



FIRST UNITED METHODIST CHURCH
W I N T E R P A R K

MINISTRY Fundraising Policy

May 2018 Revised



FIRST UNITED METHODIST CHURCH of WINTER PARK (“CHURCH”) MINISTRY FUNDRAISING POLICY

I. Rationale

Ministry fundraising activities (“fundraisers”) serve at least two important purposes beside the obvious one of raising needed money for Church ministries. First, they highlight the specific mission, the importance, reason, and needs of the organization that is raising the funds. Second, they help to build community within the Church and enthusiasm for its ministries.

The ability to raise funds, and/or the desire for the benefits those funds would obtain, is not necessarily a compelling reason for raising funds. Fundraisers should never overshadow the practice of stewardship.

II. Principles

These principles are offered as a foundation for Church fundraising policies:

- The fundraising activity must address Church ministries or ministries approved in accordance with this policy and relate to one of the Four Pillars (see Addendum A.)
- The fundraising activity itself must be compatible in content and how it is conducted to the identity and mission of Church.
- The group raising funds must be respectful of the needs, customs, and integrity of Church ministries and organizations, and should seek to build partnerships in cooperation with other groups to avoid competition and duplication.
- Church ministries, in planning their fundraising activities, must be respectful of the members of the Church, and of the sacredness of the Church’s liturgy and the sacred space.
- Fundraising activities must be duly respectful of those who are unable to contribute.
- The Church, in its administration of other funds raised, has a responsibility to be a good steward of these funds.



III. Categories

CHURCH fundraisers categorized in these policies and procedures are:

1. *Limited Term Fundraisers*: Those taking place over a given period.
2. *Ongoing Fundraisers*: Those conducted as a normal part of the Church schedule, with or without an end date. (Examples: _____)
3. *Church Wide Campaigns*: (Examples: Financial and building/capital campaigns)
4. *Fundraisers for outside the Church*: (Examples: Inua)

IV. Policies

These policies are applicable to all Church ministries that participate in fundraising. Exceptions are noted, or will be granted as it is judged appropriate.

1. Approval:
 - a. Fundraising activities may not be entered onto the Church fundraising calendar until approved by the Pillar leader and then the Finance Committee.
 - b. Applications (see attached) will be reviewed within two weeks of submission, on a first-come, first-serve basis.
 - c. The decision for or against approval may not be immediate, depending on the need for further information or consultation.
 - d. Fundraising programs beyond those of First United Methodist Church of Winter Park, such as [Panua], must submit a request at least 1 month prior to the fundraiser.
 - e. The Church Director of Communications must approve all communication(s) of the fundraising event before and after the event.
2. **Use** of Church facilities and common spaces:
 - a. Fundraisers on Church grounds or under Church auspices are not to take place on the following days:
 - Palm Sunday
 - Easter Sunday
 - Stewardship Sunday(s)
 - Christmas Eve
 - Christmas Day

Commented [MA1]: Use of church facilities should be subject to an insurance broker check as to whether any special riders should be part of our policy if facilities are in use – particularly with regard to liability issues.



FIRST UNITED METHODIST CHURCH
WINTER PARK

- b. Fundraisers taking place on Church grounds will occupy predetermined locations as designated by the Chief Financial Officer or Acting Director of Operations.
- 3. Number of Fundraisers:
 - a. Each Church ministry may request one (1) fundraising event on the Church campus per calendar year.
 - b. Each Church ministry may request two (2) off-campus fundraisers per calendar year.
 - c. No more than one (1) fundraising event on the Church campus will be scheduled per Sunday.
- 4. Purpose of funds:
 - a. The goal of the fundraiser, in dollar amounts, is to be indicated on the fundraising application. Similarly, the cost of the fundraiser should be stated and whether the costs incurred are “at risk,” that is, the costs must be fronted by the Church and incurred before the fundraiser begins such that the fundraiser may be at risk of “losing money.”
 - b. The purpose of the funds to be raised should be publicized before the event, if feasible, by way of Church communications tools. The means of publicity must be mentioned in the application for approval.
 - c. If the net 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 (e.g. the first \$1,000 to recipient A, next \$500 to recipient B, etc.)
 - d. Proceeds of the fundraiser must go to the recipients designated, in the predetermined amounts.
- 5. Reporting
 - a. The group that is conducting the fundraiser is responsible for reporting to the Church the total amount of proceeds raised and the net profit earned.
 - b. If the proceeds are to be divided among various accounts, recipients, etc. this is to be included in the report.
 - c. A final, detailed financial report is to be submitted to the Church Administrator within one month after the completion of the fundraiser. A form for this report is included with the application.
- 6. Handling of funds
 - a. Appropriate controls must be in place to receive cash collections.
 - b. All cash receipts of any fundraiser are to be submitted to the Church accounting department within 48 hours of the completion of the fundraiser.



FIRST UNITED METHODIST CHURCH
WINTER PARK

- c. Receipts of all fundraisers will be placed in the appropriate restricted fund set up to receive funds from fundraiser.
- 7. Receipts and reimbursements
 - a. Private persons are not to be reimbursed directly from the original cash receipts of the fundraiser.
 - b. Request for reimbursements are to be completed and submitted to the CHURCH accounting department by project leader on a timely basis. Checks will be disbursed on normal accounts payables dates of the 10th and 25th of each month. *(See attached Check Request)*
- 8. Compliance: A group's compliance or lack thereof, with these policies will be considered in future fundraising application requests.
- 9. Exceptions: Exceptions to this policy or to any part of it should never be assumed by the fundraising group but will only be granted by way of the application process.



