

Fund Raising Policy For East Lake United Methodist Church
Version 1 Issued February 23, 2009
Revised July 16, 2012

1. Purpose. The purpose of this policy is to permit East Lake United Methodist Church (ELUMC) to equitably manage fund raising opportunities in a way that preserves congregational relationships, protects our tax exempt status and upholds the vision, mission and values of our church. This policy is administered by the Finance Team.

2. Intent. ELUMC is adopting a policy on fundraising in order to facilitate fundraising efforts for all work areas and ministries within the church. The intent of coordinating fundraising events is to 1) ensure that events are planned and carried out in a manner that is conducive with the mission of the church, and 2) to ensure the greatest possibility of success for each event by coordinating the timing of events to provide for maximum participation for all. This policy does not supersede the church's Facility Use Request form.

Changes to this policy require approval of the Church Council. This policy shall be reviewed annually by the Finance Team.

3. Definitions.

a. Fundraising. Fundraising is defined as any effort to raise money, collect goods, or sell a product on behalf of East Lake United Methodist Church for its missions and ministries for the benefit of the church, mission, ministry, community, or partner mission agencies. All fundraisers must reflect and relate to Biblical principles of fundraising and the mission, vision and values of East Lake United Methodist Church.

b. The LITMUS Test

Core Values

- Does it **Offer Christ**?
___ Is it externally focused?
___ Does it tell the faith story?
- Does it **Grow our Faith**?
___ Does it help make faith come alive?
___ Is it geared to change one's life?
- Do we **Serve Others**?
___ Are we serving others through this?
___ Is it ministry driven or membership driven?
- Review: Where and What is the fruit?

4. Responsibilities.

a. Finance Team. The Finance Team has the responsibility for overseeing and approving all fundraising efforts at East Lake United Methodist Church. The Finance Team, upon approval of the activity, may choose to directly manage, delegate day-to-day oversight of the approved fundraising effort to the sponsor activity, or to other committees, such as the UM Youth Fellowship, or Missions and Outreach committee.

b. Administrator of Church Operations. The Administrator of Church Operations or designee, when presented with a Finance Team approved fund raising request form, will:

- verify the church calendar and facility availability, and assist with facility use request form submission
- inform the bookkeeper to prepare appropriate ledger entries for management of the fund raiser accounts and funds

Fund Raising Policy For East Lake United Methodist Church
Version 1 Issued February 23, 2009
Revised July 16, 2012

- brief the fund raiser coordinator on funds management, and reach agreement on processing of the funds and form used. *Exceptions: United Methodist Women, United Methodist Men, Young Days Pre-School, Toymakers, and non-church groups such as Boy or Girl Scouts. All of these groups maintain their own accounts.*
- provide the fund raiser sponsor with required accountability forms.

c. Fund Raiser Sponsors. Prior approval to conduct a fund raiser is required by Program Staff Members or volunteers in charge of the ministry benefiting from the fund raiser. Further, Program Staff and volunteers are responsible to make sure that all fund raisers conducted within or on behalf of their ministries are processed through this policy. The sponsor should apply the Litmus Test to their fund raiser and document how it meets this test on the request form.

d. Publicity. The coordinator of the fund raiser may work with the Communications Coordinator to promote the fund raiser. Only those fund raisers approved under this policy may be promoted through ELUMC.

5. Fund Raising Categories. Generally, fund raising is to benefit the entire church family, except in unusual situations. Those groups that manage their own accounts may raise funds for their group. Every fundraising effort shall be assigned one of the following designations:

a. General All-Church Fundraiser: Fundraiser will benefit the entire church family.

b. Specific Ministry or Mission Fundraiser: Fundraiser will benefit the specific ministry or mission conducting the fundraiser.

c. Community Fundraiser: Fundraiser will benefit the local community. Local community is defined as the areas encompassing the ZIP codes (in FL) of persons regularly worshipping at East Lake United Methodist Church.

