

PARISH FUNDRAISING POLICY

*Approved by the Holy Trinity Parish Finance Council
Oct. 18, 2023*

*“Cultivating faith and sharing its fruits since 1848”
“To know love and serve God in all we do.”*

**The following policy has been created to help our community
LEARN and GROW in the holy stewardship
of God’s gifts of money, time and talent.**

Some Definitions

- I. **FUNDRAISING** – the seeking of financial support for activities of the parish that fall within our Mission Statement and would not be possible without additional revenue beyond Sunday offerings, tuition and fees.
- II. **PARISH** – the faith community of Holy Trinity ~ Alpine including the school and all the works and ministries.
 - a. The Church’s Code of Canon Law defines a parish as “a certain community of the Christian faithful stably constituted in a particular church, whose pastoral care is entrusted to a pastor under the authority of the diocesan bishop. [515 §1]
 - b. Holy Trinity strives to welcome all who seek a spiritual home in the Roman Catholic Tradition. We are also obliged to provide spiritual and pastoral support to all Catholics who live within the parish’s official boundaries.
- III. **STEWARDSHIP:** As Christian stewards, we receive God's gifts gratefully, cultivate them responsibly, share them lovingly in justice with others, and return them with increase to the Lord. (United States Bishops)

Guiding Principles

When a parish organization hosts a fundraiser, the opportunity to collaborate and work for a common cause or ministry is as important as the funds raised.

The organizations of Holy Trinity Catholic Parish may have a limited number of fundraisers based on these principles:

1. The focus of fundraising must complement the mission and vision of the community and foster a spirituality of stewardship.
2. The fundraising activity must address true needs.
3. The date, time, season and location of the proposed event are critical to its success.
 - We don't want to compete with other parish organizations for funds.
 - We don't want to exhaust the generosity of our community with multiple appeals in a given year.
 - Ideally, fundraisers complement or enhance the Church's liturgical seasons and holy days, not distract from them.
4. Ideally, groups raising funds will be aware of other parish ministries with funding needs and seek to build partnerships with those ministries, if applicable.
5. Parishioners should be informed of the fundraisers goals and accomplishments before, during and after the event. This includes timely reporting of final totals and acknowledgment of volunteers and supporters of the event.

Fundraiser Categories

Who are you targeting with this fundraiser?

1. **All Parish / Community-Wide Fundraising Event**
 - a. This is aimed at all parishioners and friends of the parish (i.e., the public)
 - b. e.g., Community Auction, Festival, St. Patrick Dinner Dance, HT Athletics Golf Outing, Lenten Fish Fries
2. **Special Need (targeted within the parish)**
 - a. e.g., Haiti event, Knights of Columbus Tootsie Rolls
3. **Ministry-Focused**
 - a. Vacation Bible School, school fundraisers such as pie sales, 8th Grade Fund, Student Council Council Fundraising
4. **Ongoing**
 - a. e.g., Haiti Sundays, Knights Breakfasts.
5. **Capital Campaign**

Exceptions: **Concession sales at sporting events** are exempt from this policy. However, concession sales are to comply with the practice of stewardship and the policy's guiding principles. **Blood Drives are also exempt.**

IV. Procedures

These procedures are to be followed by all parish groups planning a fundraising event.

Outside organizations may request to host a fundraising activity at Holy Trinity in accordance with the parish's [Facility Use Policy for Charitable or Non-Profit Organizations](#).

A. Approval

The [Fundraising Event Request Form](#) is the primary tool for arranging a fundraiser.

1. When considering a fundraising event, groups begin by contacting their staff liaison, who will guide the group representative through the process.
 - o The staff liaison is the person who works most closely with a particular group. i.e., the school liaison is the principal, the Knights' liaison is the pastor or his delegate, etc.

2. The staff liaison will review all parish calendars, alert the group of possible conflicts, and seek solutions.
3. The staff liaison will also consult with other relevant staff for input. If the timing of the fundraiser seems feasible, it will be placed in the office's **Fundraisers by Month Spreadsheet** (internal document) and flagged "pending."
4. The next step is for the group to submit its proposal as soon as possible using the Fundraiser Request Form.
5. Plans to solicit donations from area merchants/restaurants must be detailed on the Fundraiser Event Request form.
6. Requests will be reviewed by the Finance Council each time it meets, usually every two months. Ideally, fundraiser requests will be submitted at least four months prior to the event. Requests will be considered on a first come, first-served basis.
7. Upon approval by the Finance Council, the event will be entered into the appropriate calendars. No fundraising activity using parish facilities will be entered in these calendars until approved.

VI. **Criteria regarding use of facilities, dates, and purpose of funds**

- Christmas, Easter Sunday, and other major holy days are not available for fundraising activities.
- The purpose of and the financial goal of the fundraiser will be indicated on the Fundraising Event Request Form, which is available from the staff liaison.
- Parish organizations will limit fundraising activities to a minimal amount to meet their financial need.
- Use of the parish bulletin, website, and other advertising and publicity must be included on the request form.
- Organizations will be expected to practice prudent stewardship with the parish's resources by incorporating expected costs into their fundraising proposals and reimbursing the parish for expenses, when appropriate.

VII. Accounting & Reporting Procedures

A. Diocesan Safeguard Procedures must be followed when individuals are handling money on behalf of the Church:

1. At least two people must be present whenever money is counted and secured.
2. All monies (cash, checks, gift cards) must be secured in one of the Parish safes.
3. Funds may not be deposited into any personal account.
4. All receipts must flow through the accounting system of the Parish.
5. Receipts/cash should not be used to pay expenses.
6. All receipts must be detailed on the [DEPOSIT FORM/RECORD](#) and submitted to the business office.
7. Internal controls are open to review by the Business Manager and diocese's Office of Finance.

B. Expense Reimbursement

- A [Reimbursement Form](#) (with invoice or receipt attached) must be completed and submitted to the business office.
- Payments and reimbursements will be made in a timely manner.

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C. Final Reporting

1. After all the funds have been collected and the expenses paid, the event chair is to submit a [FINAL REPORT](#) is submitted to the Business Manager.
2. Completing this form will also help you prepare a simple thank you for the bulletin.
3. Earnings from fundraisers will be placed in the appropriate fund account and earmarked for the designated purposes of the fundraiser.

THANK YOU FOR YOUR HELP

Compliance with the Legal and Insurance Regulations

- **LIABILITY INSURANCE** – As long as the fundraiser is approved and held on Parish property, the liability insurance purchased by the Parish is adequate. However, safety is always an issue that needs to be considered as well as adequate controls when alcohol is served.
- **MICHIGAN SALES TAX** – Sales of items and, in some cases, meals are subject to Michigan sales tax.. If we purchase food, prepare it, and sell tickets, we must collect and pay sales tax. An individual on the event team must be responsible for keeping necessary records. State reports must be completed within one week of the event. Sales taxes are an expense of the fundraiser.
- **MICHIGAN GAMING LAWS** – Any organization operating bingo games, raffles or millionaire parties must first obtain a license from the Charitable Gaming Division of the Bureau of the State Lottery. Any game you choose to play with prizes (cash and/or donated or purchased items) is gaming and is controlled by the State. Holy Trinity Parish has met the qualification requirement for a religious organization to conduct licensed gaming events. Adequate time must be allowed to obtain the needed licenses for a planned event. An individual must be designated to maintain detailed records of the gaming. This information is required on State of Michigan gaming reports. These reports must be completed within days of the event. Please contact the business manager for assistance.
- **SERVING ALCOHOL** – BYOB is not permitted. For the safety of all, qualified bartenders are required when serving alcohol.

REQUIRED FORMS and HELPFUL LINKS

- [Fundraising Event Request Form](#)
- [Deposit Form/Record Form](#)
- [Fundraiser Final Report](#)
- Fundraisers by Month (internal document)

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