UUSD Finance Committee Charge

Goal: The Finance Committee is a committee of the Board that supports the vision and mission of UUSD and works with the UUSD Finance Officer to assure a solid financial foundation to help the congregation flourish. All cost and policy information is considered confidential until reviewed and approved by the BOT.

Roles and Responsibilities:

1. Support the Finance Officer on any financial issues and responsibilities.
2. Coordinate the Annual Pledge Campaign Program through the Pledge Campaign sub-committee.
3. Coordinate the Annual Operating and Capital Budget Development with UUSD governance, through the Budget sub-committee and propose budgets to the Board of Trustees (BOT) for ratification by the congregation.
4. Coordinate UUSD member “legacy commitment” managed through the Cloud Society sub-committee.
5. Coordinate the planning and execution of the annual accounting review on a timely basis.Identify and propose for the BOT’s approval persons to do the review who are not members of the BOT or Finance Committee.
6. Coordinate capital campaign programs, working with the appropriate committees approved by the BOT.
7. Coordinate the development of financial policy through the Policy Sub-Committee and provide advice to BOT and Committees on financial policy, finance-related bylaws, and other financial matters.
8. Provide capital and reserve fund investment policies and advice.
9. Support fundraising with donation technology and fund management assistance.
10. Encourage UUSD’s various governance bodies to engage in short- and long-term financial planning beyond annual budget development.
11. Help prepare grant proposals.
12. Provide financial analysis and planning support for any activities that fall outside the budgeting process, undertaken by Board approved committees or projects formed within the congregation, such as special fundraisers and the ministerial search process, for example.

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