



Fundraising Policy, Principles, and Procedures

Approved: February 25, 2016
Revised:

Grace Community United Methodist Church

Fundraising Policies, Principles, and Procedures

INTRODUCTION

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 for which funds are being raised. Second, they help to build community within the church and enthusiasm for its ministries.

The ongoing ministries of Grace Community United Methodist Church (GCC) are financially supported through the Operating Budget. However, at times additional funding may be appropriate for specific projects, trips, or ministries, which are not covered by the Operating Budget.

1. PURPOSE

The purpose of this policy is to ensure that all fundraisers conducted on GCC property or for the benefit of GCC follow uniform, established procedures. No one is authorized to conduct a fundraiser except in accordance with this policy. This fundraising policy has been established for the following reasons:

- 1.1. To provide guidance for acceptable fund raising activities and communicate the guidance to the congregation;
- 1.2. To manage the number and frequency of fund raising activities so as to avoid overburdening the congregation with requests for money and thus preserving congregational relationships;
- 1.3. To communicate fund raising activities that are not in alignment with the mission and ministries of GCC;
- 1.4. To ensure that fund raising activities are consistent with our tax-exempt status;
- 1.5. To ensure that GCC's resources are focused on the highest priority needs and consistent with the approved church budget; and
- 1.6. To uphold GCC's vision, mission, and values.

2. OVERVIEW

Fundraisers are expected to contribute to goals and objectives of GCC and the proceeds realized used for pre-approved causes supporting those goals and objectives. Fundraisers will be reviewed and considered for approval based upon the conditions of need, church or community benefit, and its impact on the normal Church operations. All requests will be reviewed against a master calendar of currently approved events.

3. DEFINITIONS

- 3.1. Fundraising - Any effort to solicit money, goods or services for the purpose of funding or benefiting an individual, group, or cause. Not included in this definition are events that do not have a fund raising motive for which an entry fee is charged and any goods or services are sold during the event.
- 3.2. Fees - Proceeds resulting from program fees charged solely to recover the cost of presenter's fees, consumable supplies, food, books, and training materials.
- 3.3. Sales – Proceeds resulting from incidental activity during a sponsored event.

4. RESPONSIBILITY

It is the policy of the Church to approve and fund its ministries through its regular budget process. The Church Council and the Charge Conference approve the ministries and budget. It is also the responsibility of Church Council to oversee all off-budget fundraising activities

In accordance with the Book of Discipline of the United Methodist Church, the local church Finance Committee is responsible for approving all fundraising efforts of authorized Church ministries, scheduling the dates, times, places and number of fundraisers, maintaining a master calendar of currently approved fundraisers, and administering a process for collecting and accounting for the use of all money raised through fundraisers. The Finance Committee may delegate specific aspects of fundraising oversight to staff or other committees, as deemed appropriate.

5. POLICY

- 5.1. All fundraisers must reflect and relate to the principles and purposes of the Church and serve the mission of the Church.
- 5.2. All fundraisers are to be conducted for the benefit of the Church, its ministries, organizations or causes approved by the Church.
- 5.3. Fundraising for the benefit of for-profit entities or personal gain is prohibited.
- 5.3. Individuals may not use the Church to conduct home-based business activities, e.g. Mary Kay, Avon, Pampered Chef, even if any percentage of the profits are designated for the Church.
- 5.4. Individuals may not use the Church telephone directory to make “cold calls” on church members for personal financial gain.

This policy is not intended to discourage individual members of the Church from “networking” with each other on an informal basis or inviting individuals to participate in organizations, activities and businesses not associated with the Church, but it does prohibit people from using Church mailing lists and phone directories for the purpose of “prospecting” for business.
- 5.5. Individuals may not use the Church’s name, in any fashion, in advertising or to allude Church support of public or private businesses, products, political organizations, etc., e.g. John Doe Real Estate, your friendly Grace Community realtor.
- 5.6. 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 the Church members.
- 5.7. Fundraisers shall be limited to a specific time interval.
- 5.8. As a general rule, fundraisers will not be announced from the pulpit. However, exceptions may be made for church-wide disaster relief activities and others as deemed appropriate by the pastor.
- 5.9. Every request for a fundraiser must be made in writing using the Fundraising Request Form.
- 5.10. Solicitation for fundraisers shall not normally last more than two Sundays. Solicitation time does not include delivery of items sold or goods received. The Finance Committee can approve exceptions to the two-Sunday period.
- 5.11. Established Church programs (such as VBS supply collection, Angel Tree Program, and Salkehatchie) are exempt from the Request process. However, these programs are required to confirm their intentions to continue these programs during the Church budgeting process each year.
- 5.12. Fundraising requests do not carry over from one year to the next.
- 5.13. The following fundraising activities are not acceptable:
 - Aggressive sales pitches are prohibited
 - Events that might create a bazaar atmosphere in the Church.
 - Direct solicitation of parishioners such as blocking their paths of travel before, during or after any worship service or Church-wide event.
 - Events either on or off of Church grounds that could create unusual risk and/or liability to the Church or to event participants.
 - Events that would in any way reflect negatively on the Church, including excessive noise, disturbance to any abutters, and unreasonable hours.
 - Gambling related activities such as raffles and bingo are prohibited.

