

All Souls Church, Unitarian
1500 Harvard St., NW
Washington, DC 20009
202-332-5266

FUNDRAISING PROJECT PROPOSAL

Description:

Person and organization requesting	Date of request
Event description	
When and where (identify specific room(s) and time(s))	Date needed
Describe any "special" involvement of Church staff or resources	

Anticipated revenues and expenses:

Total anticipated revenue (before deducting expenses)	Anticipated revenue	
Expenses for specific purchase(s) or donation of funds raised	purchase	Anticipated cost / donation
	purchase	
Expenses incurred to stage fundraising event(s)	Anticipated expense	
	Net (to operating budget)	

Approval:

Board Secretary (Board of Trustees approval)	Date
Administrator's reservation of space and resources requested above	Date
Treasurer and/or Finance Chair	Date

Notes

- **IMPORTANT:** Unless otherwise agreed by the Board of Trustees, any funds raised in excess of the donation/purchase goal(s) indicated here will go to the general operating budget of the church. Similarly, if the fundraiser intends a specific purchase, and the net funds ultimately raised are insufficient for that purchase, then the net funds will instead revert to the general operating budget.
- If all net funds are to go to a targeted program, write ALL NET as the "Anticipated cost / donation," and zero as the "Net (to operating budget)."
- Attach additional explanation and documentation, as necessary (e.g., price estimates for specific purchases).
- Don't forget to include overhead as an expense – the administrator can help in this calculation.
- Submit the completed form to the Church Administrator.
- When approved, you will receive instructions for processing your expenses – please read and follow them.
- Accounting policies prohibit taking cash from fundraising proceeds to cover expenses. Instead, submit all revenues and all expense receipts to the church office; you will be reimbursed by check.

Fundraising Project Proposal

Instructions for completing the form

These are the instructions for completing the Fundraising Project Proposal form. The goals of this process – completing the form, that is – are threefold: (a) To ensure that the necessary facilities for the fundraising event are available and adequate. (b) To ensure that the necessary bookkeeping is put in place to help you and the church account for receipts and expenses, and generate related reports. (c) To ensure that the theme and goals of your proposed fundraiser are consistent with the mission and needs of the church.

Description

List your name and the name of your organization, if applicable. Briefly describe what you are proposing to do. Feel free to attach additional documentation, if this will clarify the proposed activity for those who might be unfamiliar with it.

List the church facilities you will need, and when you will need them. You should discuss this with the church administrator to ensure those facilities will indeed be available when you need them. Similarly, describe any other staff or resources you will need (e.g., for cooking, cleaning, or decorating). The church typically charges a small fee for use of facilities and/or staff time, depending on the nature of the activity.

Anticipated revenue and expenses

This has three subsections (revenues, intended donation/expenses, and event expenses):

- The anticipated revenue is the gross (pre-expenses) cash intake you expect to earn from the event. Please be honest and realistic here. No one wins if the event is a disappointment.
- Your event is raising funds toward some specific goal – perhaps helping to fund the general operations of the church, perhaps for a specific program or purchase within the church, or perhaps for some purchase or donation to a worthy external cause. List here how you intend to use the net proceeds of the event, and indicate the relevant amount(s).

Note that specific purchases are treated differently from cash donations:

- A specific purchase – say, for example, a new piano for the music program – typically requires a minimum lump sum to buy. (E.g., you wouldn't buy half a piano.) Check the small box labeled “purchase,” and list the cost of the desired item. If the proceeds from the event – net of all other expenses – exceed the purchase price, then the purchase will ensue, with any excess typically reverting to the church as a cash donation. Alternatively, in the awkward case that the funds raised are insufficient for the necessary lump sum, then the intended purchase must typically be abandoned or deferred; in this case, all the net proceeds revert to the church as a cash donation. *You can negotiate an alternative contingency plan, but it is important that you do so up front and in writing.*
- A donation of funds is simpler. List the intended recipient of the funds (e.g., “general operating budget,” “religious education program,” “Whitman-Walker clinic,” etc.). If there is more than one recipient, list each on a separate line. List the dollar amount you wish to donate to each recipient. (With multiple recipients, you may specify the percentage to be donated to each.) Any excess will typically revert to the church as a cash donation.

You may also express plans for the donation of any excess funds. For example, suppose you anticipate revenues of \$1500, to purchase a piano costing \$1000, and you want any excess to go to the music program (anticipated at \$500, but still uncertain until after the fact). To indicate this on the form, list “Piano / \$1000” on the first expense line (check the purchase box), and “Music Program / ALL NET” on the other. All net proceeds (after paying for all other expenses, including the piano) would then go to the music program. Unless otherwise directed, excess funds revert to the church to pay for general operating expenses.

- Your fundraising event will typically incur costs to produce (e.g., photocopying fliers, hiring caterers or musicians, etc.). List these anticipated amounts here. Note that the church typically charges a small overhead fee for use of its space and other resources. The administrator can provide details on the amount(s) involved. This charge should also be listed here.

Approvals

You need the approval of the administrator (to guarantee space and staff availability), and the treasurer (to ensure the bookkeeping is in place). In special cases, you may also need board approval (to ensure consistency with mission and other activities of the church). The treasurer or administrator can help guide you through the process, which is as follows: (a) get preliminary approval from the administrator (and the board, if necessary) before asking the church to commit facilities and resources. (b) Next, arrange facilities with the administrator, and bookkeeping with the treasurer. (c) Finally, if necessary, get formal board approval and the board secretary's signature.