

Year-End Appeal Purpose and Procedure

Adopted by Stewardship and Fundraising Committee and Finance Committee on August 5, 2022

PURPOSE:

The Year-end Appeal was established as an annual fundraising mailing to request donations from UUSO members and friends for specific projects or events of committees and teams that were not part of the annual budget. These named funds are established for specific projects or events such as the purchase of equipment or furnishings (example: chairs for the sanctuary), building improvements, or special speaker or community events. The appeal is also used to solicit gifts for the Community (Endowment) Fund. There is an option on the donation form to indicate whether some or all the donation is to be used for whichever approved projects have the greatest need for additional funds.

PROCEDURES:

- Committee Chairs or Team Leaders may submit written requests to the Stewardship and Fundraising Committee chairperson by September 1, or another date in early September, each year. The Stewardship and Fundraising Committee Chair will arrange that appropriate groups and individuals are informed of the deadline and process for submitting requests. (Committees or Teams seeking to fund projects or events of \$1,000 or less may apply to the Community Fund endowment in October instead of the year-end appeal through the Endowment Committee.)
- Each September the Stewardship and Fundraising Committee prepares a proposed set of funding requests for the year-end appeal and presents it to the Finance Committee for comment in the context of fiscal need and resources.
- The Stewardship and Fundraising Committee Chair will then submit a proposed list of funding requests to the Board at the October meeting for review and approval.
- After approval of the list of funding requests by the Board, the Stewardship and Fundraising Committee prepares the appeal to be mailed in early November.
- In early February, the Stewardship and Fundraising Committee Chair will create a report itemizing all the gifts to the year-end appeal and present the fund totals to the Finance Committee at their February meeting.
- The Finance Committee, after consultation with the Stewardship and Fundraising Committee, recommends to the Board of Trustees the allocation of any unrestricted funds (“Use where most needed” option on the donation form) to the other designated funds. The Board of Trustees makes the final decision on allocation of those funds.

- The Treasurer, in consultation with the Finance Committee and other appropriate parties, is responsible for approving and tracking expenditures from all designated funds.
- The Stewardship and Fundraising Committee Chair is responsible for communicating results of the appeal to the Board of Trustees, the committee/team chairs and to the congregation in the newsletter.