

Unity of the Valley
Policy for the use of Lists of Donors, Givers, Pledgers

General Philosophy

We genuinely honor and value gifts that are pledged and given to the Church. We recognize and honor the sacredness and implied understanding of confidentiality in which the gifts are given.

For purposes of meeting IRS regulations and bookkeeping a select few members of the Church have access to the list of pledgers, givers and donors, and the amounts pledged or given. In addition, the lists would be available to a limited number of other Church members for oversight of the above responsibility and potentially for acknowledgment and/or fundraising.

Every minister, associate minister, staff person, member of the Board, or member of the congregation, having access to the list of pledgers, givers or donors, and/or to the amounts given, must first sign a covenant honoring the confidentiality and sacredness of the process and the use of the lists.

The Church shall only work with highly ethical bookkeeping, accounting, legal, and related firms that will honor our intent of confidentiality.

Access

Standing Authority for Both Lists

Pursuant to the bylaws, the Church Treasurer has access to both the list of names and list of amounts associated with each pledger, giver, or donor

Pursuant to the bylaws, the Church Treasurer may delegate the functional responsibility for managing both sets of lists to the Senior Minister, Associate Ministers, the Church Administrator, and consulting professional(s) who assist the Church with bookkeeping, accounting, IRS reporting, or related functions. The Treasurer shall direct the consulting professional with whom they may discuss and release the list addressed by this Policy.

Pursuant to our 501(c)(3) exemption with IRS, the Treasurer shall release donor information to IRS as legally required by IRS. The Treasurer will also comply with any legal court order requiring release donor information.

List of Names

The Board President shall have access to the list of names for appropriate Church purposes as described above.

Other Board members shall have access to the list of names for appropriate Church purposes as described above, subject to the approval of both the Treasurer and President.

Other members of the congregation may be delegated access to the list of names by the Treasurer, for appropriate Church purposes as described above, subject to the unanimous approval of the Treasurer, President and Senior (or acting Senior) Minister.

List of Amounts

The Board President may have access to the list of amounts associated with each pledger, given, or donor, for appropriate Church purposes as described above, subject to the approval of the Treasurer and Senior Minister (in collaboration with the associate minister(s)). Access to the list shall not be unreasonably withheld.

Communication

The Church shall publish and otherwise communicate to the congregation about this philosophy. The Treasurer (and those others delegated authority by the Treasurer under this policy) may not be less restrictive than this Policy permits, but may be more restrictive to honor past commitments.

Dated: June 19, 2012

Unity Board of Trustees