



United Church of Christ, Congregational (UCC)

Fundraising Policy

1.0 PURPOSE

The purpose of this policy is to describe the expectations related to fundraising at the United Church of Christ, Congregational in Burlington, MA (UCC Burlington).

2.0 SCOPE

This policy applies to fundraising that is intended to support UCC Burlington's General Fund, Special Interest Groups/Committees, and/or External Missions.

3.0 POSITION STATEMENT

UCC Burlington is grateful for and recognizes the necessity of fundraising, especially for those programs and events that support the church's General Fund, a Special Interest Group/Committee, or an External Mission. Fundraising typically requires an extraordinary amount of time, energy, and commitment from a dedicated person(s) to plan and conduct. Similarly, the participation, attendance, and support of a fundraiser by UCC Burlington Congregants require time and financial commitment, all of which are finite. As such, this policy has been established to provide guidance to people who wish to lead a fundraiser (Fundraiser Lead) and to Parish Council, who will help to ensure that UCC Burlington balances fundraising with other spiritual and community endeavors.

Parish Council is responsible for maintaining the financial, business, and spiritual wellbeing of UCC Burlington. Although most fundraisers are valuable and important, the priority of fundraising programs or events will vary, especially as they pertain to UCC Burlington's ability to fund and maintain its General Fund and the interests of its congregants. Fundraising conducted at or sponsored by UCC Burlington will be vetted and prioritized by UCC Burlington's Parish Council prior to its communication and implementation. Fundraising Programs and Events must be aligned with UCC Burlington's values and mission. Parish Council has the discretion to request a Special Interest Group/Committee to share all or a portion of raised money to the General Fund, as specified in this policy and jointly deliberated by Parish Council along with the Fundraiser Lead.



United Church of Christ, Congregational (UCC)

Fundraising Policy

4.0 KEY TERMS/ABBREVIATIONS

<u>Term/Abbreviation</u>	<u>Description</u>
Fundraising	The act or process of collecting money for a particular cause, program, or activity. At UCC Burlington, the types of fundraisers are defined as either a Fundraising Program or a Fundraising Event.
Fundraiser	A general term used to describe either a Fundraising Program or a Fundraising Event.
Fundraising Event	A planned occasion held at UCC Burlington for the purpose of fundraising.
Fundraiser Lead	Person(s) who is the primary contact(s) and representative(s) for a fundraising Program or Event and is responsible for presenting the fundraising plan to Parish Council. If necessary, the presentation to Parish Council may be delegated.
Fundraising Program	A coordinated effort to raise funds that does not require a Fundraising Event, such as a gift card program or a specific request for money.
External Mission	A program or activity whose operation is the responsibility of an organization independent of UCC Burlington (e.g., People Helping People, Boston Missions, UCC Conference).
General Fund	The depository of money that is used to pay for UCC Burlington's yearly operating expenses.
Special Interest Group/ Committee	An UCC Burlington endorsed group/committee that is committed to raising funds for a specialized purpose (e.g., music, mission trip, sound system), which is typically in addition to or outside of the General Fund.



United Church of Christ, Congregational (UCC)

Fundraising Policy

5.0 Policy Implementation

The following actions should be followed by the listed responsible person or function when scheduling, planning, and implementing Fundraising Programs or Events.

5.1 Planning, Scheduling, and Approving a Fundraising Program or Fundraising Event

<u>Number</u>	<u>Responsibility</u>	<u>Expectation</u>
5.1.1	Fundraiser Lead	Complete Part 1 of the attached Fundraiser Planning Form to develop a high-level plan for the Fundraising Program or Event. This may be referred to as the Fundraising Plan
5.1.2	Fundraiser Lead	For a Fundraising Event, consult with the UCC Burlington Administrative Assistant to confirm whether the proposed date(s) is available on the church calendar. <ul style="list-style-type: none"> The event may be penciled in on the calendar.
5.1.3	Fundraiser Lead	Send an email to the Parish Council Moderator (moderator@UCCburlington.org) requesting time to present the Fundraiser Plan at an upcoming Parish Council meeting.
5.1.4	Fundraiser Lead	Attend Parish Council and present the Fundraising Plan, as developed in Step 5.1.1.
5.1.5	Parish Council Members	Listen to and/or review the proposed Fundraising Plan and ask questions, as needed, to gain understanding.
5.1.6	Parish Council Members	Consider the proposed Fundraising Plan. One member from Parish Council should complete Part 2 of the Fundraiser Planning Form. <ul style="list-style-type: none"> For a Fundraising Program or Event intended to support an External Mission or the General Fund proceed to Step 5.1.8. For a Fundraising Program or Event intended to support a Special Interest Group/Committee, proceed to Step 5.1.7.



