



Guidelines:

Fundraising

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Rationale

Fundraising activities serve at least two (2) important purposes besides the obvious one of raising needed money for the ministries of Jones Memorial United Methodist Church (the “Church”). First, they highlight the specific mission, importance, and needs of the Church. Second, they help to build community within the Church and enthusiasm for its ministries.

The ability to raise funds, however, and/or the desire for the benefits those funds would obtain, is not necessarily a compelling reason for raising those funds. Fundraisers should never overshadow the practice of stewardship: the amount of funds raised, the frequency of fundraisers, or the objectives of raising the funds. Nor should funds be raised for unnecessary items that may be luxuries when other essential needs in the Church are not being met.

Principles

In order to help the church practice good stewardship, to act respectfully toward members of the congregation and others who are asked to support the Church and its fundraisers, as well as supporting the goals of groups which participate in fundraising, these principles are offered as a foundation for Church fundraising policies:

- The fundraising activity must address essential elements, and not gratuitous wants or luxuries of the Church group.
- The fundraising activity itself must be compatible in its content and the way it is conducted to the identity and mission of Jones Memorial United Methodist Church as a Christian community of faith.
- The group raising funds must be aware of and 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 groups, 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 holy space.
- Because of the Church’s duty to serve the poor, all fundraising activities must be 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.
- The Church members should be informed, in a timely manner, before, during, and after any fundraiser as to the goals and accomplishments of those fundraisers, including

prompt reporting of final totals, and acknowledgment of volunteers and supporters of the fundraiser.

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, e.g., Sunday dinners;
3. *Church Wide Campaigns*: (e.g., building/capital campaigns);
4. *Annual Fundraisers*: Fundraisers held the same time each year as well as the same type of fundraiser (e.g., plant sales, ornament sales); and
5. *Fundraisers for Outside the Church*: (e.g., Aid to disaster stricken areas).

Policies

These policies are to be followed strictly by all Church groups that participate in fundraising events. Exceptions are noted, or will be granted as deemed appropriate.

Approval

1. Fundraising activities may not be entered on the church calendar until approved by the Administrative Board in conjunction with the Pastor and the Finance Committee.
2. Requests for fundraisers (see attached) will be reviewed within two weeks of being submitted on a first-come, first-served basis.
3. The decision to approve or deny may not be immediate, depending on the need for further information or consultation.
4. Requests for fundraisers involving the greater community outside of Jones Memorial United Methodist Church, such as Habitat for Humanity, etc., must be submitted at least three months prior to the fundraising event.

Use Of Church Facilities And Common Spaces

- a. Fundraisers on Church property or under Church auspices are not to take place on the following days:
 - Palm Sunday
 - Easter Sunday
 - No Excuse Sunday
 - Christmas Eve
 - Christmas Day
- b. Each group may conduct weekend fundraising activities for up to two consecutive weekends, if space is available.
- c. Fundraisers taking place on Church property will occupy predetermined locations (considered on an individual basis) as designated by the Pastor, Trustees, Administrative Board, Counsel on Ministries, Finance and Stewardship Committees.

Number Of Fundraisers

- a. Each Church group will be allotted two *limited term fundraising* activities per year, assuming the availability of the space and scheduled time.
- b. No more than one (1) fundraising event will be scheduled per Sunday.

Purpose Of Funds

- a. The financial goal of the fundraiser, in dollar amounts, is to be indicated by the Church group on the fundraising request, as well as in any pre-event publicity.
- b. The purpose of the funds to be raised must be publicized before the fundraiser by way of promotional flyers, and/or other means of publicity. All publicity *must* be approved by the Pastor. *See* Communications Guidelines. These means of publicity must be stated in the fundraising request.
- c. 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 request. This is to be done either by percentage (e.g. 50% to recipient A, 50% 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.

