Office Procedures and Guidelines for Committees

**Expenses**

Expenses made on behalf of your committee may be reimbursable by UUSIC. Many Society Committees have budget lines assigned to them. If you do not have a budget, please contact the office or the Board Treasurer to ensure a reimbursement is possible and to determine the correct account number.

*Committees with budgets are responsible for tracking and approving all spending.*

When an expense comes in, fill out a voucher form online at <http://www.uusic.org/vouchers/> (half sheet hard copies can also be found in the front office between the printer and the mailboxes). When using the online form, be sure to select the correct version- ‘Over $200’ or ‘under $200.’ Be sure to attach or mail in any receipts or invoices. Be sure you have approval from your committee chair.

*A list of all account numbers can be found online and is also posted on the bulletin board in the front office.*

Expenses under $200 will be reimbursed or paid directly from the office once the Board Treasurer has approved the voucher. Expenses over $200 go through the accountants and require two signatures from Board members in addition to the Treasurer. Expect an extra delay for expenses over $200.

**Income**

All income from your committee must be funneled through UUSIC, even if it is going to be immediately paid out again (paying for group t-shirts, or a fundraiser for a nonprofit). If you do not have a budget line, you may use #321 (Other Fundraising) for income that will immediately paid out.

Alert the office to any incoming money on behalf of your committee or group, so it can be allocated to the correct budget line.

*Have donors attach a memo to all income identifying the purpose.*

Also alert the office whether income is or is not tax deductible so donors can be credited for their giving. (Attach the names of donors to any cash gifts to ensure they are credited)

*Income is usually deductible when it is given outright to a nonprofit, and not in exchange for a good or service. A portion may be deductible if it exceeds the fair value of the good or service purchased.*

*(over)*

**Scheduling Events**

1. Check the Congregational Calendar, found on the website (uusic.org/services-events/calendar/) for any conflicting events and to ensure your chosen location is available.
2. Alert the office of all upcoming events and meetings. Details to send include date, time, location, and contact information. If the event is public please also include a brief description. If you would like the office to take RSVPs for your event, please alert the office prior to scheduling it.

*Alert the office of events even when they are closed meetings or occur off-site.*

All events will be published on the Congregational Calendar.

Public events and meetings by joinable groups will be published in the Upcoming Events section of the website, as well as in any relevant upcoming publications (Weekly Emails, Orders of Service, monthly issues of the *UU News*, and on social media, as appropriate). The office may edit your description for length and formatting compliance.

*In order to ensure your event makes it into a publication, please send event info/descriptions to the office by noon on Wednesdays (for the Weekly Email and OoS) and by noon on the specified monthly deadline for the newsletter (deadline can be found on the Congregational Calendar).*

1. Create your event in Realm. All Committee events and meetings should be listed in Realm and attendance should be taken afterwards (individual attendance when possible, plus headcounts of all non-group attendees). Alert the office of any Registration Events (events open to the whole congregation or general public which require an RSVP or ticket purchase), as the office will need to set up and track Registrants.
2. Read and ensure compliance with all other UUSIC policies that may affect your event. In particular:
	* Determine if you need childcare, and submit the online Childcare Worker Request Form (or send a hard copy to the Nursery Supervisor) at least two weeks before your event.
	* Determine if you plan to serve alcohol, and read/comply with the Alcohol Policy before scheduling.
	* If you are planning a fundraiser, please read/comply with the Fundraising Policy before scheduling.

*Find more event planning details, the Committee-Related Policy Manual, and applicable forms and links on the website::* [*http://www.uusic.org/****eventplanning****/*](http://www.uusic.org/eventplanning/)