

Swansboro United Methodist Church Fundraising Policy and Procedures

Purpose: Fundraisers are expected to contribute to the goals, objectives, and mission of Swansboro United Methodist Church, hereafter known as SUMC, and the proceeds used for pre-approved causes supporting those principles and purposes. Fundraisers shall be reviewed and considered for approval based upon the conditions of need, church or community benefit, and minimal impact to the normal church operations.

Intent: The ability to raise funds, however, and or the desire for the benefits of those funds would obtain is not necessarily a compelling reason for raising those funds. Fundraisers should never overshadow the practice of stewardship, nor should funds be raised for unnecessary items that may be luxuries when other essential needs in the church are not being met.

Finance Committee will review and approve all fundraising efforts of SUMC. The Finance Committee may delegate a subcommittee for oversight of fundraising efforts.

POLICY

- a. All fundraisers must reflect and relate to the principles, purpose, and doctrine of SUMC and serve the mission and vision of the Church.
- b. All fundraisers are to be conducted for the benefit of SUMC/UMC unless otherwise approved by the Senior Pastor and Church Council.
- c. Fundraisers shall be “chaired” or “led” by a church member.
- d. Individuals who work in sales businesses, e.g. real estate, auto sales, financial services, insurance, etc., may not use the Church directory to make “cold calls” on Church members.
- e. Church directory can only be used for solicitation for approved church fundraisers.
- f. The number and frequency of all fundraisers shall be limited at the discretion of the Finance Committee to avoid excessive and frequent financial demands on Church members.
- g. Groups wishing to conduct monetary fundraisers must complete the Application for Fund Raising packet. **Fundraising activities cannot be promoted via Sunday bulletin, signage, email or other means until approval has been obtained.**
- h. For all approved fundraising activities, committees and groups must adhere to the written guidelines detailing the appropriate use of the church facilities. *See Building Use Policy*
- i. Exceptions to this policy may be made by Church Council.

PROCEDURES

These procedures are to be followed by all church groups which participate in fundraising.

Approval:

- Fundraising activities may not be entered onto the church calendar until approved by a designee of the Finance Committee.
- Applications will be reviewed within two weeks of submission on a first-come, first-serve basis.
- The decision may not be immediate, depending on the need for further information or consultation.

Use of church facilities and common spaces:

- Fundraisers on church grounds or under church auspices are not to take place on the following days: Palm Sunday, Easter Sunday, Christmas Eve, Christmas Day, and other days determined by the Senior Pastor.
- Fundraisers taking place on church grounds may be located between buildings 2 and 3 or in the Fellowship Hall. If there is a specific need for another location, the Trustees will make that determination.

Number of fundraisers:

- Each Church Council committee will be allotted two limited term fundraising activities per year, assuming the availability of the space and scheduled time.
- No more than one (1) fundraising event will be scheduled per Sunday.

Purpose of funds:

- The purpose of the funds to be raised must be publicized before the fundraiser on all promotional material. (Signs, The Scoop, bulletin announcements etc.)
- If the proceeds are to be divided among various accounts, recipients, etc., the amounts to be given to each are to be specified in detail on the fundraiser application. (e.g. 50% to recipient A, 30% to recipient B, etc.) or by dollar amounts (e.g. the first \$1000 to recipient A, next \$500 to recipient B, etc.)
- Proceeds of the fundraiser must go to the recipients designated in the predetermined amounts.

Reporting:

- The group that is conducting the fundraiser is responsible for completing an “After Action Report” within two weeks of the event.
- The results of the fundraiser are to be publicized in the church bulletin within three weeks of completion of the event.
- If the proceeds are to be divided among various accounts, recipients, etc., this is to be included in the report.

Handling of funds:

- Prior to the completion of the event, arrangements should be made to ensure all cash will be put in the church safe.

