



**St. Pius X**  
CATHOLIC PARISH

# **Event Planning Guidelines & Policies**

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## Timeline and Checklist

Event Name \_\_\_\_\_

Type of Event \_\_\_\_\_

(Social, Fundraiser, Service)

- All events must be approved by the Parish Business Office.**
- All NEW events must also be approved by the Pastoral Council.**
- Schedule a meeting with the Business Manager to go over all requests and information.**
  - Preferred date availability – check parish calendar
  - Go through these Guidelines and Policies, including the Archdiocesan Policies
  - Night drop of all money and need for security, emergency phone numbers
  - Facilities/Clean Up
- Reserve Space**

Email parish administrative assistant and business manager to request event space. A confirmation will be sent once the dates and times are finalized. (A tentative date can be held.)
- Volunteer List**

If this event involves children, a list of all volunteers must be submitted to the Safe Environment Coordinator as soon as possible. (no later than two weeks prior to event) All volunteers must be approved **PRIOR** to the event.
- Are you requesting to serve alcohol at the event?** (must be approved) **See alcohol policy.**
- Is a gaming license required?** (see **Licensing Requirements** to determine type needed)

Timing for license approval

  - Four weeks for non-licensed raffle
  - Eight weeks for raffle license
- Arrange Advertising/Announcements**

Bulletin, School Newsletter, Mass Announcement, Website, Facebook & Twitter, Marquee, Information Center (Narthex), Yard Signs/Banners
- Set Up for Event Space - \_\_\_\_\_ # people**

Please communicate your set up requests with the Parish Administrative Assistants to add to maintenance worksheets.
- Equipment Needs**
  - TV/DVD     Easels     Overhead Projector & Screen     Piano
  - Microphones     Podium     Flipcharts     Ross Hall Sound System  
(MUST sign out key in advance)
- Pick up Keys/Code, deposit bags, cash banks, etc. the day before or day of event.**

(the need for cash banks must be arranged through a check request two weeks prior to the event.)

## Contact Information

Contact	Phone	E-mail
<b>Parish Office</b>	<b>255-4534</b>	
Sharon Wagner Parish Business Manager	466-3351	<a href="mailto:swagner@spxparish.org">swagner@spxparish.org</a>
Janet McNabb Communications/Bulletin/Website/Social Media/Mass Announcements/Information Center/Yard Signs/Marquee, Safe Parish, Background Check	466-3350	<a href="mailto:jmcnabb@spxparish.org">jmcnabb@spxparish.org</a>
Katie Gray Parish Administrative Assistant	255-4534	<a href="mailto:kgray@spxparish.org">kgray@spxparish.org</a>
Shannon Farrell Parish Administrative Assistant/Parish Calendar	255-4534	<a href="mailto:sfarrell@spxparish.org">sfarrell@spxparish.org</a>
Emily Brown Parish Accountant	466-5932	<a href="mailto:ebrown@spxparish.org">ebrown@spxparish.org</a>
Calli Eickhoff Financial Assistant/AP, Event and Gambling Licensing	466-3352	<a href="mailto:ceickhoff@spxparish.org">ceickhoff@spxparish.org</a>
<b>School Office</b>	<b>466-3361</b>	
Keely Beaudette School Principal	466-3361	<a href="mailto:kbeaudette@spxparish.org">kbeaudette@spxparish.org</a>
Melanie Hoffmire	466-3361	<a href="mailto:mhoffmire@spxparish.org">mhoffmire@spxparish.org</a>
Nancy Steadham	466-3361	<a href="mailto:nsteadham@spxparish.org">nsteadham@spxparish.org</a>
Kathy Jorgenson	466-3361	<a href="mailto:kjorgenson@spxparish.org">kjorgenson@spxparish.org</a>
Deanna Murphy School Newsletter		<a href="mailto:deanna@deannaandpat.com">deanna@deannaandpat.com</a>
<b>Maintenance</b>	<b>466-3363</b>	
Chris Wagner Parish Maintenance	466-3363	<a href="mailto:cwagner@spxparish.org">cwagner@spxparish.org</a>

# St. Pius X Event Planning Guidelines

## 1. Promotion Opportunities/Deadlines/Contacts

- **Bulletin Blurb**

- Items for the weekly bulletin should be e-mailed to the Parish Communications Coordinator in Word and/or Publisher format and are subject to pastor approval.
- Deadline is two weeks prior to the date of publication for weekend Masses.

