

# Unitarian Universalist Fellowship of Harford County

## Policy Statement

### Fundraisers and Fundraiser Announcements Policy

**Committee:** Finance

**Background:** The Unitarian Universalist Association of Harford County (UUFHC) conducts or endorses fundraisers for various purposes, including support for the operating budget, for various social justice causes, for specific activities, and for other purposes. The UUFHC has several interests in managing fundraising activities within the congregation: ensuring the activities don't compete with each other or with the annual Stewardship Drive, tracking the contributions of individual members for tax purposes, tracking the contributions of the fellowship to various charities, and ensuring that fundraising activities are consistent with the mission of the fellowship.

This policy establishes processes for initiating, approving, and scheduling various types of fundraisers, and describes the criteria by which fundraisers will be deemed appropriate.

**Definitions:** The following terms are used in defining the policy:

- **Operating Budget Fundraisers.** Events of various types that are specifically identified in the operating budget approved by the fellowship each year. Examples are the Christmas Tree Sale and the Serendipity Auction.
- **Denominational Fundraisers.** Occasions when the congregation is asked to participate in some activity or collection endorsed by UUA. An example is the Guest at Your Table Fundraiser.
- **Collection Plate Fundraisers.** Occasions when either all non-pledge funds from the collection plate at a service or the proceeds from a second collection during a service are designated to some purpose other than the operating budget.
- **On-Site Solicitation Fundraisers.** Occasions when the congregation is asked to donate to a cause and the collection is held at UUFHC. This includes both solicitation for monetary donations and solicitation for goods. Examples are requests to donate money for the Homeless Shelter or to donate items to send to soldiers overseas.
- **On-Site Sales Fundraisers.** Events held at the UUFHC where the congregation is asked to purchase items or services where the proceeds are designated for a particular purpose (such as a UUFHC activity or a charitable cause). This includes both sales associated with Sunday service and those that are independent events held at other times. Examples are fundraising dinners and sales of books after service.
- **External Fundraisers.** Events endorsed by UUFHC where the general public is asked to purchase items or services. These may be held either at the fellowship or at other locations. An example is a car wash, held either at the fellowship or at a local gas station.

- **Business-Related Fundraisers.** Agreements with businesses to donate money, goods, or services to UUFHC in exchange for purchases by members of the congregation or for advertising to the congregation.
- **Announcements for Non-UUFHC Fundraisers.** Events not directly associated with UUFHC or UUA, but that are publicized to the congregation. Examples include walks for charities or fundraising dinners, announced prior to the service or in the newsletter.

**Management of Fundraisers and Fundraiser Announcements:** The congregation approves Operating Budget Fundraisers with approval of the annual budget. The Executive Board may approve Denominational and Collection Plate Fundraisers, and the Finance Committee may approve On-Site Solicitation, On-Site Sales, and External Fundraisers.

Business Related Fundraisers are usually prohibited, because it’s generally inappropriate for UUFHC to endorse or appear to endorse private businesses. The congregation must approve any exceptions.

The Minister may approve announcements for Non-UUFHC Fundraisers. The managers of UUFHC communication channels (such as the editor for the newsletter, the webmaster for the website, the Worship Chair for pre-service announcements, and the Publicity Chair for the wayside pulpit) are responsible for directing requests for announcements of Non-UUFHC Fundraisers to the Minister for review.

Prior to approval, each fundraiser requires endorsement by the Minister, a Board member, or committee chair. The purpose of the endorsement is to provide a review of the need and appropriateness of the fundraiser. Endorsement should typically come from an official associated with the fundraiser; for example, the Social Justice Chair should endorse fundraisers related to Social Justice.

The Finance Committee is responsible for maintaining a schedule of fundraisers, and the Treasurer is responsible for managing any funds raised in a fundraiser. Finance Committee review will typically focus on avoiding scheduling conflicts and on ensuring a responsible plan to handle any funds.

Table 1 summarizes the responsibility for endorsement and approval of each type of fundraiser.

**Table 1. Endorsement and Approval Authorities for Fundraisers.**

<b>Fundraising Activity</b>	<b>Endorsement</b>	<b>Approval</b>
Operating Budget	Finance Committee and Executive Board	Congregation (with approval of budget)
Denominational	Minister	Executive Board
Collection Plate	Minister	Executive Board
On-Site Solicitation	Any committee chair or Executive Board member	Finance Committee

On-Site Sales	Any committee chair or Executive Board member	Finance Committee
External	Any committee chair or Executive Board member	Finance Committee
Business Related	Executive Board	Congregation
Non-UUFHC Announcements	Any committee chair or Executive Board member	Minister

**Process for Approval of Fundraisers and Fundraiser Announcements:** Any member of the congregation may propose a fundraiser or fundraising announcement. This is the process for requesting approval:

- Complete a Fundraising Request Form, which captures information on the purpose of the fundraiser, how the funds or goods will be collected and tracked, and other details.
- Obtain endorsement from an appropriate source, as listed in Table 1.
- Obtain approval from an appropriate approval authority, as listed in Table 1.

Once fundraiser is completed, a report on the proceeds and expenses will be provided to the treasurer.

**Adopted by the Executive Board:**

\_\_\_\_\_ **Board Approval\*\***

\_\_\_\_\_ **Date**

Review Date: \_\_\_\_\_  
(5 years from signed)

\*\*This policy was originally adopted and signed 8/28/07. Reviewed by the Finance Committee September 2009; received by the Board 7/20/10. Reapproved, with slight modification, on the date above.