SAINT JOSEPH
Catholic Church

SAINT JOSEPH CATHOLIC CHURCH

Ministry Fundraising & Activities Agreement

Approved by the Parish Finance Council

Ministry Information

Name of Ministry:	
Year Established:	
Today's Date:	
Fiscal Year Covered:	July 1, __________ – June 30, __________

1. Scope

All funds, donations, contributions, and other monetary or material resources raised, received, or collected in the parish, in the parish's name, on parish property, or from parishioners are considered parish assets and are subject to this policy. This applies to all ministry groups of the parish, both existing and future.

2. Ownership

- All funds raised by any ministry are the property of the parish, held in trust for the ministry's stated purpose.
- No ministry "owns" the money it raises. Funds are stewarded by the parish under the direction of the pastor and Finance Council.
- Proceeds are tracked in a designated ministry sub-account within the parish's general accounting system and used only for the purpose stated in the approved request.
- Expenditures from ministry sub-accounts follow the same approval process as any parish expense and must align with the approved purpose.
- Ministry sub-accounts may not hold a balance exceeding $3,000 at any time unless the funds are designated for a specific, Finance Council-approved purpose (e.g., a saved-up purchase, an upcoming approved event, or a multi-year project).
- At the end of each fiscal year, any ministry sub-account balance exceeding $3,000 that is not designated for a specific approved purpose will be transferred to the parish's primary need for the year, as designated by the pastor and Finance Council.

3. Bank Accounts

- No ministry may maintain its own bank account, PayPal, Venmo, Zelle, Cash App, or other financial account outside the parish.
- All parish accounts — including any ministry-designated accounts held within the parish — must list the pastor and designated parish staff as authorized signers, with full access granted to the parish office and Finance Council.
- Ministry-only signers are not permitted. Any existing account with ministry-only signers must be updated by July 1 to add the pastor and designated parish staff.
- Ministry funds are tracked as sub-accounts within the parish's general accounting system. The parish bookkeeper will provide each ministry with an accounting of their funds upon request.

4. Definitions: Activities vs. Fundraisers

Activities

Small-scale, low-complexity efforts — typically the sale of a food product before or after Mass. Examples: donut sales, tamale sales, coffee and pastries, bake sales.

- Short duration (one day or weekend)
- Minimal setup; no outside vendors or permits
- Proceeds generally under $2,500
- Low risk; no alcohol, no games of chance

Fundraisers

Larger, more involved events requiring significant planning, coordination, or parish resources. Examples: plant sales, golf scrambles, dinners, galas, festivals, raffles, auctions, crowdfunding campaigns.

- Multi-day planning or execution
- Outside vendors, permits, contracts, or licenses
- Proceeds typically above the activity threshold
- May involve alcohol, games of chance, or significant liability

The pastor and Finance Council have final authority to classify any event as an activity or fundraiser.

5. Application Deadlines & Annual Budget

Fundraisers

- **Due by June 1** for the following fiscal year, via the Fundraiser Application. No exceptions. Fundraisers not submitted by June 1 will not be approved for that year. (For this current transition year, July 1 is acceptable.)

Activities

May be submitted in either of two ways:

- **By June 1** as part of the annual calendar (preferred — secures the date), or
- **Year-round,** at least 30 days before the proposed date, via the Activity Application.

(For this current transition year, July 1 is acceptable for the annual calendar submission.) Year-round activity requests are reviewed by the Finance Council and pastor and approved or denied within 10 business days. Activities are approved on a first-come, first-served basis and only if they do not conflict with scheduled fundraisers or parish events.

Annual Ministry Budget

- Each ministry submits an annual budget by June 1 covering anticipated expenses, planned fundraisers and activities, expected revenue, and the intended use of funds for the fiscal year. (For this current transition year, July 1 is acceptable.)

