

# *First Parish Church of Stow and Acton*

## **Fundraising Policy**

Policy # 019

Revision # 03

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## **I. POLICY STATEMENT**

The purpose of this policy is to coordinate the timing and resources necessary for successful fundraising and to ensure that First Parish Church of Stow & Acton (FPC) does not inadvertently fund unintended activities and does not jeopardize its tax-exempt status through inadvertent participation in a prohibited activity.

## **II. SCOPE**

This Fundraising Policy sets the parameters for fundraising activities that occur at FPC, or that use affiliation with or through FPC as part of the fundraising effort.

To be approvable, a fundraising activity must be either a Social Justice fundraiser or an FPC fundraiser.

- A Social Justice fundraiser seeks funds to further the broader interest of social justice and/or community outreach through contributions to third-party non-profit entities.
- An FPC fundraiser seeks funds for the direct benefit of FPC-related church activities.

All fundraising will be guided by the following general guidelines:

- Fundraising activities must be consistent with and advance the mission of FPC and in accordance with Unitarian Universalist principles.
- FPC has a duty to ensure that fundraising complies with applicable laws and is consistent with laws regulating the tax-exempt status of FPC.
- Fundraisers need to ensure that donations are tax-deductible, or clearly state otherwise prior to accepting a donor's contribution.
- All fundraising activities need prior approval.
- Fundraisers must coordinate their efforts with FPC and report the results of their solicitations to FPC.

**FPC FUNDRAISER APPROVAL PROCESS:** All persons proposing FPC fundraisers must first go through the Fundraising Council who will approve events in

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consultation with the Parish Administrator and/or Minister in consideration of the calendar.

**SOCIAL JUSTICE FUNDRAISER APPROVAL PROCESS:** All persons proposing social justice fundraising must first comply with the following requirements:

1. Fundraising must be sponsored by an FPC committee or an active member of FPC (the "Sponsor") who will be responsible and accountable for the fundraising activities.

### 2. FUNDRAISING INFORMATION SUBMITTED:

Any fundraising proposal must include, at a minimum, the information requested on the following "Fundraising Request Sheet". Further information may be requested at any time of any proposed fundraising activity, if necessary.

The information listed on the "Fundraising Request Sheet" must be submitted to the Parish Administrator and the Minister for review prior to the activity being approved for space use or publicity.

### 3. APPROVAL PROCESS BY TYPE OF ACTIVITY:

Requests for donation of goods: These are requests to the FPC community to donate goods for social justice purposes. Examples include clothing or food drives, with donated items to be given to third-party non-profit entities.

- Fundraising requests of this type may be submitted to and approved by the Parish Administrator and Minister in general consideration of the Fundraising Calendar and other requests.

Requests for donation of funds: These are requests to the FPC community to donate funds or gift cards for social justice purposes, including, but not limited to, donations to walks or runs in support of a social justice cause or organization in the name of an FPC group.

- Fundraising requests of this type may be submitted to and approved by the Parish Administrator and Minister in general consideration of the Fundraising Calendar and other requests.

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Fundraising Events: All other fundraising activities could be considered events and should follow the request procedure outlined below.

- Requests for Fundraising Events must be submitted to the Parish Administrator or the Minister who will consult the Fundraising Calendar for availability. No more than one Fundraising Event will be approved per month available on the Fundraising Calendar, unless otherwise approved by the Board.

#### 4. REPORTING

Promptly after the fundraising event is complete, the sponsor must report the amount of gross revenue, expenses, and net charitable contribution, and document that the charitable proceeds will actually be disbursed for the intended charitable purposes. The Finance Committee may modify the required reporting information. Failure to report this information may disqualify the fundraiser from future fundraising at FPC.

#### Emergency Exceptions:

There may be instances where the Board would overrule these restrictions and limitations.

- This is permissible in cases of emergencies or time-sensitivity, when it would be important to respond quickly.
- The Board should assess whether the fundraising action requested is in keeping with Unitarian Universalist principles or past social justice statements of the church or UUA, and whether or not time is of the essence.

#### Recurring FPC Fundraising:

FPC Fundraising that occurs annually or periodically need only be approved once but must provide their fundraising report at the conclusion of the fundraising. The Finance Committee will maintain a current list of approved recurring fund drives and will periodically assess whether the need for these drives is continuing and make recommendations to the Board of Trustees as needed. Examples of recurring fundraising include, but are not limited to, the following:

- Apple Pies
- Craft Beer Festival
- Jewelry Sales
- Church Auction

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- Drag Bingo
- Plant Sale
- Holiday gifts for Renewal House and Haven shelters
- Activities undertaken as part of the regular Sunday service and approved by the Minister
- Activities undertaken as part of the Religious Education program and approved by the Director of Religious Education

### Prohibited Fundraising Activities:

There are categories of fundraising that will typically not be allowed, such as the following:

- Collecting funds or requesting volunteers for political candidates or political parties;
- Fundraising for a charitable organization that has not complied with Massachusetts Attorney General regulations applicable to solicitations;
- Collecting for other charities when the solicitor is not a member of FPC (e.g., using a hired solicitor asking for funds);
- Sale of commercial products and services by commercial entities, even if a portion of the profits are designated to a charity (e.g., sale of neckties by a clothing store, where some portion of the net profits is to be donated to American Cancer Society);
- Any fundraising without prior consent.

## **III. RESPONSIBILITY**

The Board of Trustees shall set the Fundraising Calendar each June for the following church year.

## **IV. DEFINITIONS**

In this Fundraising Policy, the term “fundraising” means any activity that makes any use of FPC buildings, property, publications, communications, or of any affiliation with or through FPC for the purpose of soliciting or collecting money or goods. The use of communications such as FPC Announce, Sunday Orders of Service, the monthly Chronicle, and letters from the Board of Trustees are governed by this policy. The unofficial communications vehicle known as FPC Forum is not subject to the requirements of this policy.

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Fundraising includes, but is not limited to, outright requests (whether active or passive) for cash, cash equivalents (stocks, gift certificates, etc.), or goods; raffles; the sale of goods (e.g., coffee, cookies, T-shirts, etc.); auctions; contributions or proceeds related to performances; payment for fundraising services provided; and similar activities.

The Fundraising Calendar will be set each June by the Board of Trustees for the following church year. This calendar would identify which months are available for a Social Justice Fundraising Event and block out others in consideration of major events already on the calendar.

V. REFERENCES - None

## VI. APPROVAL SIGNATURES

On behalf of the Board of Trustees



06/19/2024

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Jennifer Edgerton  
FPC President

Date

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**First Parish Church of Stow & Acton, Unitarian Universalist**

**FUNDRAISING REQUEST SHEET \***

(Return to Parish Administrator 978-897-8149)

Fundraising must be sponsored by an FPC committee or an active member of FPC (the “Sponsor”) who will be responsible and accountable for the fundraising activities. The Board of Trustees reserves the right to decline any application for fundraising it deems appropriate.

Sponsor’s name, phone number, email address, and affiliated committee:	
Purpose of Fundraising:	
Beneficiary Organization & address:	
Massachusetts Attorney General registration number:	
Person(s) collecting or soliciting:	
Brief narrative description of the fundraising event:	
Proposed date(s) and time(s):	
Method of fundraising:	
Location of fundraising:	
Planned publicity:	
Special requirement requests or other considerations:	
Fundraising Report**:	

\* Attach supporting information or additional sheets if necessary

\*\* Fundraising Report – amount of gross revenue, expenses, net charitable contribution, and an accounting of how the proceeds are to be used – is expected within 3 days of the event (to Parish Administrator)