



Upper Bay Counseling & Support Services, Inc.

Hosting or Attending Events for the Organization Procedure #2

From time to time, Board Members may host events in the community with the principal purpose of promoting the mission of the organization. Information obtained as a result of these events may be important to the organization. Lists of invitees and attendees will be added to the UBCSS database. Referrals and new contacts will enhance the visibility of the organization. In addition, the costs incurred in holding such events may qualify as charitable contributions to the hosts where the costs of these affairs are not reimbursed by the Corporation.

**Individuals must seek professional advice to determine the application of this guidance to their particular tax situation.*

In general, the following guidelines apply to events whose principal purpose is promotion of the mission of the Corporation:

- Board members' requests to hold events should be submitted in writing to the President of the Board and or the CEO of the organization. The brief request should include the purpose (like fundraising, stewardship, recruiting, etc.) and the venue location, time, date, list of invitees and a brief description of the event goal. The submitted document should be shared with Board President, CEO and Development Department. Either the President of the Board and or the CEO may approve the request. The President of the Board, CEO and the Development Department will keep each other informed.
- Board members should submit to the CEO, in writing, a brief report of the event including a list of attendees with contact information and any follow-up requested or required.

Board members may also be asked to attend community events that are paid for by the Corporation for the purpose of promoting the mission of the organization. The following guidelines apply to the attendees of those events.

- A brief summary following this event should be made to the CEO. The summary should include a list of contacts made with as much contact information as possible. There should be included in the summary a brief notation for each contact regarding the nature of the encounter (discussions relevant to Upper Bay, stewardship, marketing, etc.).