Executive Committee of the Board (Para 2.3 below) is authorized a discretionary

spending limit of \$10,000.

- B. The Vice Chair Operations is authorized an additional discretionary spending limit of \$2,000 per item.
- C. The Operations Committee is authorized a discretionary spending limit of \$5,000 per item.

### **2.3 EXECUTIVE COMMITTEE OF THE BOARD**

1. The Executive Committee of the Board (ECB) is a standing sub-committee of the BOT.
  - Consists of the Chairperson, Vice Chair for Operations, Vice Chair for Policy, Treasurer, and Secretary.
2. ECB's specific responsibility is to study, in-depth, certain matters placed before the BOT and to make recommendations so that the BOT takes decisions based on a thorough review of all pertinent information and conducts its business expeditiously.
  - Discusses available options on policy issues placed before the BOT and recommends suitable actions to the BOT.
  - Manages employee relation aspects of the operations of the Temple such as hiring, benefits, performance evaluation, and termination of all salaried personnel and recommends suitable actions to the BOT.
  - Delegates tasks that require further study to the Operations Committee or other committees as appropriate.
  - The Secretary of the ECB recommends the agenda for the monthly BOT meetings in conjunction with the Chairperson.
  - The VC-Policy in conjunction with the full ECB implements and translates the BOT's policies into actions.
3. Notwithstanding what is stated above, these purpose and functions are not intended to dilute or modify the individual responsibilities assigned to the Chairperson, Vice-Chair Operations, Vice-Chair Policy, Treasurer, and Secretary as specified in Para 9 of the By-laws, dated October 2011.
4. The ECB shall meet at least once a month or more frequently on an as needed basis.
  - The Chairperson of the BOT will chair the meeting and in his/her absence, the Vice Chair for Policy/operations will officiate unless otherwise designated by the Chairperson.
  - The ECB shall provide minutes of the meetings for inclusion in the BOT meeting agenda and the ECB meeting minutes shall be included as a part of the BOT meeting minutes.
  - The Chairperson may invite any trustee to participate in the ECB meetings.

### **2.4 TRUSTEE-LIAISON (TL)**

The BOT shall determine which committees established by the BOT require the role of a trustee-liaison (TL) for the smooth operation of the Temple.

The 3 primary responsibilities for the Trustee Liaison are:

1. Inviting new members and volunteers to be a part of the committee
2. Convene the June meeting to facilitate the selection of the new coordinator.
3. Call for the July meeting of each committee.
4. The Trustee-Liaison should attend their respective committee meetings. In the event the Trustee-Liaison is unable to attend he/she must designate an alternate trustee to attend the meeting to ensure open lines of communication.

The Trustee liaison is an independent observer and mediator to ensure that the committees function properly per para 3 (below). The Trustee Liaison is neither a member nor a decision maker for the committee.

The Trustee Liaison shall keep the BOT informed as to the issues/concerns with updates at the monthly BOT meeting (or more frequently as required) that are of importance to their respective committees and seek the guidance of BOT/ ECB on important issues.

The Chairperson and the BOT reserves the right to intervene to resolve issues of mis-communication or lack of coordination that could not be resolved by the Trustee-Liaison.

The Trustee-Liaison will hold the position for one year (may be extended to a second year if the BOT explicitly requests him/her to continue.) The Trustee Liaison does not have a vote in the committee decisions. The Trustee Liaison is there to facilitate communication between the committee and the BOT.

### **3. OVERVIEW OF COMMITTEE FORMATION AND OPERATION**

The BOT has adopted a deliberate strategy of encouraging the congregation's involvement and participation in the Temple's operations, especially as a means for bringing in volunteers to serve in decision-making roles.. This strategy has been implemented in a manner that ensures efficiency and sustainability by decentralizing the management of SSVT and by providing the Temple's highly dedicated volunteer corps an opportunity to actively participate in the organization and conduct of religious and other services. Furthermore, this structure enables SSVT to continue to attract new volunteers to participate in the operation and management of the Temple.

The devotee committees expected to work with harmoniously to carry out most of the Temple operations with consensus building within each committee and a cooperative relationships among the committees.

