

Fundraising Policy and Procedures

Unitarian Universalist Congregation of Rockville (UUCR)

Board Approved Ellen Rohan, President

Date April 18, 2017

Background

This document establishes UUCR's policy governing fundraising activities undertaken by committees, the Lay Ministry Council and the Board. Fundraising activities can beneficially supplement UUCR's operating budget by supporting projects, such as local charities, emergency relief efforts, or special causes at UUCR.

Requirements

With limited exceptions, all UUCR fundraisers require that a formal proposal be submitted to the Board for approval. Certain well-established annual fundraisers are excluded from the proposal process; specifically, the canvass drive, the annual endowment and music fundraisers, the Action Auction, and the Fall Fundraiser. The minister selects the Christmas Eve collection recipient, in coordination with the Board. Collections for the sole purpose of defraying expenses for an annual, congregation-wide activity, such as the Seder, also do not require a proposal. However, each of these activities still requires Board approval and Council scheduling to proceed. Fundraiser sponsors seeking non-cash donations of goods and services shall follow this policy according to the anticipated value of in-kind contributions.

All existing, annual fundraisers not identified above require submission of a proposal to the Board for approval. Sponsors do not need to resubmit proposals each year for Board approved annual fundraisers, unless the fundraiser changes appreciably in scope.

Fundraisers must comply with each of the following requirements:

1. Sponsor: All fundraisers shall be sponsored by a UUCR committee, task force, or other recognized group, the Council, or the Board of Trustees. An individual may not submit a fundraising proposal on his or her own behalf.
2. Approval: Fundraisers shall be approved according to the Approval Process outlined below. Activities shall not begin on a fundraiser until approval has been granted.
3. Scheduling: Fundraisers shall be scheduled so that they do not interfere with the goals or schedule of another Board-approved fundraiser.
4. Beneficiary restrictions: Fundraisers shall not be used to supplement specific program budgets, other than the general UUCR operating budget.
5. Accountability: All income and expenses of a fundraiser shall be accounted for and entered into UUCR's financial records.

Proposal Preparation

Before initiating a new fundraiser, the sponsoring group shall discuss the idea informally with the Minister and the Board President or Vice-President. They will help determine the general appropriateness, feasibility, and timing of the fundraiser.

Once informal agreement with Board leadership has been reached, the sponsoring group shall prepare a fundraiser proposal (attached). The proposal identifies the beneficiary, proposed dates for the fundraiser, anticipated gross revenues, resources required, expenses anticipated, outside groups involved, and any planned publicity. The sponsor shall sign the proposal, obtain Council approval of the proposed fundraising dates and submit the proposal to the approving body listed below. Sponsors should allow 60 days if the Board's approval is needed.

Proposal Approval

The Board of Trustees approves all fundraisers except for:

- the Religious Education Committee which approves its fundraisers for RE teens and youth groups, provided the fundraiser is expected to generate less than \$500 in gross proceeds, and
- the Social Justice Committee which approves Share the Plate Program beneficiaries in consultation with the Ministers.

Scheduling

Most fundraisers are scheduled by the Council. The Council should give priority to large-scale fundraisers or fundraisers that support the congregation's vision and mission. The Council should avoid scheduling more than one fundraiser of any kind during a single month.

Implementation

The sponsoring group is responsible for carrying out all activities associated with organizing and implementing the fundraiser and assuring the safety of all funds collected. All collected funds shall be deposited by the Assistant Treasurer for Deposits into a pass-through account. All checks collected shall be made out to UUCR with the fundraiser name listed on the check's memo line. A second person should be present during any cash transactions. No person should ever reimburse himself or herself for expenses directly from collected proceeds. If reimbursement is required, an expense voucher must be submitted through the Chair of the Committee.

Disbursement

At the conclusion of the fundraiser, the sponsoring group is responsible for submitting a voucher in a timely manner to the Assistant Treasurer for Disbursements to authorize the transfer of collected funds to the intended beneficiary.

Unitarian Universalist Congregation of Rockville - Fundraiser Proposal

(Before beginning the fundraiser, complete all sections and obtain all signatures required.)

1. Name of fundraiser _____

2. Sponsoring committee _____

3. Contact for fundraiser:

(Name, tel. #,
email address)

4. Beneficiary _____

5. Anticipated gross revenue (\$) _____

6. Anticipated expenses (\$) _____

7. Proposed dates for the fundraiser _____

8. Describe the fundraiser

What resources do you require? What expenses do you anticipate? What outside groups are involved?
Who within UUCR should be informed? What publicity inside/outside UUCR do you plan?

Sponsor contact signature: _____ Date _____

Scheduling body signature: _____ Date _____

Approving body signature: _____ Date _____