d. Partner Missionary Fundraiser: Fundraiser will benefit one of the East Lake United Methodist Church approved mission partners. This may be a specific fundraiser to assist the mission with a specific effort (i.e., collection of food, Angel Tree gifts, homelessness, disaster relief) or it may be permitting a guest missionary at worship to promote and sell books, tapes, CD's, and other materials provided by the guest missionary. Note: The receiving and filing of FL state sales tax on items sold by guest missionaries is the responsibility of the mission and/or missionary.

e. Special Offerings: At times, a special offering may be approved by the Church Council as recommended by the Finance Team. These offerings, on a case-by-case basis, will benefit a specific one-time cause or need in the church family or community. Special Offerings must be approved by the Church Council.

f. "Sponsor me" Fundraiser – Financial commitments via sign-up sheet solicited based on walking, bowling, running, or similar activity.

6. General Guidelines

Fund Raising Policy For East Lake United Methodist Church
Version 1 Issued February 23, 2009
Revised July 16, 2012

a. All fund raising activities and proceeds must use the LITMUS Test as the measuring stick.

b. The location of fundraising will be limited to areas that are not adjacent to or inside the sanctuary during worship events. This request is made to honor the sanctity of the worship experience and in keeping with Biblical teaching. The ministry or mission may set up a table in the courtyard area for the purpose of advertising, receiving goods, orders, registration for the fundraiser, and to distribute pre-ordered items.

c. No direct fundraising solicitations (i.e., specifically asking persons to donate to the fundraiser) may occur in the sanctuary during or after worship services. The fundraiser may be promoted in the courtyard, Education Building, Narthex, Fellowship Hall, ELUMC publications, posters, website, pre-service announcements, and may be verbally shared as part of the pre-worship announcement time. Press releases may also be submitted to the local media to assist in promoting the fundraiser. All such press releases must first be approved by the Communications Coordinator and church office.

7. Restricted and Discouraged Activities. The following fund raising activities will not be sponsored by ELUMC nor allowed on the church premises:

a. Fund raisers based upon a home party concept including, but not limited to: Mary Kay, Pampered Chef, Tupperware, Tastefully Simple, Creative Memories, Home Interiors, Stampin' Up, Jewelry companies, and Partylite. Because several members of the congregation may be consultants for these organizations, we do not wish to discriminate among or between them in fund raising activities.

b. Fund raisers where the business of a church member or ministry participant personally benefits financially. This is not intended to exclude fund raisers where the purpose is to raise financial support for a congregation member in need.

c. Fund raisers conducted by outside groups to benefit their own organizations, unless the outside organization is a non-profit organization supported by ELUMC or with which we have a ministry partnership (i.e., Boy Scout's Troop and Pack 407, etc).

8. Processing of Contributions

All monies received from the fundraiser, with the exception of those groups mentioned above, must be submitted for processing through the church Treasurer and church bookkeeper, with records kept by Administrator of Church Operations. This is done to ensure that donors receive the maximum tax advantage for their contributions. Proper forms are to be used to submit monies (attached).

The sponsor, the church Treasurer and the Administrator of Church Operations must agree on how the money is to be counted, deposited, and accounted for in the church financial records.

If no tangible benefit is provided to the donor in exchange for their contribution, the donation is tax deductible and the donor may receive credit on their contribution statement. To assure that this happens, the coordinator can do one of two things:

- Prepare individual offering envelopes for each contribution made (envelopes available in the church office); or,

Fund Raising Policy For East Lake United Methodist Church
Version 1 Issued February 23, 2009
Revised July 16, 2012

- Prepare a list of donors to the fundraiser including name, address and amount of donation who wish to have their donation recorded.

If the fundraiser involves the sale of an item, the donor is not entitled to contribution credit.

9. Fund Raising Process

a. Making A Request

Requests for fundraising events or activities must be made in writing and submitted to the Finance Team. The form for requesting an event can be obtained at the church office or on the church website at www.eastlakeumc.org. The completed form should be submitted to the Finance Team by forwarding to the Church Office or Administrator of Church Operations.

