

#### 4.D. POLICY – Fundraising

*Last approved by the Board of Trustees: 2018*

Purpose of Policy: To provide a framework for conducting fundraising efforts, complying with Congregational procedures, and avoiding conflicts with other church events.

UUCM Fundraising Objective: Raise sufficient funds annually to support key programs, pay operating expenses, and ensure long-term financial security by implementing strategic fundraising appeals and events that engage church members while supporting UUCM's mission and values.

Definitions:

**Fundraising:** *Collectively, all appeals, events, and other solicitations where the main purpose is to raise funds for or through UUCM.* Fundraising is an ongoing and strategic process. It is undertaken for the good of the Congregation—primarily, to support its general and programmatic needs or for designated community outreach activities.

**Direct appeals:** *Our core, regularly-occurring fundraising efforts, such as the annual pledge drive.* These appeals raise direct contributions to benefit UUCM; no goods and/or services are given in return for the contributor's donation. In rare cases, a direct appeal might support our community outreach efforts, such as our annual homeless appeal or a special collection for our partner church.

**Fundraisers:** *Events and activities held on one or more specific dates, such as bake sales, concerts, craft fairs, crab feeds, or auctions.* Goods and/or services (food, crafts, music, etc.) are given in exchange for the contributor's donation. In rare cases, a fundraiser might support our community outreach efforts, such as an event to raise funds for a specific Social Justice project.

**Special Gifts:** *Special gifts are individual donations which are solicited separately from UUCM appeals and fundraisers, such as bequests and memorial wall plaques.* For complete information, see the Board policy on Special Gifts: Legacy, Memorial, and Honor.

1. If an activity (appeal, event, or other solicitation) will ask UUCM members and friends to participate or financially contribute OR will use UUCM financial, staff, volunteer, or other resources, it is governed by this policy, even if the total net proceeds will benefit another organization.
2. Unless otherwise determined prior to holding the direct appeal or event, all fundraising will be for UUCM's general operating expenses.
3. **Direct Appeals:** The following direct appeals are UUCM's core fundraising efforts:
  - a. annual pledge drive,
  - b. year-end appeal, and
  - c. weekly Sunday Service offerings.

## PROCEDURE – Fundraising

*Last approved by the Board of Trustees: 2018*

1. Direct Appeal activities **MUST** be conducted each year to ensure the financial health of UUCM. Other direct appeals may be conducted with prior Board approval. The request must be made in writing to the Board President at least 30 days in advance of the anticipated appeal (please complete the [fundraiser application](#), except the Budget section).
2. **Fundraisers:** Fundraising Events (fundraisers) may vary from year to year. In a given year, one major (>\$10,000) and one to three minor (\$1,000–\$10,000) fundraisers should be conducted, depending on the congregation's financial needs and volunteer interest and availability.
  - a. A fundraiser application is required and must be submitted to the UUCM Administrator at least 45 days in advance of the proposed event in order to receive full consideration by the Board. All applications will be screened in advance by the UUCM Administrator. If a proposal meets all the criteria listed in (c) below, the Administrator will forward it to the Board for approval.
  - b. No fundraiser will be approved unless a coordinator for the event has already been identified and has committed to take on the responsibility. The coordinator may be the person proposing the project or someone else, but a coordinator must be in place at the time the application is submitted.
  - c. When reviewing fundraising event applications, the UUCM Administrator and the Board will consider the following criteria:
    - i. Is the event consistent with the mission and priorities of the Congregation?
    - ii. Is the timing of the event conducive to its success, and not disruptive of other Congregational events or appeals?
    - iii. Is there a committed coordinator for the event?
    - iv. Does the Congregation have the volunteer energy and financial means necessary to support the event?
3. **Special Gifts:** For complete information, see the Board policy on Special Gifts: Legacy, Memorial, and Honor.
4. For all fundraising appeals and events, all significant identifiable expenses to UUCM shall be charged against the income collected and/or taken out of the sponsoring committee's budget, if applicable.
5. All fundraising income collected **MUST** be deposited immediately in the safe in the Robinson/Community Room or given to the UUCM Administrator (if available). Place the funds in an envelope and clearly label it with the date, amount enclosed, name of the fundraiser, and contact information of the person depositing the funds. *For legal and liability reasons, no congregant should ever take home the proceeds of church fundraising appeals or events.*
6. Total fundraising income collected shall be deposited with the UUCM Administrator; all expenses shall be disbursed through standard accounting procedures. It is not acceptable to reimburse expenses directly from event proceeds.

7. Fundraisers by committees for committee expenses are not allowed. Committees should anticipate their total annual expenses and request that amount during the annual budgeting cycle each spring.
8. Fundraising may not be conducted for political or personal purposes. Requests to aid individual congregants shall be referred to the Minister, who may use Ministerial Discretionary Funds for this purpose.
9. Special collections, whether by solicitation of part or all of the Congregational membership or by Sunday basket, must be approved in advance by the Board. The request must be made in writing to the Board President at least 30 days in advance (please complete the [fundraiser application](#), except the Budget section).
10. If funds are being raised for a specific facilities project (such as a new playground), and should the proceeds exceed the cost of the project, any surplus shall be applied toward UUCM's general operating expenses.
11. Activities and events where income earned is incidental (such as extra income collected at a committee lunch) are covered by sections #6 and #8 of this policy.
12. Current year fundraising results and upcoming year fundraising goals will be reported and reviewed at the annual meeting of the congregation.

Visit UUCM's [Fundraisers](#) web page.