



St. Mary Magdalene Catholic Church

FUNDRAISING POLICY

As a catholic faith-based parish community that is led by the Holy Spirit to be an example of stewardship as a way of life, it is important that members of St. Mary Magdalene Catholic Church recognize that certain occasions help build the social fabric of the parish community while providing additional sources of revenue to support the overall well-being and general good works of the Church. As scripture notes:

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

In keeping with our Vision Statement, *Called by Christ, Growing in Faith, Serving with Love*, we aim to promote Stewardship to the ultimate goal of giving back what already belongs to God. In doing so, we are *Called*, we *Grow*, and in the end, we *Serve with Love*.

PURPOSE

This administrative fundraising policy establishes a process for approving and managing all fundraising activities that occur at St. Mary Magdalene Catholic Church. This includes those fund activities of our affiliates that seek funds or which use affiliation with or through the Parish as part of the fundraising effort. This policy is intended to provide effective guidance and governance to the fundraising process while minimizing conflicts, duplication from repetitive groups/organizations seeking to raise funds while maximizing parish resources.

This policy is further intended to:

1. be consistent with the vision and mission of our Parish;
2. provide guidance for attaining resource(s) for completing the objectives stated in the Pastoral Plan;
3. maximize contribution opportunities to the greatest benefit of the Parish;
4. assist each ministry in making its fundraising event as successful as possible;
5. encourage long-range fiscal planning by all ministries;

6. promote an organized fundraising environment;
7. coordinate all major fundraising events within the liturgical year;
8. continue as stewards of donors to enhance the donor/Parish relationship for the greatest benefit of both; and
9. Encourage future donations and parish support with a spirit of fairness, equality, and generosity.

SCOPE

This policy applies to all fundraising activities for the benefit of the Parish or otherwise those using its name, resources, or its facilities. It includes all recognized organizations associated with the Parish including all Ministries, Affiliates, Councils, Committees and other groups and organizations affiliated in any way with the Parish.

This policy supersedes all previous policies on fundraising until further revised by the Pastor.

APPLICATION

Fundraising efforts must respect the priorities of the Parish as a whole. They must also honor the historic pool of donors and the frequency upon which they are called. Expanding the list of donors who embrace St. Mary Magdalene Catholic Church's mission and vision is a goal as important as securing funds.

Placing specific projects in the context of the total Parish is an exercise of good stewardship and Parish spirit.

DEFINITIONS

Fundraising - the activity of raising funds, and/or in-kind gifts for the Parish, its ministries, the preschool, or religious education activities. It includes outright requests for cash or cash equivalents (e.g., stocks, gift certificates, etc.) for the sale of goods (e.g. coffee, cookies, T-shirts, etc.) and auction proceeds of which are applied to the Parish.

Event - a parish wide gathering that may require a fee or ticket for admission to cover costs of the event and/or be a fundraiser for the Parish. This excludes visiting speakers where a "love offering" or collection is taken up for the benefit of the speaker's organization.

Ministry - is a group of parishioners sharing a common goal or purpose that is recommended by the Pastoral Council and approved by the Pastor. A ministry will be: covered under the Parish insurance umbrella and all funds either for own use or for fund raising will be through the Parish's bank accounts

Affiliate -is a non-parish based organization that is recognized by the Diocese and/or Parish and supports Catholic Doctrine and teachings. A recognized affiliate will be: Regional/National/International organization, has its own insurance and its own check book for managing its funds.

Special Program - includes any approved special program where funds for participation (e.g., trip deposits) are required. Examples include World Youth Day, Parish sponsored pilgrimages or missions.

POLICY STATEMENT

1. No fundraising will be conducted without prior approval of the Pastor with advice from the Pastoral Council and which is entered on the Parish Calendar.
2. No more than two fundraisers will be allowed on any given weekend without permission of the Pastor.
3. Fundraising will be in accordance with good stewardship principles including confidentiality and where necessary, meet the requirements under both, the Internal Revenue Code and SC state regulations for charitable contributions.
4. Fundraising requests not sponsored by the Parish, its councils or ministries, or parishioners, or fundraising of indefinite duration or fundraising contrary to the mission of the Parish will not be approved.
5. Previous granting of fundraising is not an assurance or promise that the privilege will be granted for any subsequent year or period.
6. Certain fundraising requests may carry-over from one year to the next. However, recurring fundraisers should submit application form specifying requested date(s) of fund raiser for coordination of Parish calendar and to comply with other sections of this Policy.
7. Every request for a fundraising activity must be made in writing using the Parish Fundraising Application form.
8. The activity must be consistent with the Parish Vision, Mission and Pastoral Plan.
9. Fundraising activities will not be permitted on the following days/weeks: Christmas Eve, Christmas Day, Ash Wednesday, Holy Week beginning with Palm Sunday, Easter Sunday and other Holy Days of Obligation (Solemnity of Mary, Ascension, Feast of Assumption, and Immaculate Conception).
10. The Pastor will grant fundraising opportunities each fiscal year (July 1 - June 30) based on established guidelines of this policy, availability of the Parish Calendar and the advice of the Pastoral Council.

