

# **FUNDRAISING POLICIES & PROCEDURES FOR PROGRAMMING DEPARTMENTS**

## **Definition of Fundraising**

'Fundraising activities' are those activities that are designed to make money for an approved church event and/or organization. This would include the immediate exchange of money for merchandise or food. Free-will donations, order taking, paying fees, sales of visual arts exhibit items, or advance ticket sales for church sponsored events are not included in the definition. This procedure also applies to fundraising activities that do not include the immediate exchange of money for merchandise or food if such activities require the reservation of a room at the church.

## **Authority:**

Responsibility for approval of changes in these policies and procedures will reside with the Board of Trustees, acting on the recommendations of the ACC and Finance Committee.

## **Policies:**

The All Church Council (ACC) is the decision making body for all fundraising requests from First Universalist's programming areas.

It is recommended that, except for special events, there should be a limit of four fundraising activities on any single Sunday morning, with a maximum of two of these being for food sale activities.

Fundraising activity requests should not be approved for activities/items that:

- Conflict with annual or major church calendar events (e.g. church auction), or
- Conflict with IRS 501(c)(3) tax-exempt status regulations.

Fundraising plan requests can be approved for activities/items that:

- Are submitted to the appropriate Council Chair on a Fundraising Activity/Event Request Form (available from the church office) and
- Are consistent with the church's mission and
- Are approved by the appropriate Council Chair or other member of ACC as determined by that body, and
- Have a detailed plan to monitor collection and control of funds (information is available from Council Chairs and
- Are designed to generate funds for a committee, council, or activity of the church, and

- Fundraising events that involve outside organizations and have First Universalist sponsorship must follow the same guidelines as outlined below. The program area sponsoring the activity is responsible for obtaining this approval prior to committing to the event. Organizers of large events and events involving non-First Universalist organizations may be required to pay related rental and/or maintenance/clean-up fees. See 'First Universalist Church Resource Manual' for guidelines on sponsoring outside organizations

**Procedures:**

- All program areas and its committees are asked to provide a general outline of their expected fundraising activities, in writing to their Council Chair by October 1<sup>st</sup> of each year. Events that occur annually should be noted as such.
- Each committee shall submit to their Council Chair, by the first of each month a Fundraising Activity/Event Request Form describing their planned or proposed fundraising activities for the following month. For example: requests to do fundraising in December should be submitted by November 1. The ACC will make decisions on all requests at its monthly meeting.
- Multiple requests from a single Council will be prioritized by the Council Chair for that Council.
- The Council Chair responsible for the request will communicate the decision to the person generating it and make arrangements for any church calendar submissions.
- Groups engaged in ongoing weekly fundraising may submit plans on a quarterly or annual basis, but are advised that fundraising approval extending more than one month in advance could be modified or withdrawn if capacity limitations create difficulties for other fundraising efforts within the church.
- All profits from approved fundraisers must be submitted directly to the office with instructions as to where this should be deposited. In the event the office is closed, there is a safe available in the Welcome Center. The exception is AUW, who manage their own funds. Any need for staff support for fundraising activities should be discussed in advance with the Director of Member Services.

Requests for exceptions to the above procedure should be forwarded to their Council Chair or the ACC Chair for action by the ACC.