

TRINITY UNITED METHODIST CHURCH

FUNDRAISING POLICIES, PRINCIPLES AND PROCEDURES (REVISED 2015)

I. Rationale

Fundraising activities serve at least two important purposes beside 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 the funds. Second, they help to build community within the church and enthusiasm for its ministries.

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

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:

- The fundraising activity must address essential elements, and not gratuitous wants or luxuries of the church group.
- The fundraising activity itself must be compatible in its content and the way it is conducted to the identity and mission as a Christian community of faith.
- The group raising funds must be aware of and respectful of the needs, and integrity of church ministries and organizations, and should seek to build partnerships in cooperation with other groups to avoid competition and duplication.
- Church groups, in planning their fundraising activities, must be respectful of the members of the church, and the sacred space of the church.
- Because of the Church's duty to serve the poor, all fundraising activities must be respectful of those who are unable to contribute.
- The church, in its administration of other funds raised, has a responsibility to be a good steward of these funds.
- The church should be informed, in a timely manner, before, during, and after any fundraiser as to the goals and accomplishments of those fundraisers, including prompt reporting of final totals, and acknowledgment of volunteers and supporters of the fundraiser.

III. Categories

Church fundraisers categorized in these policies and procedures are:

1. Limited Term Fundraisers: Those taking place over a given period, as specified.
2. Church Wide Campaigns: (Examples: financial and building/capital campaigns)

3. Annual Fundraisers: Fundraisers held the same time each year as well as same type of fundraiser. After initial approval is received, unless a change in the fundraiser is made, no need for annual application is necessary; however, an annual fundraising budget, request for scheduling, and appropriate reporting will still be required prior to the fundraising event.

Here is a partial list of Trinity United Methodist Church's (TUMC) Annual Fundraisers:

- a. Children's Fundraiser in January or February
 - b. Valentines, Mother's Day, and Father's Day Honor bulletin insert by UMM and UMW
 - c. Spring Splash in April or May
 - d. Girl Scouts and Boy Scouts
 - e. Youth Basket Auction starting in August and running for 5 weeks
 - f. UMM Chili Cookout in September
 - g. Craft Fair and Fall Festival/Trunk or Treat in October
 - h. Christmas Cards for Fish in December
 - i. Women's Brunch the first Saturday in December
4. Fundraisers for outside the church: (Examples: UMCOR, Operation Christmas Child)

IV. Policies

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

1. Approval:

- a. Fundraising activities may not be entered onto the church fundraising calendar until approved by the Outreach Committee in conjunction with the Pastors and/or Chairperson of the Finance Committee (FC). This approval must be documented on the Fundraiser Request Form.
- b. Any fundraiser that is not part of a TUMC ministry must have the approval of Outreach Committee, Pastors, Chairperson of the FC, and the Church Council. This approval must be documented on the Fundraiser Request Form.
- c. The Fundraiser Request Form (see attached) will be reviewed within two weeks after being submitted, on a first-come, first-served basis. (With an exception of Annual Fundraisers that have already been approved by the Outreach Committee) Specific dates of the annual fundraisers must be approved each year.
- d. 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 the following days:
 - Palm Sunday
 - Easter Sunday
 - Pledge Sunday
 - Christmas Eve
 - Christmas Day
- b. Fundraisers taking place on church grounds will occupy predetermined locations as designated by the Trustees Committee. Designated areas are:
 1. Gathering area, but one must have permission by Outreach to use this area.

