

Louisville Zen Center – Financial Decisions

May 11, 2017

Decision	Group Leader	Board of Directors	Treasurer	Secretary	Sangha	Department Heads
Overall operating budget & adjustments	I	D	I	I	C	I
Financial statements/charts	C	I,C	D	I	C	C
Departmental budgets	I	D	I	I		I,C
Normal purchases up to 10% of budget			I			D
Unusual purchases up to 10% of budget		C	D			I
All purchases over 10% of budget*		I	D			I
All purchases over 15% of budget*	I	D	I	I		
Capital purchases	I	D	I	I		I
Make-or-buy issues			I			D
Information technology			D			I
Investment transactions		D	I	I		
Investment policies		D	I	I	C	
Dues and fees	I	D	I	I	C	
Rental Fees & Policies		D	I		C	
Staff salary/health insurance/retirement policies	I	D	I	I		
Insurance: policy/vendor selection		D	I	I		
Use of endowment fund	I	D	I	I	C	
Capital campaigns	I	D	I	I	C	
Donor solicitation	I	D	I			

D = decision owner

I = input for/influence on the decision

C = to whom decision needs to be communicated