

First Unitarian Universalist Church of San Diego

Fundraising Policy

Effective Date: February 1, 2007	Supersedes: October 21, 2003
Approved by: Church Administrator	Reviewed by: Ministry Team Council

Fundraisers are an important part of active church life, providing opportunities for our members to strengthen their commitment and contribution to the Church as well as providing funds for the Church, its groups and programs, and pre-approved charitable causes.

Purpose

The purpose of this policy is to establish guidelines for reviewing fundraisers and fundraising activities proposed by Church groups for any purpose, by any means, and at any location. A “Church group” is a committee, task force, church affiliated organization, or other such internal Church group of the First Unitarian Universalist Church of San Diego.

The purpose of the review is to ensure that our fundraising activities are consistent with our not-for-profit status; to avoid overburdening the Congregation with requests for money; and to ensure that the resources of the Church are focused on the highest priority needs and consistent with the approved Church budget.

Scope

All fundraising activities conducted by any groups at or within First Church must be reviewed and approved under this policy. Activities that include a request for contributions intended **only** to cover the expenses associated with a group’s activities (e.g., food, supplies, honoraria for a speaker, equipment rental) are **not** considered fundraising events, even though donations are received. Such activities do not have to be reviewed under this policy. Sale of merchandise, including sale of books, music, and other items through the Book Room, is covered by a separate policy.

Review Process

All fundraising activities must be approved in advance by the Church Administrator and the Lay Chair of the Generosity Ministry Team.

A church member must submit a request for approval on behalf of any group seeking to engage in fundraising activity. The request must certify that (1) the timing and logistical arrangements of the fundraiser are appropriately coordinated with other scheduled activities at the Church, (2) property use request forms have been completed and included in the application, and (3) the activity complies with the legal requirements of our Church's tax-exempt status, as described in the Church Policy Regarding Property Use and Parking for Church Groups.

The Church Administrator and/or the Lay Chair of the Generosity Ministry Team may approve without further review applications for fundraising activities that are reasonably expected to raise less than \$200 (net). The Administrator will provide a monthly report to the Generosity Ministry Team of all such requests.

The Administrator will pass on to the Generosity Ministry Team for review and approval all requests that meet any of the following conditions:

- a. The potential or expectation is to raise more than \$200 (net) proceeds.
- b. There will be a congregation-wide direct solicitation (as in the Pledge Drive or capital campaign).
- c. The activity takes place over more than one Sunday.
- d. The group organizing the activity has already conducted a fundraising activity during the past 12 months.
- e. The activity is done in combination with outside, non-Church groups.
- f. The Church Administrator chooses to refer the request to the Generosity Ministry Team for any other reason.

Guidelines for Sharing Net Proceeds

The Generosity Ministry Team strongly encourages all groups who conduct fundraising activities aimed at supporting their internal First Church programs to make a voluntary contribution of at least 5% of their net proceeds to the general fund of the Church in recognition of our interdependence within the broader Church life. This contribution is in addition to, and not in substitution for, any facilities or other Church property use, parking, or custodial fees that may apply to the event.

If a group is raising funds to support an external commitment (e.g., the Uptown Shelter or Mind the Gap), then the 5% voluntary contribution may not be appropriate. When the beneficiary of an approved fundraiser is a non-Church group, checks must be made out to that nonprofit organization and not the Church, unless the Generosity Ministry Team otherwise determines.

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Definitions

Fundraiser: Any event or activity that seeks to generate income for a beneficiary above the cost of conducting the event or activity. Some types of fundraisers include:

Events—such as a concert, recital, forum, speech, play, or dance, for which a suggested donation is requested.

Solicitations: requests for suggested donations from members and attendees, held onsite or through a communication medium.

Sales: the selling of services or merchandise to members or attendees. Sales include activities such as silent auction, craft fair, art or book sales, or garage sale.

Exceptions: Sales from the “Church Book Room” benefit the general operating fund and are excluded from this policy.

Sales of merchandise by children enrolled in the Religious Education (RE) program for the benefit of nonprofit organizations must be approved by the Director of RE. No request form or monetary contribution to the Church is required, unless the Director otherwise determines.

Beneficiary: Fundraisers are limited to the following types of beneficiaries:

The church general operating fund or a special restricted fund;

Entities that are not church-related that (1) hold an IRS certification as a nonprofit organization under section 501(c)(3) of the IRS code, or (2) have a clearly humanitarian objective consistent with the Church’s mission, as determined by the Church Administrator or other Church designated reviewing authority under this policy.

Proceeds: The net amount earned after expenses.