

**First United Methodist Church**  
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# FUNDRAISING POLICY, PRINCIPLES & PROCEDURES



# FIRST UNITED METHODIST CHURCH FUNDRAISING POLICIES, PRINCIPLES AND PROCEDURES

## 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 of First United Methodist Church as a Christian community of faith.
- The group raising funds must be aware of and respectful of the needs, customs, 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 of the sacredness of the church's liturgy and the sacred space.
- 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 above.

2. *Ongoing Fundraisers*: Those conducted as a normal part of the church schedule, with or without an end date. (Examples: Cookbooks, Church anniversary plates, etc.)
3. *Church Wide Campaigns*: (Examples: Fall financial and building/capital campaigns)
4. *Annual Fundraisers*: Fundraisers held the same time each year as well as same type of fundraiser (Examples: apple sales, ornament sales). 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, set-up request, request for scheduling, and appropriate reporting will still be required prior to the fundraising event.**
5. *Fundraisers for outside the church*: (Examples: United Way, 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 Church Administrator in conjunction with the Senior Pastor and/or Chairperson of the Committee on Finance acting as representatives of the Committee on Finance.
  - b. Applications (see attached) will be reviewed within two weeks after being submitted, on a first-come, first-served basis.
  - c. The decision for or against approval may not be immediate, depending on the need for further information or consultation.
  - d. Fundraising programs beyond those of First United Methodist Church, such as Talbot House, Lighthouse Ministries, Habitat for Humanity, etc., must submit a request at least 3 months prior to the fundraiser.
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
    - Loyalty Sunday
    - Christmas Eve
    - Christmas Day
  - b. Each group may conduct weekend fundraising activities for up to two consecutive weekends if available.
  - c. Fundraisers taking place on church grounds will occupy predetermined locations as designated by the Committee on Finance. Designated areas are:
    1. Outside the north entrance to the Sanctuary narthex
    2. North of lobby of Fellowship Center
    3. South entrance between buildings D & E
  - d. Requests for fundraisers on church grounds to be located other than designated areas will be considered on an individual basis (e.g. special offerings, Phoenix dinners, etc.)

3. Number of fundraisers:
  - a. Each church organization will be allotted two limited term fundraising activities per year, assuming the availability of the space and scheduled time.
  - b. No more than one (1) fundraising event will be scheduled per Sunday.
4. Purpose of funds:
  - a. The financial goal of the fundraiser, in dollar amounts, is to be indicated by the church organization on the fundraising application, as well as in any pre-event publicity.
  - b. The purpose of the funds to be raised must be publicized before the fundraiser by way of the church newsletter, promotional flyers, and/or other means of publicity. These means of publicity must be mentioned in the application for approval.
  - c. 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. 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)
  - d. 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 Church Administrator 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. All cash receipts of any fundraiser are to be submitted to the church accounting department within 48 hours of the completion of the fundraiser.
  - b. Receipts of all fundraisers will be placed in the appropriate restricted fund set up to receive funds from fundraiser.
7. Receipts and reimbursements
  - a. Private persons 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 accounting department by project leader on a timely basis. Checks will be disbursed on normal accounts payables dates of the 10<sup>th</sup> and 25<sup>th</sup> of each month. *(See attached Check Request)*
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 or to any part of it should never be assumed by the fundraising group, but will only be granted by way of the application process.



**SIGNATURE**

I hereby attest that I have read the Fundraising Principles, Policies and Procedures document of First United Methodist Church of Lakeland; 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:**

\_\_\_\_\_  
Church Administrator,  
Executive Pastor, or  
Chairperson, Committee on Finance

\_\_\_\_\_  
Date

**FIRST UNITED METHODIST CHURCH  
FUNDRAISING FINANCIAL STATEMENT**

<b>INCOME:</b>	<b>BUDGET</b>	<b>ACTUAL</b>
Donations:	_____	_____
Sales:	_____	_____
Services:	_____	_____
Other:	_____	_____
Other:	_____	_____
<b>Total Income:</b>	_____	_____

<b>EXPENSES:</b>	<b>BUDGET</b>	<b>ACTUAL</b>
Advertising	_____	_____
Materials	_____	_____
Products	_____	_____
Services	_____	_____
Other:	_____	_____
Other:	_____	_____
<b>Total Expenses:</b>	_____	_____

**NET PROJECTED INCOME:**

**NET ACTUAL INCOME:**

**VERIFICATION:**  
After careful consideration of potential expenses and income sources,  
Project Leader please initial here: \_\_\_\_\_