

WEST SHORE FUNDRAISING/DONATION DRIVE APPLICATION FORM

Event Name: _____

Brief Description: _____

Proposal Source (please check one): official West Shore Group West Shore staff

Contact Person Name (print) _____ Contact
Information: _____

I have read the Fundraising/Donation Drive Policy (included below this application form) and agree to it YES NO

If this is a fundraiser, what do you anticipate the net proceeds to be? _____

Recipient of the Fundraising/Donation Drive Proceeds:

Proposed Date of Fundraiser: _____

Additional Information (which will provide additional details to help the Stewardship Team make a decision): _____

Name of Fundraiser Treasurer (print) _____ Contact Information:

Please send this completed form to the Finance Manager, Suehana Kieres at skieres@wsuuc.org. Once the Stewardship Team has reviewed your application (at its soonest monthly meeting, which is on the second Wednesday of every month), Suehana will reach back out to you to inform you of the Team's decision.

If approved, you will want to reach out to Debbie Elliott in the office, to explore ways of publicizing your event.

FUNDRAISING & DONATION DRIVE POLICIES & PROCEDURES FOR WEST SHORE UU CHURCH

Sept. 14, 2023

1. Purpose

The purpose of the West Shore Fundraising & Donation Drive Policy is to ensure a coordinated and consistent congregation-based approach to either raising funds or collecting goods for internal or external support.

Goals include:

- Ensuring that the fundraiser or donation drive is consistent with our UU values
- Creating a conflict-free environment for fundraising or collecting goods
- Spacing out fundraisers or donation drives so that congregants aren't feeling overwhelmed
- Ensuring that opportunities to host fundraisers or donation drives are fairly shared among all our congregational groups

2. Scope

These Policies & Procedures address the following kinds of initiatives:

- Any event, activity, or ongoing endeavor conducted in the name of West Shore UU Church and/or utilizing West Shore assets to raise funds.
- Events, activities, ongoing endeavors in which goods are collected or services solicited, which
 - are intended to involve the entire congregation and/or
 - have a significant impact on/presence in West Shore's facilities and/or
 - require staff coordination and support.

3. Approval Process

- All fundraisers and donation drives must be approved by the West Shore Stewardship Team.
- Proposals for fundraisers and donation drives are to be submitted via the West Shore Fundraising Application Form, available in the West Shore office.
- Proposals will be evaluated at the Stewardship Team Meeting that follows closest to the date of receiving the application form, unless notified otherwise.
- Only approved fundraisers and donation drives may be communicated through official West Shore communication channels.
- Fundraisers budgeted in previous years will be evaluated by the Stewardship Team as part of the annual budgeting process.

4. Proposals

Fundraising or donation drive proposals must come from one of the following sources:

- An Official West Shore group, represented by its official contact
- A West Shore staff member
- A West Shore member or pledging friend who is raising money for West Shore's General Operating Budget

Sources that are not eligible to propose fundraisers include:

- Unofficial West Shore groups
- Groups not connected with West Shore

5. Recipient Regulations

In order to maintain compliance with laws governing congregational finances, all recipients of West Shore fundraising and donation drive proceeds must fall under one of the following categories:

- The West Shore operating budget, or a West Shore program
- A congregation or 501(c)(3) non-profit organization
- A direct program or service covered under an umbrella 501(c)(3) non-profit organization
- A department or operating function of a 501(c)(3) non-profit organization

West Shore fundraising and donation drive proceeds may not be disbursed to the following:

- Individual congregants (requests for individuals will only be considered through the Minister's Discretionary Fund, and is governed by the rules and policies of that fund)
- Electoral campaigns or candidates
- Lobbyists or political action groups

6. Scheduling

The Stewardship Team will create and maintain an annual fundraising and donation drive calendar.

Fundraisers and donation drives for a given West Shore group or program area will be limited to a reasonable number within a given calendar year *as determined by the Stewardship Team*.

Space requests for all fundraisers and donation drives should be submitted to the West Shore office through established scheduling procedures and protocol.

7. Additional Guidelines

All endeavors and events will have a selected "treasurer" who will be responsible for financial practices, and the treasurer must liaise with the Finance Manager to ensure compliance with

financial practices and policies. The treasurer will also enlist and oversee one volunteer who will count and sign-off on final income figures.

All funds from events and endeavors must be delivered to the West Shore office, with a full accounting sheet (to be provided by West Shore), within 7 days. A final detailed income and expense report will be turned in to the Finance Manager no later than 14 days after the event or endeavor, and all event receipts must accompany this report.

All pre-approved reimbursements must be submitted on West Shore financial forms within 7 days of the event; receipts must accompany these requests.

After all funds are received, and all financial paperwork is submitted, a check will be generated, or funds credited to the appropriate and approved recipient. This will take place within 14 days of receipt of final detailed report and event accounting.

Any returned checks and subsequent fees will be deducted from the net proceeds until good funds are received.

Contracts may be signed only by the Senior Minister or the Senior Minister's designee.

A minimum of 10% of net profits from all approved fundraisers that do not exclusively support the West Shore operating budget will be given to the West Shore Operating Fund in order to cover building/overhead costs.

REVISION HISTORY

Description of Revision	Date of Approval of Revision	Approver
New Policy	Nov. 2022	Stewardship Team
Various updates to policy	Sept. 13, 2023	Stewardship Team