

Fundraising Policy and Guidelines
July 1, 2017
St. Joseph Catholic Parish - Grafton, WI

*“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:

- a) Defined as any effort to sell a product, provide a service or solicit donations of cash or goods and/or in-kind donations for the purpose of raising money for a cause, charity or non-profit organization. It includes outright requests for cash or cash equivalents (stock, gift certificates, etc.), goods, in-kind-contributions, raffles, and sale of goods.
- b) Highlights the specific mission, importance, and needs of the organization which is raising the funds.
- c) Builds community within the Parish and enthusiasm for its ministries.
- d) Address the essential needs of the Parish/school and/or represents the identity and mission of the parish, e.g., outreach.

(2) Need and Purpose of a policy and guidelines:

The parish, school, outreach, faith formation, and child & youth ministries each host numerous ministry activities critical to support our mission. The policy and guidelines serve to:

- a) Encourage future donations
- b) Manage number of events
- c) Minimize conflicting schedules
- d) Reduce feeling by parishioners and community members of being over-solicited (this includes companies/businesses – bulletin ads, auctions, etc.)
- e) Encourage long range planning for all ministries
- f) Ensure that the purpose and outcome are transparent to parish & donors
- g) Promote an organized fundraising environment
- h) Coordinate fundraising events with the Liturgical Year
- i) Ensure Sacrificial Giving is the primary source of income for all operating groups
- j) Promote a relationship of trust between donor and fund-raising group:
 - o Funds collected be used for their intended purposes
 - o Funds collected are not absorbed by excessive fund-raising costs
- k) Ensure a consistent and fair procedure for approving all fundraising activities both
 - o Existing (recurring events and activities)
 - o New
- l) Ensure practices and communications that demonstrate honesty, accountability and respect for donors are used.
- m) Ensure that state and local laws are followed.
- n) Ensure that all receipts are handled and accounted for in accordance with internal financial controls of the Archdiocese of Milwaukee.

(3) 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, goods or in-kind donations on behalf of St. Joseph Parish.
- b) The school/Christian Formation when asking to solicit to the parish as a whole (does not include solicitation events where the school/Christian Formation is only soliciting school or Christian Formation families).
- c) These include any off-site locations where the purpose is to obtain additional funding for the organization; e.g. 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 St. Joseph Catholic Parish.
- e) External non-profit organizations requesting a special collection of St. Joseph parishioners, e.g. Knights of Columbus

Policy-

1. The Finance Council will be approving all requests. Certain requests may be referred to the Pastoral Staff for decision.
2. Once an application is received by the Director of Administration, events will be placed tentatively on Fund Raising Calendar until approved by the Finance Council.
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) Sacramental weekends – Confirmation, 1st Communion, etc. (Baptism weekends are permitted)
 - f) All other Holy Days
5. All contracts need to be signed by the Parish Director, and/or a trustee of the parish.
6. All fundraisers are to be conducted in such a manner as to include confidentiality and where necessary to meet the requirements under the IRS code for charitable contributions.
7. Handling of Cash/inventory collected
 - a) All cash will be deposited in the parish checking account.
 - b) Cash/receipts cannot be taken home. They must be placed in a parish safe in a tamper evident bag daily.
8. Deposits must be completed by two volunteers who will sign off and turn them into the parish office (Director of Administration). If the event involved inventory (e.g., 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 Director of Administration every three months and/or upon completion of fundraiser.

9. Disbursement of cash/items
 - a) Check requests/invoices for expenses will be turned into parish office ASAP. They must be approved by the Pastoral Staff liaison the committee/organization has been assigned.
 - b) If final proceeds are to be sent to an organization outside of parish, e.g., Catholic Charities, the Pastoral Staff 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) is not allowed. If a time arises that more supplies are needed at the last minute ask the staff liaison what to do or use personal funds and request reimbursement.
10. Bingo/Raffles – must follow the Wisconsin code for gaming events and Archdiocesan policies. All appropriate federal and state forms (W-2Gs) will be filed by the parish office.
11. Permission must be obtained for the distribution of alcoholic beverages, raffles and/or noise variance. The Director of Administration will determine if a liquor license/permit application is required. Refer to Archdiocesan Guidelines on distribution of alcohol at events.
12. Because we are a stewardship parish all groups/organizations are asked to please consider tithing 10% of their net income each year to the Human Concerns Committee for use in one of their approved organizations.

Process-

1. Recurring (weekly, monthly, etc.) fundraising events need to be applied for at the beginning of each fiscal year, July 1.
2. Committees/Organizations must submit a completed application form to the Director of Administration no later than one quarter prior to event.

See schedule:

Request must be received by	for fundraiser scheduled during
April 15	July – September
July 15	October – December
October 15	January – March
January 15	April – June

3. Form needs to include:
 - a) The purpose of the event, the goal, and what funds will be used for
 - b) How this activity fits the mission of St. Joseph Parish -
"The Hands of Christ...Open to All."
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 Director of Administration and updated frequently.
6. Finance Council will be approving all requests and has the authority to delegate all or parts of the approval process. Certain requests may be referred to the Pastoral Staff for decision.
7. Marketing /Mailing –Refer to Communication Guidelines.
8. In most cases a response from the Finance Council will be received within four weeks. The Finance Council normally meets the third Monday of each month.

9. All events must have a start time/date and end time/date.

Guidelines for Approval Process-

1. Approval process will be weighted on the following:
 - a) Mission of Parish – how fundraiser furthers the mission of the parish
 - b) b. Mission of fundraiser
 - c) Need based
 - d) First come-first served
2. Preference will be given to previous events that have been evaluated and proven successful.
3. Fundraisers will be placed into one of three categories:
 - a) Category 1 – Ongoing fundraiser – e.g., SCRIP, Empty Basket
 - b) Category 2 - Multiple weekends with a start and end date – e.g., SVDP Thanksgiving Baskets, SVDP Tree, Alms (Advent, Lent), School Annual Fund, Farmer’s Market
 - c) Category 3 - One and done – e.g. Archdiocesan Collections, Stewardship of Treasure Weekend, Mother’s Day Rose Sale, Workcamp Supply Sale, Bundle Sunday
4. To allow for room for fundraising events the Finance Council will use these guidelines:

Each weekend (except those exempt from fundraising named above) may have

 - i. Two - Category 1 fundraisers and
 - ii. Two – Category 2 fundraisers or
 - iii. One Category 2 and One Category 3
 - iv. All fundraising activities are contingent upon all operations needs of parish being met. Final decision authority regarding any activity resides with the Parish Director.

Reporting-

1. Within 15 business days of completion of fundraiser the committee/organization will receive an accounting from the parish 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 e.g., ‘Over the past month the parishioners of St. Joseph Parish have donated 100 pairs of socks to the Empty Basket Collection. Thank you to all volunteers who and those that donated to this worthy cause.’
5. External donors and large contributors should be recognized as part of the reporting process
6. This report should be on the website, Facebook and any other social media used (includes bulletin).