

**UUFSD Policy and Procedure Document****Policy ID: 155****Title: Generosity Sunday**

Date Approved: May 12, 2013 by the Board of Directors

Updated by the Board of Directors: January 19, 2016

Updated by the Board of Directors February 17, 2021

**Purpose**

The congregation participates in outreach and social justice work by designating one Sunday in each month as Generosity Sunday. On these Sundays, the offering is donated to an organization or project that serves the community or the cause of social justice.

**SJA leaders voted to establish the following protocol for fiscal year 2021-2022. This protocol will be revisited July 2022. The amendment follows the policy below.**

**Policy**

Application forms and related applicant information will be maintained on the UUFSD website.

The Social Action Committee (SAC) administers the Generosity Sunday process, including communication and coordination as appropriate with Worship Committee, UUFSD Treasurer and/or staff.

The SAC is responsible for final selection of Generosity Sunday recipients in accordance with procedures below.

Beneficiaries will be selected for each of 12 months. (If the pledge team concludes Generosity Sunday would impede the pledge drive, it may request the Board to suspend Generosity Sunday during one month of the pledge drive and the Board, after consulting with the Social Action Committee, may decide to do so if in the best interests of the Fellowship.)

Beneficiary selection considerations are guided by the following criteria:

- Alignment with Unitarian Universalist values.
- Current designation as a 501(c) (3) tax exempt organization or equivalent, if a foreign charitable organization.
- Past, current or future congregation member volunteer involvement.
- Percentage of organization's budget that goes to programs versus administrative costs. GS applicants may request program or general operations support.
- UUFSD general operations are not eligible for Generosity Sunday funding.
- UUFSD may undertake a congregation-sponsored social action project, for which GS funds may be designated. In cases such as this, tax-deductible

contributions may be payable to UUFSD and specifically designated for the intended project or program.

If a qualified organization is not selected in the initial review cycle following its application receipt, the organization may be reconsidered for up to 12 months from receipt. Organizations may reapply annually.

### **Procedure**

Social Action Committee designates a Generosity Sunday Coordinator. The GS Coordinator must be a member of the Social Action Committee and will be responsible for implementation of the procedure outlined below. The GS Coordinator will include at least two other SAC members in the process outlined below to enhance the open and unbiased preliminary review.

#### **Applicants**

Organizations complete and submit a Generosity Sunday Application form. The current, approved application form and related requirements are included as **EXHIBIT 1** to this policy.

#### **1. Application Availability**

Receive applications via email or other automated electronic means. UUFSD administrative staff should not need to be involved in the application process.

#### **2. Applicant Notification**

Notify applicant of its application status within 90 days of receipt.

#### **3. Application Preliminary Review**

Review the application confirming.

- all questions are answered.
- current **Board of Directors roster is included**
- most recent **fiscal year-end** financial statements are included
- Federal Tax Exemption (**IRS) Determination Letter – 501(c)(3)** – is included.

#### **4. Applicant Follow Up**

Follow-up activity with organizations submitting incomplete applications may be undertaken at the discretion of the Generosity Sunday Coordinator. If there is an abundance of qualified, complete applications, organizations that have submitted incomplete applications may be encouraged to reapply at a later time.

#### **5. Application Review - Preliminary Consideration**

Meet at least semi-annually to cooperatively review applications and forward a list to the SAC. **EXHIBIT 2** is a sample Beneficiary Selection List illustrating how recommendations might be tracked and communicated. However, the list may be

more or less detailed and/or provided in another format. The list will include all completed applications for the period referenced, along with a brief overview of each organization and/or project. The list will be submitted to the Social Action Committee chairperson for distribution to committee members in advance of a regularly scheduled SAC meeting at which final selection will occur.

## 6. Application Review - Preliminary Consideration *continued*

The following criteria will be used to prioritize organizations:

- Alignment with Unitarian Universalist values.
- Current designation as a 501(c) (3) tax exempt organization or equivalent, if a foreign charitable organization.
- Past, current or future congregation member volunteer involvement.
- Percentage of organization's budget for programs versus administrative costs. (GS applicants may request program or general operations support.)

## 7. Communications

Ensuring accurate, timely, effective and streamlined communications is an important part of the GS Coordinator's responsibilities. Therefore, the GS Coordinator or other SAC member assigned by the GS Coordinator, will be the point of contact for all parties, including the applicant, the SAC, any congregation or staff member referring the applicant, UUFSD staff, treasurer and Worship Committee, and will copy other parties on electronic communications as appropriate.

## 8. Selection

At the soonest regularly scheduled meeting following receipt of the Beneficiary Selection list, SAC members shall use the list to make final beneficiary selection(s) by a rating or voting system deemed most appropriate for ensuring compliance with this policy's criteria and broad SAC participation.

## 9. GS Offering

In keeping with UUFSD's Sunday offering policies and procedures, staff, treasurer and/or Finance Committee members will count and document GS offering and notify GS Coordinator, and other who may be designated by the SAC, of the total received within five business days. The GS donation will not include UUFSD pledge payments or other funds received with the offering and determined to be intended for non-Generosity Sunday purposes. **To ensure accurate donation communication, only the GS Coordinator should communicate the donation amount to the applicant.**

## 10. Disbursement(s)

UUFSD will issue a check for 100 percent of the GS donation to beneficiary(s) within four (4) weeks of GS offering and will also notify GS Coordinator of check issuance.

### **FY 2021-2022 Amendment**

There will be four Generosity Sundays for this fiscal year. Each GS recipient is expected to do a brief presentation during the service(s) and do a short educational forum after to answer questions and give congregants opportunities for further engagement with that organization. The coordinator for each of the four (4) focus areas (Climate Action, Helping our Neighbors, Mental Health, and Racial Justice) will be responsible for the following once annually unless no organization in their domain is found. Another focus area may then request to fill that date.

- Soliciting recipients whose organization is consistent with that group's mission and who meet the requirements of the application process (e.g. 501C3 status)
- Walking them through the application process and informing them of the outcome
- Scheduling a date and providing details
- Informing SJA, Office Administrator, Minister, Worship Committee, and arranging for space and AV assist if needed
- Providing info for the Order of Service and announcement for Weekly Newsletter, etc.
- Communicating with recipient regarding all aspects of process. The special Christmas collection for Casa de Luz will continue and is not considered to be part of Generosity Sunday. The winter collection will be spaced apart from that collection