

Budget and Expense/Reimbursement Procedure

Call for Budgets - Each Spring, the Finance Committee will ask all committees/teams/groups to submit a budget request for the upcoming fiscal year (July 1 - June 30). It is at this time, each committee/team/group is asked to consider plans for the upcoming fiscal year and what financial support is required to execute those plans.

Please note: All budget requests must be accompanied by documentation/explanation of anticipated use of requested funds.

Procedure for making purchases of goods or services.

1. Each budget category will identify one church member who will assume responsibility for tracking spending against budget. Please inform the Administrator of who has assumed this responsibility.
2. The individual responsible for tracking a particular budget, can either:
 - A. make the purchase and be reimbursed by filling out a check request or sending an email to the administrator with attached receipts, or
 - B. make a formal request, via email, for the administrator to make a purchase.
3. Any individual NOT responsible for budget tracking must first get approval from the member responsible for tracking spending that there are sufficient funds remaining in the budget to cover the expense. Once funding has been confirmed, a committee member may;
 - A. make the purchase and be reimbursed by filling out a check request or sending an email. Check requests must be signed or approved by the member responsible for budget tracking or
 - B. make a formal request, via email, for the administrator to make a purchase. The email chain will include note of approval from the member tracking the budget.
4. Each committee/team/group is responsible for their budget and to not spend over their budget. The administrator can provide spending reports as requested.
5. If a committee/team/group will go over budget because of an emergency situation, i.e. a plumbing problem, an emergency request can be made to the Board via email to allow for overspending.
6. If a committee/team/group would like to spend over budget, they must make a request to the Board **before making a commitment to spend money**. The Board meets on the second Tuesday of the month. A request must be made for a regular Board meeting.

7. A request to reallocate funds must be made to the Board. The request must be made for a regular Board meeting.
8. Any purchases or promises for payment made by a committee/team/group that will put the budget over the approved amount may not be reimbursed by Hopedale Unitarian Parish.
9. Unspent funds in a budgeted item cannot be carried over to the next fiscal year without prior approval from the Finance committee. Funds that are raised through fundraising for a particular project are an exception.
10. Professional Expenses
The Parish Board oversees the minister's professional expenses. The minister oversees staff professional expenses.