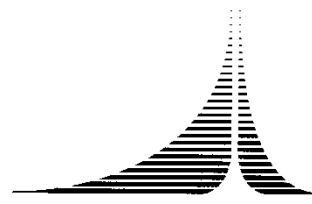


Fundraising Event - Planning and Approval Form
The Unitarian Church in Westport



BOTH SIDES OF THIS FORM MUST BE COMPLETED PRIOR TO SUBMISSION

In order to have a fundraiser that is successful along several dimensions, the following information needs to be thought through and put together in a plan. This form captures the key details of your plan. Submit this form 45 days or more in advance of the proposed fundraiser dates to the business office (either Director of Operations or Scheduling & Office Manager) by email: dorothy@uuwestport.org and/or jan@uuwestport.org.

Contact Information for the Fundraising Planner(s):

Primary Contact Name: _____ Primary Contact Phone Number: _____

Primary Contact Email Address: _____

Secondary Contact Name: _____ Secondary Contact Phone Number: _____

Secondary Contact Email Address: _____

Church Group or Committee You Are Representing: _____

Information about the Fundraising Event or Campaign:

Event Name and/or Purpose: _____

Proposed Date(s): _____

Proposed Time(s): _____

Alternate date(s) or time(s) if proposed date(s) or time(s) are not available: _____

Description of the Event: _____

Proposed Location: _____

Projected Attendance: _____

Please check the Church Mission Component that would be supported by this event:

Spiritual Development Religious Education Music Youth Outreach

Environmental Operating Funds Larger Unitarian Universalist Religious Community

Social Justice (describe): _____

Other (describe): _____

Beneficiaries of Proceeds (church group, if a nonprofit charity- please add their Tax EIN): _____

Financial Plan:

TOTAL GROSS PROCEEDS ANTICIPATED = \$ _____

Amount and description of expenses you see incurring for your fundraiser? (indicate \$ amount with description)

Expenses Continued: _____

How will these expenses be covered? (specify budget or fund name if available) _____

Will the fundraiser involve the preparation and/or serving of **food or beverages**? _____ Yes _____ No

If yes, please provide details _____

Reminder: If food and/or beverages are being served, all clean-up is the responsibility of the planners and not of the church or church staff. Spaces must be left as they are found.

How will the event be promoted? _____

Please include any promotion costs in the expense list above

Who will be responsible for handling, counting, and safeguarding the funds received during your event?*

Funds handler #1: _____ Phone: _____ Email: _____

Funds handler #2: _____ Phone: _____ Email: _____

**** Note: A minimum of two (2) fund handlers are required.**

If approved, the form will be sent back to the business office. The Scheduling & Office Manager will confirm space assignment with you, the fundraising planner and review with you any additional event details. The Director of Operations will contact you to review orientation for the funds handlers and any payment system needs.

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Review and Approvals (section below for administrative use only):
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Initial Review for Calendar Clearance (initial & date): _____

Review for financial and funds handling (initial & date): _____

Staff Head approval (signature & date): _____

- Fundraiser seeks to raise an amount under \$1,000

Stewardship Committee approval (signature & date): _____

- Stewardship Committee approval is required because the fundraiser:
 - Will be held over multiple dates; and/or
 - Is a congregation-wide solicitation; and/or
 - Is in combination with outside group(s); and/or
 - Seeks to raise an amount between \$1,000 and \$10,000

Board of Trustees (signature & date): _____

- Board approval is required because the fundraiser seeks to raise more than \$10,000