From the Cash Control Policy under ‘Other cash transactions event’ section:

- The cash will be under the control of two unrelated persons until monies are put in the safe.
- Plastic bags (‘tea bags’) are located in the Finance mailbox in Building 1 hallway (around the corner from Senior pastor’s office) and also in the Sacristy room in buildings 2 and 3.
- The names of the collectors, date and the event name will be written on the plastic bag.
- A member of the Finance Committee or designee and one collector will put the sealed plastic bag in the safe.

Receipts and reimbursements:

- Private persons are not to be reimbursed directly from the original cash receipts of the fundraiser.
- Request for reimbursements are to be completed and submitted to the Financial Administrator in a timely basis. (Use the Check Requisition Form) Checks will be disbursed by the Financial Administrator according to schedule.

Sale of Goods:

- Fundraising involving the sale of items not purchased by the church are limited to two events a year.
- If the activity involves sales of merchandise, the originating committee chairperson will work with the Financial Administrator to see that appropriate sales tax returns are filed. Sales tax must be collected and remitted on all sales of merchandise unless the merchandise sold at the activity is purchased by SUMC in a transaction where sales tax is paid. The ongoing selling of items is discouraged since it requires the group to collect and pay sales tax for all of the items sold.
- Please coordinate all ticket sales with the Church Office Manager.

Service Providers:

- Service providers used in connection with fundraising activities (such as speakers, performers, caterers, etc.) can be compensated for the specific service they provide at pre-agreed rates. Service providers and compensation should be identified in the written fundraising application submitted for approval. Where such arrangements are part of a fundraising activity, they will be reviewed during the approval process. If the service provider is an individual, or an unincorporated business, the provider's Federal tax identification number (social security number or employer identification number) must be included on the fundraising application if it is anticipated payments to the provider will exceed \$600 so that SUMC can issue a Form 1099 to the provider for the amount paid to them.

**Swansboro United Methodist Church
Fundraising Application**

Submit in advance of proposed fundraising event to the church Office Manager
(see *Fundraising Policy and Procedures*)

Name of Church Council Committee: _____

Contact Person: _____

Email: _____ Telephone: _____

For what purpose are you raising funds? _____

What event or activity do you wish to conduct? _____

Date(s) desired for fundraiser: _____

Time: _____ Location: _____

What is your goal (the amount you wish to raise?): _____

Primary beneficiary (\$ amt. or %) _____ Second beneficiary (\$ amt. or %) _____

What is the cost (before profit) that you will expend in order to fundraise? _____

Will seed money (cash advance) be needed? Yes No How much? _____

How does this activity reflect the mission of the church?

**The mission of the church is to make disciples of
Jesus Christ for the transformation of the world.**

I hereby attest that I have read the Fundraising Policy, the Cash Control Policy and Procedures and the Building Use Policy of Swansboro United Methodist Church. I commit to conducting an event in a manner respectful of worship, the church family and staff members, and promise a timely return of the designated space and equipment to a clean and orderly state.

Signature of Contact Person Date: _____

Approval: _____ Date: _____

Finance Chair or designee

Upon approval the fundraiser will be put on the church calendar by the church office staff and the original application will be kept on file in the church office. Copies will be sent to Finance, Trustees, The Senior Pastor and the applicant.

Fundraising Event: _____ Date of Event: _____

Contact Person: _____

Please complete and submit the "Pre-Event" section prior to the event. Keep a copy of your completed form so you can add the Post-Event numbers after your event has concluded to submit to the Office Manager.

Pre-Event (Complete this section prior to the event.)		Post-Event (Complete this section after the event.)	
Projected Attendance:		Actual Attendance:	
Projected Income:		Actual Income:	
Projected Expenses:		Actual Expenses:	
Advertising:		Advertising:	
Materials:		Materials:	
Products:		Products:	
Service:		Service:	
Other:		Other:	
Total Projected Expenses:		Total Actual Expenses:	
Net Projected Proceeds: (Projected income less projected expenses)		Net Actual Proceeds: (Actual income less actual expenses)	
This section completed by: (Initial)		This section completed by: (Initial)	

Results will be printed in the bulletin within three weeks of the event.