FIRST UNITED METHODIST CHURCH
WINTER PARK

FIRST UNITED METHODIST CHURCH FUNDRAISING REQUEST

*Submit in advance of proposed fundraising event
(See Fund Raising Principles, Policies and Procedures)*

ASSOCIATED PILLAR

(Vibrant Family, Gracious Hosts, Passionate Seekers, Christ-like servants)

ORGANIZATION

Group Name

Project Leader

Phone

Email

Secondary Contact

Phone

Email

EVENT

Purpose and perceived benefit derived from the event:

Describe proposed event, including category and scope of audience (*See Section III, Categories*)



FIRST UNITED METHODIST CHURCH
WINTER PARK

Proposed dates/times:

(See section IV Policies Paragraph 2. Use of Church Facilities & Common Spaces)

From: _____ To: _____
Event dates

From: _____ To: _____
Event dates

PROPOSED LOCATION

(See section IV Policies 2b. Use of Church Facilities & Common Spaces)

_____ Sunday morning locations _____ Other:

PROCEEDS (See Section IV Policies, Paragraph 5. Purpose of Funds)

- ☐ Anticipated amount to be raised: \$ _____
- ☐ Primary beneficiary (\$ amt. or %) _____
- ☐ Second beneficiary (\$ amt. or %) _____
- ☐ Third beneficiary (\$ amt. or %) _____

Please use additional sheet if necessary

NOTE: Attach proposed fundraiser budget with costs and submit with Request Form



FIRST UNITED METHODIST CHURCH
WINTER PARK

CHURCH COMMUNICATIONS:

Describe desired communication of the event, description to be included in the communication, etc. (types of communication, timing, etc.)

SIGNATURE

I hereby attest that I have read the Fundraising Policy document of First United Methodist Church of Winter Park; commit to conducting an event in a manner respectful of worship, the Church family and staff members; and promise a timely return of the designated space and equipment to a clean and orderly state.

Signature of Project Leader

Date

Pillar Leader Approval:

Signature of Pillar Leader

Date

APPROVAL:

Chairperson, Finance Committee

Date



FIRST UNITED METHODIST CHURCH
WINTER PARK

Director of Communication Approval of Desired Communications

Director of Communication

Date

Chair of Trustees/Facilities (If Necessary)

Chair of Trustees

Date



FIRST UNITED METHODIST CHURCH
WINTER PARK

**FIRST UNITED METHODIST CHURCH of WINTER PARK
FUNDRAISING FINANCIAL STATEMENT**

INCOME:	BUDGET	ACTUAL
Donations:	_____	_____
Sales:	_____	_____
Services:	_____	_____
Other:	_____	_____
Other:	_____	_____
Total Income:	_____	_____

EXPENSES¹:	BUDGET	ACTUAL
Advertising	_____	_____
Materials	_____	_____
Products	_____	_____
Services	_____	_____
Other:	_____	_____
Other:	_____	_____
Total Expenses:	_____	_____

NET PROJECTED INCOME: _____

¹ Indicate timing and source of expenses to be incurred. Use additional sheet(s) of explanation if necessary, including quotes and/or contracts for such expenses if any.



FIRST UNITED METHODIST CHURCH
WINTER PARK

NET ACTUAL INCOME: _____

VERIFICATION:

After careful consideration of potential expenses and income sources,
Project Leader please initial here: _____

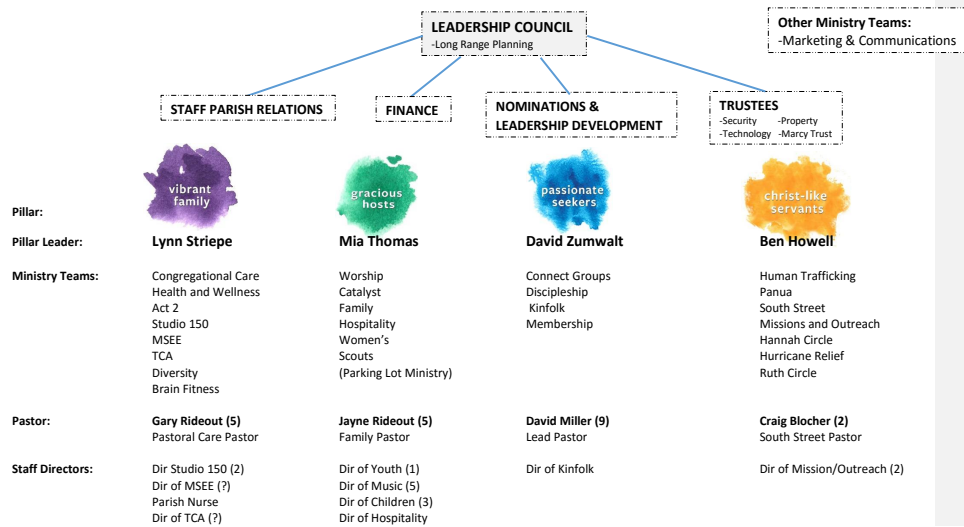


Addendum A

First UMC Winter Park Vision Statement & Organizational Map

Vision Statement: A vibrant family built on God's grace, who share a passion for the Word of God, living and serving in the image of Jesus the Christ

Mission Statement: To make Disciples of Jesus Christ



** Only includes Pastors and Staff Directors. Other staff will not be expected to attend Pillar meetings.
(#) – number of direct staff reports.
Version 2 - 04/2018 – A.S.

