

First Unitarian Church Fundraising Activities

"Gathering resources to accomplish our Mission"

Fundraising Application

Fundraising Guidelines:

All fundraising done in the name of the First Unitarian Church should be guided by the Church's Ends and Executive Limitations as set forth in the Board Policies document, which are available in the Church Office or at our web site, on the Board of Trustees page.

It is expected that First Unitarian's major fundraising effort will be the annual Operating Campaign and church programs will be financed through the resultant pledges of members and friends. In addition to the Operating Campaign, the Executive Team has approved the following ongoing fundraising activities:

- Monthly special collections
- UUSC Coffee & Chocolate Sales (weekly)
- Booster Cards - also known as Gift Cards (weekly)
- Counterpoint - fundraising for special music (Fall)
- Bi-annual Auction

In addition, various teams and groups also conduct regular fundraising as part of their ongoing activities. These include:

- Fall Fundraising event
- Book Corner sales
- ILYA Holiday and Backpacks
- Chalice Lighter Sunday
- House Pin sales

The group fundraising activities listed above will need to renew and schedule their fundraising with the Executive Team by using this form each church year so we can coordinate timing and themes, and avoid overwhelming our donors with requests.

The Executive Team may authorize a limited number of additional fundraising activities targeted specifically towards fulfilling The Mission of the Church. The approval process and scheduling will consider relevance to an End(s), compliance with Board Executive Limitations, as well as balancing program priorities, church calendar, required facility and staff resources and congregational involvement.

No fundraising applications will be approved if they consist of the following:

- A fundraiser which will put our 501 (c) 3 non-profit status at risk
- Fundraising sponsored by a non-church affiliated group or individual (although the church may rent to an outside group conducting a fundraising event)
- Fundraisers sponsored by for-profit entities. For example, if a church member is a Mary Kay Cosmetics consultant, and wishes to hold a party to sell her product and share a percentage of the proceeds with the church, the ET would not approve this fundraiser.
- Fundraisers during which alcohol is sold. Although alcohol may be served as part of a pot luck dinner or party refreshments, the sale of alcohol is prohibited.
- Fundraisers sponsored by a single church member for an outside organization. Fundraising should be conducted by church groups. **For more information on how to form a church group, please contact a member of the Executive Team or Program Team, or ask a member of our staff.**

Fundraising Application Form

SPONSOR'S INFORMATION:

Sponsoring Group: _____ Submission Date: _____

Group/Activity Fundraising contact person:

Name _____ Phone _____ Email _____

Address _____ Fax _____

PURPOSE OF FUNDRAISER:

What END or program does this Fundraising Activity support? What unmet needs will be addressed by the monies raised?

What project(s) or group(s) will be the direct beneficiaries of the funds raised?
How will the distribution of funds raised be decided?

Who is designated to authorize distribution of funds to named beneficiaries? (if different than contact person listed above.)

Name _____ Phone _____

Address _____ Email _____

When will funds be distributed? _____

DESCRIPTION OF FUNDRAISER:

Describe in detail what the fundraising activity will look like:

- Where will it take place? _____
- Over what period of time? _____
- Approximately how many people will be involved in conducting the fundraiser?

- Who will be solicited to attend or contribute? _____
- Does the event mainly involve the First U congregation or is it open to the community?

What is the preferred date? _____ Acceptable alternate dates (at least 2): _____

Circle: One-time event Recurring event If recurring, at what frequency? _____

What is the monetary goal of this activity? _____

What are the anticipated church resources and support needed for this fundraising activity?

- Space to conduct activity?
Preferred location(s) _____
- On activity date only? _____
- Space needs (ex. Storage space for materials) prior to activity _____
- Publicity through "Quest" and/or "This Week" in the Order of Service? **Circle: Y N**
- Office copying services? **Y N** ○ Custodial services? **Y N**
- Childcare? **Y N** ○ Volunteer recruitment? **Y N**
- Other? _____

If this is a recurring event, is there a leadership development plan in place? _____

If so, please describe: _____

APPROVAL PROCESS:

1. Please prepare and submit a fundraising activity application form to the church's Business Manager **at least 4 weeks prior to the proposed date for the activity, preferably earlier.**
 - Enews deadline is noon Tuesdays for each Friday enews.
 - For recurring events, a request may cover all proposed activities during a church year.
 - Please be as flexible as possible on proposed activity dates/timing.
2. The Executive Team may ask for additional information from the Sponsor/Activity Chair(s).
3. The ET will reply to the request in via email within 2 weeks of the request's submission or receipt of needed additional information.
4. Once approved, it is up to the Sponsor/Activity Chair to make room reservations, request coffee hour tables, or make other arrangements for resources needed for the fundraiser. Please consult with your staff member connection for instructions.

Date of Activity Request **Approval** _____ **By:** _____

Reason for Activity Request Being Denied:

