

Program Administrative Team
First Unitarian Church
605 Morewood Avenue
Pittsburgh, PA 15213
412/621-8008
www.first-unitarian-pgh.org

FUND RAISING POLICY

Summary

The First Unitarian Church of Pittsburgh needs financial resources to fulfill its mission. The need for financial resources is clearly stated in the Global Ends Statement adopted by the Board of Trustees: “The First Unitarian Church of Pittsburgh exists so that people who share Unitarian Universalist values can gather in a liberal religious community for spiritual and intellectual growth and social transformation, with resources comparable to other thriving religious organizations.”

The purpose of this policy is to empower the Program Administrative Team to regulate fund raising activities so that (1) church members and friends are less likely to feel overwhelmed with what they may perceive as too many requests at once; (2) church members and friends are more likely to feel reassured that they need not contribute to every giving opportunity; and (3) the congregation has a steady stream of financial resources sufficient to fulfill its mission.

General Policies

All fund raising activities are scheduled through consultation with the Program Administrative Team. The Program Administrative Team ensures that fund raising activities are spaced throughout the year rather than concentrated in one season of the year. The Program Administrative Team maintains a calendar which shows when fund raising activities are scheduled to occur.

Committees or groups wishing to schedule fund raising activities complete the Fund Raising Activity Scheduling Request Form at the end of this document and submit the completed form to the Program Administrative Team.

All fund raising activities reflect reasonable interpretations of the Ends Policy of the church.

The Program Administrative Team communicates clearly that church members and friends are not expected to contribute to every fund raising activity. The Program Administrative Team provides reassurance that contributions to fund raising activities are not required for membership or participation in the life of First Unitarian Church.

The Program Administrative Team makes ad-hoc policy decisions about fund raising situations not specifically addressed in this document. The Program Administrative Team may consult with the Operations Administrative Team or the Board of Trustees in these cases.

The Program Administrative Team informs the Treasurer and the Business Manager about upcoming fund raising events so that the Treasurer and the Business Manager can ensure that accounts are properly set up to receive proceeds from fund raising events.

First Unitarian Church provides purchasing opportunities for church members and friends which are not primarily intended as fund raising activities. These opportunities are also scheduled through consultation with the Program Administrative Team.

Fund Raising Activities Intended to Benefit the Entire Church

Major Capital Projects. When the anticipated cost of a capital project is \$50,000 or more, then it is a major capital project. Major capital projects are authorized by the Board of Trustees. Fund raising for major capital projects is coordinated by a Capital Campaign Committee. Capital campaigns for major capital projects are conducted no more frequently than once every five to seven years. Planning for capital campaigns for major capital projects is done with the assistance of a capital campaign consultant. Planning for major capital projects should reflect a reasonable interpretation of the Ends Policy of the church. One or more congregational votes ordinarily take place during the planning phase of a major capital project. The capital campaign for a major capital project ordinarily involves solicitation of major gifts from households within the congregation. Small contributions to major capital projects are welcome prior to commencement of a capital campaign.

Minor Capital Projects. When the anticipated cost of a capital project is \$5,000 or more, but less than \$50,000, then it is a minor capital project. Minor capital projects are authorized by the Program Administrative Team, the Operations Administrative Team, or the Chief Executive Officer. Fund raising efforts for minor capital projects are conducted no more frequently than once each year. Fund raising for minor capital projects is coordinated by a standing committee or an ad-hoc committee. Planning for minor capital projects should reflect a reasonable interpretation of the Ends Policy of the church. Small contributions to minor capital projects are welcome prior to commencement of fund raising efforts.

Annual Canvass. The annual operating and capital budgets are approved by the Board of Trustees upon recommendation by the Chief Executive Officer. Planning for the annual operating and capital budgets reflects a reasonable interpretation of the Ends Policy of the church. The annual canvass gathers funds from all church member and friends to support the annual operating and capital budgets. The Canvass Committee conducts the annual canvass.

Planned Giving. First Unitarian Church welcomes gifts and bequests to endowed funds owned by the church. The Planned Giving Committee encourages individuals to include bequests to First Unitarian Church in their estate plans.

