

Fundraising Policy and Guidelines

Resurrection Catholic Parish

“What we have in the way of possessions, resources, and abilities have been entrusted to us by God. We are called to act as stewards of God’s kingdom”

Genesis 1:26

Key Elements -

1. A fundraiser:

- Defined as any effort to sell a product, provide a service or solicit donations of cash or in-kind donations. It includes outright requests for cash or cash equivalents (stock, gift certificates, etc.), in-kind-contributions, raffles, sale of goods.
- They highlight the specific mission, importance, and needs of the organization which is raising the funds.
- They help to build community within the Parish and enthusiasm for its ministries.
- The activity must address the essential needs of the Parish/school and/or represent the identity and mission of the parish, i.e., outreach.

2. Why do we need a policy and guidelines?

The parish, school, outreach, faith formation, and youth activities each host numerous ministry activities critical to support our mission.

- Encourage future donations
- Sheer number of events
- Conflicting schedules
- Feeling by parishioners of being over-solicited (this includes companies/businesses – bulletin ads, auctions, golf outing, etc.)
- To encourage long range planning for all ministries
- To ensure that the purpose and outcome are transparent
- Promote organized fundraising environment
- Coordinate fundraising events with the Liturgical Year
- Ensure Sacrificial Giving is the primary source of income for all operating groups
- The relationship of trust between donor and fund-raiser requires that
 - Funds collected be used for their intended purposes
 - Funds collected are not absorbed by excessive fund-raising costs
- Donors are to be informed regarding the use of donated funds and assured that any restrictions on the use of the funds by the donor will be honored (see Gift Acceptance Guidelines for donor advised funds)

3. Purpose of policy and guidelines

- a. Ensure a consistent and fair procedure for approving all fundraising activities both
 - i. Existing
 - ii. New
 - b. Eliminate conflicting events and overlapping events
 - c. Ensure that all receipts are handled and accounted for in accordance with internal financial controls of the Diocese of Green Bay
4. Who/what is covered under the policy and guidelines
- a. Any group or individual who is asking to sell a product, provide a service or solicit donations of cash or in-kind donations on behalf of Resurrection Parish.
 - b. The school/GRACE when asking to solicit to the parish as a whole (does not include solicitation events school/GRACE is doing to only school families)
 - c. These include any off-site locations where the purpose is to obtain additional funding for the organization; i.e. restaurants, parks or other places of business.
 - d. Fundraising for the benefit of a specific individual or family mission trip will not be sponsored by Resurrection Catholic Parish. If an individual/family is planning a mission trip they can apply for a grant through the Social Outreach and Justice Committee (SoJO).
 - e. External non-profit organizations requesting a special collection of Resurrection parishioners.

Policy:

1. Finance Committee will be approving all requests. The Finance Committee has the authority to delegate all or parts of the approval process. Certain request may be referred to the Executive Committee for decision.
2. Once application is received by Business Manager, events will be placed tentatively on Fund Raising Calendar until approved by the Finance Committee.
3. Approval needs to be completed prior to event.
4. Days exempt from fundraising
 - a. Palm Sunday
 - b. Easter Sunday/Holy Week
 - c. Christmas Eve
 - d. Christmas Day
 - e. Autumn Fest
 - f. Sacramental weekends – Confirmation, 1st Communion, etc.
 - g. All other Holy Days
5. All contracts need to be signed by the pastor and/or a trustee of the parish.
6. Alcohol and guns are not allowed as prizes for raffles, etc., per diocesan policy.
7. All fundraisers are to be conducted in such a manner as to include confidentiality and where necessary meet the requirements under the IRS code for charitable contributions.
8. Handling of Cash/inventory collected
 - i. All cash will be deposited in the parish master checking account.
 - ii. Cash/receipts cannot be taken home. They must be placed in a parish safe daily.
9. Deposits must be completed by two volunteers who will sign off and turn them into the business office. If the event involved inventory (i.e., trash bags, candy bars) a detailed reconciliation of inventory on hand, inventory in

process, inventory sold, and sales proceeds received shall be maintained by organization/committee responsible. This will need to be turned over to business manager every three months and/or upon completion of fundraiser.

10. Disbursement of cash/items
 - a. Check requests/invoices for expenses will be turned into business office ASAP. They must be approved by the pastoral liaison the committee/organization has been assigned.
 - b. If final proceeds are to be sent to an organization outside of parish, i.e., Excel program, the pastoral liaison will complete the check request.
 - c. Paying for expenses using the 'cash' from the fundraiser, (i.e., taking money from cash box to pay for bread needed at last minute from store). If a time arises that more supplies are needed at the last minute ask the staff liaison what to do. The parish may have an account that can be used at a nearby business.
11. Bingo/Raffles – must follow the Wisconsin code for gaming events and diocesan policies. All appropriate federal and state forms (w-2g's), will be filed by the business office.
12. Permission must be obtained for the distribution of alcoholic beverages, raffles and/or noise variance. The Business Manager will determine if a liquor license/permit may be needed to be applied for. Refer to Diocesan Guidelines on distribution of alcohol at events.
13. Diocesan proxy guidelines/policy is followed when needed.
14. Because we are a stewardship parish all groups/organizations are asked to please consider tithing 10% of their net income each year to the Social Outreach and Justice Committee (SoJO) for use in their mini-grant process or one of SoJO approved organizations.

Process:

1. Recurring fundraising events need to be applied for at the beginning of each fiscal year.
2. Committees/Organizations must submit a completed application form to the business manager no later than one quarter prior to event. See schedule:

<u>Request must be received by</u>	<u>For fundraiser scheduled during</u>
April 15	July – September
July 15	October – December
October 15	January – March
January 15	April – June

3. Form needs to include:
 - a. Specify the purpose of the event, the goal, and what funds will be used for
 - b. How does this fit the mission of Resurrection Parish?
“As disciples of Jesus and stewards of God’ gifts, Resurrection Catholic Parish is called to be a welcoming and worshipping community that strengthens faith, shares Christian hope, reaches out, and loves one another”
4. Application must include a proposed detailed budget of anticipated incomes and expenses with final expected net proceeds.
5. Calendar of fundraising to be kept by Business Manager and updated frequently
6. Finance Committee will be approving all requests. The Finance Committee has the authority to delegate all or parts of the approval process. Certain request may be referred to the Executive Committee for decision.

7. Marketing –Refer to communication plan.
8. In most cases a response from the Finance Committee will be received within four weeks. The Finance Committee normally meets the third Tuesday of each month.
9. All events must have a start time/date and end time/date.

Guidelines for Approval Process:

- I. Approval process will be weighted on the following:
 - a. Mission of Parish – how fundraiser furthers the mission of the parish
 - b. Mission of fundraiser
 - c. Need based
 - d. First come-first serve
- II. Preference will be given to previous events that have been proven successful, i.e., Autumn Fest and the School Auction.
- III. To allow room for all requests it is asked that groups/organizations not exceed two per year.
- IV. Fundraisers will be placed into one of three categories:
 - a. Category 1 – Ongoing fundraiser – i.e., scrip/food drives
 - b. Category 2 - Multiple times throughout the year – i.e., Scholastic book sale
 - c. Category 3 - One and done – i.e., Youth Stock Sale, diocesan collections
- V. To allow for room for fundraising events the Finance Committee will use these guidelines:
 - a. Each weekend (except those exempt from fundraising named above) can have
 - i. Two - Category 1 fundraisers
 - ii. One – Category 2 fundraiser
 - iii. Category 3 fundraisers can happen two times per month.
- VI. All fundraising activities are contingent upon all operations needs of parish being met.

Reporting:

1. Within 15 business days of completion of fundraiser the committee/organization will receive an accounting from the business office. This is to be signed off by the chair/manager of event.
2. Within 30 business days of completion the chair/manager will report to organization/committee the financial report. A review of the event expectations will be done.
3. Within 30 business days of completion an update must be given to the parishioners at large by the organizing committee/organization. If the event is longer than 4 weeks – a periodic update must be given every 30 business days.
4. The parish should be informed before, during and after any fundraiser as to the goals and accomplishments of those fundraisers, including prompt report of final totals, and acknowledgement of volunteers and supports of the fundraiser. It can be as simple as i.e. ‘Over the past month the parishioners of Resurrection Parish have donated 70 pounds of food to St. Pat’s Food Pantry. Thank you to all volunteers who and those that donated food to this worthy cause.’
5. This report should be on the website, Facebook and any other social media used (includes bulletin).
6. This report should be in the next appropriate mailing to all parishioners.