United Church of Christ, Congregational (UCC)

Fundraising Policy

5.1.7	Parish Council in collaboration with the Fundraiser Lead (or delegate)	<p>NOTE: This step is for a Fundraising Program or Event that is intended to support a Special Interest Group/Committee.</p> <p>Determine whether to request that a portion of the raised money is donated to the General Fund.</p> <ul style="list-style-type: none"> • Consider UCC Burlington’s current and forecasted operating expenses for the calendar year compared to the approved operating budget and the available and forecasted money in the General Fund. • If the General Fund needs financial support, specify and agree to a percentage of money to be donated to the General Fund. The Fundraiser Lead (or delegate) should be in agreement. • Consider the following: <ol style="list-style-type: none"> a. If the Special Interest Group/Committee plans multiple fundraising events over a calendar year, it is acceptable to request up to 100% of the event’s proceeds (after expenses) from <u>one</u> of the events to be donated to the General Fund. b. If the Special Interest Group/Committee plans a Fundraising Event, it is acceptable to request that up to 20% of the event’s proceeds (after expenses) is donated to the General Fund.
5.1.8	Parish Council	<p>If the Fundraising Plan is adequately explained and there are no additional questions, proceed to Step 5.1.9.</p> <ul style="list-style-type: none"> • If there are additional questions, request the Fundraiser Lead to gather additional information and return to Parish Council per Steps 5.1.3 - 5.1.4.
5.1.9	Parish Council	<p>Vote to accept, modify, or reject the fundraiser proposal.</p> <ul style="list-style-type: none"> • Document decisions and the rationale in the Parish Council Meeting minutes.
5.1.10	Parish Council Clerk	<p>Retain a copy of the completed Fundraiser Planning Form.</p>



United Church of Christ, Congregational (UCC)

Fundraising Policy

6.0 REVISION HISTORY

Version	Summary of Changes	Approval Date
1.0	New policy to describe, plan, and manage fundraising at UCC Burlington.	15 Sep 2015

7.0 Attachments

Fundraiser Planning Form



United Church of Christ, Congregational (UCC)

Fundraiser Planning Form

Part 1. Use this form to develop a high-level plan for a proposed Fundraising Program or Event.

Fundraiser Lead Contact Information	Name:	Email address:
	Phone:	
Fundraiser Name		Proposed Date:
		Proposed Time:
Type of Fundraiser	<input type="checkbox"/> Fundraising Program <input type="checkbox"/> Fundraiser Event	
Fundraiser proceeds will be used for (check all that apply)	<input type="checkbox"/> General Fund – Donated Amount: <input type="checkbox"/> % _____ or <input type="checkbox"/> \$ _____ <input type="checkbox"/> External Mission (specify): <input type="checkbox"/> Special Interest Group/Committee (specify):	
Expense Estimation	Approximately, how much will it cost to conduct the fundraiser? \$ _____	
Earnings Estimation	Approximately, how much will the fundraiser earn? \$ _____	
Anticipated Ticket or Admission Price	\$ _____ <input type="checkbox"/> Not Applicable	
Church Required Resources (Check all that apply)	<input type="checkbox"/> Bulletin/Pulpit Announcement <input type="checkbox"/> Hilltop Article <input type="checkbox"/> Special Envelope <input type="checkbox"/> Sanctuary <input type="checkbox"/> Upstairs Hall <input type="checkbox"/> Downstairs Hall <input type="checkbox"/> Kitchen Area <input type="checkbox"/> Donated Food <input type="checkbox"/> Donated Baked Goods <input type="checkbox"/> Kitchen Stove/Oven <input type="checkbox"/> On-site Food Preparation <input type="checkbox"/> Meal Servers <input type="checkbox"/> Table/Chair Set Up <input type="checkbox"/> Sound System <input type="checkbox"/> Musician (specify): <input type="checkbox"/> Other (specify):	
Food Considerations (If food will be served)	<ul style="list-style-type: none"> • Will reusable place settings or purchased recycled disposable products (i.e., cardboard instead of Styrofoam) be used? <input type="checkbox"/> Yes <input type="checkbox"/> No • Has special dietary needs (e.g., vegetarian, food allergies) been considered? <input type="checkbox"/> Yes <input type="checkbox"/> No • Will a food permit be required (Refer to the Safe Church Policy)? <input type="checkbox"/> Yes <input type="checkbox"/> No Proposed Menu:	
Trash Considerations	Will Orange Overflow Bags be needed from the town? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Special Considerations	<input type="checkbox"/> # of ___ Adult Chaperone(s) (Refer to the Safe Church Policy) <input type="checkbox"/> N/A - Will CORI checks be needed? <input type="checkbox"/> Yes <input type="checkbox"/> No - Will Safe Church training be needed? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Raffle (Speak with Fundraising Chair) <input type="checkbox"/> N/A	
Other Considerations		



United Church of Christ, Congregational (UCC)

Fundraiser Planning Form

Part 2: For Parish Council Consideration & Discussion.

Is the Fundraiser aligned with UCC Burlington's values and mission?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the timing of the fundraiser in conflict with other church events, fundraisers, holidays, town, or community events?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Is the fundraiser, as planned, practical and reasonable to meet its fundraising goals?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are church-required resources reasonable and attainable?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the anticipated ticket/admission price fair and not unduly expensive?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Does the fundraiser include a raffle where the proceeds are taxed by the Town of Burlington?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Have food considerations been appropriately addressed?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Does the event require a food permit?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Have environmental considerations been appropriately considered?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
Have trash considerations been appropriately addressed?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
If the event is geared towards children, is the plan for CORI-checked adult chaperones and Safe Church Policy training adequate?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
If the fundraiser will support a Special Interest Group/Committee, will a percentage of the funds be set aside for the General Fund? (Refer to Step 5.1.7 of the Fundraising Policy.) If yes, how much? % _____ or \$_____	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

Considerations and Notes: