

# **St. Andrew Methodist Church**

## **Fundraising Policies, Principles and Procedures**

### **I. Rationale**

Fundraising activities serve at least two important purposes besides the obvious one of raising needed money for church ministries. First, they highlight the specific mission, importance and needs of the organization which is raising funds. Second, they help to build community within the church and enthusiasm for its various ministries.

Fundraising activities should never overshadow the practice of stewardship: the amount of funds raised, the frequency of fundraisers or the objectives of the funds being raised. Nor should they confuse the mission of St. Andrew Methodist Church: Calling the Christianish to become Passionate Servants of Christ.

### **II. Principles**

In order to help the church practice good stewardship, to act respectfully toward members of the congregation and others who are asked to support the church and its fundraisers, as well as supporting the goals of groups which participate in fundraising, these principles are offered as a foundation for church fundraising policies:

1. The fundraising activity itself must be compatible in its content and the way it is conducted to the identity and mission of St. Andrew Methodist Church as a Christian community of faith charged with Calling the Christianish to become Passionate Servants of Christ.
2. The group raising funds must be aware of and respectful of the needs, customs and integrity of church ministries and organizations. Groups should seek to build partnerships in cooperation with other groups to avoid competition and duplication.
3. Church groups, in planning their fundraising activities, must be respectful of the members of the church and of the sacredness of the church's liturgy and the sacred space.
4. All fundraising activities must be respectful of those who are unable to contribute.
5. The church, in its administration of other funds raised, has a responsibility to be a good steward of these funds.
6. The church should be informed, in a timely manner, before and after any fundraiser as to the goals and accomplishments of those fundraisers. Summary

reporting should include final totals raised and acknowledgment of volunteers and supporters of the fundraiser.

### **III. Categories**

Church fundraisers categorized in these policies and procedures are:

1. Limited Term Fundraisers: Fundraising activities take place over a given period of time.
2. Recurring Fundraisers: Those conducted as a normal part of the church schedule, with or without an end date. (Examples: Poinsettia/Lily sales)
3. Church Wide Campaigns: (Examples: Annual Ministry and any building/capital campaigns)
4. Annual Fundraisers: Fundraisers held the same time each year as well as same type of fundraiser.

### **IV. Policies**

These policies are to be followed by all church groups which participate in church wide fundraising or events. Exceptions are noted or will be granted as is judged appropriate.

#### **1. Approval:**

- a) Fundraising activities may not be entered onto the church fundraising calendar until approved by the church's CFO and/or Chairperson of the Finance Committee acting as representatives of the Finance Committee.
- b) Applications must be submitted 3 months prior to the fundraising activity or event and since applications will be evaluated on a first-come, first-served basis it is preferable to submit applications for the year prior to January 15.
- c) The decision for or against approval may not be immediate, depending on the need for further information or consultation.

#### **2. Use of Church facilities and common spaces:**

- a) Fundraisers on church grounds or under church auspices are not to take place on special worship days including the following:
  - Ash Wednesday
  - Holy Week
  - Easter Sunday
  - All Saints Day
  - Christmas Eve
  - Christmas Day

- b) Each group may conduct weekend fundraising activities for up to three consecutive weekends, if available.
- c) Fundraisers taking place on church grounds will occupy predetermined locations as approved by the Finance Committee.
- d) Requests for fundraisers on church grounds to be located other than designated areas will be considered on an individual basis (e.g. special offerings, dinners, etc.)

**3. Number of fundraisers:**

- a) Each church organization will be allotted limited fundraising activities per year assuming space availability and scheduled time.

