

## **Eastrose Fellowship Unitarian Universalist**

### **Fundraising Policy**

Fundraisers are an important part of active church life. They provide opportunities for congregants to build relationships and to strengthen their commitment to the church. They also provide funds for the church as well as for approved charitable causes.

#### **Purpose**

The purpose of this policy is to establish guidelines for approval of church fundraisers for any purpose, by any means, and at any location in order to ensure that our fundraising activities:

- are consistent with the Mission Statement of Eastrose Fellowship Unitarian Universalist,
- are consistent with the Purposes and Principles of the Unitarian Universalist Association,
- are consistent with our not-for-profit status,
- focus our resources on the church's highest priorities and the approved church budget, and
- avoid overburdening the congregation with requests for money.

#### **Scope**

All church fundraising activities must be reviewed and approved under this policy.

A "church group" is a committee, club, group, task force, class, or other internal group of Eastrose.

Any outside person/group requesting to raise funds at church or through church must have a church group as a sponsor for their fundraiser. The only exception is for children/youth enrolled in our Religious Education (RE) program selling items for scouts, school, or any other non-church activity (see Review Process below).

Activities that request contributions intended **only** to cover the expenses associated with that event (e.g., food, supplies, honorarium for a speaker, equipment rental) are **not** considered fundraising events. Such break-even activities do not have to be reviewed under this policy. However, if contributions are being split (part for expenses and part for the church or for an outside group), then this fundraising policy does apply, and the fundraiser needs approval.

Ongoing and annual fundraisers (such as Sharing the Bounty, the Service Auction, Winterfest, and the Generosity Drive) are covered by this policy. Once approved, these fundraisers do **not** need to come back for approval each year.

Political fundraisers for individual candidates or parties are not permitted, but support for causes (such as support to promote the Dream Act) may be considered.

Performers and guest speakers who wish to sell CDs and other merchandise are covered by this policy.

### **Review Process**

All fundraising activities must be approved in advance by the Finance Committee, Administrator, or Director of Religious Education, as explained below.

A congregant must submit a request in writing on behalf of any group seeking to engage in fundraising activity. The request should be submitted well in advance of the fundraiser, and **no later than the first of the month prior to the event**, to allow time for Finance Committee approval as well as subsequent publicity. This request is sent to:

- the Finance Committee chair, or
- the Eastrose Administrator (if for less than \$200), or
- the Director of Religious Education (if from children/youth for their non-church activities).

The request must include the following:

2. Who is this fundraiser for? If it is for an outside group, is that group designated as a 501(c)(3) non-profit? If it is for an outside group, are you asking Finance Committee to donate the entire amount (see Sharing Net Profits below)?
3. What are you going to do to raise the money?
4. How much money do you expect to raise?
5. What are the fundraiser dates and times?
6. What rooms or other resources are needed?
7. Have you checked the timing and logistics of the fundraiser with other scheduled activities at the church? The Eastrose Administrator can help you with this.

The Eastrose Administrator may approve without further review requests for fundraisers that are reasonably expected to raise less than \$200 (net). The Administrator will provide a monthly report to the Finance Committee of all such requests.

The Administrator will pass on to the Finance Committee all requests that meet any of the following conditions:

1. The fundraiser is expected to raise more than \$200 (net);
2. There will be a congregation-wide direct solicitation (as in the Pledge Drive or a Capital Campaign);
3. The activity takes place over more than one Sunday;
4. The group organizing the activity has already conducted a fundraising activity during the past 12 months;
5. The activity is done in combination with outside non-church groups; or
6. The Eastrose Administrator chooses to refer the request to the Finance Committee for any reason.

The Finance Committee will consider fundraiser requests in light of the following criteria:

1. coordination with other events on the church calendar,
2. consistency with our not-for-profit status,
3. consistency with our Mission and Vision and UUA Principles and Purposes,
4. consistency with the church's priorities and approved church budget,
5. for performers and guest speakers, whether the Sunday Services Committee agrees to have CDs or other merchandise available during coffee hour for those interested,
6. likelihood of success, and
7. timeliness of the request.

**Children/youth enrolled in our Religious Education program selling items for scouts, school, or any other non-church activity:** These fundraising requests are often less formal (even verbal) and go to the Director Religious Education (DRE). If approved by the DRE, children/youth may set up a table at coffee hour (space permitting) and allow people to approach them if interested. No monetary contribution to the church is required unless the DRE determines otherwise.

### **Sharing Net Proceeds**

In recognition of our interdependence within broader church life, the following guidelines are to be used for sharing the net proceeds of fundraisers:

Finance Committee strongly encourages all groups who conduct fundraising activities aimed at supporting their internal Eastrose programs to make a voluntary contribution of at least 10% of their net proceeds to the general fund of the Church in recognition of our interdependence within the broader Church life. This contribution is in addition to, and not in substitution for, any facilities or other Church property use, or custodial fees that may apply to the event.

If more than \$200 is raised (net), and the fundraiser is for a group within the church, the first \$200 goes to the fundraising group, and the rest is split 50/50 between the fundraising group and the general operating fund.

If a group is raising funds to support an external commitment (e.g., the SnowCap or UUSC), then the 10% voluntary contribution may not be appropriate. When the beneficiary of an approved fundraiser is a non-Church group, checks must be made out to that nonprofit organization and not the Church, unless the Finance Committee otherwise determines.

### **Beneficiary**

Fundraisers are limited to the following beneficiaries:

- The church general operating fund or one of the church's designated funds

- non-profits that hold an IRS section 501(c)(3) certification. If an exception is made for an outside group that is not a 501(c)(3) but has a clearly humanitarian objective consistent with the church's mission, the fundraising group is responsible for clearly communicating with donors that their donations may not be tax-deductible.