

## **OPP 2.6 – MEMORIALS AND THE MEMORIALS CLERK**

**PURPOSE:** Define the policies and procedures for accepting Memorial Gifts to Round Rock Christian Church and establish the position of Memorials Clerk on the Administrative Team.

### **POLICY**

The role of the Memorials Clerk is to assist with matters related to the tracking of memorials and honorary gifts, and communications to donors and recipients on behalf of Round Rock Christian Church. Accordingly, it shall be the responsibility of the Memorials Clerk to monitor and administer all memorial and honorary gift recording practices of the Church. The Memorials Clerk is a voting member of the Administrative Team and the memorials and honorary gifts function operates under the direction of the Administrative Team.

### **FUNCTIONS OF THE MEMORIALS CLERK**

The Memorials Clerk is responsible for assisting the Church in matters related to memorials and honorary gifts received by the church. The Memorials Clerk is responsible for the following activities:

- Maintain the complete communications record for memorials and honorary gifts, including:
  - Donor recognition for tax purposes, to include a personalized thank-you letter notifying the donor to expect an upcoming contribution statement from the Financial Secretary.
  - Honoree notification for honorary gifts, to include a personalized notice of any and all donor names (but not gift amounts) unless donor requests to remain anonymous. A Non-member donor's personal contact information may be shared upon recipient request only with prior approval of the donor.
  - Family (next-of-kin and/or church member, as appropriate) notification for memorials, to include a personalized notice of any and all donor names (but not gift amounts) unless donor requests to remain anonymous. A Non-member donor's personal contact information may be shared upon recipient request only with prior approval of the donor.
- Assist in maintaining the memorial and honorary gift records of the church, via a physical and/or electronic archive of all memorial and honorary gifts, excluding gift amounts.
- In conjunction with the Senior Minister, coordinate the acquisition, maintenance, and eventual disposal of lasting physical presentations in recognition of the honoree/memorialized. Physical memorial displays within the church property may include, but are not limited to, wall plaques, building décor, reusable worship materials, property/equipment, or other designated uses as deemed by the memorial request of the family/honoree.
- Track Memorial monetary receipts recommending annual spending allocations for physical displays in line with receipts. However, designated receipts will be handled under the purview of the Treasurer's authority for budget management.
- Reports to the Administrative Team annually to summarize activity for the year, and on an as-needed basis monthly.

The office administration resources of the church will be made available for the Memorials Clerk to use in the accomplishment of the tasks necessary to properly perform the duties described herein.

### **SELECTION OF THE MEMORIALS CLERK**

The Vice Moderator in the role as Administrative Team Leader oversees the activities of the Memorials Clerk. The Vice Moderator selects a Memorials Clerk from the at large membership of the Church. The Term of service will be one year with a maximum of three successive terms.

**DEFINITIONS:**

Memorial or Memorial Gift – A gift given in memory of a deceased person.

Honorary Gift – A gift given in honor of a specific living person or group.

**AUTHORITY:** *Section VI of the Bylaws of Round Rock Christian Church. The Administrative Team performs the staff administrative functions of the church.*

**EFFECTIVE DATE**

May 12, 2011

**LAST REVISION DATE**

May 12, 2011

**LAST REVIEW DATE**

May 12, 2011