

First Parish Church of Stow and Acton

Fundraising Policy

Policy # 019

Revision # 01

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.

REQUIREMENTS: All persons proposing 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.

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2. FUNDRAISING PROPOSAL INFORMATION:

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 event, if necessary.

The information listed on the "Fundraising Request Sheet" must be submitted for review prior to the event being approved for space use or publicity. The Board of Trustees shall designate a person/s or a committee to approve or deny all applications for fundraising. Any FPC member may appeal decisions of said designee directly to the Board of Trustees.

3. The following considerations may bear on the approval decisions, if relevant:

- the social justice or community outreach initiative being served;
- the history of the fundraising organization and any intended recipients of funds to be generated by the effort;
- the fundraising organization's or sponsor's willingness and ability to distribute any collections as advertised (FPC should not need to be responsible for any distribution of funds or goods collected);
- the existence of other fundraising efforts aimed at the same issue(s);
- the number of other fundraising efforts occurring at the same time;
- the appropriateness of the activity;
- the duration of the effort;
- the complexity of the event;
- any additional, conflicting, repetitive, or overlapping fundraising activity;
- any aspect of the effort that tends to adversely impact FPC's tax-exempt status; and
- other factors, as specified by the Finance Committee or Social Action Committee.

4. 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 will disqualify the fundraiser from future fundraising at FPC.

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

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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:

- The Fall Fair
- Apple Pies
- Jewelry Sales
- Church Auction
- 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 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 approve or shall designate a person/s or a committee to approve or deny all applications for fundraising.

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

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governed by this policy. The unofficial communications vehicle known as FPCForum is not subject to the requirements of this policy.

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.

V. REFERENCES - None

VI. APPROVAL SIGNATURES

On behalf of the Board of Trustees

[Katherine R. Weeks] 03/29/2020

FPC President / Date

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First Parish Church of Stow & Acton, Unitarian Universalist

FUNDRAISING REQUEST SHEET *

(Return to Church 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 as 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 Deedee)