#### **3.1 COMMITTEE STRUCTURE AND COMPOSITION**

- A. Committees, sub-committees, and task forces will have no less than 3 members for efficiency and manageability.
- B. This structure will provide committees enough flexibility to accommodate the interests of all who wish to participate in particular activities of their choosing and within their capability.
- C. Devotee Committees should not include any current trustees or current GB members.

D. Devotee Committees shall contain no more than 1/3 of its members who are ex-Trustees.

### **3.2 SELECTION OF MEMBERS AND THE FORMATION OF COMMITTEES**

A. Formation:

- Committees will be formed in July every year.
- The members of the BOT and the coordinators should actively recruit volunteers to serve as committee members.
- The Coordinator of the Committee and its Trustee-liaison will then invite the potential new members to join the committee.
- Vacancies will be filled depending on the needs of the committee.

B. Committee Member Role:

- Each devotee may serve only on one committee.
- The devotee may continue to volunteer on task force groups.
- No limitations apply to any devotee to volunteer his or her time in any Temple activity.
- A devotee may continue in the same committee for a maximum period of 6 consecutive years. After the 6 year term, a devotee must retire from that committee, but can re-join the committee after a gap of one year.
- A devotee, having retired from one committee, may join any other committee.

C. The BOT may authorize formation of new committees or abolish those that are found to be unnecessary or unproductive. Number and type of devotee committees will vary with the needs of the congregation and the strategic direction set by the BOT.

### **3.3 COMMITTEES RULES**

A. Members are required to attend at least 50% of the regularly scheduled committee meetings.

B. Every committee is a de facto part of the Operations Committee, headed by the Vice Chair of Operations. The Vice Chair Operations will provide guidance and administrative support to all committees to perform their respective duties and assignments.

### **3.4 COORDINATORS OF COMMITTEES**

A. Each committee will be headed by a Coordinator, elected by the members of the committee. Election is conducted according to Robert's rules of order.

B. A Coordinator must have been an active volunteer in a particular or related committee for at least one year. Electing an experienced volunteer as the Coordinator provides the committee with the necessary knowledge of the field of activity, taking into account the personal involvement, capability, and interest of the individual.

C. Coordinators of committees will normally serve for one year, from July 1<sup>st</sup> to June 30<sup>th</sup> of the following year.

D. Coordinators may be re-elected by the committee's members or re-appointed by the BOT for a second consecutive term. A Coordinator who has served for two consecutive terms will be eligible for re-nomination only after a gap of one year.

E. Until the new committee Coordinator takes charge, the incumbent Coordinator will continue to serve in the interim and conduct the committee's business as usual with the

- permission of Chairperson of the BOT.
- F. A coordinator of one committee cannot become the coordinator of another committee the following year. There should be at least a one-year interval before becoming a coordinator of another committee. Exceptions may be made with BOT approval.
  - G. The coordinator of a committee, if and when selected for trusteeship, or as a member of GB, will complete the term as coordinator. A member of a committee, when selected as a trustee or GB member can finish his/her term in as a committee member if he or she so chooses.
  - H. A committee may choose to elect Deputy-Coordinator(s) at the same time as the Coordinator is elected depending on the needs of the individual committees.

