

Fundraising Approval Policy & Procedures

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I. Purpose

United Church of Chapel Hill (“UCCH”) is a community of God’s people who believe that God will provide for the needs of the church and the community around us. We as a community endeavor to empower members of our church to take action on programs they care about while coordinating efforts so that we function healthfully as an institution. To this end, we entrust to the Church Council, Senior Pastor, and/or the Church Administrator the responsibilities outlined in the policy below, which must approve all fundraising requests in order to prioritize the annual stewardship campaign and support church members endeavoring to raise funds for causes consistent with the mission and goals of UCCH.

II. Definitions

- A. Fundraiser/fundraising: a campaign or event seeking to raise financial support from members of the UCCH congregation for programs or initiatives.
- B. Annual fundraiser/campaign: regular, expected fundraisers that traditionally occur at UCCH (examples: Alternative Gift Market, Empty Bowls, library book sale).
- C. Ongoing fundraiser/campaign: existing, standing fundraisers for our church programs or ministry partners (examples: Habitat for Humanity, Peacemaking Scholarship, altar flower fund). Special focus or events for these fundraisers may occur at certain times during the program year.
- D. One-time or special initiative fundraiser/campaign: campaigns that respond to a need faced by the church or community in a certain moment in time, or a campaign for an organization not traditionally/historically supported by UCCH (examples: capital campaign, Spreading Justice Initiative, Reentry House Plus Easter offering).
- E. External fundraising:
 - 1. Formal external fundraiser/campaign: UCCH does not receive donations or process gifts, but may provide space for the fundraising to occur (e.g. a

table in the office lobby) or communicate the initiative through official communications (examples: Girl Scout cookie sales, Chapel Hill-Carrboro CROP Hunger Walk, youth ministry pastor informing email distribution list of youth's involvement in charitable 5k).

2. Informal external fundraiser/campaign: UCCH does not receive donations or process gifts, and does not provide any form of official support, such as communications or financial processing (examples: individual asking someone at coffee hour to contribute to their charitable bike ride; adult ed Sunday School class sharing link to GoFundMe for a community member).
- F. Non-monetary campaign: efforts to collect non-monetary goods to benefit UCCH or an outside organization. Non-monetary campaigns may be annual/ongoing or a one-time/special initiative campaign (examples: Giving Tree during Advent, food collections for the IFC and UCCH food pantry).
- G. Ministry partner: non-UCCH organizations that UCCH supports (financially, in-kind, or with volunteers) or engages with regularly in our local and global ministries.
- H. Point person/contact person: Person with whom church staff and leadership will coordinate communications and other logistics of a fundraising campaign or event.

III. Policies and Procedures

- A. All fundraisers and non-monetary campaigns must comport with UCCH's Constitution and Bylaws, policies (including Safe Conduct, Building Use, and Financial), Mission Statement, and congregational covenants (including Racial Truth, Justice, and Reconciliation, and Creation).
- B. All fundraisers and non-monetary campaigns must be approved by the Church Council, Senior Pastor, or Church Administrator, as outlined in the policies below. The only exception is *informal external fundraising*, which does not require approval but may be monitored by the Senior Pastor or Church Administrator (see Section G.2., below).
- C. These fundraising policies are to be followed by all groups and individuals. Exceptions to any policies are noted within the policies or may be allowed upon application.
- D. A sample application can be found at the end of this policy. Its use is not required to request fundraising approval, but includes the typical information that will be required to make a decision.

1. Written requests for fundraising approval should be sent to the Church Administrator, who will review the request and ask for additional information if needed.
2. The Church Administrator and/or Senior Pastor can approve or deny a fundraising request in certain circumstances, or will forward the request to the Church Council for approval. Sections E-J provide more information.
3. Chairs of UCCH Boards may also bring requests for fundraising approval to the Church Council. The request should be made in writing to the Moderator and/or Senior Pastor at least two weeks before the next Council meeting.

E. Church Council “blanket approval” for annual and/or ongoing fundraisers

1. The annual stewardship campaign is held each fall/winter and takes precedence over all other internal and external fundraising. It is deemed approved. The Church Council will work with the Board of Trustees and the Board of Membership Engagement & Stewardship to set an appropriate stewardship goal and fundraising plan for the following fiscal year.
2. The Church Council may grant “blanket approval” for annual/ongoing fundraisers prior to or at the beginning of the fiscal year. “Blanket approval” does not mean that a campaign *must* occur, but that it *may* occur without further approval by the Church Council in that fiscal year. Fundraisers could include but are not limited to:
 - a) Ongoing fundraisers, such as for UCCH scholarships (e.g., Peacemaking and Edens Seminary), designated funds for UCCH groups (e.g., Sanctuary Committee, Capital Expense Reserve, and altar flowers), or community partners (e.g., Habitat for Humanity, Church World Service, and IFC).
 - b) Annual fundraising events, such as Alternative Gift Market and Empty Bowls Ash Wednesday supper.
3. To the extent possible, the “blanket approval” should include the approximate start/end times of campaigns and/or fundraising events, the fundraising goal, and the point person for each campaign in that fiscal year.
 - a) Material changes to these plans do not revoke approval, but should be communicated to the Senior Pastor and/or Church Administrator as soon as they are known.
 - b) Point persons whose fundraisers are covered by this “blanket approval” must contact and coordinate with the Church

Administrator to schedule fundraising events, set up online giving options and associated designated funds, and arrange communications regarding the fundraising at the appropriate time.

4. The Church Council may rescind approval (or ask that a fundraising campaign be paused or postponed) if an unexpected, pressing congregational financial need arises that would conflict with a previously approved initiative.

F. Approval for one-time/special initiative campaigns

1. The Church Council must approve any special fundraisers (internal or external) that:
 - a) Are not covered by the blanket approval at the beginning of the year, AND
 - b) Aim to raise more than \$1000 from the congregation.
2. Fundraising requests that require approval by the Church Council will either be sent to the Moderator by the Church Administrator who has received the written request, or may be brought by an appropriate Board chair. A request by a Board chair should be made in writing to the Moderator and/or Senior Pastor at least two weeks before the next Council meeting.
3. The Senior Pastor and/or Church Administrator may approve or deny a one-time/special fundraiser that aims to raise less than \$1000 from the congregation. The Senior Pastor and/or Church Administrator may deny a fundraising request that does not comply with this policy or another UCCH policy, Constitution & Bylaws, or congregational covenant. A list of fundraising requests denied by the Senior Pastor and/or Church Administrator will be made available to the Church Council on a semi-annual basis or upon request.

G. Approval for external fundraising

1. "Formal" external fundraising
 - a) External fundraisers supported by UCCH must benefit non-profit/not-for-profit organizations whose missions are consistent with those of UCCH.
 - b) The Senior Pastor and/or Church Administrator will approve formal external fundraising.

- c) In these cases, the church office will not receive donations or process funds, but may provide physical space (see Section J) or communications about the fundraiser.
 - d) Requests from outside organizations to ask UCCH members to contribute to a campaign or purchase tickets for a fundraising event (or similar request) should be sent to the Senior Pastor and/or Church Administrator. If the external fundraiser is suitable to share in our church communications, the Senior Pastor and/or Church Administrator will ask the Communications Manager to do so.
 - e) Fundraising requests for political campaigns will be denied.
2. “Informal” external fundraising
- a) No approval is needed.
 - b) UCCH will not manage or control, unless the method, number, or repetition of requests interrupts ability to conduct worship or ministry. Such issues should be reported to the Senior Pastor and/or Church Administrator.
 - c) Fundraising for political campaigns or partisan organizations should not occur on church property, during church gatherings (in-person or online), or through UCCH-related email distribution lists.