Fantasy Auction, Rummage Sale, and Similar Activities. The Fantasy Auction, the Rummage Sale, and similar activities may be held no more often than once per year. Ordinarily, these fund raising events have a specific goal or purpose outside the annual operating and capital budgets which reflects a reasonable interpretation of the Ends Policy. The Fund Raising Committee coordinates these activities.

Fund Raising Activities Intended to Benefit the Larger Unitarian Universalist Community

Unitarian Universalist Association. First Unitarian Church cooperates with major fund raising campaigns coordinated by the Unitarian Universalist Association.

Unitarian Universalist Service Committee. First Unitarian Church encourages church members and friends to become members of the Unitarian Universalist Service Committee. The importance of membership in the Unitarian Universalist Service Committee is ordinarily a major focus on Sunday morning once per year. In addition, First Unitarian Church participates in the Guest at Your Table fund raising program coordinated by the Unitarian Universalist Service Committee.

Ohio-Meadville District. First Unitarian Church cooperates with major fund raising campaigns coordinated by the Ohio-Meadville District. First Unitarian Church encourages church members and friends to become Chalice Lighters. First Unitarian Church also encourages contributions toward the Evans Fund for Theological Education.

Partner Churches. First Unitarian Church values its partner church relationships. Ordinarily, First Unitarian Church conducts one fund raising activity per year for each partner church relationship.

Fund Raising Activities Intended to Benefit a Specific Group within the Church

Contributions to Program Endowments. First Unitarian Church has program endowments for Social Justice, Campus Ministry, Music, and Ministry with Children and Youth. The four committees which have overall responsibility for coordination of program activities in these four areas may invite contributions from church members and friends to the program endowment in their area no more than once per year. In addition, the campus ministry program may invite contributions from alumni and parents to the Campus Ministry Endowment no more than once per year.

Benefit Concerts, Events Involving Food and Drink, Art Auctions, Car Washes, Bake Sales, and Similar Activities. First Unitarian Church encourages committees and groups within the church to hold ad-hoc fund raising events for their own benefit. However, committees and groups within the church may not raise funds to supplement specific

operating budget accounts. In setting the operating budget, the Board of Trustees is guided by a principle of providing comprehensive financial support for the church as a whole, and fund raising efforts intended to raise funds to supplement specific operating budget accounts run counter to this principle.

Capital Contribution Opportunities. Committees, groups, and staff members may request approval from the Program Administrative Team or the Chief Executive Officer to invite contributions for equipment or other capital projects. The Program Administrative Team maintains a list of approved capital contributions opportunities and publishes this list in the newsletter.

Fund Raising Activities Intended to Benefit the Larger Community

Share-the-Plate. On the first Sunday of each month, one half of the loose cash in the offering will be given to a charitable group which affirms and promotes principles and values which are in accord with Unitarian Universalist principles and values. The Social Justice Committee recommends specific groups for approval by the Program Administrative Team.

Gifts in Kind. First Unitarian Church provides opportunities for church members and friends to contribute gifts-in-kind to local charitable organizations.

Alternative Gift Market. Annually, First Unitarian Church provides an opportunity for church members and friends to participate in the Alternative Gift Market.

Unitarian Universalist Service Committee (UUSC) Disaster Relief. From time to time, the UUSC provides opportunities for individuals and congregations to contribute toward disaster relief efforts.

Customary Fund Raising Activities

September

- Share the Plate
- Khasi Hills Kick-Off

October

- Share the Plate
- Annual Canvass
- Campus Ministry Endowment

November

- Share the Plate
- Annual Canvass Continues
- Alternative Gift Market

December

- Share the Plate
- Annual Canvass Continues
- Mathilda Theiss Gifts
- Mitten Tree

January

- Share the Plate
- Endowment for Ministry with Children and Youth
- Spaghetti Supper for Coming of Age or Youth Group

February

- Share the Plate

March

- Share the Plate
- Unitarian Universalist Service Committee Sunday

April

- Share the Plate

May

- Share the Plate
- Music Endowment
- Fantasy Auction

June

- Share the Plate

July

- Share the Plate

August

- Share the Plate

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FUND RAISING ACTIVITY SCHEDULING REQUEST FORM

Name of contact person _____

Telephone _____

Email address _____

Name of committee or group _____

Description of fund raising activity _____

Preferred dates _____

Additional information regarding space reservations, set-up requests, and publicity _____