### **3.5 GENERAL DUTIES OF COORDINATORS**

- A. Coordinators shall discharge their duties and responsibilities in accordance with policies established by the BOT.
- B. Coordinators have the responsibility to organize their activity in the most efficient manner and collaborate with other committees in all related activities.
- C. Coordinators will call for committee meetings on a monthly basis or more frequently as needed to address the needs of the Temple.
- D. Unless otherwise decided by the BOT, the order of business at all regular Committee meetings will be as follows:
  - a. Invocation
  - b. Roll call
  - c. Minutes of previous meeting- approval
  - d. Reports and statements from BOT or OC relevant to the committee's business.
  - e. Unfinished business
  - f. Agenda Items
  - g. Any other relevant business
- E. The required quorum is a simple majority of the members of the Committee. A quorum is required for any recommendations to be sent to the BOT by the committee.
- F. The coordinator of a committee may invite a retired member or any devotee as an advisor/consultant to participate in a meeting on a particular issue/subject. Such invitees will have no voting authority or decision making authority.
- G. Coordinators will prepare an agenda for the meeting and prepare minutes, which will be submitted to the VC-Operations.
- H. Minutes of the meetings should be sent to all members (including absentee members).
- I. Each Coordinator will prepare a budget and submit the budget to the VC-Operations for BOT approval.
- J. Coordinators must obtain approval from the VC-Operations before going ahead with any event/project. The committee must review the feasibility, cost, and projected income of each event/project and every effort should be made to maintain expenses consistent with the approved budget for the event/project. Any cost overruns must be discussed with the VC-Operations and approved by the BOT.
- K. Coordinators will assist the Vice Chair of the Operations with the budgetary process and other needs of the committees.
- L. The Coordinator schedules members as needed for duty at the Temple for weekends and other functions.
- M. Outgoing coordinators have the responsibility to provide orientation to the incoming coordinators of the roles and responsibilities.

### 3.6 TASK FORCES

Task forces are entrusted with short term projects or specialized assignments that are self-directed and require little coordination. These committees and task forces are intended to equitably spread the task of management of the Temple over a large volunteer force. The formation and working of the committees and task forces are detailed below. Any devotee who is a member of a committee, a current trustee, or a current GB member may continue to volunteer on task force groups.

There are 3 regularly operating task forces:

#### A. Standing Task Forces

1. Flower Task Force  
Order and ensure delivery of all the flowers required for the decoration and worship of the deities on an ongoing basis.
2. Decoration Task Force
  - (a) decoration of the Vasantha Mandapam and Sannidhi's of all deities for all Temple Sponsored Events
  - (b) Decoration of the Auditorium for Temple sponsored events
  - (c) Private Decoration for a fee for private occasions when the private event is held in the Temple auditorium
  - (d) The Decoration Task Force must coordinate with the Treasurer (for funding) and the General Manager for decoration tasks.
3. The Saree/Vastra Task Force
  - a) Purchase and sale of sarees for use as adornment for the deities only (these sarees are not for private use but for Temple use only)
  - b) The volunteers of this task force shall regularly maintain all the vastras of the deities.
4. Priest Selection Task Force  
Maintains an updated and standing pipeline of resumes for priests as required by the needs of the Temple.

#### B. Special Event Task Forces:

These special event task forces are formed on an as needed basis to plan, coordinate, and execute all aspects and logistics required to ensure a successful Temple event.

#### C. Ad-Hoc Task Forces:

These specialized task forces are created by the BOT on an as needed basis to plan, coordinate, and execute all aspects and logistics to ensure the proper completion and address a specific short-term need of the Temple (including non-religious needs).

## 4. ADMINISTRATIVE COMMITTEES

There are seven committees that are critical functions which expedite the day to day operations of the Temple. These committees are the:

- A. Executive Committee of the Board (see para 2.2 above)
- B. Engineering Committee (see para 4.1 below)
- C. Finance Committee (see para 4.2 below)
- D. Fund Raising Committee (see para 4.3 below)
- E. Outreach Committee (see para 4.4 below)
- F. Operations Committee (see para 4.5 below)

#### **4.1 ENGINEERING COMMITTEE**

The Engineering Committee provides technical advice on all matters relating to the construction, installation, remodeling, and maintenance of the Temple's buildings, utilities, and grounds.

- The BOT appoints a coordinator for the Engineering Committee, who is a current trustee.
  - Devotees with expertise in construction, engineering, procurement, or maintenance can be members.
  - The EC reports to the Board.
  - The EC has no specific budget, but gets funds from the BOT for preliminary design and costing of planned projects. However, the EC recommends final payment for finished projects to the BOT.
  - The EC meets monthly or as needed. The EC coordinator will prepare an agenda prior to the meeting and will provide minutes of the meeting to the Secretary of the BOT.
1. Provides engineering and permitting support for new construction, improvements, and maintenance of the Temple's facilities.
  2. Interacts with the Sthapathi regarding religious aspects of expansion and other changes to the Temple's buildings.
  3. Establishes construction standards and performance criteria. . Assures that appropriate and timely permits are obtained.
  4. Plans, organizes, coordinates, and supervises all phases of design, construction, and improvements to SSVT buildings and grounds.
  5. Supervises installation of HVAC, electrical, plumbing, communication, and drainage systems.
  6. Recommends architects, design engineers, and contractors and negotiates their contracts and bids.
  7. Obtains the necessary City, County, and State permits.
  8. The BOT shall appoint a Project Manager for all capital projects who will manage all required tasks to bring major projects to completion.
    - For large projects likely to cost in excess of \$0.5 million, the EC shall appoint an oversight group of 3-5 individuals to handle the project design, the awarding of contracts, approval of change orders, processing of payment requests, project

