



# Memorial Fund Policy

Version 2.0  
April 15, 2025

## 1.0 PURPOSE

The purpose of this policy is to describe the receipt, management, and expenditure of memorial contributions given to United Church of Christ, Congregational in Burlington, MA (UCC Burlington).

## 2.0 SCOPE

This policy applies to financial contributions made in memory of a named church member or friend of UCC Burlington.

## 3.0 POLICY

### 3.1 Policy Statement

3.1.1 UCC Burlington appreciates contributions given in memory of a named church member or friend of UCC Burlington.

3.1.2 Memorial fund donations may be received electronically (e.g., church's online donation tool) or be received in cash or by check.

- The church administrator responsible for the church's electronic online donation tool routinely reports memorial fund donations to the UCC Treasurer and to the Memorial Fund Coordinator.

3.1.3 Memorial donations are managed by the Board of Deacons.

- The Board of Deacons appoints a Memorial Fund Coordinator at the start of each annual church term (i.e., after the Annual Meeting).
- A Memorial Fund Assistant may be appointed to assist the Memorial Fund Coordinator.

3.1.4 Expenditure of memorial funds are recommended by the Board of Deacons and are approved by Parish Council.

3.1.5 Revisions to this policy will be recommended by the Board of Deacons and endorsed by Parish Council.

### 3.2 Types of Memorial Funds

3.2.1 There are four (4) funds to which memorial contributions may be designated:

- 1) General Memorial Fund: Donations may be used for capital items, programs, and projects that are not included in the church's annual operating budget.



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- 2) Youth and Christian Education Memorial Fund: Donations may be used for capital items, programs, and projects related to Youth and Christian Education ministries that are not included in the church's annual operating budget.
- 3) Music Memorial Fund: Donations may be used for capital items, programs, and projects related to Music ministries that are not included in the church's annual operating budget or Special Music Fund.
- 4) Renovation Memorial Fund: Donations may be used for capital expenditures to improve, renovate, and maintain the church buildings or property that are not included in the church's annual operating budget.

## **3.3 Receiving and Managing Memorial Funds**

3.3.1 A UCC member, UCC friend, or the person's representative may designate UCC Burlington to receive memorial donations in the name of a UCC Burlington member or friend.

- A formal designation naming UCC Burlington as a recipient may be made by completing a Memorial Fund form (Step 3.3.2 and Attachment 1).
- Undesignated memorial donations that are received will be managed by the Board of Deacons, as described in this policy.
- The Board of Deacons will assign undesignated memorial donations to the General Memorial Fund (Refer to Section 3.2).

3.3.2 A Memorial Fund form (Refer to Attachment 1), whenever possible, should be completed.

- The Memorial Fund form is used to collect information about the deceased (e.g., name, date of death or date of funeral, representative contact information, and Memorial Fund allocation (Refer to Section 3.2)).
- A copy of the Memorial Fund form may be found on the church's website.
- A copy of the Memorial Fund form may be mailed to anyone who requests it.
- A copy of the Memorial Fund form should be included in the information package sent to the family of the loved one when planning a memorial service.
- When a completed form is received it should be sent to the Memorial Fund Coordinator and a copy retained on file in the church office.

3.3.3 Upon notification that memorial donations will be received, the Board of Deacons Memorial Fund Coordinator requests the administrator of the church's electronic online giving program add the named memorial to the online giving web page.



