

FUNDRAISING POLICY

Unitarian Universalist Fellowship of Beaufort (UUFB)

Fundraisers are important to the social and financial health of the Unitarian Universalist Fellowship of Beaufort (UUFB). They provide opportunities for members to build relationships and to strengthen their commitment to the fellowship.

PURPOSE The purpose of this policy is to establish guidelines for approval of fellowship fundraisers for any purpose, by any means, and at any location in order to ensure that our fundraising activities:

- are consistent with the Mission and Principles of UUFB,
- are consistent with the Purposes and Principles of the Unitarian Universalist Association (UUA),
- are consistent with our not-for-profit status,
- focus our resources on the fellowship's highest priorities and the approved fellowship budget, and
- avoid overburdening the fellowship with requests for money.

Fundraisers for specific purposes other than the operational budget will be limited while the fellowship is operating with a deficit.

Procedures

A. Definitions

Fundraisers are concerted efforts to raise money for a cause and/or operational expenses.

Subsidies, for the purpose of distinguishing them from proactive UUFB fundraising events, are donations received through passive collection efforts during UUFB activities and programs (such as the coffee can during social hour to offset hospitality expenses, or a donation basket during activities open to the public, such as meditation, to offset operational expenses).

Fellowship Group is a committee, task force, class, club, or other internal group of UUFB

Appeals for goods and/or services, though technically not fundraisers, can benefit UUFB financially and are an important part of UUFB's outreach programs.

B. Scope

Fundraisers, subsidies and appeals hereinafter will be referred to as fundraisers unless specifically addressed otherwise.

All fellowship fundraising activities must be reviewed and approved under this policy. Any outside person/group requesting to raise funds at UUFB or through UUFB must have a fellowship group as a sponsor for their fundraiser activity.

The only exception is for children of members who are selling items for scouts, school, or any other non-fellowship activity.

Political fundraisers for individual candidates or parties are not permitted, but support for causes (for example, such as Black Lives Matter, Immigration Reform) will be considered.

Ongoing and annual fundraisers such as the Pledge Drive, Great Lakes Scrip, Auction, and Yard Sale are covered by this policy. Once approved, these fundraisers do not need to come back for approval each year.

Review Process

All fundraising activities must be approved by the Board in advance as explained below.

Any member or member group of UUFB including, but not limited to, the Board, Committees, and UUFB Board-recognized Affinity Groups may initiate a fundraiser to benefit UUFB. A fundraiser is deemed to benefit UUFB if 100% of the net proceeds are used to support its mission and programs.

All fundraising events must have a designated chair. The chairperson for the event is responsible for completing the *UUFB Fundraising Application* and submitting it to the Board for consideration and approval well in advance of the fundraiser and no later than the first of the month prior to the event to allow time for Board approval. All fundraising events require an application except for the 5th Sunday offering, and annual Unitarian Universalist Association (UUA) and Unitarian Universalist Service Committee (UUSC) events.

The goal of any fundraising activity shall be clearly and specifically identified when application is made.

When using UUFB facilities, the designated chair will ensure compliance with the *UUFB Facilities Use and Rental Policy*.

A. Scheduling

The UUFB Board recognizes the need to limit the number of fundraisers and the need to spread them throughout the year. It will schedule fundraising activities accordingly.

The UUFB Board will schedule known annual fundraisers in January of each year. Additional fundraisers will be added to the calendar as approved.

Events will be scheduled, as much as reasonably possible, to avoid competing with outside causes in the broader community.

No event will be scheduled more than six months into the future without the specific approval of the UUFB Board and/or the Minister.

The UUFB calendar found at uufb.org is the official calendar for checking dates and times of availability.

B. Solicitation

Individuals may solicit for a cause using UUFB's membership list only for Board approved fundraisers.

Email solicitation is limited to those addresses with whom UUFB has received permission to communicate.

Any personal information gathered for solicitation purposes, will not be sold or distributed elsewhere.

In some cases, soliciting via the internet may require UUFB to register as a charitable organization in other states, so it is not allowed at this time.