supervision, and reporting to the BOT. A the oversight group should include the Temple Manager, Trustee as Project Manager, Engineering Committee Coordinator, Treasurer, Architect.

- Where appropriate the EC should appoint a paid Construction Manager. In addition, the EC should use legal counsel to review contracts.
  - All Board approvals for capital projects should be on the basis of the project report/ feasibility report prepared by the oversight group referred to in (1) above.
9. Provides monthly status reports to BOT on active projects.
  10. Submits a final report to the BOT upon completion of each major project.

## **4.2 FINANCE COMMITTEE**

The Finance Committee is tasked with overseeing the finances of the temple in coordination with the Treasurer and the BOT.

- Headed by the Treasurer, who is selected by the BOT.
  - Composed of current trustees and devotees, who have some financial expertise.
  - Has no specific budget at its disposal; funds if required are allocated by the BOT.
  - Meets quarterly or as needed.
  - The Treasurer prepares an agenda prior to each scheduled meeting.
  - The Treasurer sends minutes of the meeting to the Secretary prior to the BOT meeting
  - The FC reports to the BOT.
1. Advises the BOT on financial policies including sources of borrowing when required and terms thereof
  2. Reviews annual budgets and financial (quarterly, annual, and external auditors) reports.
  3. Makes recommendations to the BOT on all issues that have a bearing on SSVT's financial viability.

### **Hundi Counting Sub-Committee (Reports to Treasurer)**

1. Opening and collecting all the Hundis and safe deposit boxes.
2. Sorting the collections by payment type (such as cash or check or credit card) and by purpose category (such as archana tickets food, and donations etc).
3. Providing the Treasurer with a detailed account of collections by various categories. Depositing the checks and cash in the bank after proper verification.

### **Database Sub-Committee (Reports to Treasurer)**

1. Maintains database of SSVT
2. Tracks income by category and works with Hundi counting sub-committee
3. Provides various donor lists for fundraising purposes
4. Provides donation receipts to devotees as per IRS regulations

### **Endowment Investment Management Sub-Committee (Independent Committee)**

1. Maintains all long-term and short-term investments of the Temple and makes recommendations regarding the investment portfolio of the Temple.
2. Provides a report to the Finance Committee on the status of investments on a regular basis.

3. The Investment Management comprises of four Trustee-Emeritii, two investment experts and the SSVT Treasurer who acts as a liason between the BOT and the investment management committee. All the members of Investment Management Committee are appointed by the BOT.
4. The members of the Investment Management Committee is to act independently and its investment decisions are not subject to review either by the Finance Committttee or the BOT. The Investment Management Committee shall be guided in its investment strategies and decisions by one or more investment management firms, depending on the size of the endowment funds. The BOT has the authority to replace members of the Investment Management Committee and the selected investment management firms.

Additional financial sub-committees may be created if needed at the recommendation of the FC and with approval of the BOT. The functions and responsibility of each sub-committee will be decided by the Treasurer and Finance Committee and can be modified as circumstances dictate.

### **4.3 FUND RAISING COMMITTEE**

The Fund Raising Committee is tasked with developing long and short term fund raising goals that will ensure continuity beyond the term life of trustees, officers, and volunteers. This committee will ensure that fundraising in SSVT is solicited using a two pronged approach – strategic and systematic which will fulfill both long and short term fund raising needs of SSVT

The focus of the Fund Raising Committee is to permit funds to be generated for the following capital intensive areas:

1. Endowment – Stability & Safety, Cultural & Educational
2. Capital projects – varies
3. Special Functions – incl. Annual Dinner, Annual Puja and other special events
4. Normal Operations

The function and duties of the committee are two-fold:

1. Advisory – set up goals, policies and procedures and monitor progress
2. Functional – engage in actual solicitation and collection including follow-up with devotees.