Reporting

- a. The group conducting the fundraiser is responsible for reporting the total amount of proceeds raised to the Administrative Board, Counsel on Ministries, and the Finance Committee. A printed report is to be submitted within 21 days of the completion of the fundraiser. If the final report is not ready at that time, an interim report is to be made.
- b. A final, detailed financial report is to be submitted to the Administrative Board, Counsel on Ministries, and the Finance Committee within 30 days after the completion of the fundraiser. A form for this report is included in the General Fundraising Guidelines.
- c. If the proceeds are to be divided among various accounts, recipients, etc., this is to be included in the report.

Handling Of Funds

- a. All cash receipts of any fundraiser(s) are to be submitted to the Church's Finance Committee within 48 hours of the completion of the fundraiser.
- b. Receipts of all fundraisers will be placed in the appropriate restricted fund set up to receive funds from fundraisers.

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's Finance Committee by the project leader in a timely manner.
- c. Checks will be disbursed on normal accounts payables dates. Please see the Finance Chairperson for information on disbursement dates. (*See General Fundraising Guidelines for the Check Request*).

Compliance With This Policy

A group's or individual's compliance or lack thereof, with these policies will be taken into consideration when future fundraising requests are received.

Exceptions To The Fundraising Policy

Exceptions to this policy or to any part of it should never be assumed by the fundraising group. Any exceptions, if made, will **only** be granted by way of the fundraising approval process.

Brainstorming Your Fundraiser

What

- What type of fundraiser your group wants to hold?
- What you want to accomplish through the activity?

Try to avoid fundraisers that require too much *up front* money or time or those that have a high risk of losing money. Keep your event simple so that you can manage it.

Who

- ***Audience*** - Who is the activity aimed at? Pick a target group: Jones Memorial United Methodist Church only, the local community, other churches, students, professors, organizations, etc. How many people do you expect to invite? How are you going to target that particular audience?
- ***Collaborators*** - Are there other organizations at Jones that would be interested in being involved?
- ***Entertainment*** - You need to decide who or what is going to be the highlight of the event so that you can attract people. For example: If you are holding a concert, pick a musician. If you are coordinating a fundraising dinner, you need a speaker. If it is a talent show, who will perform? Consider speakers or performers well-known to your audience, and who might be willing to donate their time.

Where and When

Deciding upon event locations and dates is an important part of the planning process.

If the proposed event will take place in a location other than on Church property, choose a location which is affordable, easily accessible, available, and appropriate for the occasion.

Approval of fundraising requests will be made in light of its proximity to prior scheduled Church events as well as the Christian calendar. Accordingly, be mindful of the Church's existing calendar.

Organization

- To make sure those activities occur in an orderly manner each member or volunteer should take responsibility for at least one task.
- Get permits for food and merchandise sales where necessary.
- Set deadlines for each task to leave time for mishaps.

Plan for the worst—i.e. speakers or performers failing to appear, lack of food, bad weather, etc. Identify measures that can be taken in these situations to ensure that the fundraising event still runs smoothly.

Be sure to confirm all activity details, in writing where possible (i.e. guest speaker, talent, room reservations, and supplies).

Budget

- Create a budget for your event and stick to it.
- Make a list of all the items that you need to purchase and how much you will need per item. Mark those things that could be donated.
- Total all costs and subtract donations (confirm each donation before finalizing it on the budget plan). Search for alternatives to reduce the cost of high-priced items.

Costs

- **Publicity** - You will need to advertise your event. Advertising includes flyers, posters, brochures, and newsletters. Set aside an overall printing budget, including photocopying costs. Try to find a printer who is willing to donate the printing costs or at least give you a discount.
- **Location** - Renting a hall, room, etc. If you plan to hold the event at a public place (i.e., a park), obtain permission. Keep in mind the estimated attendance when booking a venue, including those who may buy tickets on the day of the event.
- **Food** - Food is a must at all events. If you are holding a dinner, include the price of dinner in the ticket. Search for a caterer who is willing to donate food for your event. At a concert you might want to sell snacks and beverages. Again, find vendors willing to donate food or provide a discount.
- **Speaker, musician, etc.** - The cost for the speaker should include travel, lodging and meals, unless they are willing to come for free.
- **Security** - Depending on the event, you might need security.