- **Bulletin Flier**

Contact Parish Communications Coordinator for feasibility of a bulletin flier.

- Flier must accompany request.
- Fliers are scheduled well in advance.
- These are fliers that are inserted as a page of the bulletin – **not stuffed later**.
- Fliers must be in Word and/or Publisher format.

- **Bulletin Stuffer**

Due to a larger bulletin, **we no longer allow stuffers for bulletins.**

- **Mass Announcements**

A **short** mass announcement may be e-mailed to the Parish Communications Coordinator, subject to pastor approval.

- **Website, Facebook, Twitter, Information Center (Narthex), Marquee, Yard Signs/Banners**

- Contact the Parish Communications Coordinator to submit information. Information must be in Word and/or Publisher format.
- Website, Facebook & Twitter - updated as needed.
- If event planner is considering creating a Website/Facebook page for fundraising/promotion, approval must be received by the Parish Business Office.
- Information Center (Narthex) - Items for the Information Center (Narthex) should be e-mailed, in Word and/or Publisher format, to the Parish Communications Coordinator for feasibility of display at the Information Center (Narthex).
- Marquee – Contact the Communications Coordinator for feasibility of advertisement on marquee. Advertisements are scheduled well in advance.
- Yard Signs/Banners – Contact the Communications Coordinator for feasibility of advertisement using yard signs/banners.

- **Purple and Gold Newsletter (School)**
  - School Newsletter - The Purple & Gold Rush is sent home via e-mail to school families on Mondays during the school year. The deadline for things to go into the P&G is Thursday at noon. See school Newsletter contact on enclosed sheet.
  - Material for specific parents can be sent home with the youngest in the family.
    - Address the envelope to the parent, include the name of the youngest child & classroom number on the envelope.
    - Deliver it to the school office.
    - Items going to multiple families should be arranged by room number and then alphabetically by last name.
  
- **E-mail Capabilities**
  - St. Pius X Parish School is able to send a mass e-mail to all school family households. Contact school Administrative Assistant.
  - The Pastor sends weekly e-mail blasts to parishioners who have provided their e-mail address. Contact the Parish Communications Coordinator for consideration.
  
- **Logo**
  - Logo can only be used if approved by Parish Business Office.
  
- **Mailing Options**
  - Parish and School Offices have postage meters (and scale to determine postage needed.)
  - Meter may be used by parish/school groups if arranged well in advance.
    - (Number of items must be tracked and group will be charged for postage.)
  - If arranged through parish office in advance, the Catholic Center has the ability to fold, stuff and mail out large mailings. (need a couple days lead time - Closed Fridays)
  - Raffle tickets **may not be** mailed.
  - The prohibition is based on Criminal Lottery Statute (18 U.S.C. Section 1302).
  
- **Letterhead availability/envelopes (with approval from the Business Manager)**
  - Letterhead is available as a Word document.
  - Copies of letterhead can be made or letter can be inserted directly into Word document.
  - Plain envelopes with SPX return address, window envelopes with SPX return address and return envelopes are available if arranged well in advance.

- Coordinate with Parish or Administrative Assistant to ensure that enough is on hand.
- Group will be charged for cost involved.

## 2. Facilities Usage

- **Usage rules**

- The space provided for your event must be respected and left in the manner in which it was found. Please ask before assuming something is okay.
- Keys or entry code, if needed, will be available from the Business Manager.  
One person from the group is responsible for signing out the keys, oversight of the space, making sure clean up is complete, locking up and returning the keys.