### **4.4 OUTREACH COMMITTEE**

1. Act as the public face of the temple for outside entities, temples, mandir organizations.
2. Advise BOT on outreach efforts for the temple including temple's role in the interfaith organizations, Temple collaboratives. Temple's exposure in political offices if need be.
3. The Chairperson is the de facto ambassador of the temple and also the coordinator of the committee. Any member of the congregation is eligible to join the committee upon approval from the BOT.

## 4.5 OPERATIONS COMMITTEE

The OC has overall responsibility of coordinating operations of all the other committees and task force activities.

1. The OC is headed by the VC-Operations, who is appointed by the BOT
2. Other members include the Coordinators of each devotee committee, sub-committees, and task-forces (*e.g.* cultural, food, maintenance, publications, public relations, religious, and youth).
3. The BOT may appoint additional members to serve on the OC as and when needed.
4. The OC meets once a month or more often as needed.
  - The VC- prepares an agenda for the meeting and provides minutes of the meeting that have been approved by committee members to the BOT.
5. Prepares and reviews the annual budgets for the operations of the Temple based on estimates submitted by the devotee committees and task forces.
6. Approves expenses and authorizes payment of outstanding bills in accordance with the priorities established by the BOT.

## 5.0 DEVOTEE COMMITTEES

Each of the following functional committees will be headed by a coordinator along with a trustee liaison being the channel of communication between the committee and the board of trustees. The committees will report to the Operations Committee.

- A. Cultural Committee
- B. Food Committee
- C. Publications Committee
- D. Public Relations Committee
- E. IT Committee
- F. Religious Committee

### 5.1 CULTURAL COMMITTEE

- A. Plans, organizes, and conducts cultural events.
- B. Organizes a variety of cultural programs under the Temple's auspices.
- C. Provides logistical support to visiting artists.
- D. Maintains the Temple's audio-visual systems.
- E. Responsible for the production of audio tapes/CDs for concerts sponsored by the Temple.

### 5.2 FOOD COMMITTEE

- A. Plans, organizes, and coordinates vegetarian food services to devotees on weekends, holidays, and special puja days as determined by the Operations

Committee.

- B. The Temple kitchen shall not engage in catering services for outside events.
- A. Members schedule volunteers to assist during their turn in food preparation, selling, and clean up, on special functions and accounts for all proceeds.
- B. Assists in the Temple's annual bazaar and other special events.
- C. Coordinator maintains the inventory of supplies with the assistance of the kitchen staff and facilitates the purchase of such supplies on a regular basis.

### 5.3 PUBLICATIONS COMMITTEE

- A. Oversees all Temple publications:
  - Temple Newsletter
  - Souvenirs
  - Puja programs, announcements, and flyers,
  - Weekly e-mail updates to devotees about Temple events.
  - Coordinates with the IT Committee to ensure that all publications are available on the Temple website.
- B. Collects pertinent information and edits information about Temple activities from the BOT and all Devotee Committees and Task Forces.
- C. Submits materials to the Operations Committee, ECB, and Trustee-Liaison for Publications or his/her designee for approval before publication.
- D. Assists in the selection of printing and mailing contractors and negotiating the final contract at the most reasonable price.

### 5.4 PUBLIC RELATIONS COMMITTEE

Responsible for providing volunteers to staff the front-desk.

- Schedules volunteers for the front-desk and information desk on weekends, holidays, and special events.
- The Committee Coordinator trains front-desk volunteers on the use and operation of Temple computers and the programs in place to ensure that correct and accurate information is taken and entered into the Temple's temple services computer program.
  - Trains volunteers to help answer devotee questions and assist with requests (either walk-in or phone)
  - Publicizes routine and special religious and cultural events
  - Receives updates from devotees on contact information (*i.e.*, address changes and email id changes and forwards them to the Database Sub-Committee for updating the Temple's devotee database.

