

Southcrest Baptist Church

SHORT-TERM MISSION TRIP

FINANCIAL POLICIES AND PROCEDURES

Southcrest does not provide financial assistance nor does it provide assistance in raising financial support for anyone participating in a short-term mission trip that is not sponsored by Southcrest. Southcrest cannot serve as a conduit of funds for individuals to other mission agencies or as a legitimizing agent for those activities.

Individuals participating as a member of a short-term mission team sponsored by Southcrest will be responsible and accountable for raising the amount of money required for their personal travel, daily living expenses, and their portion of general team expenses that are necessary for the team to fulfill their ministry. Failure to meet the financial requirements as outlined in these financial policies and procedures may result in a person not being able to participate in the mission trip.

Although funds will be raised and accounted for individually, all funds raised by an individual team member will be treated as team funds. If a person raises more than enough to cover his/her individual cost for the trip, the balance of the funds designated for him/her will go to offset any shortages incurred by other team members. If the funds raised by the entire team exceed the amount needed for the trip, the Director of Missions and the Executive Pastor of Business Administration will decide how the excess funds will be used.

In the case of team or individual overages, no funds may be transferred to any volunteer on another mission trip. No excess funds will be refunded to donors.

The following guidelines will govern fundraising:

- All participants will fully comply with all the fund raising policies established for

the mission trip and will do all that is required by those policies to raise the specified amount for their trip.

- Participants are encouraged to speak personally to or send support request letters to family and friends. While it is permissible for participants to individually approach or send letters to Southcrest members who are close personal friends, appeals for funds should not be made to organized groups (such as a SS class) nor should any church mailing list be used for fundraising. The church directory should be used only to obtain addresses of close personal friends in the church.
- All support letters are to be sent with the express purpose of soliciting contributions for expenses directly related to the mission trip. Contributions donated through Southcrest on behalf of an individual will be applied only to the announced cost of the trip unless the total amount raised exceeds the announced cost of the trip.
- Each participant is expected to submit the required trip deposit no later than the announced deadline.
- Each individual is personally responsible for the payment of any fees and expenses required for the following, unless these fees are included in announced trip costs:
 - Passport and passport photos
 - Visas
 - Immunizations
 - Country entrance and exit fees
 - Personal items such as clothing, toiletries, prescriptions, etc.

Donations given through Southcrest on behalf of the participant may not be used for any of the above named personal items, except when the items are included in the announced cost of the trip.

While applicants are expected to raise 100% of their financial needs, a limited amount of partial scholarships may be available for those members who qualify. Requests for assistance will be evaluated on an individual basis. Financial Assistance Requests must

be submitted prior to the purchase of non-refundable airline tickets to prevent ticket purchases for those who have not raised sufficient funds and who do not qualify for scholarships.

Married couples who are participating on the same team can elect to either send individual fund raising letters or they can send joint letters requesting support for both individuals. Contributions will be credited based on the designation of the donor. If the designation is for both, the amount will be divided equally. The account for each individual will be considered independently and all financial policies will apply to each individual.

The designated trip leader will review the financial status of each individual and the team prior to purchasing the airline tickets to ensure that adequate funds are available to cover the expenditure. The following policies and procedures will apply:

- Each individual should have raised at least 50% of the trip cost (or the cost of the airline ticket if more than 50%) by the non-refundable purchase date for airline tickets.
- An airline ticket will not be purchased for those individuals who have not raised at least 50% of their funds (or the cost of the airline ticket if more than 50%) by the non-refundable ticket purchase deadline.

Refund policy:

- When a trip participant makes a deposit or payment for his/her trip, or when individuals make a contribution on behalf of a trip participant, a declaration form must be submitted by that individual whereby he declares whether or not he wants the contribution to be tax deductible. (See Fundraising information)
- If the contributor desires the gift to be tax deductible, that contribution cannot be refunded for any reason, even if the trip member fails to make the trip.
- If the contributor declares the gift to be not tax deductible, then the amount contributed, minus any expenses already paid by the church on behalf of that participant, will be refunded upon request if the individual does not make the trip.