- **Electrical Outlets**

Floor plans of the space may be available indicating electrical outlets.

- **Kitchen specifics**

- Advance arrangements must be made to use stove/ovens or store food in kitchen.
- Kitchen must be cleaned at the completion of event.

- **Set-up requests**

- Communicate set up needs with Parish Administrative Assistant. May need to follow up with Maintenance Coordinator as well.
- Maintenance staff will normally set up tables and chairs, though group may need to assist. Group is responsible for decorating and any additional items brought into space.
- If the setup is complicated, a detailed drawing of your needs is requested.

- **Clean up requirements**

- The group is responsible for all clean up and resetting of space.
- Parish Rooms: Clean up meeting area space and kitchenette. Collect trash and place bags in kitchenette area.
- Ross Hall: Kitchen and meeting area space must be cleaned, floors swept and mopped and tables and counters washed, extra tables put away and chairs stacked on top of remaining clean tables. Trash is to be collected and deposited into dumpster located behind kitchen area of the school. Do not use the recycling dumpster.

- **Security**

- Group contact is responsible for keys, and lock up of building upon departure.
- If alcohol is served, security is required.
- Members of group must stay in designated area.
- Children are to be **supervised** at all times.
- No doors are to be propped open.
- Gym and gym equipment is not to be used unless prior arrangements have been made.

- **Emergency**
  - Call 911 for emergency, fire or injury.
  - Contact Maintenance Coordinator for electrical, water, hvac or plumbing problems.

### 3. Vendor Information

- **Vendors**
  - To ensure that the same vendors are not solicited for donations for all events, contact the Parish Business Manager with a vendor list before approaching a vendor for a major donation.
  - The Business Office can also help you with contacts for your purchases with vendors we already have relationships with and possibly best pricing.
  - **Vendors should be paid directly by St. Pius X Parish.** Individuals should not pay vendors directly and ask for reimbursement.
- **Donation solicitation**
  - By mail, phone or in person.
- **Contract requirements**
  - **You must receive approval from the Business Office prior to entering into a contract with an outside source.**
  - A copy of all signed contracts must be submitted to the parish Business Office, one month **in advance**, for signature from Business Manager or Pastor. **Volunteers or staff may not sign as representative.**
- **Non-profit & Tax Exempt Information**
  - St. Pius X is a non-profit organization recognized by the IRS under the provisions of paragraph 501(c)(3) of the Internal Revenue Code.
    - Contact the Parish Accountant for a copy of our IRS determination letter if needed by a vendor.
  - Tax exempt forms
    - A copy of Form ST-105 “Indiana Department of Revenue General Sales Tax Exemption Certificate” is required to make tax exempt purchases on behalf of St. Pius X. Contact the Parish Business Office for a copy.
- **Policies**
  - Event workers who must make purchases for an event using their personal funds or their personal credit card should provide the vendor with a copy of Form ST-105.



Individuals who make purchases without using Form ST-105 will not be reimbursed for the amount of the sales tax they paid.

#### 4. Licensing Requirements

- **All licensing must be arranged through the Parish Business Office at least 8 weeks in advance.** (licensing requires 8 weeks)
- **Gaming**
  - No license is required if the total value of all prizes awarded at one single event is less than \$1,000. No license is required if all St. Pius Parish events have less than \$3,000 in awards during a calendar year – consult with Business Office for this determination.  
(We must register with the Indiana Department of Revenue at least eight (8) weeks prior to the event.)
  - Only cash or check may be used to participate in gaming activities. Indiana Charity Gaming laws state, “a qualified organization **may not** accept credit cards or extend credit to a player for the purchase of: (1) a chance to play any game of chance offered at an allowable activity; or (2) licensed supplies”.
  - **Raffle license** - allows the following games: raffle drawings, door prize drawings or the sale of pull-tabs, punchboards & tip boards.
    - Application for license must be filed at least eight (8) weeks prior to the event.
    - Must have name, address, Social Security number, phone number and birth date for at least two (2) people who will be responsible for the operation and conduct of the gaming event.
    - Must have list of all individuals who will assist and work in the operation of the licensed event (same information is needed as above).
    - All advertising must disclose the organization’s license number within the advertisement.
    - Must have a license in hand before advertising for an event.
    - The age limit of charity gaming is eighteen (18). Children under 18 cannot purchase tickets, pull winning tickets, play or call Bingo unless the games are conducted specifically for children with no cost to participate. Kids (under eighteen) cannot win. Therefore, the parents or grandparents cannot purchase a raffle/chance and put the child’s name on it. The organization would be in violation if they awarded a prize to a child.
- **Liquor**
  - See alcohol policy and permit information.
- **Insurance**
  - Required for outside groups