### 5.5 IT COMMITTEE

- A. The IT Committee plans, organizes, maintains and supports all aspects of the Temple's IT infrastructure (SSVT servers, software, networks, physical security, information security,

audio, video, website, database). The IT systems at the temple includes:

- Computers/Servers/Printers/Copier/FAX machine used by Temple employees and volunteers to conduct Temple operations;
- Local Area Network that connects all computers, Internet/Broadband access,
- Telephone / Data Communications Network,
- various applications (E-mail, Accounting software, [SSVT.ORG](http://SSVT.ORG) Website, Point Of Sale Web Application, MS Office application),
- Temple Security/CCTV systems, and
- Audio/Video Systems.

B. IT Committee members will ensure systems are maintained and configured properly so that Temple operations can be carried out smoothly. The IT Committee is responsible for establishing IT protocols and System Security protocols to protect devotee and donor's personal information from cyber threats, and security breaches. The IT Committee will also provide training and support to other Temple committees which require the use of Temple IT services.

C. Regular maintenance of the IT infrastructure includes implementing system enhancements, application upgrades, and ensures compliances with various software and system license agreements.

## 5.6 RELIGIOUS COMMITTEE

A. Plans and organizes all the religious activities of the Temple's religious calendar of events.

- Provides guidance on scheduling and prioritizing Temple pujas.
- Provides religious input to special events.
- Publishes an annual and monthly calendar of religious events and works in conjunction with the Publications Committee
- Maintains the inventory of puja supplies and facilitates the purchase of puja related items.

B. Organizes relevant pujas for Hindu religious days and special occasions.

- Schedules volunteers to assist on special puja days.

C. The religious committee shall continue to be formed and function as a functional devotee committee, however, for administrative purposes and accountability it is required to report to both the OC and the BOT.

D. Assists the Priests Selection Task Force in selecting and maintaining a pipeline of candidates for recruitment.

## 6.0 COMMUNITY GROUPS

The following groups provide community programs and other activities.

- A. Youth Group (Aakar)
- B. Education Group
- C. Senior Citizen Group
- D. Seva Task Group
- E. Gift Shop Group

## 6.1 YOUTH GROUP (AAKAR)

- A. Aakar is designed to promote the active participation of children and young adults in Temple sponsored activities.
- B. The main focus of the group is to enable youth members of the congregation to have exposure and information about Hindu mythology, rituals and also serve as a means of involving youth in the community activities.
- C. Aakar is tasked with organizing:
  - a. Monthly sandwich for the homeless programs.
  - b. Weekly Balgokul classes
  - c. Children's Day Activities
  - d. Maintaining the Aakar library

## 6.2 EDUCATION GROUP

Plans and implement long term educational programs at the Temple.

- A. Vedic studies
- B. Sanskrit classes
- C. Yoga classes
- D. SAT classes
- E. Other classes as required by the congregation and community.

## 6.3 SENIOR CITIZEN GROUP

Involves Senior Citizens to maintain a healthy, happy, active and independent life by sponsoring enrichment activities at the Temple.

- A. Organizes discussing groups addressing successful aging, family support.
- B. Conducts other classes such as music, devotional songs, meditation, etc. as required by the congregation and community.

## 6.4 SEVA TASK GROUP

Provides community services in the local community including:

- A. Cleanup activities of local streets
- B. Volunteers for local homeless kitchens to prepare meals for the homeless
- C. Provides contacts to coordinate and assist in times of family distress and other situations for Temple congregation members and non-members.
- D. Assistance to Bhutanese refugees to settle in local area by providing assistance with healthcare, job fairs, and other assistance as required.
- E. Conducts medical camps and health fairs for local communities

## 6.5 GIFT SHOP GROUP

- A. Provides gift and other articles from India for sale to devotees.
- B. Procures puja articles from India and elsewhere for sale to devotees.
- C. Works in conjunction with the Temple Manager to maintain an account of the items bought and sold, including audio tapes, CDs, and video tapes.
- D. Coordinates agreements with vendors who are allowed to display their merchandise on Temple's premises for sale to devotees. The task force is responsible for coordinating the schedule for such vendor sales with the OC.

