

# St. Paul's UMC Fundraising Policies and Guidelines

## VISION

SPUMC is a diverse community of faith that seeks to live out our faith, known through Jesus' radical message of love and inclusion and the mystery of God's grace, through prayer, worship, education and action.

## MISSION STATEMENT

Believing that God lives in and around us, and loves us all, we celebrate the sacredness and abundance of creation while equipping and sending people of God to carry their faith into the world as followers of Jesus Christ.

This document serves as a practical guideline for fundraising activities at St. Paul's UMC. Consistent with our vision and mission as a church, fundraising activities at St. Paul's should seek primarily to foster caring and concern in our church, community, and beyond. This policy applies to all St. Paul's committees, congregational or church-wide organizations, and non-church community groups seeking the involvement of St. Paul's in their fundraising activities or appeals.

## Definitions

**Fundraiser:** Any event, activity, or solicitation that seeks to generate income or goods for a beneficiary. Some examples include:

- **Requests for Offering or other Cash Contributions:** includes contributions for youth programs, UMCOR, Kitchen Cupboard, the Giving Tree, CROP, etc.
- **Requests for Gifts in Kind:** non-cash gifts, such as items for the Rummage Sale or silent auctions, grocery donations, bake sales, the Giving Tree, book collection, supplies for UMCOR kits, etc.
- **Fundraising Events:** such as Spaghetti Dinners, Starry Nights, Sunday Brunches, etc., for which a suggested donation or a per-person fee is charged.
- **Sales:** the selling of services or merchandise to members or attendees. Examples include activities such as silent auctions, calendar sales, flower sales, candy sales, craft fairs, book sales, CD sales, etc.
- **Exceptions:** Donations of food for church events, Sunday Coffee Hour contributions, Lily and Poinsettia sales

**Beneficiaries:** intended recipients of fundraising proceeds

- **St. Paul's general Operating Budget** or a specially **designated fund** (e.g., St. Paul's seminary students, youth programs, Faith Explorers offering, bell choir, retreat ministries, etc.)
- **Conference/Denominational funds** (e.g., United Methodist UMCOR, Annual Conference Love Offering, Peace with Justice Offering, etc.)
- **Ecumenical/Multi-Church funds** (e.g., Lift Every Voice, CROP Walk, Church World Service, ACT, Ithaca Kitchen Cupboard.)
- **Non-Church Community Groups** (NCCG) that hold an IRS certification as a non-profit organization under section 501(c)(3) of the IRS code (e.g., Relay for Life, SPCA, Habitat for Humanity, Hospicare).
- Sponsored person(s) in need (e.g., refugee resettlement, personal crisis or disaster)

**Proceeds:** The net amount earned after expenses.

## Fundraising Policy

1. Fundraising can not involve gambling or games of chance (bingo, raffles, etc.).
2. Fundraising activities **must** be approved by the Finance Team before the event occurs.
3. With the exception of special offerings designated by the United Methodist Church, the Upper New York Annual Conference or St. Paul's Church Council, all fundraising requests must be made by a church committee or ministry area in accord with the Fundraising Approval Process. Non-Church Community Groups must have the support of, and make requests through, a church committee or ministry area. In considering NCCG fundraising requests, church committees/ministry areas shall ensure that the request is consistent with the vision and mission of the church.
4. Ongoing fundraisers (Equal Exchange coffee sale, calendar sales, etc...) should follow the fundraising approval process and will be approved for a maximum period of a year. These fundraisers need to seek renewal on an annual basis.
5. Only activities that have the support of a church committee or ministry area are permitted to set up a table, display or other physical presence (e.g., posters, brochures) or use church media (e.g., bulletin, newsletter, website, weekly e-mail) for a fundraiser. Requests for fundraising sales/display must have approval of the Finance Team.
6. Individual St. Paulians may privately sell items or solicit funds for entities that are not church-sponsored (e.g., Girl Scout cookie sales) one-on-one, but no table setups or other displays will be permitted. As long as these activities are conducted circumspectly, advance Finance Team approval need not be sought.
7. Using the St. Paul's Directory or other Church rosters for non-St. Paul's fundraising solicitations is prohibited.
8. Fee charged to attend/participate in an event should not preclude any St. Paul's member or friend from participating.
9. Each group is limited to one fundraiser at a time.