2. Connecting area between Gathering area and Gym
 3. West side of building and grassy area by the Foley House
 4. Fowler Hall
 5. Gym
 6. In front of church, but one must have permission by Outreach to use this area.
3. Number of fundraisers:
 - a. All fundraisers other than Annual ones must be approved by Finance, Outreach, and Pastors.
 - b. No more than one (1) fundraising event will be scheduled on a given Sunday.
 - c. Ministries of TUMC are allowed two fundraisers a year. If a ministry wants to have more than two fundraisers, the ministry must get the approval of the Church Council. This approval must be documented on the Fundraiser Request Form.
 4. Purpose of funds:
 - a. The purpose of the funds to be raised must be publicized before the fundraiser by way of the church newsletter, and/or other means of publicity. These means of publicity must be mentioned in the application for approval.
 - b. If proceeds are to be divided among various accounts, recipients, etc., and you know the designated group to receive the amounts, specify this amount 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). If you are not sure of the designated groups to receive the funds just leave it blank.
 - c. Proceeds of the fundraiser must go to the recipients designated, in the predetermined amounts.
 5. Reporting
 - a. The group that is conducting the fundraiser is responsible for reporting to the church 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. The report is to be made via the church newsletter within three weeks of the completion of the fundraiser. If the final report is not ready at that time, an interim report is to be made at that time with weekly updates until the final report is published.
 - d. A final, detailed financial report is to be submitted to the Outreach Committee via their Cubby/Box by the water fountain, 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. Annual fundraising groups with independent bank accounts are to submit reports as described above. Disbursements should then be reported when they are paid.
 - b. All cash receipts of any other fundraiser are to be submitted to the church Financial Secretary within 48 hours of the completion of the fundraiser.
 - c. Funds raised by all fundraisers will be placed in the appropriate designated accounts once the cash receipts are received by the church Financial Secretary.
 7. Receipts and reimbursements
 - a. Private persons, vendors, and suppliers are not to be reimbursed directly from the original cash receipts of the fundraiser.

b. Request for reimbursements are to be completed and submitted to the Church Treasurer by project leader on a timely basis. Checks will be disbursed one to two weeks after submission by Church Treasurer (Reimbursement forms are located in the Church Office.)

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 should never be assumed by the fundraising group, but will only be granted by way of the application process.

**TRINTY UNITED METHODIST CHURCH
FUNDRAISING REQUEST**

*Submit in advance of proposed fundraising event
(see Fund Raising Principles, Policies and Procedures)*

ORGANIZATION

Group Name _____

Project Leader _____ Phone _____ Email _____

Secondary Contact _____ Phone _____ Email _____

EVENT - *(See Section III, Categories)*

Describe proposed event, purpose and perceived benefit derived from the event:

PROPOSED DATES/TIMES: This includes if additional days are needed for prep.

(See section IV Policies Paragraph 2. Use of Church Facilities & Common Spaces)

Event Date: _____ Event Time From: _____ To: _____

Prep Date: _____ Prep Time From: _____ To: _____

PROPOSED LOCATION:

(See section IV Policies Paragraph 2. Use of Church Facilities & Common Spaces)

_____ Sunday morning locations _____ Other *(Check one of the two)*

Where is the location? – *(See section IV Policies Paragraph 2. Use of Church Facilities & Common Spaces)*

If needing addition day for preparation, where will you be doing this prep?

PROCEEDS *(See Section IV Policies, Paragraph 5. Purpose of Funds)*

- Anticipated amount to be raised: \$ _____
- Primary beneficiary/if known(\$ amt. or %) _____
- Second beneficiary/if known (\$ amt. or %) _____
- Third beneficiary/if known (\$ amt. or %) _____

Please use additional sheet if necessary. NOTE: Attach proposed fundraiser budget and submit with Request Form

SIGNATURE

I hereby attest that I have read the Fundraising Principles, Policies and Procedures document of Trinity United Methodist Church; 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 Project Leader _____ Date _____

APPROVAL:

Outreach Chairperson _____ Date _____
Finance Chairperson _____ Date _____
Pastor _____ Date _____

*Church Council Chairperson _____ Date _____

**Any fundraiser that is not part of a TUMC ministry must have the approval of Outreach Committee, Pastor, Chairperson of the FC, and the Church Council. Also, if a ministry wants to have more than two fundraisers, the ministry must get the approval of the Church Council, Outreach Committee, Pastor, and Chairperson of the FC.*

**TRINITY UNITED METHODIST CHURCH
FUNDRAISING FINANCIAL STATEMENT**

ORGANIZATION

Group Name _____

Project Leader _____

FUNDRAISING EVENT _____

INCOME:	BUDGET	ACTUAL
Donations:	_____	_____
Sales:	_____	_____
Total Income:	_____	_____

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: _____