



POLICY PROCEDURE MANUAL

Policy Name: **Memorial Donation Policy**

Effective Date: 11/13/2025

Review Date(s): 02/12/2026

Purpose: To provide guidance when helping loved ones through the process of documenting instructions regarding use of memorial funds.

Policy Statement: Upon the passing of a loved one, family members may choose to give a donation in the form of cash to McFarland United Church of Christ (MUCC). Additionally, a member may have documented their wish to donate by adding a Planned Giving Statement to a Will or Trust. The Treasurer and Funeral Coordinator collaborate to assist families with documenting their instructions for memorial donations.

Procedure:

1. Completion of the Memorial Designation Form

- a. At an appropriate time during the planning of Funeral or Celebration of Life, the Funeral Coordinator provides information about memorial designations if the family has indicated intent to make donations to MUCC (checking with the Pastor first to verify if there has been a prior discussion about memorials).
- b. The Funeral Coordinator requests that a family representative complete the Memorial Designation Form to document the family's intentions.
- c. The Funeral Coordinator provides information about the status of the Memorial Designation Form to the Treasurer, including:
 - i. Family received copy of form, but form has not been completed
 - ii. Family has completed form; Funeral Coordinator provides completed form to the Treasurer.
 - iii. Family has completed form but has some questions or requests funds be designated for a specific purpose which need to be addressed by the Treasurer and/or SaLT
- d. If the family documents that the donation should be used based on church priorities, then the Servant and Leadership Team (SaLT) determines which fund or funds the donation will be assigned.
- e. If, for any reason, the family does not complete a Memorial Designation Form within six months of a death and/or funeral service, then any memorial donations received by MUCC are distributed to church priorities as determined by SaLT.

2. Receipt of memorial donations

- a. Financial Secretaries process cash or check donations designated as memorial donations per usual procedures for deposit.
- b. Entry of the memorial donation in the church management software system includes selecting the Memorial Fund and adding the identification of the memorialized individual.

3. Documentation of specific instructions/purpose in a Will or Trust or on the Memorial Designation Form

- a. The family is asked to work with the Treasurer to ensure the loved one's or family wishes are fully understood.
- b. If the Treasurer determines that an existing fund may be used to support the request, the Treasurer assigns the donation to the applicable fund or funds upon receipt.
- c. Requests and instructions that cannot be handled through an existing fund are reviewed by SaLT to ensure the requested use aligns with the church's values and long term plans.
- d. If the instructions are approved, the Treasurer ensures funds are spent as requested which may require the creation of a new, memorial-specific fund to track expenditures.
- e. If the request is not approved by SaLT, then a church representative (typically the Treasurer or Pastor) follows up with the family to share SaLT's feedback and determine next steps.

Policy Review

This policy is to be reviewed by the Servant and Leadership Team (SaLT) and the Funeral Team annually.