

UCH Policy on Targeted Donations and Fundraising Initiatives

Approved by the Board of Trustees

October 13, 2015

Purpose

Questions occasionally arise as to whether targeted donations and fundraising initiatives are ever appropriate and, if so, under what circumstances. This policy seeks to strike a balance between allowing those who wish to make targeted donations the flexibility to do so while recognizing that such donations, if not carefully circumscribed, have the potential to distort the annual operating budget, as approved by the congregation.

Definitions

Targeted monetary donations are contributions for a specific purpose that do not go into the Church's general or capital fund and that usually are not reflected in the annual budget. This policy addresses two types of targeted monetary donations: (1) contributions on behalf of ongoing programs, such as a speaker honorarium or a new initiative or ministry; and (2) one-time gifts for tangible property ("capital donations") intended to improve building quality, such as a stair rail for the pulpit.

Targeted fundraising initiatives by members or groups of members within the congregation seek to raise money for a targeted donation, as defined above.

"In kind" donations are gifts of nonmonetary items, such as furniture, decorative accessories, or computers.

Monies for targeted donations may come from members or friends who have earmarked non-pledge contributions for that purpose or from special fundraisers held by members or groups within the congregation. Fundraising by the youth group for youth group activities is specifically exempted from this policy.

Criteria for Accepting Targeted Donations

1. Targeted monetary donations and fundraising initiatives shall be consistent with the mission of the Church.
2. Because a member's primary financial obligation to the congregation is to support the totality of the congregation's ministry through the member's annual pledge, a targeted monetary donation shall not be made in lieu of the member's annual pledge. A targeted monetary donation that, in the opinion of the Executive Team, is disproportionate to the member's annual pledge (except a donation to the endowment fund or the capital fund) may be declined.
3. No member may make a targeted monetary donation unless the member's pledge payments are current.
4. The appropriate Circle Coordinator or the Executive Team may accept or decline a proposed monetary donation or impose any conditions it sees fit.
5. If a targeted monetary donation is not used in the fiscal year for which it was intended, the funds shall be held for the restricted purpose for another year. If the funds cannot be spent as originally planned, the Church shall offer to return the donor's money or shall ask the donor's permission to use the funds to support the broader mission of the Church.
6. The appropriate Circle Coordinator may accept or decline a proposed in-kind donation based on its condition, the Church's need for such a donation, and the acceptability of any conditions that may be attached to the gift, such as whether it can be disposed of in the future.