

Title: **Fundraising**

1.0 PURPOSE

To provide guidelines and procedures for USNH staff and members proposing, sponsoring or managing any fundraising activity not including the annual pledge drive. Such funds may benefit USNH directly or outreach organizations approved by USNH.

2.0 RESPONSIBILITIES

- 2.1 Individual Sponsor. (Primary)
- 2.2 Management Team. (MT). (Pre-approval)
- 2.3 Finance Chair or designee (If/as advised by MT)
- 2.4 Office Administrator (Expense vouchers)
- 2.5 DLRE (If/as advised by MT)

3.0 DUTIES OF THE SPONSOR

3.1 **Assignment.** Every fundraiser must have a clearly identified sponsor who may be any USNH member or a committee chairperson.

3.2 **Overview of Responsibilities.** The sponsor completes a “Fundraiser Proposal Form” (Appendix I), obtains the required approvals, interfaces with the Management Team and any relevant committee chairs, obtains help as needed, schedules and runs the event, and completes a “Fundraiser Report Form” (Appendix III), all in accordance with this procedure.

The sponsor is responsible for all expenditures and proceeds, and assures that all are fully accounted for. Following the event, the sponsor hands in all cash proceeds together with a “Fundraiser Money Form” (Appendix II) per instructions provided on the form.

3.3 **Initial Verbal Review.** Before submitting a “Fundraiser Proposal Form” for a new fundraiser, the sponsor talks over the idea with a member of the Management Team. The Management Team can assist the sponsor in using this procedure. The sponsor may need to coordinate with the chair or designee of the Finance Committee or the DLRE, as advised by the Management Team.

3.4 **Completing a “Fundraiser Proposal Form”.** The sponsor completes the “Fundraiser Proposal Form” (Appendix I). Instructions are provided on the form.

3.5 **Obtaining the Required Approvals.** The sponsor submits the completed form to the Management Team, which will usually review it at their next scheduled meeting.

3.6 **Scheduling and Running the Event.** The sponsor secures and organizes the help, delegating activities as needed. The sponsor ensures that all involved clearly understand their responsibilities and deadlines.

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The Sponsor is responsible for advertising the event via newsletter postings, (see SOP-0003), service inserts and announcements. Special consideration should be made to advertise events open to members of the wider community outside USNH membership.

3.7 **Handling Expenditures and Cash Proceeds**

3.7.1 **Reimbursements** will have been defined and pre-approved using the “Fundraiser Proposal Form” (Copy from Appendix I). The sponsor submits any Expense Vouchers to the Office Administrator.

3.7.2 **Cash Proceeds.** Complete “Fundraiser Monies Form” (Appendix II), and hand it into the office administrator. The form is used each time money is counted. By pre-arrangement, envelopes containing cash/checks are delivered to the Office Administrator, the Treasurer or other person known to have a key to the safe. (If a safe drop-box is in use a safe key will not be required).

3.8 **Completing a “Fundraiser Report Form.”** The sponsor completes and submits a Fundraiser Report Form (Appendix III) to the Management Team and to the Chair or designee of the Finance Committee within two weeks of the event’s conclusion.

4.0 **DUTIES OF THE MANAGEMENT TEAM**

4.1 **Fundraising Activities**

4.1.1 **Approval.** The Management Team initially receives verbal or written proposals and, unless denied, then reviews a completed Fundraiser Proposal Form (see Appendix I) from a sponsor. The Management Team ensures that the plan and timetable is realistic, that the purpose is in line with USNH principles and goals and that the required human and material resources are available or have been secured.

In general, no more than one fundraiser will be scheduled in a single month and timing which might impact the annual fund drive or other USNH money raising activities will be avoided.

4.1.2 **Final Review.** A Management Team designee, in coordination with the Chair of the Finance Committee, reviews the “Fundraiser Report Form” submitted by the sponsor at the conclusion of the fundraising event. The designee checks that any deviations from the proposal are explained, that all funds have been accounted for, and that the funds have been turned in to the office.

