



# PARISH FUNDRAISING: PRINCIPLES, GUIDELINES, & PROCEDURES

## PURPOSE

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The purpose of this policy is to establish the rules and requirements for parish-approved or supported organizations, or other organizations whose missions and goals match those of St. Francis of Assisi Parish.

## GUIDING PRINCIPLES

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*These principles are offered as a foundation for parish fundraising policies:*

1. The focus of fundraising must be on the mission and vision of the parish. We can support the work of other ministries but should largely concentrate on supporting the overall ministry of this parish.
2. Fundraising for capital needs including renovation and new construction is understood to be necessary and prudent.
3. Events conducted by other community organizations should not be promoted as “parish events”.
4. In the case of parties held for social and community building purposes, any incidental profits should be allocated to parish.
5. Raffles or any fundraising activity must be conducted in accordance with Missouri law and guidance from the Archdiocese, especially when alcohol or gambling is involved. All fundraising activities need to be coordinated through the parish office.
6. The group raising funds must be aware of and respectful of the needs, customs, and integrity of other parish ministries and programs, and should seek to build partnerships in cooperation with other parish groups to avoid competition and duplication.
7. The Director of Operations and Finance should be informed in a timely manner, before, during, and after any fundraisers as to the goals and accomplishments of those fundraisers, including prompt reporting of final totals, and acknowledgment of volunteers and supporters of the fundraiser (see the **Request for Fundraising Activity** and **Fundraiser/Event Budget Worksheet** contained in the Forms section).



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## CATEGORIES

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*Parish fundraisers will be categorized as:*

1. **Minor Fundraisers:** Those which will take place over a given period (e.g. days, weekends, a liturgical season, etc.), and which seek to raise a net profit of \$500-2000 or less. Annual permission may be granted.
2. **Major Fundraisers:** Those which will take place over a given period, as specified in point #1, and which seek to raise a net profit of over \$2,000-5,000. Annual permission may be granted.
3. **Significant Fundraisers:** Those which will take place over a given period, as specified in point #1, and which seek to raise a net profit of over \$5,000. Annual permission may be granted.
4. **Parish-Wide Campaigns:** (Examples: parish capital campaign)
5. **Special Fundraisers:** (Examples: One-time special collections at Mass; special collections requested by the diocese, etc.)

These categories include all fundraisers, either on- or off-site, which are sponsored or approved by the parish. All new fundraising initiatives operated under parish sponsorship are required to submit a **Request for Fundraising Activity** and **Fundraiser/Event Budget Worksheet** prior to the start of the fundraiser.

## APPROVAL PROCESS

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*The pastor has final approval for any and all fundraising events*

1. All fundraising requests (Exception: Special collections or campaigns requested by the diocese) are subject to pastor approval.
2. Requesting ministry should submit **Request for Fundraising Activity** and **Fundraiser/Event Budget Worksheet** *at least 90 days in advance*. These forms are located in the Forms section of this handbook.
3. Finance Committee will review and make a recommendation to the Parish Council for its approval within one week of receipt of completed Fundraising Activity and Budget forms.
4. Parish Council will provide decision to Finance Committee 30 days.
  - a. Re-approval is required for significant change in fundraising category, scope or budget

Note: If annual permission is requested and approved, a new request does not need to be submitted each year (unless re-approval is applicable per 4-a)

5. No fundraising activity using parish grounds or facilities will be scheduled in the parish calendar until approved.



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## RESCHEDULING PROCESS

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*The pastor has final approval for any and all fundraising events*

1. In the event a fundraiser needs to reschedule, the requesting ministry should alert the Director of Operations and Finance as soon as possible.
2. The requesting ministry should select a reschedule date after checking the Parish Calendar to verify availability, taking into consideration events already scheduled within one month of the requested reschedule date, vendor availability, licensing / permits, etc. The requesting ministry will propose the reschedule date to the Director of Operations and Finance.
3. The Director of Operations and Finance will submit to Parish Council and decision will be provided within 3 business days.

## PURPOSE OF FUNDS

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The financial goal of the fundraiser, in dollar amounts, is to be indicated by the parish ministry on the fundraising application. If the proceeds are to be divided among various accounts, recipients, etc., the amounts to be given to each are to be specified in detail on the fundraiser application. This is to be done either by percentage (e.g. 50% to recipient A, 30% to recipient B, etc.) or by dollar amounts. Proceeds of the fundraiser must go to the recipients designated, in the predetermined amounts.

## REPORTING

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The organization that is running the fundraiser is responsible for reporting total amount of the proceeds raised. The organization should add (1) Actual revenue and expenses and (2) Variance to their initial **Fundraiser/Event Budget Worksheet**. This should be submitted to the Director of Business Operations no later than one month after the completion of the fundraiser. The President or Treasurer of the fundraising organization should approve this report before submitting. A summary report to the parish community via the bulletin or other communication vehicle is encouraged.

## HANDLING OF FUNDS

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The handling of funds for each fundraiser will follow the St. Francis of Assisi [Financial Stewardship & Cash Control Policy](#).