- ***Equipment and decorations*** - Reserve and confirm audiovisual equipment such as microphones, DVD players, projectors, and all other necessary equipment. Don't forget tables and chairs.
- ***Miscellaneous*** - Send thank you notes to people who helped organize the event, i.e., speakers, performers and donators of supplies for the event.

Earnings - *There are two main ways to raise funds:*

- ***Tickets*** - How much are you going to charge for the event? Will you charge the same rate for everyone or will there be a discounted Jones Memorial United Methodist Church member rate? When deciding the ticket price, keep in mind the total cost of the event. Try to charge enough so that you are making a profit that makes the time and energy spent on the event worthwhile. Be careful of overcharging because you want to make sure many people can attend. Decide whether you will sell tickets at the event, or only beforehand.
- ***Selling merchandise*** - T-shirts, pins, and posters can be sold at your event. Remember that selling merchandise requires initial funds to purchase the products, especially if you are designing the products yourself. You can also invite vendors, who will give you a percentage of their profit for inviting them to the event. Set reasonable goals. It is better to run out of merchandise than to have leftovers .

Other Important Things To Remember

- ***Plan backwards*** - While planning, work backwards to make sure you are thinking through all of the steps you'll need for a successful event. For example, if you are holding a catered fundraising dinner, think through when you'll want to set up the space where dinner will be, when you'll need to order the food, when and how you're going to pay for the food, when you're going to follow up with the speaker to ensure he's/she's coming, when you're going to meet the caterer, when you're going to choose a caterer, when you'll develop a budget for how much you can spend on a caterer and decorations and who you're going to have as a speaker, etc.
- ***Soliciting donations*** - It's amazing how much can be donated if you know the right people, if you are creative in your solicitations, and if you are thorough and persistent in your search for donations - ask around for contacts and suggestions of people/businesses who might be able to donate food, drinks, material, event space, sound equipment and sound help, flowers, balloons, photocopying, access to phones, prizes, etc. This may be a time-consuming process if you are seeking several different types of donations. It will be very helpful to designate tasks and distribute calling lists early on in the planning stages.
- ***Publicly recognizing your business and major donors*** - These could be listed on the back of the event's program, verbally listed before or after the event, or written on posters

near the event's entrance. Make sure to include every business and major donor who made significant contributions to the event.

- ***Consider having an ad book*** - This can be distributed as part of the event's program. Ad solicitations may occur at the same time as donation solicitations. You offer a free full-page ad to donors who give above a certain amount. If applicable, use the opportunity to give facts and statistics about the cause or issue(s) that the fundraiser is being held for; contact information for the local and/or national organization, action alerts, and other ways in which a person interested in the cause/issue can become active.
- ***Buy a box of thank-you notes*** - Always remember to thank everyone who helped you make the fundraiser a success. You might thank the individuals publicly at the event, include their names in a "special thanks" section on the event program, and/or send personal notes after the event.
- ***Have fun!*** - You will expend a fair amount of time and energy to make this event a success. Be sure to enjoy the event when it all comes together after several months of planning.

Appendix A



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FUNDRAISING REQUEST FORM
(Please Print)

*Form Must Be Submitted **And** Approved **Prior** To The Commencement Of Fundraising Activities
(See Church Guidelines for Fundraising)*

ORGANIZATION

Group Name

Project Contact

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 **Categories** on Page 4 of the *Fundraising Guidelines*)

Appendix B



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FUNDRAISING FINANCIAL STATEMENT
(Please Type/Print)

INCOME:	BUDGET	ACTUAL
Donations:		
Sales:		
Services:		
Other:		
Other:		
Total Income:		
EXPENSES:	BUDGET	ACTUAL
Advertising:		
Materials:		
Products:		
Services:		
Other:		
Other:		
Total Expenses:		

NET PROJECTED INCOME: _____

NET ACTUAL INCOME: _____

VERIFICATION:

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