

Fund Raising Policy

Date of Policy Approval: 11/2001

Policy Updated: **6/2009 and 12/2011**

Policy Owner: Finance Coordinating Council

1. All fundraising activities must be in conformance with the tax-exempt status of the Second Unitarian Church and will be in keeping with the stated mission, values, and covenants of the Church.
2. Fundraisers that benefit the whole congregation take priority over those that benefit certain committees, programs, or individuals, in a case of conflicting schedules or material overlap of intended donors. All committees are encouraged to informally coordinate their needs with those of other Church committees or programs seeking to engage in fundraising activities within a fiscal year.
3. All proposals for fundraisers will be submitted to the Board for approval using the Fundraising Activity Application form.
4. Only a Member of the Second Unitarian Church may request permission to hold a fundraiser under the auspices of the Church.
5. The sponsor of the fundraising activity is responsible for providing the Board and the congregation full disclosure of any third parties that will receive financial gain as a result of the fundraiser and how much.
6. Normally the Board considers applications at regularly scheduled meetings, and will notify the sponsor of the fundraiser within seven days of its decision. The Board President will notify the Finance Committee Chair when the Board approves a fund raising application.
7. The person accountable for the monies generated by the fundraiser will place them in the lock box in the church office within seven days after the event.
8. The persons accountable for net receipts, gross receipts, and disbursements will give these to the Treasurer within 14 days after the event or receipt of the bills.

Roles and Responsibilities for Fundraising Activity

Sponsor of Fundraiser

- Check the Church calendar to find out if your fundraiser conflicts with others already planned.
- If there is no conflict, fill out the Fundraising Activity Application form. Also submit a calendar reservation form.
- Put the completed application in the Board President's mailbox in the church office.
- When planning the fundraiser, take into account: collection and reporting of sales tax, and tax-exempt for the Church.
- Work with the Treasurer for any seed money that might be needed. Keep a record of receipts and disbursements.
- Within 7 days put the collected cash and checks in an envelope. Place the envelope in the lock box in the church office. Also include a written amount of the count, who made the count, and the fund name/number to be credited.
- Within 14 days of the end of the event, provide in writing to the Treasurer a record of gross receipts, disbursements and net receipts.

Board

- The Board will review Fundraising Applications according to the fundraising policy.
- Respond to the applicant within seven days of the decision of the Board to reject or accept the Fundraising proposal.

Finance Committee

- Prepare the fund for deposit during the weekly offering count.
- Use a separate Weekly Deposit Form rather than including the Fundraiser as part of the weekly offering.

Treasurer

- Write disbursement checks and provide balance of separate funds.
- Fill out sales tax forms.

In addition to the above fundraising rules the following apply to Special Collections:

- Special Collections are recommended to be handled through the Share the Plate program.
- If an exception has been approved by the Board, notify the Finance Committee a week before the collection.