

SAINT MARK'S EPISCOPAL CATHEDRAL

Council Policy #4 Fundraising Policy

Approved October 16, 2014

I. Purpose

This policy is intended to allow St. Mark's Cathedral to take full advantage of fundraising opportunities in a way that preserves congregational relationships, protects our tax-exempt status, and upholds and advances St. Mark's vision, mission, and values. It is intended to provide a focused and coordinated approach to fundraising and solicitation of contributions from members of St. Mark's by clergy, parishioners, or anyone else associated with St. Mark's. This policy is to be administered by the Council and it is the final authority for all fundraising policy at St. Mark's.

II. Policy

Any proposal to solicit funds or contributions from members of St. Mark's by any person or organization associated with St. Mark's, whether on St. Mark's premises or elsewhere, must be reviewed and approved by the Council. This requirement applies whether the intended beneficiary of the effort is the Cathedral itself or one of its special designated funds as outlined in the Gift Acceptance Policy, an affiliated church organization (e.g., the Wells Foundation), or a group or purpose that is unrelated to the Cathedral. Requests will be reviewed and scheduled to minimize conflicts among fundraising efforts and maximize the success of each effort. In particular, no additional fundraising requests will ordinarily be permitted during the annual Stewardship campaign.

B

III. Procedures

A. A request for approval of a fundraising effort under this policy must be submitted in writing to the Council, using Attachment A, at least two months before the effort is planned to begin. Greater advance notice will increase the likelihood of the application being approved.

B. Previous approval of a fundraising effort is not an assurance that approval will be granted again. Applications do not carry over from year to year.

C. If the proposed fundraising effort is intended to support a special designated activity of the Cathedral, the Council shall consider whether the intended purpose is consistent with the Cathedral's priorities, as reflected in the Cathedral budget and elsewhere.

D. Any fundraising effort that is subject to this policy is expected to reimburse the Cathedral for costs incurred by the Cathedral in connection with the effort. Such reimbursement may consist of either or both of a flat fee for the use of Cathedral facilities and/or a percentage of the effort's gross revenue. In its discretion, the Council may waive the fee that would otherwise be required under this paragraph. In deciding the amount of the fee for a fundraising event, or to waive such a fee, the Council shall consult with the Cathedral Administrator to determine the costs, including estimated personnel costs, incurred by the Cathedral.

E. Within a reasonable time after an effort has been completed (usually 3-5 days, unless good cause for delayed reporting exists), the sponsors shall report to the Council using Attachment B, the total amount received through the effort, the total expenses incurred (in detail with receipts, including an accounting of any in-kind donations received in support of the effort), and the net proceeds achieved, including a specific description of how (to whom) the proceeds will be distributed.

Attachment A

St. Mark's Episcopal Cathedral Fundraiser Application

An application must be completed and submitted to the Finance Committee two months prior to the event.

Date(s) and times of event:

Application date:

Sponsoring Committee/Group:

Contact(s):

Phone(s): Cell/Work

Email(s):

Type of Fundraiser Check all that apply:

Gift-giving Gifts-in-kind

Fellowship Event Sales

Who will benefit from the proceeds?

Is this event new or existing?

Briefly describe activity/event.

Space and equipment needed e.g., Fireplace Room, tables, chairs etc. (the sponsoring

committee or group must confirm the availability of space and equipment pending Finance Committee approval by contacting _____).

Estimated goal - how much do you hope to raise?

Name of individual submitting the request: _

Attachment B
St. Mark's Episcopal Cathedral Accounting Worksheet

To be submitted to Finance Committee, via Cathedral administrator, within 3-5 days after completion of event.

Name of fundraising event:

Sponsoring group:

Date(s) of event:

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]