Title: **Fundraising****Appendix I****Fundraiser Proposal Form**

Instructions to Sponsor: Submit this completed form to the office administrator or place it directly in the Management Team mail slot. If the office is closed use the mailbox immediately outside the office door. A member of the Management Team will contact you.

At the conclusion of the event use the Fundraiser Monies Form (Copy from Appendix II). Follow instructions on the form.

Within 2 weeks after the fundraiser, submit a Fundraiser Report Form (Copy from Appendix III). Follow instructions on the form.

1. Name of Fundraiser:	
2. Date requested for the Fundraiser Event or Activity:	
3. Single event or Intended Duration:	
4. Sponsoring Individual or Committee:	
5. Primary contact information for fundraising event: (Name, phone #, email)	
6. To benefit USNH or outreach (name organization)	
7. Anticipated gross revenue (\$):	
8. Anticipated expenses (\$):	
9. Describe the plan for the fundraiser. What do you intend to do? What resources do you require? What specific expenses do you anticipate? What outside groups or persons will be involved? What USNH Committee chairs are involved? Attach additional sheets as needed.	
10. How will the fundraiser advance current USNH goals? How does the fundraiser relate to USNH's mission and vision? What USNH principles does the fundraiser promote? Attach additional sheets as needed.	
11. Sponsor signature and date:	
12. Management Team signature and date:	

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Appendix II

Fundraiser Monies Form

At the conclusion of the fundraiser Cash raised from the event must be counted by two persons (usually the sponsor and an assigned helper) and placed in an envelope with a copy of this form, signed off by the two counters, stating the date, event name and total cash/check amount.

By pre-arrangement, the envelope and contents must be delivered to the office administrator, the treasurer or other person known to have a key to the safe. (Should a safe drop-box become available, the need for a safe key will no longer be required). If money is submitted over the course of an extended fundraising event, submit an additional Fundraiser Monies Form every time money is turned in, to ensure correct allocations.

DATE	
EVENT NAME	
TOTAL AMOUNT	
SIGNATURE	
PRINTED NAME	
SIGNATURE	
PRINTED NAME	

Title: **Fundraising****APPENDIX III****Fundraiser Report Form**

Instructions to Sponsor: Submit this form within two weeks following the fundraiser to the Management Team and to the Chair of Finance. For reimbursement of expenses, complete a voucher, attach receipts, and submit to the Office Administrator.

List the amounts and dates money was previously submitted in section 6. Keep a copy of each submitted Report Form so you can recap the dates on your final form.

It is the sponsor's responsibility to ensure that any vouchers submitted for fundraiser expenses do not exceed the actual amount collected. Please address any discrepancies before signing and submitting vouchers.

1. Name of Fundraiser:	
2. USNH sponsor:	
3. Total gross revenue (\$):	
4. Total actual expenses (\$):	
5. Total value of donated materials/services (\$): (not including volunteer time)	
6. Monies handed in (dates and amounts)	
7. Total dollar amount of submitted expense vouchers	
8. Describe any deviations from the fundraiser plan.	
9. Sponsor signature and date:	

For USNH use only:

10. Notes:	
11. Approval signature and date:	
12. Revenue received:	
13. Expense vouchers received:	
14. Management Team Review signature and date:	
15. Finance Chair Review signature and date:	

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REVISION HISTORY

Rev	By	Date	Changes Made
1	Jeremy Hill	05/26/2018	Initial draft.
2	Gwen HS	05/28/2018	Multiple edits.
3	Jeremy Hill	05/28/2018	Further edits and other improvements.
4	Jeremy Hill	06/11/2018	Added provisions for Grant Applications.
5	Rev Megan	07/07/2018	Changes following Rev Megan's review
6	D Stagg/J Hill	08/20/2018	Added to 5.2, revised 2.0. Clarified tenses.
7	J Hill	09/25/2018	Simplified after review by finance Committee
8	J Hill for MT and Finance	09/30/2018	Eliminated Grant Applications Sections. Will be separate SOP. Now 2 pages + Forms.
A	J Hill for MT	10/01/2018	Formal Release