H. Denial of Fundraising Request/Application and Requests for More Information

- 1. The Church Council, Senior Pastor, and/or Church Administrator may deny a request or application for fundraising or may ask the contact person to provide more information before making a decision.
- 2. Denials
 - a) The denial will be communicated to the contact person via email, phone call, or in-person by the Senior Pastor, Church Administrator, or other appropriate representative of the church (Moderator, Business Manager, etc.)
 - b) A request for fundraising approval may be denied if the fundraiser does not meet the requirements described in these policies, would conflict with a previously approved fundraiser, or is otherwise inappropriate to share with the congregation.
- 3. Requests for More Information

- a) The Senior Pastor, Church Administrator, or other appropriate representative of the church (Moderator, Business Manager, etc.) may request more information from the contact person before a decision is made about the fundraising approval request. The request for more information may be made via email, phone call, or in-person.
 - b) The requested information should be provided in writing via email as soon as possible.
- I. Sharing information or encouraging members and others to consider UCCH in their planned giving, or the Senior Pastor's decision to approach individuals or families about giving to the church, does not need approval from the Church Council.
- J. Receipt of unsolicited gifts of any size, toward the General Operating Fund or any designated fund, does not need approval from the Church Council.
- K. Fundraising Tables & Events** - for internal or external fundraising
- 1. Tables - groups may set up a table for fundraising purposes on Sunday mornings.
 - a) Fundraising activity may not interfere with worship.
 - b) Groups must arrange with the Church Administrator to set up a table for fundraising. The Church Administrator and/or Senior Pastor may limit the number of tables for fundraising activity on any given Sunday.
 - c) The table should be set up at least 20 minutes before the first worship service begins. The table may remain up throughout the morning. After the fundraising activity is complete, all materials must be removed and the table and chairs must be returned to their appropriate storage.
 - d) The table will be set up in the church office lobby or in another convenient place in the church building, as arranged with the Church Administrator and/or Senior Pastor.
 - e) Appropriate signage may be placed in the Narthex or Fellowship Hall by the Church Administrator on the Friday prior to the fundraiser.
 - f) For internal fundraising only, funds being processed by the UCCH business office must be collected, safeguarded, and counted according to the UCCH Financial Policies.

2. Fundraising events, including dinners, concerts, and speakers, must be arranged with the Church Administrator, who will reserve space.
 - a) Fundraising events must follow all Building Use Policies, including no consumption of alcohol on United Church property.
 - b) Fundraising events may not interfere with worship or UCCH programs.
 - c) Donations for use of the space may be requested for non-UCCH groups using the facilities. The fee may be waived at the Church Administrator's discretion. Waived fees will be recorded in the Building Use Agreement to be signed by the building user and Church Administrator.
 - d) For internal fundraising only, funds being processed by the UCCH business office must be collected, safeguarded, and counted according to the UCCH Financial Policies.
 - e) Fundraising events for political campaigns are not allowed.
3. Fundraising during Worship Services
 - a) Special messages encouraging giving to internal fundraisers may be allowed.
 - b) Arrangements for these special messages during a worship service must be made with the Senior Pastor.

IV. Sample Fundraising Proposal Application

Forms (electronic or paper) should be sent to the Church Administrator. Applications should be submitted as soon as possible, but no later than 5 weeks before the proposed fundraiser is to begin. Receipt of the applications will be acknowledged by the Church Administrator and the submitter will be contacted as to the status of the application (Approved, Denied, More Information Needed, Forwarded to Church Council for Approval) as soon as possible.

Individuals or organizations wishing to use UCCH facilities to hold a fundraising event must make arrangements with the Church Administrator and sign a Building Use Agreement.

United Church of Chapel Hill Application for Fundraising Approval

Applicant's name:

Applicant's email address and phone number:

Did you read and do you agree to the UCCH Fundraising Policy? Yes No

Is this a fundraiser for a UCCH program, ministry, or other initiative (including fundraisers for UCCH's existing ministry partners)?

Yes, it is for:

No

For non-UCCH fundraisers:

What organization will the fundraiser support?

Name:

Address:

Website:

Phone number:

Is the organization non-profit or not-for-profit? Yes No

For all fundraisers:

What is the fundraising goal? \$

What are the requested dates of the fundraising campaign and/or event?

Will you be the contact person for the duration of the fundraising campaign and/or event?

Yes No

If no, who is the contact person?

Name:

Email address and phone number:

Would you like UCCH to publicize your fundraiser? Yes No

If yes, please provide a written blurb (100 words or less), describing the fundraiser, including the goal, important dates, how to donate, etc. (UCCH may edit for our communications):