In case of an event that needs immediate attention please contact either the Finance Chair or the Administrator of Church Operations. The request may be reviewed by the committee via email and an answer will be given as soon as possible.

b. Approval Process

Unless handled otherwise (see above), all requests will be reviewed once per month at the regularly scheduled Finance Team meeting. After the committee reviews the requests, the Administrator of Church Operations or a designated Finance member will contact the ministry areas regarding the status of the request, and, if appropriate, to begin assisting with planning and implementation of the event. In the event time does not allow for a scheduled finance meeting, an email approval is acceptable.

c. Request & Approval

1. The form, Fund Raising Request (attachment A), must be completed to initiate approval to hold a fund raising activity sponsored by East Lake United Methodist Church and/or held on the church premises.
2. The following approvals are required (in this order):
 - a. Program Staff – staff member in charge of the ministry that benefits from the fund raiser. The Program Staff Member assures that the request appropriately supports their ministry and does not violate any of the guidelines in this policy.
 - b. Administrator of Church Operations – the Administrator of Church Operations assures that the request is within the guidelines of the policy.
 - c. Finance Team
3. If a request is received that is not clearly addressed in the policy, the Program Staff Member and Administrator of Church Operations will make a recommendation to the Finance Team on how it should be handled. If the Finance Team changes the content of this policy, it will require Church Council approval.

If the proposed fundraiser is consistent with the above principles and guidelines, and is approved by the Finance Team, the fundraiser will be placed on the church calendar and will be promoted.

**Fund Raising Policy For East Lake United Methodist Church
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Fund Raising Request

(Allow a minimum of 30 days for approval processing)

Date: _____ Requestor Name: _____

Telephone Number: _____ E-Mail Address: _____

Coordinator for this Fundraiser (if different from requestor): _____

Category of Fund Raiser: *Circle Category* All-Church // Ministry // Community // Partner //
Special Offering // Sponsor-Me

Ministry Name _____

Proceeds from this fund raiser will be used for the following purpose: _____

Description of fund raising method (s): _____

Litmus Test: (attach additional info if desired)

Offers Christ by _____

Grows our Faith by _____

Serves Others by _____

Where and What is the Fruit? _____

Dates of fund raising activity: From _____ To _____

Will the business of any ELUMC congregation member or ministry participant personally benefit financially from this fundraiser? Yes No

Account # / fund title where funds are to be accumulated: _____

Approvals:

Program staff, if one benefits Date

Administrator of Church Operations Date

Finance Team Date

**Fund Raising Policy For East Lake United Methodist Church
Version 1 Issued February 23, 2009
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SAMPLE FUND ACCOUNTABILITY FORM (similar forms may be used)

Event Name _____ Account Number _____

TALLY SHEET (CASH)

TALLY SHEET (CHECKS)

DATE: _____

DATE: _____

Number Coins or Bills	Denomination	Total	Last Name	Check #	Amount
_____	x .01 =	_____	_____	_____	_____
_____	x .05 =	_____	_____	_____	_____
_____	x .10 =	_____	_____	_____	_____
_____	x .25 =	_____	_____	_____	_____
_____	x .50 =	_____	_____	_____	_____
	<i>Subtotal</i>		_____	_____	_____
	<i>Coins</i>	\$ _____	_____	_____	_____
_____	X 1.00 =	_____	_____	_____	_____
_____	X 5.00 =	_____	_____	_____	_____
_____	X 10.00 =	_____	_____	_____	_____
_____	X 20.00 =	_____	_____	_____	_____
_____	X 50.00 =	_____	_____	_____	_____
_____	X 100.00 =	_____	_____	_____	_____
	<i>Subtotal Bills</i>	\$ _____	_____	_____	_____
	Total cash	\$ _____		Total Checks	\$ _____
	Total Deposit	\$ _____			

Initial Counter

Verifier

Initial Counter

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**Fund Raising Policy For East Lake United Methodist Church
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Donor Name	Address of Donor	Amount Donated