

**1. Title:** Congregation-Wide Fundraising

**2. Purpose:**

The purpose of this Operations Policy Statement is the following:

1. To emphasize that fundraising projects and Special Offerings are separate and distinct entities and are governed by separate Operations Policy Statements.
2. To establish policy and procedures for requesting and approving congregation-wide fundraising projects.
3. To provide for the scheduling of fundraising projects on the Church Calendar.
4. To assure that a proposed fundraising project is consistent with the Church's mission.
5. To assure that a proposed fundraising project does not interfere or conflicts with other already planned and approved Church activities and obligations.
6. To assess any potential risks or liabilities associated with any proposed fundraising project. This includes any potential adverse impact on or conflict with the Church's stewardship program.

**3. Policy:**

**3.1 BASIC REQUIREMENTS**

1. The Session shall approve all fundraising projects as defined in "4. Definitions" below.
2. Any request for a congregation-wide fundraising project must be proposed or sponsored by a FPCC organization.
3. Mission Ministry projects are allocated funds during the Church budget development process and any request for a Mission Ministry-sponsored fundraising project should be well justified. The Session's evaluation should weigh the benefit against any adverse impact on members of the congregation and/or the Stewardship program.
4. As an organization sponsored by the denomination, the church's Presbyterian Women (PW) may solicit contributions. With the approval of

the PW Coordinating Team, PW groups are permitted to conduct fundraisers within the Circles and Mission Sewing group without obtaining the Session's approval; however, any fundraisers or solicitations from the congregation must be approved by Session.

5. Youth Groups, Sunday School classes, Small Groups, and Bible Study groups are permitted to conduct fundraisers within their groups without obtaining the Session's approval. Any congregation-wide fundraisers or solicitations, however, must be approved by the Session. A youth car wash or similar youth activity shall not require the Session's approval.
6. Any fundraising project itself must be compatible in its content and the way it is conducted to the identity and mission of FPCC as a Christian community of faith. All fundraising events and activities will take care to avoid the appearance of impropriety (i.e., no gambling, alcoholic beverages, suggestive clothing or advertising, etc.).
7. The fundraising project must address essential needs, and not gratuitous wants or luxuries of the group.
8. In cases of dispute about the applicability or interpretation of this policy, the Administration Committee shall advise the parties involved. If this does not bring resolution, the matter shall be referred to the Session.
9. A Fundraiser may be declared as being perpetual. A perpetual Fundraiser does not require the annual submission of F-240101. Perpetual Fundraisers do require the annual submission of F-050401. The following are recognized as being perpetual Fundraisers:
  - The Annual Chili Cook-off
  - The annual Youth Auction

### **3.2 APPROVAL PROCESS**

1. The *Fundraising Project Approval Form* (F-240201) shall be used for requesting approval of a fundraising project.
2. All requests, before submission to Session, must firstly be approved by the sponsoring organization via the passing of a motion for same at a regular meeting and so recorded in its minutes.
3. The Session shall approve (or disapprove) fundraising project requests.
4. The *Fundraising Project Approval Form* (F-240201) shall be submitted to the Church Administrator at least eight (8) weeks prior to project's desired

start date. Sponsoring organizations should consider **planning their fundraising projects a year in advance** and submitting their requests sufficiently early for facilitating the integrity of the Church Calendar and avoiding scheduling conflicts. A request is only good for “one time” and annual repeats must be re-requested and re-approved from year to year unless it is a perpetual project as described in Part 3.1.9.

5. All fundraising project events require the completion of the *Events Approval Scheduling and Planning form* (F-050401). [See OPS 05.04 *Events Approval Scheduling and Planning*.]

### 3.3 RESTRICTIONS

1. Any Church organization which sponsors a fundraising activity shall not advertise or solicit outside the community boundary (*I-45 on the East, FM 1097 on the North, SR 149 on the West and SR 1488 on the South*). Nor shall they sell products or services door to door.
2. Fundraising activities which do not qualify for approval include:
  - a. Activities completed with paid labor, either by employees or by contract.
  - b. Entertainment for which the Church organization pays performers for their services, when admission is charged, and when the intent of the project is to raise funds.
  - c. The sale of commercial goods, including food storage items. A bake sale is not considered being “a sale of commercial goods”.
  - d. Games of chance, such as gambling, raffles, lotteries, and bingo.
3. The organizers of a fundraising project shall not personally benefit financially from the fundraising project.
4. Information about church members shall not be shared with any one or any entity for fundraising or solicitations of other resources except with specific Session permission.

### 3.4 SCHEDULING

1. No more than one (1) Congregation-wide Fundraiser will be scheduled within a month.
2. Only one (1) individual sales Fundraiser will be scheduled at any given time. In other words, no two individual sales Fundraisers may overlap on the calendar.

3. To allow all organizations ample opportunities, only two (2) Congregation-wide Fundraisers may be scheduled by any organization during the calendar year.
4. Fundraisers will not be scheduled on the following days: *Palm Sunday, Easter Sunday, Christmas Eve, Christmas Day*. If a fundraising project overlaps one of these days, fundraising will be suspended for the holiday.

### 3.5 PROMOTION

1. The *Church Connection* may be used for advertising a Fundraising Project and input is due by Tuesday at noon for the following Sunday and must be first approved by the sponsoring organization's chairperson.

### 3.6 LOCATIONS

1. A table may be set up in the Narthex or in the Family Life Center Hallway for conducting a Fundraising Project sale of tickets or other needs.
2. The Main Hall is not to be used for fundraising projects due to fire code for protecting traffic flow. The Family Life Center Hallway may be used due to its having adequate space but with caution for keeping a clear aisle.
3. The scheduling of an event (see Definitions) for an approved fundraising project which needs to use the Church's facilities must abide with OPS 05.04 – *Events Approval Scheduling and Planning*.