11. Each ministry will have no more than two fundraisers that benefit their own operations per year, and no more than one in any quarter.
12. All applications must be submitted to the Director of Business Administration by March 1 each year for distribution to the Pastoral Council for review and vetting by the council with final approval by the Pastor.
13. It is the duty of the Pastoral Council to use its discretion to recommend approval of fundraisers to the Pastor which is in the best interest of the Parish while providing a balance of basic fundraisers, parish budget, capital campaigns and general fundraising.
14. The fundraising activity shall not overshadow the primary source of gifts, the Sunday collection, nor any parish capital campaigns. Funds shall not be raised for unnecessary items when other essential needs in the Parish are not being met.
15. All fundraising activities must be respectful of those who are unable to contribute.
16. Exceptions to this policy without the express written permission of the Pastor will result in the suspension of fundraising privileges for the remainder of the current fiscal year and the following fiscal year.

NOTICE of PRIVACY PRACTICES 501(c)

Any information supplied to the Parish by donors will be used solely to fulfill their donation and shall not be shared for any reason unless permission is granted by the donor to share such information. All requests to remain anonymous shall be honored.

APPLYING for a FUNDRAISING ACTIVITY

Any parish ministry, organization or group wishing to have a fundraising activity must present a completed Fundraising Application Form (FR-APP) to the Director of Business Administration for such fundraiser no less than 12 weeks prior to the requested date. The Director of Business Administration is the first point of contact for a fundraising application and communication concerning any fundraising event.

This application will then be submitted to the Pastoral Council at its next regularly scheduled meeting. Meetings are held the 2nd Monday of the month, August to June (no meeting in July). NOTE: The review process could take up to 60 days. As such, submitting the fundraising application as soon as possible will facilitate recommendation to the Pastor.

1. The Pastoral Council will review applications within 30 days after submission. The Council's recommendation will be made to the Pastor within 45 days after submission unless further information or consultation is needed. The Finance Council will be notified of all approved fundraising events.

Applications must name the beneficiary and include a proposed detailed budget of anticipated incomes, expenses and expected net proceeds.

2. The Fundraising Application Form and Room Reservation Request Form (if requesting rooms including canopy usage) must be submitted at the same time
3. If a request for a fundraiser needs clarification or is not approved by the Pastor, it will be the responsibility of the Director of Business Administration to communicate said circumstance to the ministry leader or requesting party.

“Stewardship Tithe” - in keeping with the call to be good stewards, a Tithe (10%) of **gross proceeds** will be donated to a predetermined approved organization or may be donated to the Outreach Tithe Committee. For organizations who receive net proceeds from their fundraiser (e.g., Boy Scouts, Girl Scouts, American Heritage Girls), in those situations, the tithe will be 10% of the **net proceeds**. The request for this **net proceeds** option must be included in the application. Post event request for this option will be discouraged and granted in only very limited circumstances.

Fundraisers by ministries or affiliates for other approved organizations are subject to review and Parish Calendar limitations. These do not count against their two fundraiser limit for the year (e.g. Boy Scouts Food Drives for the Society of St. Vincent DePaul (SVDP)).

Fundraisers for internal ministry operations will be limited to two per year.

Exceptions to the 2X per year limitation:

1. The Knights of Columbus Monthly Breakfast and Lenten Fish Dinners are considered a “Parish Life” event. Prior to each event, the Knights of Columbus will designate a beneficiary of the proceeds which will be communicated to the parish as part of the regular bulletin announcements.
2. SVDP is considered an outreach ministry, integral to the Parish Vision and Mission, and as such is exempt. SVDP may conduct requests as needed from time to time subject to Parish Calendar availability and resource limitations. Other ministries may conduct fundraisers on behalf of SVDP. Ministry leaders are required to submit to the Director of Business Administration a fundraiser application for coordination on the parish calendar.
 - a. If the Pastor approves the fundraising request, then the fundraising activity will be entered in the Parish Calendar.

EVENTS

A parish event which is a fundraiser and/or is charging a fee must be submitted to the Pastoral Council for review and vetting for recommendation to the Pastor. Other parish events should follow the normal scheduling procedure using the Facilities Calendar.

A request for an event in the upcoming fiscal year must be submitted by April 1 of the preceding fiscal year using the Event Request form.

