

**Live Oak UU Church**

Fundraiser Approval Form

Name of Contact Person: \_\_\_\_\_

Phone number: \_\_\_\_\_

e-mail address: \_\_\_\_\_

Sponsoring Committee: \_\_\_\_\_

Date, Time and Description of Event: \_\_\_\_\_

\_\_\_\_\_

Purpose of Fundraiser: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Monetary goal of Fundraiser: \_\_\_\_\_

Starting Date for Fundraising: \_\_\_\_\_

Ending Date for Fundraising: \_\_\_\_\_

Expiration Date for Funds: \_\_\_\_\_

Space(s) Requested for Fundraiser: \_\_\_\_\_

\_\_\_\_\_

Have you checked with the Administrator to see if the space is available for the time you are proposing?  Yes  No

Do your fundraising documents inform donors that any funds that remain unspent at the expiration date will revert to the general fund of Live Oak UU?  Yes  No

Names of 2 Cash Handlers: \_\_\_\_\_

\_\_\_\_\_

Reviewed by and date signed: \_\_\_\_\_

# Live Oak Unitarian Universalist Church

## Fundraising Guidelines

Live Oak encourages the generosity of our members both in sustaining our community and supporting causes in the larger community. To help keep the fundraising process smooth, all projects designed to raise funds must follow the guidelines outlined below.

General Guidelines for All Fundraising Efforts:

- A **Fundraiser Approval Form** must be submitted to [fundraising@liveoakuu.org](mailto:fundraising@liveoakuu.org) for consideration and should be submitted at least 4 weeks in advance of the start of the fundraiser. The Fundraising Committee is a sub-committee of the Finance Committee. Approvals are dependent upon the fundraiser's consistency with Live Oak's mission, as well as on space and time considerations. Additional restrictions may be imposed during the pledge campaign period.
- A start and end date for soliciting funds must be specified on the form.
- The sponsors of the fund-raiser will be responsible for set-up and clean-up.
- The church will not advance money to groups for fundraising. Pre-orders of merchandise are encouraged.

Additional Guidelines for Fundraisers That Benefit Live Oak:

- Committees and church groups may raise funds for specific purposes not included in the operating budget. However, if there is already a line item in the budget for the purpose, additional fundraising is not allowed.
- Fundraisers must follow the church cash handling procedures: a collection form, found in the safe room or 103, must be filled out by two cash handlers. One copy of the form goes in the treasurer's lock box in Room 103 and the other copy goes with the collected funds in the collection envelope, which is then placed in the church safe.
- Unless the fundraising is for an existing non-expiring capital account, fundraisers must provide a date by which funds will be spent. Any unused funds will roll over to the church's general fund. Fundraising solicitation materials must state that excess funds will revert to the general fund.
- Fundraisers whose goal exceeds 2% of the church's operating budget will be presented by the Fundraising Committee to Finance Committee for recommendation to the Policy Committee.
- Internal Revenue Service rules prevent church-sponsored fundraisers that benefit an individual or family.