

Donation Policy & Procedure

1. Donor prepares a Westside UU Church Gift Form, either online or in printed format, designating the amount of money to donate, where the funds are to be allocated (operations or endowment), and whether it is a memorial, a gift in honor of someone, or undesignated.
2. The form, along with the check, or the charge if the donation is made online, goes to the Financial Secretary. Should the contribution be in a non-monetary form, such as real or personal property, the Financial Secretary shall promptly notify the board president of the details. The board president shall convene the board through an appropriate medium for a decision on whether it is to the Church's advantage to accept the gift. The board may involve outside experts or knowledgeable persons within the congregation in making a determination. If the contribution has been designated for the Endowment Fund, the board president shall notify the chair of the Endowment Committee and involve that committee in the decision. The board reserves the right to refuse any gift the acceptance of which is deemed to be not advantageous or harmful to the interests of the Church for any reason.
3. The Financial Secretary deposits check or charge donations, and records them for income tax reporting purposes. Once non-monetary contributions are accepted by the board and a value attached, they shall be appropriately recorded by the Financial Secretary, who then passes the form to either the Endowment Committee, or an appropriate designee, for further action.
4. If the funds are designated for the Endowment Fund, the form goes to the Endowment Committee Chair or the Endowment Committee Recorder, and the Treasurer is notified of the donation so that they can move the funds from the checking account to the Endowment Fund.
5. The Endowment Recorder records the donation and prepares a thank you note to the donor and a notification letter to the honoree or family of the deceased, or asks another member of the committee to write the letters. All gift forms are then filed at the church in the Endowment Committee files for future reference.
6. If the funds are designated for the Operating Fund, the form goes to an appropriate designee, who prepares the thank you letter to the donor and notification letter to any honorees or the deceased's family, and files the donor form.
7. Letters to donors should be on letterhead and include a statement that Westside UU Church is a 501(c)3 and donations are tax deductible to the limit provided by the U.S. tax code.

Adopted September 16, 2015
Revised August 23, 2017