## **7.0 GRIEVANCE PROCEDURE**

- A. SSVT has a prescribed grievance procedure for any issues related to its volunteers, committee members, and committee coordinators.
- B. If any SSVT volunteer has difficulty carrying out their duties and/or difficulty contributing to committee activities, the procedure to be followed for the redressal of the grievance is specified at para. B(3) of the By-laws.

## **8.0 THE MANAGERIAL STAFF**

The Managerial staff is responsible for the routine functions of the Temple. The managerial staff includes General Manager, and up to a maximum of 3 managers depending upon the work load at the Temple. The managerial staff also has 2 part time clerical staff to assist the General Manager and the Treasurer.

Detailed job descriptions and functions of each staff position are maintained in the Employee Handbook.

## **Appendix I**

### **Conflict of Interest Policy**

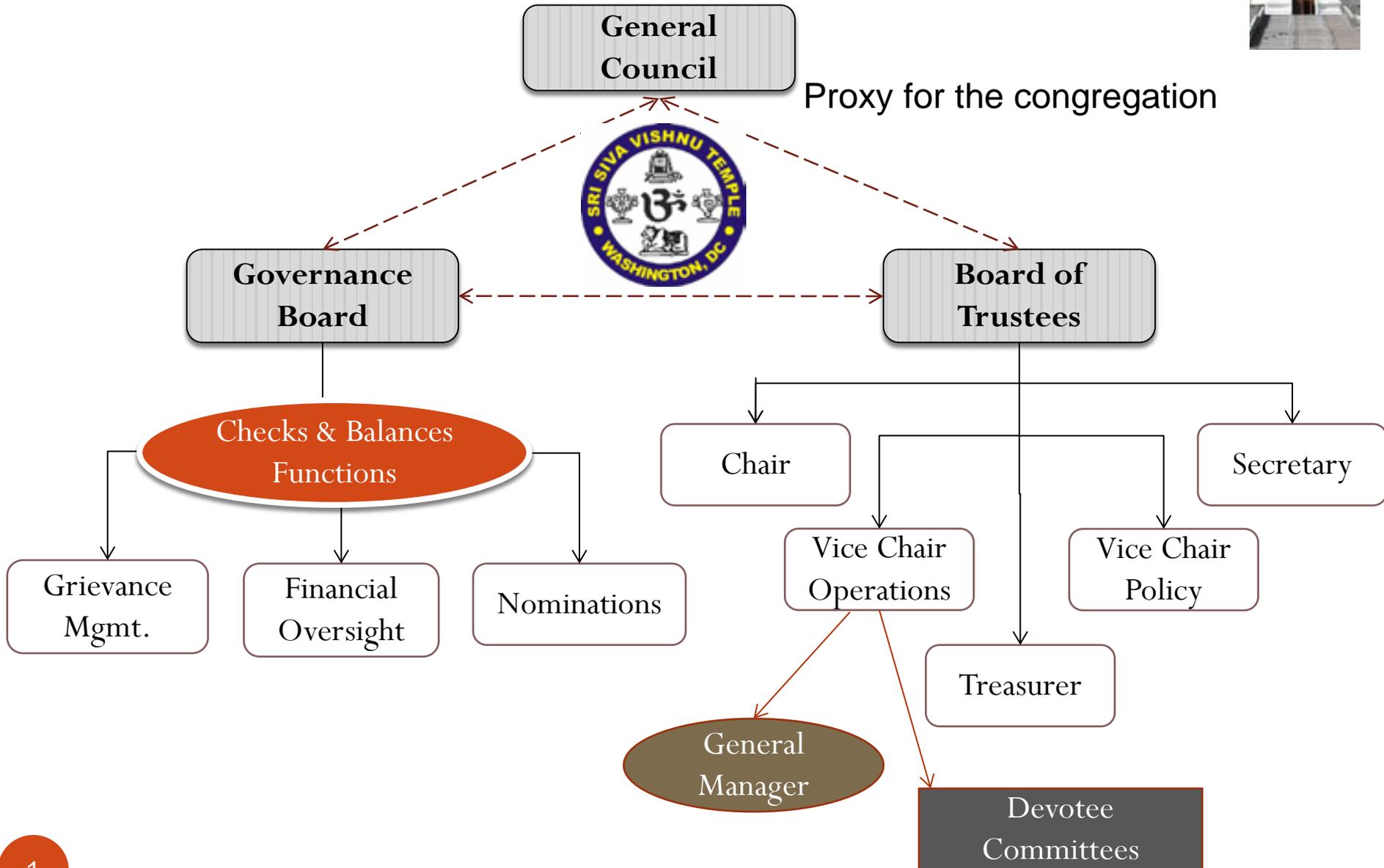
**SSVT's conflict-of-interest (COI) policy is addressed in the Bylaws. Certain additional restrictions are proposed as follows as a matter of prudence and to encourage wider participation by volunteers in decision-making positions:**

