

Union Baptist Church Fundraising Policy

Approved by Council on March 13, 2019 – Effective July 01, 2019

Definitions:

- **Fundraising:** Any effort to solicit money, goods, or services for the purpose of funding or benefiting an individual, group, or cause.

Introduction:

- The ongoing ministries of Union Baptist Church (UBC) are financially supported through the operating budget. However, at times, additional funding may be appropriate for specific projects, trips, or ministries which are not covered by the operating budget.

Purpose:

The purpose of this policy is to ensure that all fundraisers conducted 1) by the Church or 2) by the Church's ministry partners on church property follow uniform, established procedures. All such fundraisers should be conducted in accordance with this policy.

This fundraising policy has been established for the following reasons:

- To provide guidance for acceptable fundraising activities and communicate the guidance to the congregation;
- To manage the number and frequency of the fundraising activities so as to avoid overburdening the congregation with requests for money, thus preserving congregational relationships;
- To ensure that fundraising activities are consistent with our tax-exempt status;
- To ensure that UBC's resources are focused on the highest priority needs and consistent with the church budget;
- To uphold UBC's vision, mission, and values.

Overview:

Fundraisers are expected to contribute to the goals and objectives of UBC, and the proceeds realized are to be used for the support of those goals and objectives.

Fundraising requests will be reviewed and considered for approval based on the conditions of 1) need, 2) the church or community benefit, and 3) the impact on normal church operations. All requests will be reviewed by the Church Council against a master calendar of currently approved events.

Responsibility:

It is the policy of the church to approve and fund its ministries through its regular budgeting process. The Church approves the ministries and the budget. It is the responsibility of the Church Council to oversee all fundraising activities.

Policy:

- All fundraisers must reflect and relate to the principles and purposes of the church and serve the mission of the church.
- All fundraisers are to be conducted for the benefit of the church, its ministries, or organizations and causes approved by the church, and shall never charge an admission fee. In lieu of admission fees to events, funds shall be raised via "voluntary" or "suggested" donations.
- Any fundraiser designated by the Church Council for the purpose of supporting UBC or its missions shall set aside 10% of the fundraising proceeds. That portion of the proceeds shall to be donated to a charitable entity that is recommended by the persons holding the fundraiser and approved by the Church Council.
- Fundraising for the benefit of for-profit entities or personal gain is strictly prohibited.
- Individuals may not use the church telephone directory to make 'cold calls' on church members for personal financial gain.
- This policy is not intended to discourage individual members of the church from networking with each other on an informal basis or inviting individuals to participate in organizations, activities, or businesses not associated with the church, but it does prohibit people from using church mailing lists and phone directories for the purpose of prospecting for business.
- Individuals may not use the church's name in any fashion for advertising, or for alluding to church support of public or private businesses, products, or political organizations.
- Fundraisers shall be limited to a specific time interval as specified on the fundraising request form.
- Every request for a fundraiser must be made by submitting a UBC Fundraising Request Form to the Church Council.
- Fundraising requests do not carry over from one year to the next, with no exceptions.
- Groups or individuals conducting monetary fundraisers must provide a report back to the Treasurer detailing the following information:
 1. Total money collected
 2. Total expenses, if any, for the fundraiser, including seed money.
 3. The required follow-up report and all funds raised are due to the Treasurer no later than thirty (30) days after the end of the event.

Procedures:

- Fundraising Request Forms must be submitted to the Church Council Chairperson. The Church Council Chairperson will coordinate with the Missions liaison and other appropriate leaders to ensure that there are no church-wide conflicts with other Missions/Outreach program activities. Request forms may be obtained from the church office.
- Requests should be submitted to the church office at least two (2) months prior to the proposed fundraising event. The Church Council Chairperson shall place the request on the agenda of the next scheduled Church Council meeting.
- The Church Council will review the request. Those submitting the request shall be invited to attend the Council meeting at which their request is reviewed, and they will have the opportunity to make a presentation if they choose to do so.
- After the Church Council has voted on a request, a response will be provided to the contact person listed on the UBC Fundraising form.

The following criteria shall be considered when the Church Council evaluates fundraising requests:

- Compliance with the procedures set forth in the UBC Fundraising policy.
- Time elapsed since the last fundraising by the same persons or for the same purpose.
- Time elapsed since the last fundraiser held at UBC.
- Time between the proposed fundraiser and any regularly scheduled or previously-approved fundraiser.
- The degree of affinity between the fundraiser and UBC's mission.
- The impact of the fundraiser on the church facilities.
- Potential interference with other church activities.

The handling of monetary funds will be as follows:

- All checks collected must be payable to Union Baptist Church.
- All money (cash and checks) collected must be counted by two people and given to the Church Treasurer for deposit into the appropriate bank account.
- No expenses shall be paid out of cash received during the fundraiser.
- Any cash advance (seed money) requested must be approved by the Church Council and accounted for with receipts in the final report to the Treasurer.
- In the event that a solicitation for supplies is held and someone submits money for that event, the aforementioned policies must still be followed.

Outside Groups:

When Certified tax-exempt groups that are independent of the Church (e.g. LUNCH, Denison Pequotsepos Nature Center, Groton Community Meals) submit a fundraising request, those groups may, at the discretion of the Church Council, be exempted from the money handling and reporting requirements of this policy. All other guidelines and procedures set forth in this policy will still apply.

Union Baptist Church Fundraising Event Request Form

(Form must be filled out and returned to Office two months prior to event)

Organization/Entity making request: _____

Does Organization/Entity wish to make a presentation to UBC Council? Yes_____

No_____

Contact Information of responsible person(s):

Name(s): _____

Email(s): _____

Phone#(s): _____

Proposed date and time of event: _____

Proposed location of event: _____

Proposed beneficiary(ies) of fundraiser: _____

Church equipment requested (ie tables/chairs): _____

Church tech support needed (ie sound system, microphone, screen, ext. cords, etc.): _____

*******UBC ONLY*******

Seed money requested: Yes_____ No_____ Amount, if 'Yes'

Names of two persons who will handle the counting of funds and reporting to Treasurer:

1. Name _____ Phone# _____

2. Name _____ Phone# _____

Approved by UBC Council? Yes_____ No_____ Council Meeting

Date:_____