


<p align="center">ONEIDA NATION STANDARD OPERATING PROCEDURE</p>	<p>TITLE: ONEIDA FINANCE FUND for PRODUCT (formerly the Community Fund)</p>	<p>Origination Date: Amendment Date: Dec. 23, 2010 Sept. 19, 2016 <i>August 29, 2022</i> Effective Date:</p>
<p>Unit Number: 5122X06</p>	<p>APPROVED BY: Finance Committee Action</p>	<p>DATE:</p>
<p>Larry Barton, Chief Financial Officer</p>	<p>APPROVED BY: </p>	<p>DATE: <i>10/19/22</i></p>
<p>Treasurer</p>	<p>APPROVED BY:</p>	<p>DATE:</p>
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1 PURPOSE: To set a standardized process for Oneida community members to request beverage products from the Oneida Finance Fund. The Oneida Nation wishes to show their commitment to the membership and community by providing beverage product donations to support the following events as identified by the Finance Committee:

1. Oneida Tribal & Public-School Systems Student Events
2. Oneida Community Events /Fundraising
3. Oneida Sponsored Health & Safety Events.

2 DEFINITIONS:

- 2.1 Requester-** Person(s) asking for a product donation. This includes Oneida tribal citizens, Oneida community groups, and Oneida programs/departments.
- 2.2 Designee** – Person appointed by the Finance Committee to develop and process the paperwork /forms required to obtain the product from the vendor.
- 2.3 School Event** – Extracurricular school sponsored events that directly benefit the Oneida students with refreshments such as school dances, proms, graduation, etc.
- 2.4 Community Events** – Events that are free and open to the public and encourage positive educational /social /physical activities that benefit the Oneida Community.
- 2.5 Fundraising Activities** – Fundraisers by Oneida members to utilize the product as part of the fundraiser such as sporting events, family events or local Oneida group events.
- 2.6 Twelve Month Period** - The time period measured by the Fiscal Year of the Oneida Nation which begins Oct. 1st and ends the following Sept. 30th.
- 2.7 Request Review** – The Finance Committee will review all completed Oneida Finance Fund Product requests once each month at their first scheduled meeting of each month.
- 2.8 First Come, First Served Basis** – Product allocations are limited therefore requests

for product will be on a first come, first served basis. Only completed product applications/requests will be reviewed.

3 WORK STANDARDS / PROCEDURES:

3.1 All requests for products shall be submitted Online (preferred) or in writing to the designee of the Finance Committee. The requester will complete the Oneida Finance Fund Product Request application and include all the required information and backup:

- 3.1.1 Name, Phone/Cell number, Oneida enrollment number, address, and email address of requester;
- 3.1.2 Name and Date of Event where product is to be used;
- 3.1.3 Reason for the request i.e. fundraiser or free refreshments;
- 3.1.4 Amount (25 case limit) and type of product being requested;
- 3.1.5 Date product needed (cannot be more than 3-5 days before event);
- 3.1.6 Name of Program / Department (as applicable);
- 3.1.7 Description of how activity benefits Oneida members/Community;
- 3.1.8 Supervisor approval required for requests from programs / departments.

3.2 The requester will E-Mail or mail the completed Oneida Finance Fund-Product Request Form and associated backup to the designee of the Finance Committee, who will:

- 3.2.1 Acknowledge the receipt of the completed request.
- 3.2.2 Places a redacted copy of the request on the agenda of the first Finance Committee meeting of the month.
- 3.2.3 Returns all incomplete requests back to requester with a list of items missing.

3.3 When the request is approved or denied, the designee of the Finance Committee will:

- 3.3.1 Notify the requester via e-mail of the status of request and next steps;
- 3.3.2 If approved, prepares the paperwork for submission to the vendor
- 3.3.3 Notifies the requester of the pickup instructions when approval received from vendor.
- 3.3.4 Requester will be responsible for product pickup; there will be no delivery of product to the event by vendor (with limited exceptions).

3.4 The Designee will provide the Finance Committee with monthly reports of the Oneida Finance Fund Product Activities.

- 3.4.1 The Designee will development and maintain a spreadsheet of all Oneida Finance Fund product activities / expenditures.
- 3.4.2 Each month the Designee will prepare an update report that provides a summary of spending, current balance & number of cases remaining, current requests pending, and outlines of spending / product distributed by quarter and category.

4 DISTRIBUTION AMOUNTS & PROCEDURES

4.1 The annual distribution amount is determined through the contract with the vendor and calculated by case cost each year.

- 4.1.1 Product requests will be limited up to 25 cases maximum, with limited exceptions to be determined by the Finance Committee.
- 4.1.2 A request for a product donation is limited to one request per event / per requester / per year.
- 4.1.3 All product requests will be limited to product available for the Fiscal Year on a first come, first served basis.
- 4.1.4 When approval is obtained from the vendor, the designee will E-Mail a pickup notice to the requester.
- 4.1.6 All unused product is to be returned to the designee to the Finance Committee within 5 working days after event.

5 AREAS NOT COVERED

5.1 Product requests for the following (but not limited to) are prohibited and will not be reviewed.

- 5.1.1 External requests (requests from private organizations outside the Oneida Community).
- 5.1.2 Requests that have already taken place by FC review date.
- 5.1.3 Requests for individual / program / department for personal use.
- 5.1.4 Fundraising by programs / departments/individuals where proceeds are used for personal use.
- 5.1.5 Events that are considered unsafe, such as an indoor group activity and do not practice /prepare for social distancing.

6 REQUIRED FOLLOW UP

6.1 All recipients of the beverage products from the Oneida Finance Fund are responsible for the following:

- 6.1.1 Recipients must submit a written follow up report to the Oneida Finance Fund within 60 days of the event. The report must include a brief description of the results of the fundraiser / event. The receipt from the vendor must be included.
- 6.1.2 The designee will update the spreadsheet of completed product requests and close out the e-file and office file.
- 6.1.3 The designee will send report reminders to requesters who do not provide a timely report.
- 6.1.4 If follow up report is not received by the end of the fiscal year when product received, requester will be ineligible to reapply in the next fiscal year.