

THE TRIPP-JONES FAMILY

FUNDRAISER PLANNING &

APPROVAL FORM

All fundraising activities must be approved by the Finance Committee before being conducted

— Standing Rules Section 3

1. Why Approval Is Required

All fundraising carried out in the name of the Tripp-Jones Family must be approved in advance by the Finance Committee (Standing Rules, Section 3; Financial Policies Manual, Section 8). This ensures that fundraising activities are consistent with the family's mission, are financially sound, and that proceeds are properly accounted for. No individual may collect money on behalf of the family without this approval.

2. How to Submit a Proposal

1. Complete all sections of this form.
2. Submit to the Treasurer at least 45 days before the proposed fundraiser start date.
3. The Treasurer presents the proposal to the Finance Committee at the next scheduled meeting.
4. You will receive a written decision within 21 days of submission.
5. If approved, work with the Treasurer to set up proper payment collection.
6. Submit a post-fundraiser income report to the Treasurer within 14 days of conclusion.

3. Fundraiser Proposal Form

TRIPP-JONES FAMILY — FUNDRAISER PROPOSAL	
Date Submitted: _____	Submitted by: _____

Section A — Basic Information

Field	Response
Fundraiser Name / Title	
Type of Fundraiser	<input type="checkbox"/> Raffle <input type="checkbox"/> Sale (items) <input type="checkbox"/> Sponsored event <input type="checkbox"/> Online campaign <input type="checkbox"/> Bake sale / food <input type="checkbox"/> Other: _____
Proposed Start Date	
Proposed End Date	
Fundraiser Location / Platform	
Who will run it?	
How many volunteers needed?	

Section B — Financial Projections

Field	Response
Projected gross income	\$
Estimated expenses / costs	\$
Projected net proceeds	\$
Intended use of proceeds	<input type="checkbox"/> General Fund <input type="checkbox"/> Reunion support <input type="checkbox"/> <input type="checkbox"/> Benevolence Fund <input type="checkbox"/> Historian budget <input type="checkbox"/> Other: ____
Will any outside vendors or platforms be used?	<input type="checkbox"/> Yes — Name: _____ <input type="checkbox"/> No
Platform fees or commissions (if any)	\$

Field	Response
How will money be collected?	<input type="checkbox"/> Cash <input type="checkbox"/> Check <input type="checkbox"/> Venmo/Zelle <input type="checkbox"/> Online platform <input type="checkbox"/> Other: _____
Who will handle the money?	
How will proceeds be transferred to the Treasurer?	

Section C — Legal & Compliance

Field	Response
Does this fundraiser involve games of chance (raffle, lottery)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, have applicable local laws been checked?	<input type="checkbox"/> Yes <input type="checkbox"/> N/A
Will minors be involved in the fundraiser?	<input type="checkbox"/> Yes — describe parental consent plan: _____ <input type="checkbox"/> No
Are there any health/safety considerations?	<input type="checkbox"/> Yes — describe: _____ <input type="checkbox"/> No

Section D — Description & Promotion

Describe the fundraiser in detail — what it is, how it works, and how you plan to promote it:

Proposer Signature Date: _____

4. Finance Committee Decision

Finance Committee Review Date: _____
Decision: <input type="checkbox"/> Approved <input type="checkbox"/> Approved with Conditions <input type="checkbox"/> Rejected

Conditions or notes (if any):

Finance Committee Chair / Treasurer Date: _____

5. Post-Fundraiser Income Report

Complete this section and return to the Treasurer within 14 days of the fundraiser's conclusion.

Field	Response
Fundraiser Name	
Actual End Date	
Gross Income Collected	\$
Total Expenses Incurred	\$
Net Proceeds Transferred to Fund	\$
Date Transferred to Treasurer	
Transfer Method	
Receipts Attached?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notes / Lessons Learned	

Fundraiser Lead Signature Date: _____

Treasurer Received By Date: _____