- Any solicitation, even for approved ministries of the church in which a group or individual solicits goods or money using the church phone directory.
- 5.14. Groups wishing to conduct monetary fundraisers must provide a report back to the Finance Committee detailing the following information after the completion of the fundraiser:
- Total items sold and/or money collected.
 - Total expenses, if any, for the fundraiser.
 - A specific listing of how much and where the proceeds were used.

The required follow up report is due to the Finance Committee two weeks after the end of the event, or last delivery date, whichever is the later date.

6. PROCEDURES

- 6.1. A Church Fundraising Request must be completed and submitted to the Finance Committee Chairperson. The Finance Committee Chairperson will reach out to the Missions Chairperson and Connectional Ministries Chairperson to ensure there are no church-wide conflicts with other Missions/Outreach program activities. Applications may be obtained from the Church office or downloaded from the GCC website <http://come2grace.org/>.
- 6.2. Request should be submitted to the Finance Chair at least 2 months prior to the proposed fundraising event. The Finance Chair shall place the Request on the agenda of the next scheduled meeting of the Finance Committee.
- 6.3. The Finance Committee will review the proposals. Those submitting proposals shall be invited to attend the meeting of the Finance Committee at which the proposal is reviewed and are permitted to make a presentation.
- 6.4. After the Finance Committee has voted on a proposal a response will be prepared and provided to the contact person listed on the Request.
- 6.6. The following criteria shall be considered when evaluating a fundraising proposal:
- Compliance with the procedures set forth in this document.
 - Time elapsed since the last fundraiser by the same proponents or for the same purpose.
 - Time elapsed since the last fundraiser at the Church.
 - Time between the proposed fundraiser and any regularly scheduled or previously-approved fundraiser.
 - The degree of affinity between the fundraiser and the Church's mission.
 - The impact of the fundraiser on the church's facilities.
 - Potential interference with other church activities.
- 6.7. The handling of monetary funds will be as follows:
- All checks collected must be written to Grace Community United Methodist Church or the appropriate Church organization. (No checks may be written to individuals.)
 - All money (cash and checks) collected must be given to the Financial Secretary for deposit into the appropriate bank account.
 - All expenses must be drawn from the appropriate bank account by the Financial Secretary via a funding Request Form.
 - No expenses shall be paid out of "cash received" (no petty cash expenses).
 - Any cash advance (seed money) needed must be approved by the Finance Committee.
 - In the event that a solicitation for supplies is held and someone submits money for the event, the policies above must still be followed. In such instances the money will usually be deposited into the Restricted Fund for subsequent disbursement.

Grace Community United Methodist Church

Fundraising Principles

Things to consider before conducting a fundraiser:

The following questions should be considered as you prepare your fundraising activity:

- Are the goals for the activity clearly established before the activity is undertaken? Who is being served by this effort and how?
 - Is this effort consistent with the total ministry of the Church?
 - What is the guiding principle in designing the event or program: Making the most money by any means possible? Service to the community? Fellowship?
 - Does the method of fundraising accomplish these goals?
 - Do the goals complement other financial stewardship efforts within the Church, district or conference?
- Are the people who will work on an activity part of the decision-making process?
- Does the activity provide a service beyond the fundraising itself?
- Will the activity provide an avenue for people to use their abilities and to express their willingness to serve others?
- Does the activity send a message consistent with the idea of sacrificial giving?
- Does the activity ask community members to support something that the congregation is not willing to fund?
- Does the activity build commitment with the community?
- Will the activity benefit the ministry of the whole organization.
- Will the activity be seen as a unique contribution to the community or as direct competition with local businesses?

Brainstorming Your Fundraiser

Try to avoid fundraisers that require too much up front money or time or those that have a high risk of losing money. Keep your event simple so that you can manage it. If many people and resources are required for the activity to be successful, be sure those resources are lined up prior to submitting your Request.

What

- What type of fundraiser does your group want to hold?
- What do you want to accomplish through the activity?

Who

- **Audience** – To whom is the activity targeted? Pick a target group: Grace Community Church only, the local community, other churches, students, organizations, etc. How many people do you expect to invite? How are you going to target that particular audience?
- **Collaborators** - Are there other organizations at Grace Community that would be interested in being involved?
- **Entertainment** - You need to decide who or what is going to be the highlight of the event so that you can attract people. For example: If you are holding a concert, pick a musician. If you are coordinating a fundraising dinner, you need a speaker. If it is a talent show, who will perform? Consider speakers or performers well-known to your audience, and who might be willing to donate their time.

Where and When

- Deciding upon event locations and dates is an important part of the planning process.
- If the proposed event will take place in a location other than on Church property, choose a location which is affordable, easily accessible, available, and appropriate for the occasion.
- Approval of fundraising requests will be made in light of its proximity to prior scheduled Church events as well as the Church calendar. Accordingly, be mindful of the Church's existing calendar.
- Use of Church facilities should be coordinated with the Trustees
- Worship Center audio visual equipment can only be operated by authorized AV Team members.

Organization

- To make sure those activities occur in an orderly manner, each member or volunteer should take responsibility for at least one task.
- Get permits for food and merchandise sales where necessary.
- Set deadlines for each task to leave time for mishaps.
- Plan for the worst — i.e., speakers or performers failing to appear, lack of food, bad weather, etc. Identify measures that can be taken in these situations to ensure that the fundraising event still runs smoothly.
- Be sure to confirm all activity details, in writing where possible (i.e., guest speaker, talent, room reservations, and supplies).

Budget

- Create a budget for your event and stick to it.
- Make a list of all the items that you need to purchase and how much you will need per item. Mark those things that could be donated.
- Total all costs and subtract donations (confirm each donation before finalizing it on the budget plan). Search for alternatives to reduce the cost of high-priced items.

Costs

- **Publicity** - You will need to advertise your event. Advertising includes flyers, posters, brochures, and newsletters. Set aside an overall printing budget, including photocopying costs. Try to find a printer who is willing to donate the printing costs or at least give you a discount.
- **Location** - Renting a hall, room, etc. If you plan to hold the event at a public place (i.e., a park), obtain permission. Keep in mind the estimated attendance when booking a venue, including those who may buy tickets on the day of the event.
- **Food** - If you are holding a dinner, include the price of dinner in the ticket. Search for a caterer who is willing to donate food for your event. At a concert you might want to sell snacks and beverages. Again, find vendors willing to donate food or provide a discount.
- **Speaker, musician, etc.** - The cost for the speaker should include travel, lodging and meals, unless they are willing to come for free.
- **Security** - Depending on the event, you might need security.
- **Equipment and decorations** – See “When and Where” above for use of audio visual equipment. Other equipment such as tables, chairs, kitchen equipment, tents etc. should be considered and reserved as needed.
- **Miscellaneous** - Send thank you notes to people who helped organize the event, i.e., speakers, performers, and donors of supplies for the event.

Other Important Things To Remember

- ***Plan backwards*** - While planning, work backwards to make sure you are thinking through all of the steps you'll need for a successful event. For example, if you are holding a catered fundraising dinner, think through when you'll want to set up the space where dinner will be, when you'll need to order the food, when and how you're going to pay for the food, when you're going to follow up with the speaker to ensure he's/she's coming, when you're going to meet the caterer, when you're going to choose a caterer, when you'll develop a budget for how much you can spend on a caterer and decorations and who you're going to have as a speaker, etc.
- ***Soliciting donations*** - It's amazing how much can be donated if you know the right people, if you are creative in your solicitations, and if you are thorough and persistent in your search for donations - ask around for contacts and suggestions of people/businesses who might be able to donate food, drinks, material, event space, sound equipment and sound help, flowers, balloons, photocopying, access to phones, prizes, etc. This may be a time-consuming process if you are seeking several different types of donations. It will be very helpful to designate tasks and distribute calling lists early on in the planning stages.
- ***Buy a box of thank-you notes*** - Always remember to thank everyone who helped you make the fundraiser a success. You might thank the individuals publicly at the event, include their names in a "special thanks" section on the event program, and/or send personal notes after the event.
- ***Have fun!*** - You will expend a fair amount of time and energy to make this event a success. Be sure to enjoy the event when it all comes together after several months of planning.



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FUNDRAISING REQUEST FORM

(Please Print)

*Form must be submitted and approved prior to the commencement of fundraising activity
(Please obtain and read a copy of the Church Policy and Guidelines for Fundraising)*

ORGANIZATION

Group Name

Primary Contact

Phone

Email

Secondary Contact

Phone

Email

EVENT

Purpose and benefit derived from the event:

How does this activity you are sponsoring support the mission of Grace Community Church?

Describe the proposed event or activity, including scope of audience: (Candy or other sale, brunch, dinner, etc.)

PROPOSED DATES/TIMES:

Event Dates/Times

From: _____ To: _____

Event Dates/Times

From: _____ To: _____

PROPOSED LOCATION

(If the Church property is being requested, please provide specifics on space(s) required such as worship center, classrooms, lawn, etc.)

PROCEEDS

- ☐ *Anticipated amount to be raised:* _____
- ☐ *Primary beneficiary (incl. \$ amt. or %)* _____
- ☐ *Second beneficiary (incl. \$ amt. or %)* _____
- ☐ *Third beneficiary (incl. \$ amt. or %)* _____

Note: Attach and submit proposed fundraiser budget with this Request Form.

SIGNATURE

I hereby attest that I have read the Fundraising Policy, Procedure and Principles of Grace Community 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

Signature of Finance Chair/Church Council Chair
Or Appointed Designee

Date

Please use additional sheet(s) if necessary.