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- The named memorial may remain on the online giving page for up to 6 months past the person's date of death.
- 3.3.4 The Board of Deacons Memorial Fund Coordinator retains the completed Memorial Fund form and uses the information to ensure that the person's wishes are understood and honored.
- Memorial donations totaling \$300 or less may be moved to the General Memorial Fund at the Board of Deacons' discretion.
  - If the form was not returned, the Memorial Fund Coordinator should contact the family to request their wishes and the Coordinator should complete a form on their behalf.
- 3.3.5 Upon receipt of memorial donations, either a church Collector or the administrator of the church's electronic online giving program completes a Memorial Fund Donations form (or provides an electronic notification).
- The notification or the form should indicate wherever possible, the donor's name and contact information, the amount of the donation, and the name of the deceased.
- A sample of the form is attached. (Attachment 2)
- The person completing the form or electronic notification provides the information (e.g., copy of form or email) to the Memorial Fund Coordinator and to the Financial Secretary.
  - The Memorial Fund Coordinator retains copies of the form and electronic notifications.
  - The Collector deposits cash and check donations per church policy.
- 3.3.6 The UCC Treasurer tracks and reports memorial fund donations on the UCC Burlington's Balance Sheet, per the assigned memorial fund account numbers.
- The UCC Treasurer assigns a memorial fund account number, so that memorial donations specific to a named person may be tracked and reported.
  - Quarterly, the UCC Treasurer provides a copy of the Balance Sheet to the Memorial Fund Coordinator.
  - The Memorial Fund Coordinator should review the Balance Sheet and create a voucher requesting the transfer of the monies from an individual to the family's selected Memorial Fund.
- 3.3.7 Upon notification of memorial donations, the Board of Deacons Memorial Fund Coordinator performs the following:
- Sends a thank you note to each donor.



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- Sends a list of donors to the family to ensure they are aware of all memorials donated to the church; the frequency of sending should depend upon the volume of donations.
- Ensures an inscription of the named person's name is added to the In-Memoriam plaque, which is hung in the sanctuary.

## 3.4 Expending Memorial Funds

- 3.4.1 When the Board of Deacons becomes aware of a financial expense that is not otherwise covered by the church's annual operating budget, Special Music Fund, or other Special Fund, the Board of Deacons may consider using memorial funds to cover the expense.
- 3.4.2 The Memorial Fund Coordinator summarizes available memorial fund options, based on the type of expense and the available monies in the related Memorial Fund category (Refer to Section 3.2).
  - The Board of Deacons may combine memorial fund donations from multiple named people within the same named Memorial Fund to financially support a single program, project, or capital item.
- 3.4.3 The Board of Deacons prepares a proposal for how Memorial Funds may be used to cover all or a portion of the identified expense. This proposal is presented to Parish Council for review and approval.
  - Upon Parish Council's approval, the approved amount of money may be spent by the named project manager, Board, or Committee.
- 3.4.4 Project manager gets the work done and submits the receipt/invoice to the Memorial Fund Coordinator.
- 3.4.5 Upon receiving the receipt/invoice, the Memorial Fund Coordinator completes a voucher with Deacons approval and sends it to the UCC Treasurer per church policy.
- 3.4.6 The UCC Treasurer tracks and reports the expenditure using UCC Burlington's Balance Sheet.
- 3.4.7 When monies are spent from Memorial Funds, the Memorial Fund Coordinator ensures a notice is published in the Hilltop Herald and Annual Report.
  - The notice identifies the name(s) of the named person, from whom the memorial donations were used to fund the capital item, program, or project.
  - With the exception of an inscription on the In-Memoriam plaque (Refer to Step 3.3.7), the name(s) of the deceased are not permanently added to any church building, room, or fixture.



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## 4.0 REFERENCES

None

## 5.0 ATTACHMENTS

1. Memorial Fund Form
2. Memorial Fund Donation Form

## 6.0 REVISION HISTORY

Version	Summary of Changes	Approval Date
1.0	New policy to describe how to manage contributions given in memory of members and friends of the Congregation.	2017
2.0	Policy converted to a new template. Additional details added for clarity and consistency. Development of a Memorial Fund form.	April 15, 2025



## United Church of Christ Congregational, Burlington Memorial Fund Form

UCC Burlington thanks you very much for naming our church as a recipient of financial gifts in honor of your loved one. Memorial fund donations are administered by the Board of Deacons with final approval of expenditures granted by Parish Council.

Memorial Funds donations will not be used for expenses included in the operating budget of the church.

In recognition of your loved one, their name will be inscribed on the In-Memoriam plaque at the back of the sanctuary. We currently do not add names to the church building, rooms, or fixtures.

Please complete the information below and designate the type of memorial fund to which donations will be added and expended. We ask that you return/submit the completed form within 90 days from the date of your loved one's death announcement. If a memorial fund is not selected, the Board of Deacons will assign the *General Memorial Fund* by default.