1. Upon approval of the Pastor, the ministry, council or committee responsible for the event must receive pre-approval of all contract documents from the Director of Business Administration before agreeing to or signing any contractual services on behalf of the Parish for the event. Sufficient time must be allowed for review of any contract documents by the Diocese of Charleston, SC. This step must be taken into consideration when planning the event.
2. Permission must be obtained from the Pastor for the sale or distribution of alcoholic beverages. Authorization will be provided by an initialed signature of the Pastor on the Event Application Form (Refer to EV-AP) and be obtained prior to the submission of the request for the event. The EV-AP form should be submitted to the Director of Business Administration who will request approval from the Pastor.
3. Upon approval of the event by the Pastor, the event committee must submit all marketing and communications through the Communications Coordinator for review before any public distribution. Refer to the Parish Communications Policy for communicating an event. Sample copies of flyers, invitations, response cards, posters, PSA's or Mass announcements should be provided with the application or as soon as they are available.

SPECIAL PROGRAM

When a ministry, group or organization from St. Mary Magdalene wants to raise funds for a special program (see definition; includes trips such as World Youth Day, pilgrimages and/or missions) that require upfront/in advance deposits, a **fundraising plan and fundraising form** must be submitted no less than 3 months prior to when the advance deposit is required. This plan will be submitted to Director of Business Administration for submittal to both the Pastoral & Finance Councils.

The fundraising plan will include the following information:

- The name and date of the special program
- The name of the sponsoring organization of the special program
- The ministry(ies)/affiliates whose members will be part of the special program
- Identify the maximum number of participants

- The cost per participant, the cost of the deposit, the total cost of the special program broken down by hotel, airfare, incidentals and other expenses. Identify what costs will be covered by the participants
- List the individual fundraisers and expected net proceeds (after the Stewardship tithe - See above), name of leaders responsible for fundraiser, requested date of each fundraiser.

Upon receipt, the request will be processed as a normal fundraising request as described above with recommendations to the Pastor from both the Pastoral and Finance Councils.

CONDUCTING a FUNDRAISER or EVENT

1. Those conducting any fundraising event must have a current completed and approved Fundraising Application Form (FR-AP) on file in order to conduct an event.
2. A Room Reservation Request Form may also be required if the fund raiser requires use of Parish facilities including canopy tents.
3. Those interested in distributing or selling alcoholic beverages must have on file pre-approved signatures from the Pastor on the application form.
4. Those using parish grounds, facilities or equipment must complete a Facility Reservation form with the Parish Office to verify and secure the event dates in the Parish Calendar along with the Fundraising Raising approval form.
5. Those conducting fundraising events are responsible for their own promotion and publicity. All communications and promotional materials must be submitted to the Communications Coordinator prior to any public distribution in an effort to coordinate parish communications.
6. All cash receipts collected by Ministries must be submitted to the Parish Bookkeeper no later than the next business day in accordance with the Parish Cash Management Policy. The coordinator of the event must contact the Parish Bookkeeper the week prior to the event for instruction on how to deposit funds. Affiliates will provide the Director of Business Administration a report detailing the gross proceeds/receipts, itemized expenses (if any) and the net proceeds.
7. Reimbursement from cash receipts of the fundraising activity is not permitted. All expenses are to be reimbursed by check through the Parish Business Office. Requests for reimbursement must be presented to the Parish Bookkeeper in a timely manner and must be supported by invoices, receipts, signed petty cash requests or other verifiable documentation. A reimbursement check will be issued by the parish within one week after the documented request.
8. All fundraising must be conducted in compliance with the Fundraising Policy of the Parish.

COMPLETION of the FUNDRAISING EVENT

1. Those conducting the event must submit a completion report to the Director of Business Administration within 30 days after completion. The Director of Business Administration is responsible for reporting the event completion to the Pastoral, Stewardship and Finance Councils. The report will include an overview of the event, including but not limited to, attendance s, income and expense statement, the event beneficiary, the overall success of the event and recommendation for future planning.
2. Those conducting a fundraiser or event are responsible for communicating to the parish community its results, including but not limited to, the purpose of the event, attendance, net amount raised, and proceeds recipient(s). The report can be submitted for inclusion in the bulletin, newsletter, Parish website or Social Media.
3. All volunteers, vendors, staff, parishioner, or non-parishioners associated with the event, must comply with all Diocesan regulations, Internal Revenue Code regulations and State of South Carolina regulations. Non-compliance with the Fundraising Policy or these Procedures will be taken into consideration on future requests for fundraising events.

Approvals:

Fr. Theo Trujillo - Pastor

Date:

[Click here to print required forms](#)
