

Fundraising Policy and Guidelines

For

Immaculate Conception Church and School

What is a fundraiser?

- A Fundraiser is defined as an effort to sell a product, provide a service, or solicit donations of cash or in-kind donations. Included are requests for cash or cash equivalents (stock, gift certificates, etc.), in-kind-contributions, raffles, and sale of goods.
 - These include any off-site locations where the purpose is to obtain additional funding for the organization (i.e. restaurants or other places of business donating proceeds from sales to Immaculate Conception Church and School).

Why do we need a policy and guidelines?

Our Parish is growing and because of the number of activities, guidelines are needed too:

- Encourage future donations.
- Control the number of fundraising events/requests.
- Reduce conflict in scheduling.
- Prevent over-solicitation of parishioners and local companies and businesses.
- Encourage long-range planning for all ministries.
- Ensure that the purpose and outcome are transparent.
- Promote an organized fundraising environment.
- Coordinate fundraising events within the Liturgical Year.
- Establish the relationship of trust between donors and fundraisers:
 - Funds collected be used for their intended purposes.
 - Funds collected are not absorbed by excessive fund-raising costs.
- Inform Donors regarding the use of donated funds and assure that any restrictions on the use of the funds by the donor will be honored.
- Fundraisers must address the essential needs of the Parish or school and/or represent the identity and mission of the Parish, (i.e., outreach).

Purpose of policy and guidelines

- Ensure a consistent and fair procedure for approving all fundraising activities.
- Eliminate conflicting and overlapping events
- Ensure that all receipts are handled and accounted for by following internal financial controls and Diocesan guidelines.

Fundraising Policy:

- Fundraising events must be approved before the event takes place.
- Required sales tax must be paid on all expenses to include but not limited to food, supplies, vendors, etc.
- To concentrate on liturgical and eucharistic practices, certain days will be exempt from fundraising:
 - Palm Sunday
 - Easter Sunday/Holy Week
 - Christmas Eve / Christmas Day
 - Sacramental weekends – Confirmation, 1st Communion, etc.

- All other Holy Days
- All contracts must be submitted to the Business Administrator to be reviewed and signed by the appropriate Parish Administration.
- All fundraisers will be conducted in such a manner as to include confidentiality, and where necessary, meet the requirements under the IRS code for charitable contributions.
- Permission must be obtained for the distribution of alcoholic beverages. The Business Administrator will determine if a liquor license/permit will be needed. Refer to Diocesan Guidelines on the distribution of alcohol at events.
- All fundraising totals must be reconciled and verified with the Parish Bookkeeper prior to publication.

Process:

- All fundraising events (Including recurring events) need to be applied for at the beginning of each fiscal year which begins on July 1st.
- Immaculate Conception Church and School Committees/Organizations must submit a completed Fundraising Application to the Business Administrator for approval before the beginning of the Parish fiscal year (July 1st) or 12 weeks before the event will be scheduled.
- Fundraising Application includes:
 - Specifics about the purpose of the event, the goal, and what the funds will be used for.
 - How does this fundraiser fit the mission of Immaculate Conception Church and School?
 - Location, will an Immaculate Conception facility be utilized?
 - Date, start time and ending time. If using an Immaculate Conception facility, time for setup and cleanup must be included.
- A calendar of fundraising will be kept and updated frequently by the parish office for all events combined.

Guidelines for Approval Process:

- The approval process will be weighed on the following:
 - The mission of Parish; how the fundraiser furthers the mission of the parish and its ministries.
 - How the fundraiser fits with the mission of the church.
 - Need-based. Does the organization/groups need funds/donations to operate.
 - First, come-first serve.
- Preference will be given to previous events that have been proven successful.
- To allow opportunities for all requests it is asked that groups/organizations not exceed one per quarter.
- Fundraisers will be placed into one of three categories:
 - Category 1: Ongoing fundraiser.
 - Category 2: Multiple times throughout the year.
 - Category 3: One and done.
- All fundraising activities are contingent upon operational needs of the parish.