The types of Memorial Funds are:

- General Memorial Fund:** Donations may be used for capital items, programs, and projects.
- Youth and Christian Education Memorial Fund:** Donations may be used for capital items, programs, and projects related to Youth and Christian Education ministries.
- Music Memorial Fund:** Donations may be used for capital items, programs, and projects related to Music ministries.
- Renovation Memorial Fund:** Donations may be used for capital expenditures to improve, renovate, and maintain the church buildings or property.

*Note: Once the family has chosen their preferred type of memorial fund, the church will carry out their wishes when an appropriate project is proposed. UCC Burlington may use multiple named donations from a memorial fund to support a single program, project, or capital item.*

Donations should be made to: United Church of Christ Congregational, 6 Lexington St., Burlington, MA 01803 either through check, cash or online giving, which may be accessed through our website, [www.uccburlington.org](http://www.uccburlington.org).

Contact the church office at [UCCBurlington@gmail.com](mailto:UCCBurlington@gmail.com) or (781) 272-4547 if you have any questions.

We are very sorry for your loss. May God's love and embrace bring you comfort and support.



## United Church of Christ Congregational, Burlington Memorial Fund Form

This page allows for answers to be entered online or as text.

My Name: [click or tap here to enter text](#)

My Relationship with the Deceased: [Click or tap here to enter text.](#)

My Mailing Address: [Click or tap here to enter text.](#)

My Phone Number: [Click or tap here to enter text.](#)

My Email Address: [Click or tap here to enter text.](#)

My Loved One's Name: [Click or tap here to enter text.](#)

My Loved One's Date of Death: [Click or tap here to enter text.](#)

Please select ONE of the following types of memorial funds to which donations will be added and expended.

- General Memorial Fund**
- Youth and Christian Education Memorial Fund**
- Music Memorial Fund**
- Renovation Memorial Fund**

*Note: Once the family has chosen their preferred type of memorial fund, the church will carry out their wishes when an appropriate project is proposed. UCC Burlington may use multiple named donations from a memorial fund to support a single program, project, or capital item.*

Either submit this completed form online or return it to UCC Burlington, 6 Lexington Street, Burlington, MA 01803. Attention: Memorial Fund Administrator, Board of Deacons. Thank you for supporting UCC Burlington.



## United Church of Christ Congregational, Burlington Memorial Fund Form

This page allows for answers to be handwritten.

My Name: \_\_\_\_\_

My Relationship with the Deceased: \_\_\_\_\_

My Mailing Address: \_\_\_\_\_

My Phone Number: \_\_\_\_\_

My Email Address: \_\_\_\_\_

My Loved One's Name: \_\_\_\_\_

My Loved One's Date of Death: \_\_\_\_\_

Please select ONE of the following types of memorial funds to which donations will be added and expended.

- General Memorial Fund**
- Youth and Christian Education Memorial Fund**
- Music Memorial Fund**
- Renovation Memorial Fund**

*Note: Once the family has chosen their preferred type of memorial fund, the church will carry out their wishes when an appropriate project is proposed. UCC Burlington may use multiple named donations from a memorial fund to support a single program, project, or capital item.*

Please return this completed form to UCC Burlington, 6 Lexington Street, Burlington, MA 01803. Attention: Memorial Fund Administrator, Board of Deacons. Thank you for supporting UCC Burlington.



# Memorial Fund Donation Form

DISTRIBUTION: -Financial Secretary  
 -Memorial Fund Coordinator

Compiled By: \_\_\_\_\_  
 Date: \_\_\_\_\_

	<u>Donor's Name</u>	<u>Address*</u>	<u>Memorial Fund</u>	<u>Amount Donated</u>
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				

(USE ADDITIONAL SHEETS IF NECESSARY)

\*IF DESIRED, A COPY OF THE DONOR'S CHECK CONTAINING THE NAME AND ADDRESS OF THE DONOR MAY BE PROVIDED TO THE MEMORIAL FUND COORDINATOR IN LIEU OF COMPLETING THE ADDRESS SECTION OF THIS FORM. IT IS NOT NECESSARY TO PROVIDE CHECK COPIES TO THE FINANCIAL SECRETARY.

Revised March 17, 2025