

FIRST UNITARIAN UNIVERSALIST CHURCH OF SAN ANTONIO FUNDRAISING PROTOCOL

Generosity is a value this congregation seeks to espouse and encourage. At the same time, there is a need to balance financial outreach, money-raising requests, and the presence of the church as a spiritual and liberally religious community. These guidelines are intended to help church committees and groups conduct approved fundraising activities without negatively impacting stewardship activities or detracting from the spirit of community through uncoordinated or overly frequent requests for funds.

Who may request special fundraising?

1. Annually, as part of the process of developing the operating budget, committees are given the opportunity to submit detailed requests for their operating budget for the subsequent fiscal year (beginning the next June 1). It is expected that committees will plan for and manage their programs and activities from that budget. However, this protocol recognizes that on occasion specific activities or opportunities may require additional fundraising.
2. Groups without budgets within the church, such as covenant groups, may occasionally develop a plan for a project that requires funding.
3. All fundraisers must be directly sponsored by an authorized church committee or group and approved by the minister.

For what purposes may funds be raised?

Occasions and activities for which special fundraising may be requested include, but are not limited to:

- Scholarships for authorized programs or activities
- CREF Endowment fund
- Special activities connected with outside organizations that do not receive sponsorship through the annual operating budget
- Response to environmental or other emergencies
- Ad hoc activities for specific and approved purposes that serve or address the mission and vision of First UU.

What is the process for requesting a fundraiser?

1. The requesting committee or group must submit a written proposal to the Minister for approval on the *Fundraiser Request Form* (Addendum 1.) This form can be found on the church website (www.uusat.org) or on the basket located on the office manager's door. The Minister may as appropriate consult with staff, Council or other entities as appropriate. In the event that the Minister is unavailable (i.e. away for more than a few days) the right to grant permission is delegated to the DLRE. The Minister or his/her delegate will make every effort to respond to the fundraising request within seven days.

2. Except in emergency circumstances, requests for fundraising activities must be submitted at least four weeks in advance of the proposed activity.
3. Requests for fundraising activities must state:
 - i. The purpose for which monies are being raised and anticipated proceeds.
 - ii. The name of the church committee/group and the name, telephone number and email of the responsible contact person.
 - iii. A description of the event/activity together with date(s), time(s) and desired location.
 - iv. How the costs of the activity will be covered.
 - v. Plans for advertising the event/activity.
 - vi. The reserve account into which the proceeds will be deposited.
4. Permission will take into account the following criteria:
 - i. Availability of calendar for the date(s) requested
 - ii. Proximity to other fundraising activities, including FUUND Lunches.
 - iii. Number of other designated fundraisers in the same general time period.
 - iv. Number of other designated fundraisers requested by the sponsoring entity.
 - v. How similar or different the proposed fundraiser is to other recent or scheduled activities.

Notes

- a. All monies raised must be accounted for within the church's financial accounting system. In order to protect the church's 501(c) 3 status, no individual or special bank accounts or record keeping systems are permitted. At the conclusion of a fundraiser, a representative of the group shall complete a Fundraiser form (Addendum 2) and turn in the form and the money raised to the office manager to be deposited.
- b. With the exception of FUUND Lunches and Share the Plate or in case of a significant emergency, no fundraisers may be conducted during the first four weeks of the annual stewardship campaign for the operating fund.

Addendum 1 - Fundraiser Request Form

Fundraiser Request Form

Date request submitted: _____

Committee/Group: _____

Name of Contact Person: _____

Phone #: _____

Email: _____

Purpose of fundraising: _____

Invite: _____

Inspire: _____

Involve: _____

Reserve account where proceeds will be placed: _____

Description of fundraising activity: _____

Preferred date(s) of activity: _____

Location of activity: _____

Anticipated cost of activity: _____

Anticipated amount to be raised: _____

Plans for advertising: _____

Office Use

_____ approved _____ not approved

Reason not approved: _____

Minister (or DLRE if minister is absent)

Date

If approved, forward to Office Manager for scheduling.

Addendum 2 - Fundraiser Form

Fundraiser Form

For FUUnd Lunches or other fundraising events, fill out this form and take to the office.

Please post to **RESERVE ACCOUNT:** _____ Date: _____

___ in \$100.00 bills

___ in \$20.00 bills

___ in \$10.00 bills

___ in \$ 5.00 bills

___ in \$2.00 bills

___ in \$1.00 bills

___ in coin

Make sure Memo line of check is annotated for FUUnd Lunch or EVENT

Total cash \$ _____ **Total in checks:** _____

By: _____ Accepted & verified by: _____

Signature of person bringing in money