

Unitarian Universalists of the Cumberland Valley

POLICY ON FUNDRAISING ACTIVITIES

Preamble: In order to foster the continuing growth of liberal religion in the Cumberland Valley, the UUCV has set forth guidelines regarding the raising of funds for the benefit of the congregation and in partnership with other entities.

- I. Fundraising may be conducted by anyone in the congregation, representing the congregation, committees within the congregation, or outside partners who share aspects of our values and mission.
 - A. Official fundraising activities on behalf of the congregation require the approval of the Finance and Fundraising Committee (F&F).
 - 1) Fundraising proposals should be submitted to the chair of the F&F committee at any time using the official UUCV Fundraising Proposal Form. Such items will be added to the agenda of the next F&F meeting and discussed at that time. Although F&F will make reasonable efforts to expedite decisions on proposals, approval may require up to one month.
 - 2) F&F will consider such matters as scheduling, volunteer time requirements, investment requirements (if any), and risk.
 - 3) F&F will notify the requesting party of the decision.
 - 4) The Treasurer will be notified of the fundraiser, its timing, and activity, and the board liaison will notify the members of the BOT.
 - 5) The requesting party will discuss with the Treasurer how to collect and submit funds and how to account for expenses and sales tax (where applicable).
 - 6) Should the requesting party disagree with the F&F decisions regarding the planned fundraising activity, the requesting party would follow the process noted below in section I-B.
 - B. Fundraising activities on behalf of and/or in partnership with outside entities that the proposers and the Board of Trustees (BOT) agree are closely aligned with the beliefs, mission and goals of UUCV are permitted, if they are approved by the BOT.
 - 1) Such Fundraising proposals can be submitted to the president of the Board of Trustees at any time using the official UUCV Fundraising Proposal Form. Although the BOT will make reasonable efforts to expedite decisions on proposals, approval may require up to two months.
 - 2) BOT will notify F&F of its preliminary recommendation.
 - 3) F&F will consider such matters as scheduling, volunteer time requirements, direct costs (such as those listed in II.C.), investment requirements (if any), and risk.

- 4) F&F will provide guidance to BOT concerning recommended changes to the fundraising activity.
- 5) BOT will reconsider its recommendations in light of F&F recommendations and notify the requesting party of its decision.
- 6) The Treasurer will be notified of the fundraiser, its timing, and activity.
- 7) The requesting party will discuss with the Treasurer how to collect and submit funds, how, when and to whom funds are to be paid, and how to account for expenses in a way that minimizes the time required of the Treasurer.

II. A. Any fundraising event will be clearly defined as to what percentage of funds are to be distributed, and to whom. The percentage of funds expected to come from outside of UUCV sources will also be defined.

B. Committees and members of the congregation are discouraged from earmarking funds to specific internal causes/needs. Generally speaking, all funds raised for the congregation will be deposited into the general fund and considered available for any expense the congregation may have unless approval has been given in advance by the BOT or the event has been planned for in advance via the budget process.

C. Whenever funds are being raised for the benefit of outside entities, the direct costs of the fundraising activities (such as supplies, office copying, printing, postage, baby sitting, bookkeeper time, janitorial time, etc.) will be subtracted from the total and retained by UUCV before disbursements are made.

All fundraising activities must remain consistent with the laws, rules and regulations (Federal, State, Local, etc.) governing our taxexempt status.