

**Unitarian Universalist Congregation of Fairfax  
Operational Policy**

**Subject: Fundraising**

**Number: V.A.**

**Effective Date:** June 10, 2008

**Approved By:** Coordinating Team

**Revised:** June 26, 2019

**Policy**

Certain fundraising efforts within UUCF require prior approval of the Coordinating Team in accordance with the following procedures. UUCF does not promote or publicize individual member fundraisers (see #4 under Scope below) and congregants may not use UUCF social media for this purpose.

**Purpose**

To regulate the flow of fundraising appeals to UUCF members and friends in order to:

- 1) Reduce the perceived burden of requests for money;
- 2) Help members and friends make better-informed decisions about which projects to support by giving them advance notice of all upcoming appeals; and
- 3) Limit simultaneous appeals for money on behalf of different projects.

**Scope**

This policy applies to all efforts to raise more than \$1,000 from UUCF members and friends in any fiscal year in order to support any UUCF-sponsored or affiliated program or project. It also applies to all special collections at worship services.

This policy does not apply to:

- 1) bake sales or other incidental sales of goods;
- 2) events, including speakers, concerts and meals, to which tickets are sold;
- 3) the Share the Plate program;
- 4) efforts to raise money or obtain sponsors by individual UUCF members that are not part of a UUCF program or project. Individual members of UUCF may solicit funds and support from fellow members, on an informal walk-around basis, i.e. using a clipboard and walking around the Commons and Sanctuary after services, for efforts that are in harmony with the general principles of UUCF.

**Procedures**

- 1) Fundraising Calendar

- a) A fundraising calendar for the upcoming 12-month period will be published no later than September of each year.
    - i) Members and friends will be informed that the purpose of the calendar is to help them select from among the available programs those projects they may wish to support.
    - ii) Listed events for the upcoming month will appear in each issue of the newsletter; the full calendar will be available on the UUCF website.
  - b) Unless authorized by the Coordinating Team (CT) pursuant to subsection c) or d), below, no money may be solicited or accepted on behalf of any UUCF program or project that is not listed on the calendar. New items added to the calendar after it is published must be listed at least 6 months before the scheduled event.
  - c) The CT may authorize a fundraising appeal that was not timely included on the calendar in the event of extraordinary and unforeseeable circumstances.
- 2) Approval of Fundraising Proposals
- a) Already ongoing projects (such as Partner Church scholarships and the Auction, among others) must apply to the CT for a date on the calendar but need provide no further information. The CT will assign dates so as to distribute activities throughout the year and to avoid conflict among activities.
  - b) Sponsors of new projects must apply to the CT for inclusion on the calendar.
  - c) Fundraising efforts may also require approval by the UUCF Board of Directors pursuant to its policies.
- 3) Process for obtaining approval.
- a) The sponsoring individuals or groups must submit a written proposal to CT.
  - b) The proposal must include:
    - i) The name and contact information of the sponsoring individual or group.
    - ii) The name and contact information of the project leader and financial manager.
    - iii) An estimate of the amount of money to be raised within UUCF.
    - iv) The amount of money, if any, to be raised from other sources.
    - v) The identity and description of any partner organizations.
    - vi) A description of the nature and purpose of the project and how the money will be used.
    - vii) A timeline for fundraising and any associated activities.
    - viii) A description of how the proposal will support UUCF's mission and of its relationship to other UUCF activities.
    - ix) A description of procedures that will be followed to ensure program and financial accountability.
  - c) Proposals to raise money for social justice projects must first be submitted to the SJC for its recommendation.
  - d) Sponsors may meet with the CT to discuss the proposal. The CT may request additional information or suggest changes.

- e) The CT will decide whether to authorize the project and add it to the calendar based on consideration of the following factors, among others:
  - i) Has sufficient information been provided to permit the CT to make a reasoned decision?
  - ii) Does the program further UUCF's mission?
  - iii) Is it consistent with the strategic plan?
  - iv) Does the plan evidence sufficient leadership, planning and organization?
  - v) Is the proposal likely to generate sufficient financial support from the congregation?
  - vi) Is the proposal consistent with UUCF's tax-exempt status?
  - vii) Is the proposal consistent with other policies (for example, the UUCF Policy on Soliciting and Disbursing Donations)?
- f) The CT may seek input on the proposal from the Lay Ministers or other affected lay leaders.
- g) The CT will notify the sponsoring individuals or group of its decision.
- h) The CT may require the sponsors to report on the outcome of the project.
- i) Once a proposal is approved, the Finance Manager may set up the necessary accounts to receive and disburse the money. All funds must be handled in accordance with UUCF financial policies and procedures.