

UUCP Fundraising Request for Approval: **Helpful Information**

Why all the paperwork?

Since 2003 it has been the policy of UUCP's Governing Board to approve all fundraisers, using the Finance Team to screen requests. There are three reasons for this policy: (1) to ensure all church facilities and resources needed by the fundraiser will be available; (2) to ensure there aren't too many fundraisers within too short a period of time (creating contribution fatigue in the congregation); and (3) to make sure the fundraising organizers are able to plan with the benefit of lessons learned by others before them.

Here are some things to think about as you fill in the form:

- 1. Who's in charge?** Is this under the auspices of an existing Ministry Team or is it an ad hoc committee formed for the sole purpose of putting on the fundraiser?
- 2. Designate one person** to be the go-to person for questions by the Board or Finance Team. This person will also coordinate with the Treasurer to authorize expense reimbursements and distribution of the proceeds
- 3. Brief statement of the purpose** of the event – what are you doing and what is the money for?
- 4. Describe your event** as you envision it, and give lots of detail.
- 5. Facilities** – what space in the church will you need and when will you need it? Think storage of items, rehearsals, set-up for event, food storage and preparation, and where people will be.
- 6. Labor** – who is going to do all the tasks required to pull this off? Volunteers to plan, set up and break down; provision of food and beverage; childcare; custodial labor; office assistance; publicity; etc.
- 7. Budget**
 - What are your up-front expenses?** (Items to be sold, materials, labor, childcare, food and beverage, postage or other publicity costs.)
 - How much do you expect the fundraiser to make?** Show your work. (Number of people expected to attend, purchase, or contribute, times price or amount of contribution. Be realistic.)
- 8. How do you expect to pay these upfront expenses?** [Options include (1) up-front purchase with reimbursement from proceeds after the event; or (2) using seed money from a church account – this money will be reimbursed from the proceeds of the event. You will need the Treasurer's assistance to use this option.]
- 9. Will you be partnering with any non-UUCP groups?** Describe the groups and the nature of the partnership.
- 10. Publicity** – who is your target audience and how are you going to get the word out to them? Free publicity within the church includes our website, our Facebook page, The Light, the weekly email, the weekly Order of Service insert, and pulpit announcements. Be aware, though, that not all of our congregants receive electronic communications, and any postage used for mailing must be paid for from your proceeds. The church office can print a limited number of black-and-white flyers and a very limited number of color posters at no charge.

UUCP Fundraising Request for Approval

Date of request: _____

Title of Event: _____

Proposed Date of Event: _____

Acceptable alternate dates for event: _____

1. Sponsoring Ministry Team(s): _____

2. Contact person: _____ Phone: _____

3. Purpose of event/benefit to church:

4. Description of event: (Attached separate page if needed)

5. Facilities needed and additional dates and times needed (i.e., if setup or practices are required):

	DATES NEEDED	TIMES NEEDED
Entire Building		
Kitchen		
Conference Room		
Library		
Sanctuary		
Rainforest Room		
Nursery		
Office		
Outdoor/Memorial Garden		
Playground		
Other		

6. Labor needed: Indicate how many you need for each task.

	Volunteers	Paid Labor (How much and for how long?)
Set up and break down		
Food & Beverage		
Childcare		
Custodial		
Office Assistance		
Publicity		

7. Anticipated budget:*

Expenses \$ _____

Income \$ _____

Net Proceeds \$ _____

* Please attach detailed description of anticipated expenses including use of other church resources (i.e. copier or kitchen items).

8. Source and amount of seed money (If needed): _____

9. Name of non-UUCP groups involved: _____

10. Publicity Plans:

Endorsements and Approvals

Finance Team Action: _____ Approved _____ Not approved

Comments:

Special Conditions - Approval of this event and requested use for net proceeds is contingent upon the requestor/sponsoring ministry team doing the following:

Net Proceeds credited to: Operating Budget Fundraising Account: _____

Off-Budget Fundraising Account: _____

Other Off-Budget Account: _____

Other: _____

Board Action: _____ Approved _____ Not approved

Comments:

Distribution:

_____ Sponsoring Ministry Team or Requestor

_____ Finance Team

_____ Board Secretary

_____ Other