

**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

**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.

**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.



## EXHIBIT 1

# Unitarian Universalist Fellowship of San Dieguito Generosity Sunday Policy

One of the ways our congregation participates in outreach and social justice work is to designate one Sunday in each month as a Generosity Sunday. On these Sundays, we donate the offering to an organization or project that serves the community or the cause of social justice.

Any UUFSD member, committee or staff member can initiate considerations by referring an organization. A Generosity Sunday Application Form must be submitted by the organization.

### **Request Form**

Beneficiary consideration begins with submission of an application. Downloadable forms are available on our website <http://uufsd.org/social-action/generosity-sundays/>. The application form serves the following purposes:

1. Confirms an organization's 501(c)(3) status.
2. Provides an overview of the organization's mission, financial status and intended use of funds.
3. Provides a point of contact.
4. Provides information for use in UUFSD communications related to Generosity Sunday beneficiaries.

### **Beneficiary Selection**

Unfortunately, UUFSD will not be able to support the important work of all the worthy organizations that apply. Our selection considerations are guided by the following criteria. Our Social Action Committee administers the process.

- 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.

Beneficiaries will typically be selected for each of 12 months.

### **Annual Requests**

Our goal is to serve a variety of needs and organizations. Organizations not selected during one selection process may be reconsidered during another selection process within a year of application receipt. Organizations may apply once every 12 months. Designated organizations with which UUFSD has a strong continuing relationship may be invited to submit applications for two projects per year.



## Unitarian Universalist Fellowship of San Dieguito Generosity Sunday

## Application Form

The Unitarian Universalist Fellowship of San Dieguito (UUFSD) considers grants for nonprofit organizations that are recommended by our members. Please review our guidelines below and complete the application carefully. Your application can only be considered if all requested information is provided.

- \_\_\_ Answer all questions respecting the maximum words indicated.
- \_\_\_ Provide current **Board of Directors roster**
- \_\_\_ Provide your most recent **fiscal year-end financial statements**
- \_\_\_ Provide copy of your Federal Tax Exemption Determination Letter – 501(c)(3)

### Contact Information

Organization Name:

EIN:

*Does your organization operate under other names? Program names? If so, please list.*

Mailing Address:

City:

State:

Zip:

Physical Address (if different):

City:

State:

Zip:

Phone:

Fax:

Email:

Website:

Contact Name:

Title:

Our organization was referred to UUFSD by

- Congregation Member \_\_\_\_\_
- Web Search
- Other: \_\_\_\_\_

### Organization and Funding Request

1. Brief (150 words or less) description of your organization. Please include:
  - a. Date you were established
  - b. Description of people served (i.e. how many and demographics)
  - c. What geographic areas are served by your organization?
  - d. What parts of our region are served by your organization?
2. Please state your mission. Please be concise, as we may use this information in our congregation's news mediums and/or press releases if your organization is approved.
3. Please outline the intended use of the funds requested. 100-150 words
  - a. Briefly describe the applicable program or operational need.
  - b. What is the timing is for your funding need?
4. In what year was the organization incorporated?
5. Have you applied for a UUFSD grant in the past? If so, when?

6. In addition to funding support from UUFSD, how do you plan to finance your request?
7. If selected for funding support, can your organization provide approximately 100 informational flyers?

### **If Selected . . .**

We will mail a check to the address you reference below

- Mailing Address in **Contact Information** section above.
- Physical Address in **Contact Information** section above.

### **Application Complete?**

Please review the application for completeness and be sure to include:

- \_\_\_ Current **Board of Directors roster**
- \_\_\_ Most recent **fiscal year-end financial statements**
- \_\_\_ Copy of Federal Tax Exemption Determination Letter – 501(c)(3)

### **Submitted By**

This application is submitted by the following **authorized representative**.

Name:  
Title:  
Date:

### **Questions?**

Questions about this application should be directed to UUFSD Generosity Sunday at **generosity@uufsd.org**.

### **Submit Your Request**

Thank you for answering all items completely, and for emailing or mailing this application and all supporting documents.

generosity@uufsd.org

UUFSD Generosity Sunday  
P.O. Box 201  
Solana Beach, CA 92075

### **Consideration, Notification**

Unfortunately, we will fulfill only a small number of requests and will notify such applicants within 90 days of the application receipt. If not selected in the initial review cycle, qualified requests may be reconsidered for up to 12 months from receipt. Organizations may reapply annually.



## EXHIBIT 2

# Unitarian Universalist Fellowship of San Dieguito Generosity Sunday - Beneficiary Selection Process

The Unitarian Universalist Fellowship of San Dieguito 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.

Following is a list of recent applicants, which are being submitted to the Social Action Committee for funding consideration.

Propose this table be maintained as a simple database online for convenient access and historical record. Excel worksheet might be most user-friendly.

Applications Received: from     date     to     date    

#	Organization Name/	# Served by requested funds	Application Status	Notes	Prior UUFSD Funding?	Project \$ (If applicable)	Priority
1	<b>ABC Helps Kids</b> What: Art program for disabled kids. Who: Children ages 8-15 Where: San Diego County How: Local artists volunteer their When: 3 workshops, begin Apr 2013	60 children	<input checked="" type="checkbox"/> All ? answered <input checked="" type="checkbox"/> Board of Directors <input checked="" type="checkbox"/> Financials <input checked="" type="checkbox"/> 501 (c) (3) Letter	<ul style="list-style-type: none"> <li>▪ Active since 2004.</li> <li>▪ Has cash assets</li> </ul>	none	\$1,500  \$500 ea. for 3 workshops	3
2	<b>Feeding the Poor.org</b> What: Description here. Who: Description here Where: Description here How: Description here	100 children	<input checked="" type="checkbox"/> All ? answered <input checked="" type="checkbox"/> Board of Directors <input checked="" type="checkbox"/> Financials <input checked="" type="checkbox"/> 501 (c) (3) Letter	<ul style="list-style-type: none"> <li>▪ Active since 2004.</li> <li>▪ Has cash assets</li> <li>▪ 3 UUFSD members on board</li> </ul>	2010	\$500	2
3	<b>DEF Helps Kids</b> What: Art program for disabled kids. Who: Children ages 8-15 Where: San Diego County How: Local artists volunteer their When: 3 workshops, begin Apr 2013	60 children	<input checked="" type="checkbox"/> All ? answered <input checked="" type="checkbox"/> Board of Directors <input checked="" type="checkbox"/> Financials <input checked="" type="checkbox"/> 501 (c) (3) Letter	JRUU selected this organization	2011	na	1
4	<b>GHI Helps Kids</b> What: Description here. Who: Description here Where: Description here How: Description here	60 children	<input checked="" type="checkbox"/> All ? answered <input checked="" type="checkbox"/> Board of Directors <input checked="" type="checkbox"/> Financials <input checked="" type="checkbox"/> 501 (c) (3) Letter	Active since 2010	none	na	2
5	<b>JKL Disabled Adults</b> Employment training services  What: Description here Who: Description here Where: Tijuana How: Description here	2000 per year	<input checked="" type="checkbox"/> All ? answered <input checked="" type="checkbox"/> Board of Directors <input checked="" type="checkbox"/> Financials (UUFSD) <input checked="" type="checkbox"/> 501 (c) (3) Letter (UUFSD)	This is a UUFSD project.	2010	na	1
6	<b>CRC Domestic Violence shelter</b> What: Description here. Who: Description here Where: Description here How: Description here	12 women 10 children	<input checked="" type="checkbox"/> All ? answered <input checked="" type="checkbox"/> Board of Directors <input type="checkbox"/> Financials <input checked="" type="checkbox"/> 501 (c) (3) Letter		Annually since 2009	na	2

# Unitarian Universalist Fellowship of San Dieguito

## Generosity Sunday - Beneficiary Selection Process

GS team completes this form and is responsible for communications noted.

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. Following is a list of recently selected beneficiaries.

Date: \_\_\_\_\_

GS Date	Organization	Organization Notified (Name, Date)	Worship Committee Notified((Name, Date)	Treasurer, Admin. Staff Notified (Name, Date)
2013 May 12	<b>DEF Helps Kids</b> JRUU Selected	JRUU to coordinate	<input type="checkbox"/> Susan Hahm, sandchahm@yahoo.com  Date _____	<input type="checkbox"/> Bev Majors <i>Email address here</i> <input type="checkbox"/> Elizabeth. Lindsey office@uufsd.org Date _____
2013 Jun 16	<b>GHI Helps Kids</b> YRUU Selected	YRUU to coordinate	<input type="checkbox"/> Susan Hahm, sandchahm@yahoo.com  Date _____	<input type="checkbox"/> Bev Majors <i>Email address here</i> <input type="checkbox"/> Elizabeth. Lindsey office@uufsd.org Date _____
2013 Jul 28	CRC Domestic Violence Shelter	A. Person, 04/01/13,	<input type="checkbox"/> Susan Hahm, sandchahm@yahoo.com  Date _____	<input type="checkbox"/> Bev Majors <i>Email address here</i> <input type="checkbox"/> Elizabeth. Lindsey office@uufsd.org Date _____
2013 Sep 22	<b>Feeding the Poor.org</b>	B. Lastname, 04/01/13,	<input type="checkbox"/> Susan Hahm, sandchahm@yahoo.com  Date _____	<input type="checkbox"/> Bev Majors <i>Email address here</i> <input type="checkbox"/> Elizabeth. Lindsey office@uufsd.org Date _____

Table to be copied/pasted into one email addressed to all recipients.