Any fundraising activity which advertises to or solicits from the non-UUFB greater community, except UUFB Capital or Endowment Fund Campaigns, should benefit the non-UUFB community financially (at least 20% of the net funds raised by UUFB will be allocated to the SEJ committee for local projects) or provide fair value services or goods (such as a concert, meal or yard sale goods) to the participants. *An exception to the above is: when a UUFB Fundraising Application is presented to and approved by the Board in which the designation of raised funds are to be applied **100%** to the deficit Operating Budget.*

C. Permits

Certain fundraisers may require permitting by government entities, particularly if food is to be served. As of March 2013, the following guidelines by the South Carolina Department of Health and Environmental Control (DHEC) apply for churches serving food:

- **Serving members and guests only:** No permit is needed from DHEC for strictly in-house functions.
- **Serving the public, on church/charity premises, no more than 12 functions in a 12-month period:** No permit is needed from DHEC, regardless of whether or not the church/charity charges for the food.
- **Serving the public, on church/charity premises, 13 or more functions in a 12-month period:** The church/charity must get the appropriate food service permit from DHEC, regardless of whether or not the church charges for the food.
- **Serving the public, away from church/charity premises:** Regardless of whether or not the church/charity charges for the food, the church or charity will need to apply for and meet the requirements of the most appropriate permit.

For more information on permits and the handling of food, please see the following DHEC website:

<http://www.scdhec.gov/environment/envhealth/food/htm/church-nonprofit.htm> .

D. Financial and Administrative Management

UUFB fundraising activities must be economically viable. Expenses incurred should be covered by the money received.

The Board will review and consider requests for significant fundraising expenditures, such as hiring a musical or theatrical group, to ensure that proceeds are likely to cover costs. If approved, disbursements for advance payments and/or deposits may be negotiated with the Board upon application. All financial transactions must pass through UUFB accounts. No cash will be disbursed from UUFB funds.

Cash or checks collected before or during an event will be given to the UUFB Board member or UUFB group member delegated to handle money. Before leaving the building at the end of an event, two UUFB members will count the money, record it, and secure it for deposit into a locked drop box for processing by the UUFB Administrator consistent with the procedures for processing the Sunday offering. If the cash amount exceeds two hundred dollars, it must be processed and secured for immediate deposit at the bank or in its night deposit drawer.

Post-event donations may be sent to the UUFB Administrator or put in the collection basket during the Sunday offering.

The chairperson for the event will submit receipts and reimbursement requests to the UUFB Treasurer within one week of the completion of the activity or, in the case of ongoing subsidies, on a quarterly basis at the minimum. In the case of appeals for goods and/or services, the chairperson will submit a best guess estimate of the value of the goods and/or services received. Upon receipt of the documents, applicable reimbursements to individuals will be made within two weeks by the Treasurer, and disbursements to beneficiaries will be made within thirty days.

Following the close of the event or, in the case of ongoing subsidies and appeals, on a quarterly basis at the minimum, the UUFB Treasurer will complete a comprehensive financial report (income, expenses, funds disbursed to beneficiaries) including post-event donations and submit it to the Board Secretary to file with the UUFB Fundraising Application.

All net proceeds will be used to satisfy the Annual Operating Budget unless the fundraiser has been approved by the Board to fund other efforts as follows:

- a Capital Campaign,
- an Endowment Campaign,
- a targeted fundraiser for a special project or acquisition outside of the Annual Operating Budget,
- a partnered fundraiser with the greater community.

Net proceeds of all fundraisers will be allocated by the UUFB Treasurer in accordance with the priorities set by the Board and, in the case of subsidies, the corresponding budget line items will be funded until or unless the budget line item is satisfied.

UUFB may support, but not collect money for, off-campus fundraisers that require informal pre-sale of tickets or other cash transactions due to the complexities of money management.

UUFB members soliciting money, goods or services on behalf of UUFB and its programs will not accept personal gifts or reap the benefit of personal gain from their fundraising activities.

E. UUFB Non-Profit Status

The Board will remain cognizant of any financial or liability implications or consequences that might affect UUFB's tax-filing requirements or its status as a non-profit religious organization. Information related to tax on unrelated business income, including rental income, may be obtained from the Church & Clergy Tax Guide by Richard R. Hammar (copy available from the UUFB Treasurer). In some instances, it may be advisable to seek opinion from UUFB's accountant or from a qualified attorney.

Approved by UUFB Board June 9, 2016
*Amended by UUFB Board May 24, 2019