## 5. Staffing & Office needs

### Staff Availability

- The parish office is **normally** open Monday through Thursday 8:00 a.m. until 4:30 p.m. and Friday 8:00 a.m. until noon. If you have any office needs, please contact the Parish Administrative Assistant in advance. If you need to see the Pastor, Business Manager, or other staff in the Business Office, please call for an appointment.

## 6. Internal Control & Accounting Procedures

- **Internal controls for events and fundraising activities should include the following procedures:**

Per Archdiocesan guidelines the parish staff is responsible for depositing all monies collected and issuing payment for expenditures for all organizations affiliated with the church. (i.e. PTO, Athletics, 8<sup>th</sup> Grade etc.) Parish staff will maintain broader records of the event (total deposit and copies of invoices/check requests) for back-up purposes. All affiliated organizations are responsible for maintaining their own detailed records for each event.

- The Organization must appoint a bookkeeper for the event who will be responsible for developing a budget and maintaining detailed records of the event. Receipts and expenses must stay within the budget to ensure fiscal responsibility.
  - At least two non-related individuals must be present during any cash counting of monies collected and ensure the total is properly recorded on count sheets (which should be signed by all counters).
  - If the event involves inventory items, the items for sale or auction must be inventoried and a detailed reconciliation must be done upon completion of event to verify all the inventory on hand, inventory sold, and the sales proceeds received.
  - Money must be collected and maintained on parish property. Reservations, sales and sign up forms and money may not be mailed to an individual or taken home to reconcile. It must come to the parish office. Group can make copies of checks and take registration forms.
  - On the night of the event, you and a staff member or security will be depositing the cash and checks in the Parish Office safe.
- **Gaming Records Requirement**
    - Any events that involve a Bingo or Raffle License will require some additional records to be maintained for reporting to the Indiana Gaming Commission after the event. This report is due 10 days after the event was held. The event bookkeeper must provide a copy of the event's records no later than 5 business days after completion of the event. The Indiana Gaming Commission requires all money deposited and expensed from a gaming event to be recorded through a separate checking account the church maintains.
      - All Revenue streams should be recorded separately. (i.e., Bingo cards, raffle tickets, booth rentals, event tickets, food or drink tickets, sponsors...etc.)
      - Cash/Checks received for gaming activities must be kept separate from general funds and deposited into a separate bank account. A separate count sheet should

be presented to the business office for gaming proceeds that accompany the gaming funds to be deposited into the gaming bank account. A separate count sheet should be presented to the business office for general event proceeds that accompany the general funds to be deposited into the parish general bank account. Gaming proceeds cannot be commingled with general event proceeds.

- Credit cards MAY NOT be accepted for payment for any gaming activities per Indiana Charity Gaming Laws.
- All Expenses should also be tracked separately. (i.e., Raffle prizes, Bingo Prizes, cost of food/alcohol, cost of supplies, rent, advertising...etc.)
- Raffle and Bingo prizes awarded as cash may be paid out in cash at the event, as long as it is from the cash collected for the raffle or bingo. Winner must sign a receipt verifying amount of cash prize and event details.
- For tip board prizes over \$50 the winner's name, Driver's License #, birth date, and signature must be obtained and kept with the gaming records for the event.
- Any cash prize over \$599.99 must be in the form of a check issued from the Church's separate gaming checking account. The winner must complete a W-9 form to be turned in with the check request.

