

Fundraising Policy The Unitarian Church in Summit

Any member or group of members of The Unitarian Church in Summit (the "Church") may raise money to benefit the Church or a reputable charitable organization as long as they comply with the requirements set forth under this policy statement. For purposes of this policy statement, fundraising is any activity organized to solicit contributions from or sell goods or services to members of the congregation or the public and excludes ad hoc fundraising among members of a committee to serve the mission of that committee as long as the committee's primary purpose or function is not fundraising.

Fundraising Requirements

1. Any monies raised may not financially benefit directly or indirectly any individual Church member. Any potential conflict of interest arising in connection with fundraising for use by an outside organization shall be subject to the Financial Controls Policy of the Church.
2. No funds may be raised by offering games of chance, gambling, raffles, or any other opportunity where the benefit received by the person providing funds involves an element of risk.
3. Any costs and/or expenses that are incurred for fundraising must be substantially less than the anticipated funds to be raised.
4. Fundraising activities must be in keeping with Unitarian Universalist principles.
5. Excluding (a) Board-directed fundraising events such as, but not limited to, the Services Auction, the Garage Sale, and the Partner Church Pancake Breakfast; (b) Second Saturday Admission Fees; (c) fundraising by the Youth Group through the sale of coffee and eco-bags; and (d) any fundraising by any children, including the Youth Group, enrolled in the Religious Education program for which proceeds are not anticipated to exceed \$500 in any given month ("RE Fundraiser"), (e) plate collections proposed by the Social Action Committee and included as part of the approved budget for the current year, organizers of any fundraising activity must generate a brief, written proposal explaining the nature of the activity, the amount of funds expected to be raised, anticipated costs and expenses, and the proposed use of funds. The proposal must include the signature of the Church Office Manager acknowledging approval of the date of the fundraiser. The completed proposal should be submitted to the Finance Committee for approval before any material expenses are incurred and at least six (6) weeks prior to the proposed date of the fundraiser. See attached form.
6. A fundraising proposal that includes a commitment to cover any shortfall must state that commitment in writing, or, in the alternative, any Finance Committee approval must be conditioned, in writing, on such commitment.
7. A final report specifying revenues, expenses, profit, and use of proceeds should be submitted to the Finance Committee within one month of completion of any fundraising activity.
8. All fundraisers, including Board-directed fundraising, must be scheduled with the Church Office Manager. Every effort will be made to avoid scheduling fundraisers that overlap and during the beginning of the annual budget drive. Fundraisers will be separated by a reasonable amount of time if possible. By July 31 of each fiscal year, the Church staff will provide a schedule of upcoming fundraisers for the new fiscal year to the Finance Committee and the Board. Such fundraisers will include any special collections that are UUA-sponsored, dedicated plate collections, and traditional fundraisers. A fundraiser organized to provide aid after a catastrophe or emergency will be permitted upon acceptance by a majority of the officers of the Board and at least two members of the Finance Committee.

9. Non-members including vendors may offer to share proceeds with the Church as part of a program of selling services or merchandise to members as long as approval is received at least four (4) weeks in advance from the Finance Committee.
10. No fundraisers sponsored by members that are held on the Church's premises will be permitted that do not benefit the Church or a reputable charitable organization.
11. All other policies of the Church and local and state laws and regulations must be adhered to.

Exceptions to this policy must be approved by the Finance Committee and the Board.

Approved 8/17/2009

PROPOSAL FOR

**FUNDRAISER
The Unitarian Church in Summit**

Description: _____

Date of Fundraiser: _____
Approved by: _____,
Church Office Manager

Anticipated Revenues: \$ _____
Anticipated Expenses: \$ _____
Anticipated Net Proceeds: \$ _____

Use of
Proceeds: _____

Organizing
Members: _____

Date Submitted: _____