- 1. Immediate family members (spouse, children and siblings) should not be called to service at the same time on either the BOT or the GB. As per present practice and the SSVT By-Laws, there are no restrictions to close relatives serving as members or coordinators of devotee committees or close relatives of GB members, trustees and devotee committee coordinators being appointed as part-time or full time employees.**
- 2. On major capital projects (exceeding \$500,000) a clear separation between Owner's Representative and Builder should be observed.**
- 3. When real or perceived COI situations arise the concerned individual should recuse themselves or in some cases be required.**
- 4. With regard to participation of Trustee Emeritus members of the GB in various Administrative / Devotee committees, they will be governed by the same procedures laid down for BOT members in the Operations Manual, with the proviso that GB members will not serve as members of the Audit Committee or Finance Committee in view of the financial oversight functions entrusted to the GB under the By-Laws.**
- 5. In all matters relating to COI the GB will be the authority to determine whether COI exists and how to resolve it.**

## **Appendix II**

### **SSVT Organizational Structure**

# New Structure approved October 9, 2011



# SSVT ORGANIZATIONAL STRUCTURE

## BOARD OF TRUSTEES

Review Policy Matters; Provide Instructions to EC and the OC, Fund Raising Approval, Review of Capital Projects, Donation Programs, Provide Quarterly Report to GB

## CHAIRPERSON

Overall in charge of Policy, Operations, Ambassadorships, Outreach and Governance, Financial Oversight, Operational Oversight, Policy Oversight

## TREASURER

Overseeing the management and reporting of finances; instituting a good system of internal controls;

- **Bank Account Maintenance:** including reviewing and paying off loans, overdraft, and line of credit
- **Financial Transaction Oversight:** accurate and timely bookkeeping including AR; payables; petty cash; bank reconciliations
- **Payroll** – Monthly payroll disbursements; W2 & 1099
- **Budgets** – developing annual budgets as well as comparing the actual revenues and expenses incurred against the budget periodically
- **Audits** – ensuring timely completion of external and internal audits
- **Reporting** – Keeping the BoT informed on a monthly basis on key financial matters, trends, concerns, and any other questions/clarifications; also providing monthly/ quarterly financial statements such as income statements; balance sheets and cash flow statements to enable decision making on strategic priorities
- **Finance/ Audit Committees** – ensuring the formulation of finance and audit committees; providing information periodically to facilitate meetings and necessary actions. Endowment Programs, CFC, United Way

Treasurer's Team

## SECRETARY

Prepared Meeting Documents for EC and BoT  
Analyze and allow Policy matters for discussions  
Documentation for future reference  
Documentation of GB and GC meetings  
Maintain GC database  
Call for GC Meetings once a year

## VICE CHAIR POLICY

Coordinate Operations with Bylaws  
Study Bylaws and report back to GB on issues  
Review New Operations Manual and advise the BoT and the committees of roles and responsibilities.  
Interpret and advise in times of conflicts with the BoT and/or with other committees

### BOT Task Forces

Special Functions  
Special Event Operations  
Fund Raising

## VICE CHAIR OPERATIONS

Manage all Devotee Committees  
Prepare Budgets for each fiscal year  
Review budgets of committees  
Review contracts, sign contracts  
Review employee performance and evaluation  
Hiring and Firing of Employees and contractors