- **Check Requests**

Parish "Check Request Form" must be completed and submitted to the Parish Office by 8:00 a.m. on Thursday.

- Checks requested by Thursday at 8:00 a.m. are usually available on Wednesday afternoon of the following week.
- Only **original** receipts and invoices are valid, to be turned in with check requests, as supporting documentation.
- If reimbursement is being requested on a purchase that was made using an individual's credit card, documentation of payment must be provided.
- Individuals will not be reimbursed for sales tax paid on any items. Individuals may pick up a sales tax exempt form (ST-105) prior to making purchases to avoid paying sales tax.

- **Deposit procedures**

For security purposes no monies are allowed to leave the parish campus except to be deposited. Any money collected should be maintained at the Church or School office.

- **Contribution acknowledgement letter**

- A donor/sponsor/vendor list must be submitted to the Parish Business Office at the end of the event.
- The event chair should acknowledge all contributions from vendors and or sponsors with a letter that has been previously approved by the Parish Business Office to ensure it complies with IRS contribution acknowledgement guidelines.
- Copies of all contribution acknowledgement letters sent to vendors/sponsors should be provided to the parish accountant.

- No value should be listed on any contribution letters sent to vendors for in-kind (non-cash) donations. (The IRS requires the donor to establish the market value of an in-kind donation.)
- A list of all contributions made by donors (excluding vendor/sponsor donations acknowledged above) must be submitted to the parish accountant and/or financial assistant. These contributions will be recorded in the parish donor database to ensure compliance with IRS requirements for gift acknowledgement.

## 7. Volunteer Information

- **Safe Parish and Background check procedure**
  - Any adult 18 or older volunteering for an event sponsored by St. Pius, which involves children, must have completed and be current on the Safe Environment program - which includes a Background Check (BGC).
  - Contact the Safe Environment and BGC Coordinator in the Parish Office to verify that all volunteers have completed all requirements at least two weeks prior to the event - before allowing them to volunteer.

## 8. Follow-up

- **Thank you notes**
  - Volunteers
  - Contributing Vendors/Sponsors
    - Contribution acknowledgement letters
      - The event chair should acknowledge all contributions from vendors/sponsors with a letter that has been previously approved by the Parish Business Office to ensure it complies with IRS contribution acknowledgement guidelines.
      - Copies of all contribution acknowledgement letters sent to vendors/sponsors should be provided to the parish accountant.
- No value should be listed on any contribution letters sent to vendors for in-kind (non-cash) donations. (The IRS requires the donor to establish the market value of an in-kind donation.) **Vendors usage reported to Financial Assistant**
- **Donations reported to Financial Assistant/Accountant**
- **Summary of event**
  - Volunteers used
  - Who did this event “touch” (i.e., school families, school of religion, entire parish)
- **Evaluations**
  - Facilities used

- Equipment used
- Interaction with staff
- **Thorough notes/suggestions for next time**
- **Record retention**

## **St. Pius X Parish Policies**

### **Alcohol Policy**

#### **Policy Statement**

As a parish community, we are committed to the responsible use of alcohol in accordance with the values set forth in our mission. This includes using alcohol only in moderation, modeling appropriate use of alcohol to our children, respecting the diverse views of our parishioners towards alcohol, and protecting the parish from legal liability. Alcohol will be allowed at specific, approved events, where it will be served within the limitations set out below. Individuals attending meetings or events will not be allowed to bring alcohol on parish property. St. Pius's parish events will also include some events at which no alcohol is permitted, and alcohol is not permitted at any event whose focus is on children.

