

UUPF Guidelines for Financial Aid Requests

Overview

Fellowship members and committees take seriously their responsibility to manage and use the congregation's financial resources. This guideline provides an understanding of how financial aid requests are accepted and processed.

Financial Aid Definition

"Financial Aid" is any request for money which originates from within the Fellowship or from any outside source.

Criteria for requesting Financial Aid

1. Requests are consistent with UUA principles and the UUPF Mission
2. Requests are consistent with the Fellowship's current-year priorities
3. Funds are available within the current year's budget
4. The request is verifiable (existence of the organization, the project, etc.)
5. The distribution of funds is consistent with the Fellowship's Financial Committee and/or IRS guidelines for religious organizations
6. The request isn't duplicated by other Fellowship committees or groups

Administrative Process

1. The person or committee in receipt of or who is making a Financial Aid request shall refer it to the Social Action Committee (SA) or the Facilitator. The Social Action Committee administrates and processes all requests.
2. If a request meets the criteria, the SA may approve it.
3. For an approved request, the SA Chair will send a written request to the Treasurer to allocate funds.

Any request being evaluated may be brought to the Coordinating Council for further discussion and possible presentation to the membership.

Exclusions

The following are not candidates for receiving UUPF financial aid:

- Basic operating expenses for any UUPF committee, taskforce or the Council
- Travel and related expenses for any organization or individual
- Deficit reductions
- Funds for any lottery or gambling (such as state lotteries, casino, etc.)
- Political parties or candidates
- "Pass through" organizations (such as telemarketing or 3rd-party fundraisers) or private foundations
- Memorial or endowment campaigns/requests