



REVISION HISTORY

This is a new policy concerning fundraisers at UUCWC.

BACKGROUND/PURPOSE

Fundraisers are an important financial component of UUCWC's operating income. Unrelated business income tax (UBIT) rules and requirements are complex and may pertain to nonprofits. In general, UBIT is not owed from fundraising events if they are not held regularly and if there is not trade or business involved. There are numerous exemptions and inclusion; this policy informs how fundraisers can operate within these guidelines.

POLICY

A fundraiser is any event that is held to generate financial support or gain for UUCWC. It must be supportive of the church mission and aligned with our communal values.

Use of Space and Time

- Fundraisers are time limited events. eg, A plant sale may occur seasonally and twice a year.
- Fundraisers cannot be scheduled on an ongoing basis unless the event is considered “low impact” in which space, volunteers and other resources are not overly taxed or taken, or as specified by the approved plan.
- Dates are subject to the other needs of the church and its community.

Financial Implications and Expectations

- Any and all expenses associated with the creation of the fundraiser will be assumed by fundraising hosts, or reimbursed from the profits, as specified by the approved plan (see below).
- All income above overhead will be given to UUCWC.
- All income above overhead will be given to UUCWC's general fund.

Liability

- Fundraisers held at and for UUCWC are covered by our liability insurance.

Responsibility

- It is the responsibility of the volunteer(s) to oversee the fundraising effort from start to finish, including following the procedures documented in the appendix labeled “Event Check List”. This includes, but is not limited to, a formal proposal to the Finance Committee; a potential support team depending on the size and scope of the project; understanding of the financial impact and/or gain; and backup plans.



APPENDIX

- Check List for Fundraisers, Building Use and Communication
- Guidelines and Expectations for In-house Use of Church Kitchen
- Kitchen Policies
- Kitchen Procedures
- Safe Congregations Policy
- Safe Congregations Procedures and appendices

Event Planning Considerations:

- 1) Strategy
 - a) What is the event trying to accomplish?
 - b) What group is targeted for attendance?
 - c) Does this event fit into the mission of UUCWC?
 - d) Who is the sponsoring group in UUCWC?
 - e) Will any outside groups be participating? If yes, who will be point of contact?
- 2) Leadership
 - a) Who is leading this event?
 - b) Who is the contact in any sponsoring group?
 - c) Who is recruiting additional helpers?
- 3) Date, time, location
 - a) What is the proposed date and location? Is a rain date needed?
 - b) What time best suits an event of this nature?
 - c) Will child care be needed/offered?
 - d) What is timeline for this event? include arrangements with outside speakers, helpers, presenters.
- 4) Size of event
 - a) Consider what is the ideal number for optimum experience of attendees
 - b) Consider physical capacity of space; contact office or see website for details.
- 5) Budget
 - a) Who will cover what portion of costs?
 - b) Who will approve expenditures?
 - c) Who is in charge of logistics? Meet with Church Administrator before finalizing plans.
- 6) Publicity
 - a) What publicity is required for event:
 - i) inside church: contact church office
 - ii) outside church: contact communications@uucwc.org for press releases
 - b) Will this info post on the website?
 - c) Are directions included?
 - d) Will there be a photographer for the event?
- 7) Catering/Food & Beverage
 - a) Determine menu concept (light hors d'oeuvres, full meal, coffee and cookies)
 - b) Any special themes? Are they consistent with 8th principle?
 - c) What items can the host provide and what might need to be purchased or provided by caterer? (plates, utensils, glasses, tables)
 - d) Will alcohol be served? If yes, please see guidelines in appendix.
- 8) Physical Set up
 - a) Where will event be? Will additional rooms be needed for break-out sessions, meals, etc.?
 - b) If outdoor, is there a rain plan?
 - c) Crossing Room seats 100; Sanctuary can hold 250 people.