**4. Purpose of funds:**

- a) The financial goal of the fundraiser, in dollar amounts, is to be indicated by the church organization on the fundraising application.
- b) The purpose of the funds to be raised must be publicized before the fundraiser via the church's current communications channels, promotional flyers and/or other means of publicity. The means of publicity must be mentioned in the application for approval.
- c) If the proceeds are to be divided among various accounts, groups or projects, the amounts to be given to each are to be specified in detail on the fundraiser application. This is to be done either by percentage (e.g. 50% to recipient A, 30% to recipient B, etc.) or by dollar amounts (e.g. the first \$ 1,000 to recipient A, next \$ 500 to recipient B, etc)

**5. Reporting**

- a) The group conducting the fundraiser is responsible for reporting to the Finance Committee the total amount of proceeds raised.
- b) If the proceeds are to be divided among various accounts, recipients, etc., this is to be included in the report.

c) A final, detailed financial report is to be submitted to the Church Business Administrator within one month, maximum, after the completion of the fundraiser. A form for this report is included with the application.

6. **Handling of funds**

- a) All cash receipts of any fundraiser are to be submitted to the church accounting department within 48 hours of the completion of the fundraiser.
- b) Receipts of all fundraising activities will be placed in the appropriate fund set up to receive the proceeds.

7. **Receipts and reimbursements**

- a) Reimbursements are not to be made directly from the fundraiser's original cash receipts.
- b) Requests for reimbursements are to be completed and submitted to the Church Business Officer by the project leader on a timely basis. Checks will be disbursed on normal accounts payables dates.

8. **Compliance:** A group's compliance or lack thereof with these policies will be considered in future fundraising application requests.

9. **Exceptions:** Exceptions to this policy or to any part of it should never be assumed by the fundraising group but will only be granted by way of the application process.

**ST. ANDREW METHODIST CHURCH  
FUNDRAISING REQUEST**

**Submit at least 3 months in advance of proposed fundraising event**

ORGANIZATION: \_\_\_\_\_

Group Name: \_\_\_\_\_

Project Leader Phone/Email: \_\_\_\_\_

Secondary Contact Phone/Email: \_\_\_\_\_

**EVENT:**

Purpose and perceived benefit derived from the event:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Describe proposed event, including category and scope of audience

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Proposed Fundraising dates/times:**

From: \_\_\_\_\_ To: \_\_\_\_\_

**Proposed Event dates:**

From: \_\_\_\_\_ To: \_\_\_\_\_

**Proposed Location:** Sunday morning \_\_\_\_\_ Other: \_\_\_\_\_

**PROCEEDS**

- Anticipated amount to be raised: \$ \_\_\_\_\_
- Primary beneficiary (\$ amt. or %) \_\_\_\_\_
- Second beneficiary (\$ amt. or %) \_\_\_\_\_
- Third beneficiary (\$ amt. or %) \_\_\_\_\_

NOTE: Attach proposed fundraiser budget (if there are anticipated costs) and submit with Request Form

SIGNATURE: I hereby attest that I have read the Fundraising Principles, Policies and Procedures document of St. Andrew Methodist Church; commit to conducting an event in a manner respectful of worship, the church family and staff members; promise a timely return of the designated space and equipment to a clean and orderly state; and provide a final report to the Church Administrator within 1 month after completion of the fundraising activity.

\_\_\_\_\_  
Signature of Project Leader

\_\_\_\_\_  
Date

**APPROVAL:**

\_\_\_\_\_  
Authorized Signature, Finance Chair

\_\_\_\_\_  
Date

**ST. ANDREW METHODIST CHURCH  
FUNDRAISING FINANCIAL STATEMENT**

PROCEEDS: BUDGET/ACTUAL

Donations: \_\_\_\_\_

Sales: \_\_\_\_\_

Services: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Total Proceeds: \_\_\_\_\_

EXPENSES: BUDGET ACTUAL

Advertising \_\_\_\_\_

Materials \_\_\_\_\_

Products \_\_\_\_\_

Services \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Total Expenses: \_\_\_\_\_

NET PROJECTED INCOME:

NET ACTUAL INCOME:

*VERIFICATION: After careful consideration of potential expenses and income sources,*

*Project Leader please initial here: \_\_\_\_\_*