### 3.7 ACCOUNTING

1. Cash receipts shall be handled and controlled per OPS 08.05, *Cash Receipts Processing Policy* 08.05, 3.17.
2. Income received from a fundraiser must be entered/held in a designated fund (liability/expense account) (line 6 of F-08051). The designated fund must be established before the fundraiser is conducted. The income from a church fundraiser must be spent on the intended purpose unless approved by the Session.
3. Persons are not to be reimbursed for fundraising expenses directly from the original cash receipts of the fundraiser. Requests for reimbursements are to be completed and submitted to the Church Administrator by the sponsoring organization's chairperson on a timely basis per OPS 08.04, *Cash Disbursements – Payment Procedures for Invoices and Reimbursements*.

4. FPCC cannot give contribution credit for items purchased at fundraising events. If an individual wants to contribute beyond the purchase price of an item, then a separate check should be made payable to the church for this donation.
5. The church cannot give contribution credit for any donations of property to be sold or auctioned at a fundraiser. However, upon request of the donor the church may provide a thank you letter with the date and description of the property donated without assigning a value to the donated property. Some donors may be able to deduct the contribution from their federal income taxes. Upon request by the donor, the organization sponsoring the fundraiser shall submit the donation information (donor name and address, donated item, date donated) to the Church Administrator for the thank you letter to be processed.
6. Sales tax collection may be required for a fundraiser. The Church Administrator should be consulted about sales tax collection requirements and the handling of sales tax money and reporting.
7. Money earned by an individual through fundraising that is not used by him/her (either due to the individual not participating in a trip, or because more money was earned than was needed), will be used by the ministry to offset trip expenses.
8. Money raised by an individual through fundraising for an activity but who fails to participate in the activity shall not be returned to the individual for any reason.

### 3.8 OTHER

1. The Administration Committee is responsible for interpreting and answering questions regarding this OPS; and, for its periodic review and revision.

### 4. Definitions:

**Event** - An assembly or meeting of persons for a program or activity requiring any of the following: use of the church's facilities, Staff support such as for music, an audio/video technician support, publicity (Weekly Connection or other), custodial service, child care, etc.

**Fundraising Project** - Any congregation-wide fundraising activity which is approved by the Session apart from the annual congregational stewardship

program and *Special Offerings* and which provides an opportunity for the entire congregation to participate.

**Fundraiser** - An event, social function, or sale of tickets or merchandise that is a task or the means within a Fundraising Project for raising money from the congregation. -Examples are the Chili Cook-Off and Youth Auction.

**Sale** - The exchange of goods or services for an amount of money or its equivalent. An example is the Mission Ministry's sale of coffee.

#### 5. References:

- OPS 05.04, *Events Approval Scheduling and Planning*
- OPS 08.05, *Cash Receipts Processing*
- OPS 08.04, Requesting Payments – Cash Disbursements

#### 6. Applicability:

This OPS applies to all congregational-wide fundraising projects except the annual congregation stewardship program. Special Offerings are exempt from this OPS. The Pastors' Discretionary Fund is exempt from this OPS. This policy does not require the Session's approval as an example for a Sunday School class's collection from its members for a specific cause since it would not involve the whole congregation. The Missions Ministry's Christmas Baskets project is excluded from this policy for the Session's approval. Any request for the donation of airline frequent flyer miles is exempt from this OPS. Other policy requirements such as for accounting may apply. This policy applies to **any** fundraiser planned by **any** Church organization including the Day School for providing the opportunity for the congregation as a whole to participate. In cases of dispute about the applicability of this policy, the Administration Committee should advise the parties involved. If this does not bring resolution, the matter should be referred to Session.

#### 7. Procedures:

##### Fundraising Project Approval

1. The sponsoring organization shall assure that the proposed fundraising project complies with this OPS policies/requirements and if it fully complies shall consider its approval by voting on a motion for its approval.

## Miscellaneous Policies

Policy Number: 24.02

Effective Date: Feb. 19, 2017

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2. After a vote of approval, the sponsoring organization's chairperson shall complete a *Fundraising Project Approval Form* (F-240201) and submit it to the Church Administrator.
  3. The Church Administrator shall review the F-240201 with the sponsoring chairperson to identify any conflicts of the proposed schedule with the Church Calendar and shall provide completed copies of it to the Pastor and Clerk of Session.
  4. The Clerk of Session shall add the proposed Fundraising Project to the next Session's meeting agenda.
  5. The Church Administrator shall attach copies of the completed F-240201 to the *Session Packet* for distribution to the Session members.
  6. The sponsoring organization's chairperson (or PDS liaison) shall introduce a motion for approving the proposed fundraising project.
  7. The Session shall approve/disapprove the proposed Fundraising Project.
  8. The Clerk shall mark the form's line for approved/disapproved, affix the date of the Session's decision to the form, sign and submit it to the Church Administrator.
  9. The Church Administrator shall make electronic distribution of the approved form to all affected parties and file the Clerk's-signed F-240201.
  10. The Church Administrator shall schedule (insert) any event in the Church Calendar.
  11. The sponsoring chairperson shall submit to the Church Administrator any article for publication in *the Weekly Connection* for a designated date.
  12. When required, the Church Administrator shall assist the sponsoring chairperson in completing an F-05101 for reserving any needed rooms, etc., and reserve the space facilities on the Church Calendar.
  13. The sponsoring organization's chairperson shall consult with all affected Staff and ministries for initiating the planning for their respective responsibilities for any fundraiser event per OPS 05.04 - *Events Approval Scheduling and Planning*.
- 8 Review Schedule:** The Administration Committee shall review this OPS triennially for determining any need and making of revisions.

- 9 Approval:** Session approved and made effective this OPS on February 19, 2017.