

SAINT PETER LUTHERAN CHURCH FUNDRAISING POLICY AND GUIDE

Saint Peter Lutheran Church Fundraising Procedures

Saint Peter Lutheran Church Procedures – Fundraising Campaign and Events

The ministry group conducting the event is responsible for:

- Submitting appropriate information to the Administrative Team.
- Initiating and completing all requirements in a timely manner.
- Providing copies of all forms to the Church Office.

All policy, guidelines, and forms needed to conduct your event are available in the Church Office.

Saint Peter Guidelines for Setting Up, Running, and Closing a Fundraising Event:

These general guidelines apply to all fundraising projects or campaigns. Any adjustments to fit the event require prior consent by the Executive or Administrative Teams:

Appoint an event manager and a coordinator to oversee the event. The generally accepted practice involving money calls for two people to share responsibility in planning, operating, and handling funds. The sponsoring Ministry Team creates outline of activities including:

- Establish the Project Goal
- Determine the Method of Fundraising
- Schedule Dates on Church calendar

Make Request – The Event Manager and Coordinator initiate the process by submitting the *Application for Fundraising* form. The details for collecting and disbursing funds are requested as an attachment to the form, if any variance from the process described herein.

Obtain authorization for the project:

Authorization is obtained from the Administrative Leadership Team. The Team will facilitate review and endorsement of the event. The group requesting the event will provide an *Application for Fundraising* form to the VP (Chair of the Administrative Team) at least 45 days prior to the starting date. The VP will arrange for distribution of the request to the Administrative Team and add it to the next monthly Team meeting agenda. The meeting minutes will show action taken and Event Manager will be advised. The Event Manager and Coordinator are required to attend the Administrative Team meeting to hear discussion and to respond to questions if any.

The Event Manager or Coordinator will verify any specific guidelines or state-mandated regulations for the type of event. A raffle will require specific oversight by the Gaming Manager.

Soliciting Gifts:

IRS requirements for acknowledgement of individual gifts to a charitable organization apply. The Event Manager and Coordinator will obtain guidance from the Financial Secretary as needed. The Description of Activities on the *Application for Fundraising* form should include at least one activity for gift acknowledgement before closing the project. An audit trail of all donations is required.

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Collecting Funds:

The Treasurer is the main contact for monies collected during any church-sponsored activities. However, the daily collection and solicitation of funds is managed by the Event Manager or Coordinator. After the money is collected by the Event Manager or Coordinator, it is given to the church Bookkeeper or left in church office. Under no circumstances are collections to be held by an individual, unless a signed receipt for the products/tickets or monies is completed. The Bookkeeper will review the deposit amount with the Treasurer. All participants in fundraising projects are responsible for proper handling and securing of money. Individuals selling products or tickets for food or services must be made aware of requirement to report, secure, and return monies on established dates. A written record must be maintained for each individual's collection and in total when handed over to church office. An audit trail of all cash or property is required. Use the form provided.

Distributing the Products or Services sold:

On the date or dates of the activity identified for distribution, the Event Manager and Coordinator must obtain and maintain appropriate records for market value, amount received, and value of donation for proper reporting to the Financial Secretary and Treasurer.

If federal information documents are required (W-9), please arrange to get some information from the Church Office in advance.

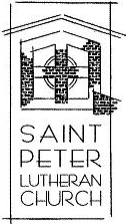
- IRS Requirements – If cash or property value is \$600 or more, at the time of the event and before the prize is delivered, the winner must complete a W-9 form. Form 1099-MISC is then sent at year end.
- IRS Requirements – If cash or property value is \$5,000 or more, in addition to the W-9 requirements, Saint Peter must retain, before the prize is awarded, 28% withholding. If the prize is property, the winner must pay the withholding amount before the prize can be delivered. Uncollected withholding will be included as an expense of the project/event.

Closing the Event:

The *Final Report for Fundraising* form is provided to the Treasurer. The Treasurer will distribute the form to the Executive and Administrative Teams with the appropriate financial reports supporting the fundraising timeline and activities.

SAINT PETER LUTHERAN CHURCH APPLICATION FOR FUNDRAISING

*** Please submit this form to the Vice President at least 45 days prior to the event or campaign start date ***



Date Form Prepared:		Date Form Received:	
Name of Event or Campaign:			
Name of Fund or Budget Line:			
Event/Campaign Starting Date:			
Event/Campaign Ending Date:			
Campaign Manager:			
Event Coordinator:			
Committee Members:			
Event Location:		Insurance? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Description of Event or Campaign Activities:			
Description of Marketing and Publicity:			
Is a Product or Service to be Sold*:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	* Includes auctioned
Describe product or service:			
Liability Risks:			

ANTICIPATED BUDGET

REVENUES		EXPENSES	
Price of Admission/Item	\$	Printing	\$
x Number of Sales		Postage	\$
= Expected Revenue:	\$	Supplies	\$
Other Donations:		Products	\$
Source - Individual	\$	Rent	\$
Sponsorships	\$	Food	\$
	\$	Honorarium/Fees	\$
	\$		\$
Total Estimated Revenue:	\$	Total Estimated Expenses:	\$

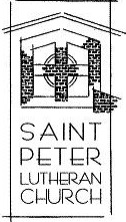
PROJECTED NET INCOME TO FUND: \$
(Total Estimated Revenue minus Total Estimated Expenses)

Event Manager Signature: _____ Phone: _____

Coordinator Signature: _____ Phone: _____

Administrative Team Recommendation: _____ Date Reviewed: _____

SAINT PETER LUTHERAN CHURCH FINAL REPORT FOR FUNDRAISING



Date Form Prepared:	Date Form Received:
Name of Event or Campaign:	
Name of Fund or Budget Line:	
Event/Campaign Starting Date:	
Event/Campaign Ending Date:	
Campaign Manager:	
Event Coordinator:	

ACTUAL INCOME AND EXPENSES

REVENUES		EXPENSES	
Price of Admission/Item	\$	Printing	\$
x Number of Sales		Postage	\$
= Expected Revenue:	\$	Supplies	\$
Other Donations:		Products	\$
Source - Individual	\$	Rent	\$
Sponsorships	\$	Food	\$
	\$	Honorarium/Fees	\$
	\$		\$
Total Revenue:	\$	Total Expenses:	\$

NET INCOME TO FUND: \$
(Total Revenue minus Total Expenses)

Event Manager Signature: _____ Date: _____

Coordinator Signature: _____ Date: _____

Treasurer Signature: _____ Date: _____

COMMENTS: