

St. Louis de Montfort  
Standard Operating Policy  
Fund Raising  
SLDMPOL04  
Approved *PCO*  
Date *10/31/08*



**Purpose** To ensure appropriate controls are in place so that fund raising events are minimized since the majority of funding comes from the parish collection revenue.

**Scope** This policy applies to all parishioners, staff and outside groups.

**Related Documents** None

**Definitions** None

### **Saint Louis de Montfort Church and School Fundraising Activities: Principles, Policies, and Procedures**

**I. Rationale:** Saint Louis de Montfort (SLDM) is a stewardship parish. In the ideal stewardship parish, the sharing of time, talent and treasure by parishioners, and the overall parish commitment to the sharing of God's gifts, would make parish fundraising by parish groups unnecessary.

Fund raising activities do serve at least two important purposes, besides the obvious one of raising needed money for church and school (parish) ministries. First, they highlight the specific mission, importance, and needs of the organization which is raising the funds. Second, they help to build community within the parish, 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, in the amount of funds raised, the frequency of fundraisers, or the objectives of raising the funds.

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1. General: A twelve month calendar of fundraising events will be used to schedule and track all fundraising activities.
2. Specific: In order to be placed on the fundraising calendar, approval is required by the Director of Stewardship and Development (DSD) at least six months prior to the event; twelve months is recommended.
  - a. Special collections for the poor or other emergency needs may be scheduled by the Pastor at any time.
  - b. No fundraising activity using parish grounds or facilities will be entered in the parish calendar until approved.
  - c. Solicitation of any prospective fundraising sponsor (businesses or individuals) must be submitted in writing to the DSD prior to contacting.
  - d. Applications (see attached) will be reviewed by the DSD on a first-come, first-served basis. The DSD reports to the Director of Ministry & Operations, and the Pastor. Meetings regarding fundraising activities are on an as needed basis. The decision for or against approval may not be immediate, depending on the need for further information or consultation.
3. Use of parish facilities and common spaces:
  - a. On the weekend of Palm Sunday, during holy week, and on Easter Sunday, no fund-raisers are to take place on parish grounds or under parish auspices.
  - b. In accordance with the practice already current, the sale of Scrip by the parish is to take place in the Parish Office.
  - c. The Narthex is limited to two approved and scheduled fundraisers. These fundraisers include: Mardi de Montfort cash raffle, Knights of Columbus 500 Club raffle. The raffles will each occur for two consecutive weekends only. Raffle sales in the Narthex will be scheduled through the Service U Scheduler and placed on the parish calendar.
  - d. The gift shop, located in the Parish Office , may be open on most weekends.

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4. Collaborative fundraisers: The involvement of a second parish organization in another organization's fundraising program is not to be assumed, and must be approved in writing by the chair of the second organization, and the DSD.
5. Publicity: The purpose of the fundraising activity must be publicized before the event by way of the parish bulletin, promotional flyers, and/or other means of publicity. These means of publicity must be mentioned in the application for approval. Promotional material must be proof read and approved by the fundraising ministry's staff liaison. Promotional material like bulletin announcements and inserts need to state that purchasers make checks payable to SLDM and include the mail-in address: SLDM, PO Box 30, Fishers, IN 46038.
6. Reporting/Budgeting: A final, detailed, budgeted financial report is to be submitted to the Director of Ministry & Operations, and DSD two to six months prior to the event. Time line is dependent on the size and scope of the fundraising event. (See attachment titled Proposed Fundraising Activity Budget.)
7. Handling of funds:
  - a. Three weeks prior to the fundraising activity bring a copy of the budget, approved event application and an event flyer to the Accounting Office.
  - b. Accounting will review the specific handling of funds procedure with the event coordinator. Please refer to the attached **Procedure for Collection of Funds** for details on proper handling of funds.
  - c. All fundraising expenses must be submitted to the fundraising ministry's staff liaison within two weeks of the event. This includes: receipts; purchase orders; invoices (or notice of mailed invoices); reimbursement requests, etc.
8. Compliance: A group's compliance with these policies is required and will be considered in future fundraising application processes.

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Nor should funds be raised for unnecessary items which may be luxuries when other essential needs in the parish are not being met.

**II. Principles:** In order to help the parish live out the values of good stewardship, to act respectfully toward parishioners and others supporting the parish and the goals of parish groups, these principles are our foundation for parish fundraising:

- The fundraising activity must address essential elements, and not gratuitous wants or luxuries, of the parish group.
- The fundraising activity and the group conducting the fundraising must be compatible, in its content and the way it is conducted, to the identity and mission of Saint Louis de Montfort as a Catholic Christian faith community, and be respectful of the needs, customs, and integrity of parish ministries and organizations.
- Parish groups, in planning their fundraising activities, must be respectful of the members of the parish, and of the sacredness of the Church's liturgy and the parish's sacred space.
- Because of the Church's duty to serve the poor, all fundraising activities must be respectful of those who are unable to contribute.
- Parish fundraising activities will be limited to one per month.
- The parish, in its administration of the funds raised, has a responsibility to be a good steward of these funds.

**III. Categories:** Parish fundraising activities are categorized in one of the following:

1. Church- and School- Ministries (Examples: Mardi de Montfort, Market Day, Scrip, Spirit and Athletic wear, Walk-A-Thon, Poinsettia sale, Food Pantry, Giving Tree, etc.)
2. Church- and School-Wide Campaigns (Examples: Fruitful Harvest, Catholic Moment, Debt Reduction Envelopes, Corporate Match Program, etc.)

*The above categories include all church and school fundraising activities, either on- or off-site.*

**IV. Policies:** These policies are to be followed strictly by all parish groups which do fundraising. Exceptions are noted, or will be granted as it is judged appropriate.