

First Parish Brewster Unitarian Universalist Policy

Policy Title: Fundraising

Revisions: March 2023

Policy Number: 3.2

Board Review Date: Nov 2019, Apr 2023

Purpose: To describe the process of fundraising approval and the distribution of the funds.

Congregations' Review Period: 10-25-2019 to 11-25-2019

Effective Date: 1-7-2020, 4-18-2023

POLICY STATEMENT

Fundraising is an event or program whose purpose is to raise funds either for FPBUU or another charitable organization that shares FPBUU values. Activities that raise funds for individuals are considered separate from typical fundraising (see Financial Controls Policy).

FPBUU individuals and groups conducting fundraising events/programs shall submit between 50%-100% of all monies received in the event/program to an FPBUU Operating Fund, unless the Minister or Board President waives that requirement.

All FPBUU fundraising events/programs must be approved by the Administration and Finance Director (AFD), unless the event is a standard yearly event, such as the Pledge Drive, Spring Raffle, etc.

PROCEDURES

- Plans for fundraising shall be evaluated by the AFD as to appropriateness, feasibility, potential profitability, volunteer commitment required, and coordination with other pre-existing or ongoing fundraising efforts by FPBUU. The committee or group requesting permission to conduct a fundraising event/program shall submit a written proposal that includes the specific designation of the amount or percentage of the fundraising monies that will be added to an Operating Fund.
- Between 50%-100% of all fundraising projects' monies shall be given to the appropriate Operating Fund, unless this requirement has been waived by the Minister or Board President.
- The AFD shall ensure that fundraising events/programs are scheduled so as not to interfere with other events in the FPBUU community. Conflicting fundraising event/program dates may result in cancellation or lack of First Parish Brewster sponsorship.
- Fundraising events/programs that support Youth group activities, e.g., trips, must be approved by their adult advisors and the CYM Director, but do not require approval by the AFD.
- Money collected at events/programs held under FPBUU sponsorship shall be accounted for within the FPBUU accounting structure. Organizers of events/programs not sponsored by FPBUU shall ensure that money is sent directly to the receiving entity.

- Money collected at events/programs held under the sponsorship of FPBUU that is submitted to a non-fundraising line item of the FPBUU operating budget must be used within the same FPBUU fiscal year in which it is raised. Money remaining within that non-fundraising line item at the end of the fiscal year shall not carry forward into the next fiscal year.

GUIDELINES

It is our hope and goal in creating this policy that, by following the steps outlined above, congregants, committees and special groups comprised of FPBUU members will be encouraged and feel supported in planning and conducting fundraising events and programs.

STANDARDS

No standards are recommended at this time.

DEFINITIONS

Fundraising – an event or program whose purpose is to raise funds for either FPBUU or another charitable organization that shares FPBUU values. Activities that raise funds for individuals are considered separate from typical fundraising.

FPBUU Operating Funds – The Operating Funds are a collection of funds used to support the regular expenses of FPBUU. They include: the Fundraising line item in the annual operating budget, the Sustainability Fund, and the Capital Expense Fund.