

St. Luke's Episcopal Church
Bethesda, Maryland
Fundraising Policy

Introduction

We financially support the ongoing ministries of St. Luke's Episcopal Church through the budget of the General Fund. However, at times, additional funding may be required for specific projects, trips, or ministries, which are not covered by the General Fund or which may support the non-profit initiatives of parishioners when St. Luke's Church is not the primary beneficiary. The purpose of this policy is to allow us to take advantage of fund raising opportunities in a way that preserves the parish relationships, protects our tax-exempt status, and upholds St. Luke's vision, mission, and values as outlined in the new strategic plan. This policy is to be administered by the Vestry. Requests will be reviewed and scheduled so as to minimize conflicts in scheduling and maximize success of the project.

Policy and Procedures

All fundraising activities conducted on behalf of St. Luke's, whether on-site or off-site must be reviewed for compliance with this policy and approved by the Vestry. Complete and submit one of the fundraising applications (either A for activities for the benefit of St. Luke's or B for causes outside of St. Luke's) to the Vestry before their monthly meeting on the third Monday of each month and at least one month before the event. The advance notice will increase the likelihood of the application(s) being approved. St. Luke's proceeds will be held at the Church. Within 5 days after the event sponsors should complete, and return to the vestry, attachment C (Accounting Form and Receipt Log) to provide a public report/accounting to include:

Total income (in detail)

Total expenses (in detail with receipts including donations)

Specific use of the proceeds

The sponsoring group is expected to publish the net proceeds to the Parish via any approved St. Luke's communication tools such as Acts, the Sunday bulletin, and the church website.

The Rector may use his/her own discretion to determine when a special Saturday evening or Sunday morning appeal will be made in response to a parish, diocesan, local, national, or international disaster (e.g. hurricane/earthquake relief funds).

Definitions

- Fundraiser: Any event, activity, or solicitation that seeks to generate income or goods for a beneficiary. Some examples of fundraising include:
 - Gift-Giving: Cash contributions of all sorts including specific outreach or J2A projects
 - Gifts in kind: non-cash gifts such as donations of coffee and food for weekly coffee hour, non-perishable items to the food pantry, or necessary supplies for properties/altar guild/church school
 - Fellowship events: Such as S-Cubed for which a suggested donation or a per-person fee is charged and the primary purpose is fellowship and community building
 - Sales: the selling of services or merchandise to members or attendees as long as there is no personal profit. Examples include activities such as silent auctions, jewelry or craft fairs, etc.

Individuals raising funds for outside non-profit groups or causes that are consistent with the mission and vision of St. Luke's can discreetly approach guests at coffee hour for contributions or sales. Please use Attachment B to make your request

Beneficiaries

- The church General Fund or special designated fund (e.g. Outreach Fund, J2A)
- Affiliated church organizations (e.g. UTO, Episcopal Relief and Development)
- Entities that are not church related that have an objective consistent with the Church's mission as determined by the reviewing entity.
- Sponsored person(s) in need (e.g. personal crisis, disaster, refugee resettlement)

Proceeds

The net amount earned after expenses.

ATTACHMENT A
St. Luke's Episcopal Church Fundraiser Application –
For the benefit of St. Luke's Church

Application date: _____ Name of Fundraising Event: _____

St Luke's Sponsor : _____

Contacts: (1) _____ (2) _____

Phone: (1) _____ (2) _____

Cell/Work Phone: (1) _____ (2) _____

Email: (1) _____ (2) _____

Type of Fundraiser (see definitions under church fundraising policy) Check all that apply:

Gift-giving Gifts-in-kind Fellowship Event Sales

Who will benefit from the proceeds? _____

Will this be an annual event? (updated annually with changes) Yes/ No

Brief description of activity/event including location and any space, equipment or other special needs:

Single date: _____ Time: _____

Multiple dates and times (e.g., ticket/raffle sales, event date): _____

Estimated financial goal (if known): _____

Other goal: _____

After the event, please submit Attachment C (Accounting worksheet) to the Church Treasurer.
Drafted 10/30/2010 Zakarka

ATTACHMENT B
St. Luke's Episcopal Church Fundraiser Application –
For the benefit of a group other than St. Luke's Church

Application date: _____ Name of Fundraising Event: _____

St Luke's Sponsor: _____

Contacts: (1) _____ (2) _____

Phone: (1) _____ (2) _____

Cell/Work Phone: (1) _____ (2) _____

Email: (1) _____ (2) _____

Type of Fundraiser (see definitions under church fundraising policy) Check all that apply:

Gift-giving Gifts-in-kind Fellowship Event Sales

Who will benefit from the proceeds? _____

Will this be an annual event? (updated annually with changes) Yes/ No

Brief description of activity/event including location and any space, equipment or other special needs:

Single date: _____ Time: _____

Multiple dates and times (e.g., ticket/raffle sales, event date): _____

Estimated financial goal (if known): _____

Other goal: _____

Attachment C
St. Luke's Episcopal Church Accounting Worksheet

Return completed form to Church Treasurer

Name of fundraising event: _____

Sponsoring group: _____

Date of event: _____

Completed by: _____

Income Details (e.g., ticket sales, food, silent auction) _____

Total Income \$ _____

Expense Details (e.g., food, equipment rental, supplies, postage) _____

Total Expenses \$ _____

PLEASE ATTACH ALL RECEIPTS TO THIS PAGE