FUNDRAISING INFORMATION

1. Create a list of donors with names and addresses. Letters may be sent to close, personal friends and family members who are members of Southcrest Baptist Church. No church mailing list should be utilized, nor should appeals be made to organized groups at Southcrest, such as Sunday School classes or departments, etc. The church directory should be used only to verify addresses of close friends.

2. All checks are to be made payable to Southcrest Baptist Church. Checks should not be made out to you personally. The check should have the name of the trip in the “memo” line.

3. In your letter, be sure to indicate the date by which you need these funds to be donated. That date should come at least 2-3 weeks prior to the non-refundable airline ticket purchase.

4. About cash donations:

a. Cash is to be placed in an envelope with the donor’s name and address clearly printed on the front along with the name of the recipient and the trip he or she is on.

b. Do not deposit the money into your account or write a personal check to Southcrest for cash given to you.

5. With each letter you send, it is essential that you include a copy of the Mission Trip Contribution Form included in this packet so that donors can declare whether or not they want tax deductibility for their contributions. The sample fund-raising letter included in this information gives suggested wording for instructing donors how to use this form.

6. Please submit your money to your team leader or to the Church Office.

SAMPLE FUNDRAISING LETTER

Dear _____,

I am thrilled and feel blessed that I have been given the opportunity to serve on a volunteer missions team to _____ (location) on _____ (dates). I will be joining a team of _____ (number) people from Southcrest Baptist Church in Lubbock, TX. Along with my team members, I am now preparing myself physically and spiritually for this trip. We will be ministering to the physical and spiritual needs of the people while there (you may want to specify some of the ministry to be done).

The cost of the mission trip per person is \$ _____. In addition to what I am able to provide myself for this cost, I am trusting God to help provide for the trip expense through friends and family members. If you would like to help me with the expense of this mission project, I would be deeply grateful.

Should you be able and feel led to help me participate in this project, please make checks payable to Southcrest Baptist Church and mail to: Gary Beaty, Director of Missions, Southcrest Baptist Church, 3801 S. Loop 289, Lubbock, TX, 79423. Please put the destination of my trip on the "for" line on the check. I must have all monies by _____ (deadline date).

Included in this letter is a form, which you must complete and return with your contribution should you choose to make one on my behalf. On the form you must select either Option 1 or Option 2 and complete the information requested and sign the document. Please read the document carefully because which option you choose determines whether or not the gift is tax deductible and also whether or not you may receive a refund should I not be able to make the trip.

If you cannot help financially, please be a prayer partner for me as I prepare and then journey to _____ (country/state).

Love in Christ,

As part of Southcrest Baptist Church's Mission, we have regular scheduled mission trips, both domestic and International in which we use to spread the Gospel and assist in establishing evangelistic ministries. **The IRS guidelines regarding the ability to treat contributions for mission trips as tax-deductible contributions are complex. The church does not provide any tax counsel or guidance to a donor, nor does it assume any responsibility other than that required by law.** In general the only time a contribution can be considered a tax-deductible contribution for mission trips are:

- When the donor understands that the financial gift is an irrevocable transfer. i.e., the church cannot refund the financial gift without serious legal risks to both the Church and the individual.
- The church at all times maintains administrative control of the trip and the expenditures related to the trip.
- The mission trip is consistent with Southcrest Baptist Church's evangelistic mission and the trip is not of a recreational manner.

This form must accompany any contribution toward a Southcrest sponsored mission trip. Please read the following options carefully and check the one that applies to your contribution:

Option 1. I wish for the attached contribution to be treated as a tax-deductible contribution. I understand by doing so, I release full control of the contribution to Southcrest Baptist Church. I understand the church retains full administrative control over the mission trip and that the trip is intended to further Southcrest Baptist Church's evangelistic mission. I further understand that the church retains the right to refuse to refund any money contributed toward the mission trip.

· Funds are requested to cover the expenses of: _____

· Name of Mission Trip: _____

· Date of Mission Trip: _____

Option 2. I wish for the attached financial payment to be used to cover the expenses of the person listed below for the purpose stated herein. In order for this payment to be designated for the explicit use of the stated individual as well as to be refundable in the event that the individual listed is unable to participate, I hereby waive any consideration of this payment as a tax deductible gift.

· Funds are to cover the expenses of: _____

· Name of Mission Trip: _____

· Date of Mission Trip: _____

Signed: _____ Date: _____

