

# **FUNDRAISING POLICIES & PROCEDURES FOR UUCA**

## **Purpose**

The purpose of the UUCA Fundraising Policy is to ensure a coordinated and consistent approach to raising funds within the congregation for internal and external support.

## **Scope**

These Policies & Procedures address the following kinds of fundraisers:

- Any event, activity, or ongoing endeavor conducted in the name of UUCA and/or utilizing UUCA assets to raise funds.
- Events, activities, ongoing endeavors in which goods are collected or services solicited, which
  - are intended to involve the entire congregation &/or
  - have a significant impact on/presence in UUCA's facilities &/or
  - require staff coordination and support

## **Fundraising Approval Process**

- All fundraisers within the scope of these Policies & Procedures must be approved by the UUCA Generosity Committee.
- Proposals for fundraisers are to be submitted via the UUCA Fundraising Application Form, available in the UUCA office and on-line at:

[http://www.uuca.org/wp-content/uploads/2008/09/UUCA\\_Fundraising\\_Application\\_Form.pdf](http://www.uuca.org/wp-content/uploads/2008/09/UUCA_Fundraising_Application_Form.pdf)

- Once the form is received, a determination will be provided, with any stipulations or requests, within 14 days.
- Only approved fundraisers may be communicated through official UUCA communication channels, including, but not limited to:
  - The Weekly Update
  - The newsletter
  - The website
  - UUCA's Facebook page
  - UUCA Announcements list
- Fundraisers budgeted in previous years will be evaluated by the Generosity Committee as part of the annual budgeting process. Events in which goods and services are collected which are beyond the scope of these Policies & Procedures may be publicized (as space allows) through UUCA communication channels. UUCA groups who use non-UUCA email lists and social networking sites are encouraged to make clear the difference between official UUCA fundraisers and personal invitations by group members to non-UUCA fundraisers.

## **Fundraising Proposals**

Fundraising proposals must come from one of the following sources:

- An Official UUCA group (as communicated by its) official contact
- A UUCA staff member
- A UUCA member or pledging friend who is raising money for the UUCA General Operating Budget

Sources that are not eligible to propose fundraisers at UUCA include:

- Unofficial UUCA groups
- Groups not connected with UUCA

## **Recipient Regulations**

In order to maintain compliance with laws governing congregational finances, all recipients of UUCA fundraising proceeds must fall under one of the following categories:

- The UUCA operating budget, or a UUCA program
- A congregation or 501(c)(3) non-profit organization
- A direct program or service covered under an umbrella 501(c)(3) non- profit organization
- A department or operating function of a 501(c)(3) non- profit organization

UUCA fundraising proceeds may not be disbursed to the following:

- Individual congregants (funding requests for individuals will only be considered through the Minister's Benevolence Fund, and is governed by the rules and policies of that fund)
- Electoral campaigns or candidates
- Lobbyists or political action groups

Note: Fundraising activities and/or recipients which could threaten or in any way impair UUCA's non-profit status are strictly prohibited.

## **Scheduling**

We want to prevent three undesirable circumstances:

1. fundraisers which conflict with major UUCA events;
2. fundraisers which are so numerous that congregants feel overwhelmed by too many requests; and
3. particular UUCA groups or programs which sponsor an excessive number of fundraisers, thus limiting fundraising opportunities for others.

- The Generosity Committee will create and maintain an annual fundraising calendar.
- Space requests for all fundraisers should be submitted to the UUCA office through established scheduling procedures and protocol;
- Fundraisers for a given UUCA group or program area will be limited to a reasonable number as determined by the Generosity Committee within a given calendar year.

### **Additional Guidelines**

- All endeavors and events will have a selected “treasurer” who will be responsible for financial practices, and the treasurer must liaise with the Executive Director to ensure compliance with financial practices and policies. The treasurer will also enlist and oversee one volunteer who will count and sign-off on final income figures.
- All funds from events and endeavors must be delivered to the UUCA office, with a full accounting sheet (to be provided by UUCA), within 7 days. A final detailed income and expense report will be turned in to the Executive Director no later than 14 days after the event or endeavor, and all event receipts must accompany this report.
- All pre-approved re-imburements must be submitted on UUCA financial forms within 7 days of the event; receipts must accompany these requests.
- After all funds are received, and all financial paperwork is submitted, a check will be generated, or funds credited to the appropriate and approved recipient. This will take place within 14 days of receipt of final detailed report and event accounting.
- Any returned checks and subsequent fees will be deducted from the net proceeds until good funds are received.
- Contracts may be signed only by the Executive or the Executive’s designee.
- A minimum of 10% of net profits from all approved fundraisers that do not exclusively support the UUCA operating budget will be given to UUCA Operating Fund in order to cover building/overhead costs.

*Revised 03/06/2013*

**UUCA FUNDRAISING APPLICATION FORM**

**Event Name:** \_\_\_\_\_

**Brief Description:** \_\_\_\_\_

An application must be in compliance with current UUCA Fundraising Policy.

Fundraising Proposal Source (please circle one):    **official UUCA group**    **UUCA staff member**

Contact Person:

**Name (print)** \_\_\_\_\_ **Contact Information:** \_\_\_\_\_

**Official UUCA Group Represented** \_\_\_\_\_

**Recipient of the Fundraising Proceeds:** \_\_\_\_\_

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- *A direct program or service covered under an umbrella 501(c)(3) non- profit organization*
- *A department or operating function of a 501(c)(3) non- profit organization*

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- *Electoral campaign or candidates*
- *Lobbyists and political action groups*

**Proposed Date of Fundraiser:** \_\_\_\_\_

Treasurer for Fundraiser:

**Name (print)** \_\_\_\_\_ **Contact Information:** \_\_\_\_\_

All endeavors and events will have a selected "treasurer" who will be responsible for financial practices, and the treasurer must liaise with the Executive Director to ensure compliance with financial practices and policies. The treasurer will also enlist and oversee one volunteer who will count and sign-off on final income figures.

Approval Process:

- All proposed UUCA fundraisers must be approved by the congregation's Generosity Committee
- Once the UUCA Fundraising Application Form is received, a determination will be provided, with any stipulations or requests, within 14 days.    *Revised 1.15.2013*