#### **Administrative Rules**

##### **Alcohol is permitted only at events that:**

- are approved by the Parish Council in writing ahead of the event.
- include food and other beverages, as well as coffee at the event and end serving of alcohol at least one hour prior to end of the event. (this may be adjusted for short functions or receptions)
- either exclude children or have bar away from all children's areas.
- obtain a temporary permit for the serving of beer and wine only and have licensed servers and bartenders to serve at the temporary function who are not permitted to drink.
- have a licensed alcoholic beverage caterer for the serving of liquor.
- have at least one server participating in the event who has attended the Indiana State Excise Police sponsored server training program.
- comply with all State Laws on serving alcohol.
- the organizers agree to monitor attendees attempting to bring alcohol onto the parish property.

##### **Approval to serve alcohol at an event will be based on:**

- the ability of the event organizers to comply with the above stipulations.
- preserving a balance of alcohol events with non-alcohol events.
- the extent to which the event centers on children. Specifically, alcohol will not be permitted at any event focused primarily on children.
- whether or not it is a parish event. Individuals renting/using parish property for non-parish events must provide St. Pius X with proof of insurance from their personal

homeowner's insurance. They must also purchase a rider to their policy for the one day of the event and this rider must be for at least \$1,000,000.

### **Application**

Provided the events maintain year-on-year compliance with the above Administrative Rules, they will be permitted to serve alcohol. Other events will be considered on a case-by-case basis.

## **St. Pius X Fundraising Policy**

### **Purpose**

St. Pius X Catholic Parish is committed to stewardship both within and beyond our Parish community. The Fundraising Policy exists to ensure that fundraising is equitable to both donors and parish groups, and aligns with the mission of the Church.

### **Scope**

The Fundraising Policy applies to all groups sponsored by St. Pius X Parish, including but not limited to PTO, CYO Athletics, School and Youth Ministry.

### **Principles**

All fundraising activities must be reviewed by the Parish Business Manager prior to booking the event.

New fundraisers may also need to be approved by Pastoral Council.

The funds must be intended for a purpose consistent with the mission of the Parish.

Fundraising must not detract from stewardship.

### **Categories**

**Short-term fundraisers:** Non-recurring fundraisers that occur over a limited time.

**Ongoing fundraisers:** Fundraisers that occur throughout the fiscal year.

**Annual fundraisers:** Fundraisers that recur every 1-2 years.

### **Requirements**

Schedule a meeting with the Parish Business Manager.

If necessary, meet with Pastoral Council.

Keep Business Manager informed throughout planning of event.

**ST. PIUS X PARISH GROUP FUNDRAISING APPLICATION**

Ministry Name: \_\_\_\_\_

Ministry Contact, Phone, e-mail: \_\_\_\_\_

Event Name: \_\_\_\_\_

Event Location: \_\_\_\_\_

Event Date(s) and Time(s): Start \_\_\_\_\_ Finish \_\_\_\_\_

Are any special licenses required? Gambling Liquor Other: \_\_\_\_\_

Event Type (check one):

- Short-term fundraiser:** Non-recurring fundraiser that occurs over a limited time.
- Ongoing fundraiser:** Fundraiser that occurs throughout the fiscal year.
- Annual fundraiser:** Fundraiser that occurs on a recurring schedule every 1-2 years.

Event purpose and plans:

\_\_\_\_\_  
\_\_\_\_\_

Anticipated sources of income and donations (Circle all that apply):

SPX parishioners	SPX business owners	General public
Neighboring businesses	Indianapolis business community	Corporations

Other: \_\_\_\_\_

Event Budget: \$ \_\_\_\_\_

Parish Resources:

Parish/School facilities: Yes No \_\_\_\_\_

Number of Volunteers \_\_\_\_\_ hours per volunteer: \_\_\_\_\_

Chairperson(s) commitment \_\_\_\_\_

Anticipated amount to be raised: \_\_\_\_\_

Beneficiary(-ies): \_\_\_\_\_

**Signatures:**

I attest that I have reviewed the Fundraising Policy of St. Pius X Catholic Parish and that our group will conduct this event while being mindful of the Church mission.

\_\_\_\_\_  
Signature of Responsible Ministry/Group Representative Date: \_\_\_\_\_

Approval: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature, Business Manager