

## Unitarian Universalist Congregation (UUC)

### 3.3 UUC Procedures for Special Fund Raising Initiatives

**Preamble:** The Finance Committee provides the first level of oversight for UUC fund raising initiatives. It provides recommendations to the Board, which has final authority. In exceptional cases, the Board may involve the entire congregation for guidance and authorization. The Finance Committee recognizes that the primary source of revenue for the congregation comes from the Annual Pledge Drive. Other sources of regular income are the Harvest Auction and approved regular committee sponsored events (e.g. RE Holiday Shop; regular Wednesday dinners; Concerts; rentals; coffee sales; hymnal purchases).

From time to time, the Board, individuals or committees suggest additional fundraising initiatives, either to pay for beyond-budget projects (window or door replacement, piano). or emergencies (equipment replacement or building damage repair). Because of the ad hoc nature of these initiatives, and because of the potential for conflict with the primary fundraising initiatives, the Finance Committee recommends the following process for these proposals:

#### **Step 1: Submission of Proposal**

Individuals or groups wishing to propose a new fund raising event or project must complete a “Fundraising Proposal” form and turn it in to the Finance Committee for review. If a request is sent directly to the Board, it should be sent to the Finance Committee for review first.

Fundraisers for emergency needs (a new furnace, a new copy machine, a broken water main, . . .) will be considered by the Board and initiated as soon as possible. If there is enough time, the Finance Committee may be consulted about procedural issues for the potential emergency fundraiser.

Events or activities that solicit only out-of-pocket cash donations are exempt from Finance Committee oversight (Wednesday evening meals, RE Holiday gift sale, . . .). The committee responsible for collecting the funds during these activities may determine where, when, and how the funds will be dispersed.

#### **Step 2: Committee Approval**

Based on the information received, the Finance Committee will authorize (or reject) the initiative and notify the party involved of their decision in a timely manner. To make this determination, the Committee will consider the amount of the funds sought, the timing and nature of the initiative, the potential impact on other initiatives, and other relevant factors. The Committee should report all submissions and their status to the Board as part of the regular Finance Committee update in the monthly Board meeting.

#### **Step 3: Board Approval**

If the proposal is seeking a large amount of funds, has a significant impact on events, or offers a change to current operations, Board approval should be sought. The Finance Committee will forward the proposal to the Board with a recommendation on action. (The party who made the proposal will be notified of the Board meeting date in which their project will be considered.) The Finance Committee will notify the party of the status of the Board approval. If the Board determines that the proposal is important enough for congregational approval, it will include the proposal on the agenda of an official meeting of the congregation. When appropriate, the Board will also sponsor meetings for information about the proposal and discussion about its merits.

#### **Step 4: Assimilation into Operations**

If the proposal is for an ongoing or yearly project (similar to coffee sales or RE Holiday Shop) the project should be assigned to a standing committee for oversight and added to the budget for ongoing tracking of income and expenses.

**Unitarian Universalist Congregation (UUC)**  
**3.4 Fundraising Proposal Form**

**Submit to Finance Committee Chair for approval**

**General guidelines**

- Fundraisers should not be conducted for regularly budgeted items
- Fundraisers should not be held during Annual Pledge (February-March)

**Name** \_\_\_\_\_ **Phone** \_\_\_\_\_ **email** \_\_\_\_\_

**Title/Theme of event** \_\_\_\_\_

**One-time event**     **Yearly event**

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

**Funds raised for** \_\_\_\_\_

**Fundraising goal \$** \_\_\_\_\_

**Committee associated with event/project** \_\_\_\_\_

**Start up money requested \$** \_\_\_\_\_

**Additional comments /description:** \_\_\_\_\_

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**No announcements or articles will be allowed until approval by the Finance Committee.**

**In some cases additional Board approval may be needed. You will be notified of the status of your proposal by the Finance Committee.**