- d) Is any A/V set up needed? Who will run it?
 - e) Will there be a check-in table needed? Who will sit there and when will doors open?
 - f) Is a “green room” needed for guests? Who will be their “handler”? Provide water and cups for them?
 - g) Who is responsible for/how many people are needed for: Set up; Running event; Clean Up/Lock Up
- 9) Décor and Signage
- a) Will linens be required? Who will be responsible for prepping and cleaning them?
 - b) Is any special signage required? Who will provide it?
 - c) Any other needs like balloons, flags, banners, etc.?
- 10) Sound/Music/AV
- a) Will the church A/v system be sufficient? If additional equipment is brought in, who is responsible for its storage and use?
 - b) Is there a presentation that requires the projector (Sanctuary or Crossings Room)?
 - c) Who will run the sound and/or a/v equipment?
 - d) Will there be ambient background music?
 - e) Will there be performers who need sound set up?
- 11) Parking
- a) Is there sufficient parking on property? Under 100 parking spaces
 - b) Are parking assistants required?
 - c) Is security or a police presence to manage traffic needed (note there is an additional fee from the township for this)?
- 12) Program
- a) Who is host (person to welcome, do introductions, wrap-up)?
 - b) Are there speakers, performers, etc., needed for the event?
 - c) What is the length and style of the program
 - d) What is the program schedule?
 - e) Is a printed program required?
- 13) Registration/Welcome/Staffing
- a) Will there be a registration table? Who is providing? What literature (branding) will be on it?
 - b) Is there an attendance/guest list?
 - c) Do you need name tags? If so, they are not provided by the church and need to be purchased.
 - d) How many people needed for check in, welcome? Have greeters, etc., review emergency procedures.
- 14) Event
- a) Who will open the building for the event? Do they need a key?
 - b) Who will organize volunteers on day of event?
 - c) Who will greet guest speakers and show them green room if needed?
- 15) Follow Up
- a) Thank you correspondence
 - b) Wrap Report: successes, need to improve, final guest count, was event within budget, was there a profit if fundraiser?

Event Planning Checklist:

Program Name: _____

Day and Date of event: _____ Time: _____

Location: _____

Organizer(s): _____

Co-sponsorship: _____

Number of attendees anticipated: _____

Equipment needs (projector, screen, flipcharts, a/v, etc.): _____

Will food be served? _____ If yes, is kitchen needed? _____ See kitchen procedures.

8 weeks or more prior to the event:

_____ Check with office for availability of proposed date(s), time, and rooms requested; include any special equipment needs, staffing needs) **DO not proceed unless you have confirmation of a reservation for facility**

_____ Prepare a budget. Include any costs for staff (sexton), materials, etc.

_____ Are any outside vendors needed? If contract must be signed, it must be reviewed by office.

_____ Determine who is going to be responsible for different aspects of the event (volunteers, clean up crew, parking help, sound help, etc.).

_____ Develop a timeline and calendar so everyone knows what has to be done, when and by whom

_____ Meet with co-sponsor to review details and discuss exactly what the plan is

_____ Announcements: how will this event be marketed?

Inside church: Save the date if desired can run as soon as confirmed as well as request for volunteers. Actual event details will not be published until 3 weeks before event.

Announcement should be sent to office at assistant@uucwc.org for inclusion in Crossings II and weekly email. For an announcement in CrossCurrents, contact crosscurrents@uucwc.org.

Outside church: For publicity in newspapers, on FB pages, etc., contact communications@uucwc.org.

_____ Are posters or other printed pieces needed; obtain quotes.

6-8 weeks prior to event:

_____ Obtain all signed contracts

_____ Order publicity or printed materials

_____ Review facilities policies, including kitchen rules if food is being served.

_____ Submit budget to co-sponsoring group for review

5-6 weeks prior to event:

_____ Submit information for publicity to office/communications as noted above.

4 weeks prior to event:

_____ Review budget and adjust spending as needed.

_____ Confirm volunteers and other helpers.

2 -3 weeks prior to event:

_____ Finalize security, staffing, volunteers.

_____ Review all necessary confirmations of room a/v equipment, copies of contracts, etc.

_____ Have Announcements begin

1 week prior to event:

_____ Confirm all details with any outside contractors.

_____ Review responsibilities of all involved individuals.

_____ Determine who will introduce event; confirm with clean-up crew and volunteers.

_____ If decorations are needed, when will they be done relative to other church events.

Day of event:

_____ If charging admission, put all money and receipts in office lockbox.

Enjoy!

After event:

_____ Confirm clean-up within guidelines and lock the building.

1-2 days after event:

_____ Review event for things that went well or needed attention for future planning.

_____ Submit receipts for reimbursement to sponsoring group.

_____ Send thank you notes as needed.