6. Avoiding Overlap & Donor Fatigue

- Fundraisers may only be held on the 2nd and 4th weekends of each month.
- April is Fiesta month. Fiesta fundraising and ticket sales take priority. The four weekends leading up to Fiesta are a blackout — no other fundraisers or activities. Activities may be permitted during the blackout only as genuinely needed, with Finance Council and pastor approval; the default is no events.
- The four weekends leading up to the St. Joseph's School Carnival (October 10 this year) are also a blackout — no other fundraisers or activities during that period.
- The Finance Council publishes an approved parish fundraising and activity calendar by August 1 each year.
- No more than one fundraiser may be scheduled on any given weekend.
- Each ministry is limited to one major fundraiser per fiscal year. Additional fundraisers require Finance Council approval with written justification.
- Activities may be held as needed throughout the year, subject to Finance Council and pastor approval and calendar availability.
- No ministry event may conflict with diocesan appeals (e.g., Annual Catholic Appeal), Holy Week, Christmas, or parish-wide fundraisers.

7. Application Requirements

Applications may be submitted to SJCEVENTSREQUEST@gmail.com, or delivered to the parish office, which will forward them to this email.

Every request (activity or fundraiser) must include:

- Ministry name and point of contact
- Purpose of the event and intended use of proceeds
- Proposed date(s), time(s), and location
- Method (food sale, plant sale, raffle, dinner, etc.)
- Estimated revenue and expenses
- Volunteers needed
- Any permits, licenses, or insurance considerations (fundraisers only)

8. Financial Handling

- All cash and checks are counted by two unrelated individuals immediately after the event; both sign the deposit slip.
- Funds are turned in to the bookkeeper within 48 hours.
- Receipts must be submitted to the parish office within 30 days to receive reimbursement for expenses.
- No ministry may cash checks, hold cash reserves, or disburse funds directly.

9. Use of Proceeds

- Proceeds are used only for the purpose stated in the approved request.
- Any change in use requires Finance Council approval.
- Proceeds may not be sent to outside organizations, individuals, or charities without written approval from the pastor and Finance Council.

10. Permits, Licenses & Alcohol

- The parish is not responsible for obtaining permits for ministry events.
- Any required permits or licenses must be obtained by the ministry and submitted to the parish office at least 3 days prior to the event.
- Raffles, bingo, and games of chance must comply with state and local law.
- Events serving alcohol require pastor approval, proper licensing, and appropriate liability coverage.

11. Soliciting at Other Parishes

- Ministries may not sell tickets, fundraise, or solicit donations at other parishes without the pastor's written permission in advance.

12. Youth Participation

- Fundraisers and activities conducted in support of youth ministries must actively engage youth through meaningful participation and presence at the event. Events benefiting youth ministries cannot be organized or operated exclusively by adults.

13. Publicity

- All publicity (bulletin, website, social media, flyers) is submitted to the parish office at least two weeks in advance.
- Only approved events may be publicized through parish channels.

14. Post-Event Reporting

- A post-event report is submitted to the parish office within 7 days, including gross revenue, expenses, net proceeds, attendance, and a list of all sponsors and major donors solicited.
- The parish office maintains a master sponsor and donor list to prevent the same individuals and businesses from being asked repeatedly across ministries.
- The Finance Council receives an annual summary of all ministry fundraising and activities.

15. Review

This policy is reviewed annually by the Finance Council. The pastor and Finance Council may amend this policy at any time as needed.

ACKNOWLEDGMENT & AGREEMENT

By signing below, the undersigned representatives of the ministry named above acknowledge that they have read, understood, and agree to follow this policy in full, including that:

- All funds raised are parish funds.
- The pastor and parish office have full access to any account holding ministry funds.
- Fundraiser requests must be submitted by June 1 each year, with no exceptions. (July 1 for this transition year.)

A minimum of three (3) ministry members must sign below.

Ministry Leader: ______________________________ **Date:** ____________

Printed Name: ______________________________

Co-Leader / Treasurer: ______________________________ **Date:** ____________

Printed Name: ______________________________

Ministry Member: ______________________________ **Date:** ____________

Printed Name: ______________________________

Additional Signatures (if applicable)

Ministry Member: ______________________________ **Date:** ____________

Printed Name: ______________________________

Ministry Member: ______________________________ **Date:** ____________

Printed Name: ______________________________