# Fundraising Approval Process

1. **Church Committee or Ministry Area approves fundraising request.**
2. **Committee Representative Contacts the Church Office** - At least one month in advance of the event, check for possible conflicts on the church calendar and building use. Remember that your first date may not be available. If there is no conflict, the church office will pencil in activity as "tentative" on the church *calendar pending receipt of a completed Fundraising Request Form and action by the Finance Team.*
3. **Committee Representative Submits a Fundraising Request Form** - By the 1<sup>st</sup> Sunday of the month, submit the form to the church office so that it can be added to the Finance Team's meeting agenda.
4. **Finance Team Reviews** – All fundraising requests are reviewed and approved/denied as part of the monthly Finance Team meeting on the 2nd Tuesday of the month. Finance Team, in its discretion, may refer any request to Church Council for discussion of fit, scope, scale, timing, etc.

## In determining the approval process of the application, the Finance Team will rely on the following guidelines:

- Does the fundraiser benefit the mission of St. Paul's?
- Can the fundraiser be combined with other similar fundraisers?
- Is the timing of fundraiser appropriate (e.g., not in conflict with other fundraisers, including the annual stewardship campaign)
- Is there a way the ministry can operate within its budget without the fundraiser? (e.g., raise fees or scale back the program expectations, borrow or reuse materials) To ascertain your ministry area's budget balance, contact the church office.
- Has the ministry explored other sources of support? (e.g., personal donations, designated savings accounts, denominational assistance, grants)

5. **Publicize your Fundraising Project** - Once the fundraising project is approved by the Finance Team, the activity may be publicized in the Sunday bulletin, the monthly *St. Paul's Letter*, and church bulletin boards. All publicity must be submitted to the church office. Fundraising publicity may be posted and printed *after approval* from the Finance Team has been confirmed.

## Please NOTE that:

- In order to promote your fundraiser, or to schedule use of any space in the church, your fundraising request must be pre-approved by the Finance Team.
- In the event of an urgent need, the pastor can supersede the above guidelines. The pastor shall, however, submit the usual request form to the Finance Team after the fact, for its records.
- Fundraisers approved in the past are not automatically approved.

## Fundraising Guidelines and Practices

1. Building fellowship in the church and service to the community are important goals of these activities, together with raising money.
2. Products offered for sale should be handled in a low-key manner, and at a discrete distance from the sanctuary entrances and with consideration for the sacredness of the space.
3. The fundraising should complement and not detract from other financial stewardship efforts within the congregation.
4. The activity should provide an avenue for people to use their abilities and to express willingness to serve others.

## Accounting

1. All monies received from the fundraiser must be submitted to the St. Paul's office for processing, and shall flow through an established church account. All checks shall be written to St. Paul's UMC.
2. If online giving channels are used, the sponsoring group should make every effort to identify the source as St. Paul's (e.g., for an UMCOR Advance, we ask the donor to designate St. Paul's as the home church, for the CROP Walk, donate through a St. Paul's online group.)
3. All expenses must be supported with receipts.
4. St. Paul's is exempt from NYS sales tax. Tax exempt forms are available in the church office and should be used when incurring any expense. Sales tax will not be reimbursed.
5. All requests for expense reimbursement must be submitted through the church office, using the Payment Request form. Copies of all receipts **must** be submitted with the request.
6. Expenses *can not be reimbursed from the cash proceeds* of a fundraiser. All monies received and all expenses must be processed through the church account.
7. The sponsoring group is expected to publish the net proceeds and ministry purpose of the fundraiser to the congregation via the newsletter in the month following the fundraiser.
8. Any excess funds that are raised shall be retained by the ministry or church for stated or similar ministries.

## St. Paul's Fundraising Request Form

Fundraising includes any activity that asks for money or goods. Please complete and submit this form to the Church Office at least 1 month prior to the activity and by the 1<sup>st</sup> Sunday of the month.

Today's Date:					
Your Name:		Phone:		Email:	
Activity Contact: (If Different )		Phone:		Email:	

Name of Activity:				
Committee or Ministry Area Sponsor:				

Start Date:		Start Time:	
End Date:		End Time:	

<p><b>Brief <u>description</u> of fundraiser, <u>ministry</u> for which funds are raised and <u>specific purpose</u> for which funds are raised:</b></p>	
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**Fundraising Type:**  Offering    Contribution    Gifts in Kind/Collection of Goods    Event    Sales  
*(check all that apply)*

**Benefit Organization:**  St. Paul's    United Methodist    Ecumenical  
 Non-Church Community Group   Name of Group:

This fundraiser requires the use of church facilities *(Please complete a Space Use Request Form.)*

### BUDGET

Total income goal for this fundraiser	\$
Anticipated expenses for this fundraiser, if applicable	\$
Net income goal for this fundraiser	\$

Total estimate of cost for which funds are being raised <i>(e.g., retreat, mission trip, etc.)</i>	\$
Other sources of income <i>(e.g., operating budget line, participant contributions, personal donations, etc.)</i> , if applicable What source?	\$

**Finance Team Approval Date:**

**Comments:**