

All Souls Unitarian Universalist Congregation
Fund Raising Policy

Fund raising activities are essential to the financial health of All Souls Unitarian Universalist Congregation. Fund raisers generate revenue for All Souls operating budget over and above the annual pledge drive, plate offerings, and mission related building use fees.

Fundraisers are events whose primary function is to raise money; each should net at least \$1000. In the '09.'10 budget these include the Auction, Sailfest Parking, the Tag Sale, and the Scrip Program.

The congregation, a committee or group within the congregation, or an individual member may propose a fundraiser. Proposals must be submitted in writing on the approved form to the Fund Raising Coordinator who will, in turn, present the proposal to the Finance Committee.

The Finance Committee reviews proposals for new fund raising events and makes recommendations to the Board of Trustees via the Treasurer. For ongoing Fundraisers the Fundraising Coordinator will gather the pertinent information about the event and report to the Finance Committee and Board prior to the event. The All Souls Board of Trustees has the authority and responsibility to review and approve fund raising proposals in order to ensure that they support the mission of the congregation.

We also have several events whose primary function is to build community. They involve money but are not usually expected to net over \$1000. They include in '09/'10 the Bookstore, Craft Fair, Music Night, Holiday Plants, Italian Sisters dinner, Garde dinners, Pies, Compost. The Treasurer shall contact the leader of these events at budget preparation time to ensure they will take place and get an idea of net proceeds. Managers of these events are responsible for giving the dates and times to the Office Administrator in August at the Council Calendar Meeting. This calendar will be approved by the Board.

The financial results of a fund raising activity consist of revenue (total receipts), expenses (all costs incurred to raise the revenue), and proceeds (revenue minus expenses) that support All Souls.

The Board of Trustees shall consider proposals recommended by the Finance Committee using the following guidelines:

1. The primary beneficiary of the fundraiser or community event shall be All Souls, and, in most cases, fund raisers shall support the All Souls annual operating budget.
2. Calendar conflicts and the impact a fundraiser may have on previously scheduled activities will be considered. Alternate dates may be recommended.
3. Any third-party proceeds will be limited to 25% or less of All Souls' proceeds.
4. When an entity other than All Souls is the beneficiary of a fundraiser, the Board of Trustees shall consider who the primary beneficiary is, and the implications of supporting that entity.

Fundraisers will be authorized for one year. Reauthorization or notification is required each year. The Board of Trustees is charged with ensuring that the conditions of each fundraiser are not breached, and reserves the right to determine if the conditions of the fund raiser are being met.

Passed August 9, 2001
Updated Dec. 2007
Updated June 11, 2009

ALL SOULS FUNDRAISER PROPOSAL

Name of All Souls committee, group or member making proposal:

Date of proposal:

Contact person:

phone:

email:

1. Identify the purpose of the fundraiser
2. List dates and duration of fundraiser
3. Describe fundraising activities in detail. Include publicity, timing, space needs. What is expected of the congregation?
4. List fundraiser budget here. Include all expenses (such as printing, food, mailing, supplies), estimated revenue and projected proceeds (revenue minus expenses).
5. How many people are needed to carry out fundraiser? How many total "people hours"?

6. Where will the activity take place?

7. Will a third party (organization or person including member or friend of All Souls) realize financial gain as a result of the fundraiser? Yes_____ No _____

If yes, list names and amount each will receive:

8. Will funds raised be designated to a specific use or cause? Yes_____ No_____

If yes, please explain:

Submitted by: _____

Recommend approval Yes_____ No_____

All Souls Finance Committee

Approved Yes _____ No _____

All Souls President

Date: