

# St. Joseph's Parish Fundraising Policy

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Note: This draft policy is in effect pending review and advice by the Stewardship and Fundraising Committee.

## Overview

The purpose of this policy is to establish the rules and requirements for Parish-approved or supported ministries and committees to raise money for use by the Parish, its approved ministries, or other organizations whose missions and goals match those of St. Joseph's Parish. This policy does not apply to normal Parish offertory collections, stipends, or donations. The determination of whether or not an event is approved rests with the Parish Council, which will then make the final decision.

## Rationale

Fundraising activities serve at least two important purposes beside the obvious one of raising needed money for Parish ministries and committees. First, they highlight the specific mission, importance, and needs of the ministry or committee, 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; nor should funds be raised for discretionary items when other essential needs in the Parish are not being met.

## Principles

In order to help the Parish practice good stewardship, to act respectfully toward Parishioners of the congregation and others who are asked to support the Parish and its fundraisers, as well as supporting the goals of groups, which participate in fundraising, these principles are offered as a foundation for Parish fundraising policies:

- a) The fundraising activity itself must be compatible in its content and the manner in which it is conducted with the identity and mission of St. Joseph's Parish as a Christian community of faith.
- b) The group raising funds must be aware and respectful of the needs, customs, and integrity of Parish ministries and organizations and should seek to build partnerships in cooperation with other groups to avoid competition and duplication.

- c) In planning Parish groups must be respectful of Parish members and of the sacredness of the Parish's liturgy and the sacred space.
- d) Because of the Parish's duty to serve the poor, all fundraising activities must be respectful of those who are unable to contribute.
- e) In its administration of other funds raised, the Parish has a responsibility to be a good steward of these funds, including oversight of contractual obligations & risk management.
- f) The Parish should be informed before, during, and after any fundraiser as to the goals and accomplishments of those fundraisers, including prompt reporting of final totals, and acknowledgment of volunteers and supporters of the fundraiser.
- g) All ministries and committees wishing to have a fundraising event are required to submit a Fundraising Request (see attached) to the Parish Council at a minimum 2 months prior to the event.
- h) Previous granting of fundraising is not an assurance, promise or expectation that the privilege will be granted for any subsequent year. Fundraising requests do not carry over from one year to the next.
- i) Approval from the Parish Council must be obtained prior to any expenditures being made and prior to any publication or communication of the event.
- j) All funds must be submitted to the Parish Office in order to ensure they are properly accounted for and allocated accordingly.

## Allocation of Funds

Generally all funds raised should go to the general parish funds, as Parish Council determines where the needs are needed the most. However, some exceptions may occur, and it's the discretion of Parish Council to decide based on the submitted proposal (i.e. where the funds are being allocated to a ministry that is running a deficit or there is a greater need).

## Definition of Fundraising Activities

Fundraising is defined as any sale of goods or services to Parish members, special collections during Mass, or any solicitation of cash or goods from those outside the Parish where any representation of the Parish or any of its ministries or committees are involved. Fundraising also includes events that take place on behalf of or with representation for the Parish. All fundraisers are subject to this policy. Fundraisers must be approved as followed:

### **Anticipated Proceeds**

Less than \$500.00

Over \$500

### **Must be Approved by in Order Stated**

Parish Core Leadership Team

Parish Council

NOTE: The Core Leadership Team consists of the Executive Director, Chair of Parish Council and the Pastor.

## Approval Process

- 1) Ministries and Committees should first obtain approvals from their appropriate chairpersons. This step is not necessary, if a ministry or committee is not sponsoring the event.
- 2) The proposal must then be submitted through the ministry cluster council representative or through the Parish Council chair.
- 3) The Parish Council will review the requests and contact the requesting ministry or committee for additional clarification if required.
- 4) Parish Council may elect to send the proposal to the Finance Committee for their input, particularly if initial parish funds are requested to offset costs or to determine if the proposal is financially viable.
- 5) The decision of Parish Council will be communicated to the requesting ministry or committee.
- 6) Within 30 days after the completion of the event, the requesting ministry or committee is responsible for supplying actual fundraising income and expense data to the Parish Council.
- 7) All expenses must be submitted to the Parish Finance Coordinator. After receipt and verification of information the parish will issue any reimbursements and direct the funds to the appropriate allocations.

## Policy Approved

Parish Council approved by consensus this policy on October 12, 2012.



Donald Duthie

Parish Council Chair

# St. Joseph's Parish Fundraising Request

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Applications for fundraising at St. Joseph's Parish are reviewed pursuant to the procedures established by the St. Joseph's Parish Council and subject to the approval by the Parish Council. Ministries and organizations within the parish that wish to raise funds for the parish or a ministry should complete this application.

## St. Joseph's Mission Statement

We who choose St. Joseph's Parish are called, as part of the Body of Christ, in the Archdiocese of Ottawa to be:

A **Proclaiming community**, which is a living witness to Christ in the inner city and in partnership with the Oblates of Mary Immaculate, proclaims the Good News to the poor.

A **Welcoming Community** which is gathered together in weakness and strength by the Spirit of Jesus to nurture its faith by sharing the Word and breaking the Bread, remembering and celebrating God's love for us.

A **Discerning Community**, which inspired and led by the Holy Spirit on a journey of Faith, encourages the gifts of individuals to flourish;

A **Ministering Community** which serves the needs of its people and reaches out in solidarity, especially to those who are poor and marginalized in the community at large.

## Section I: Ministry Information

Name of Applying Ministry: \_\_\_\_\_

Contact person(s) responsible for the effort: \_\_\_\_\_

Home phone \_\_\_\_\_ E-mail: \_\_\_\_\_

### Purpose of funds:

*<Provide a description of how the funds will be used>*

*<If funds will go to a charity outside the parish, please list accordingly.>*

## Section II: Fundraising and Community Building Events

1) What event or activity are you wishing to sponsor?

*<I.e. concert, dinner, sale of baked goods, etc.>*

### Dates

Proposed start date: \_\_\_\_\_ Proposed ending date: \_\_\_\_\_

Alternate start date: \_\_\_\_\_ Alternate ending date: \_\_\_\_\_

### Budget

2) What is your proposed budget for the fundraiser? \$ \_\_\_\_\_

3) Are you requesting funds for this fundraiser? If so, how much and what for?

4) Total revenues anticipated? \$ \_\_\_\_\_

5) What is your monetary goal (total revenues minus total expenses): \$ \_\_\_\_\_

6) Location(s) of the fundraiser (List all that apply, if it's within the parish, please be specific):

7) If the fundraiser will take place within the parish or on the parish grounds, please specify if staff assistance will be required.

8) How will the fundraiser be publicized?

9) How many people will you involve in the work of fundraising?

10) How many hours total and per person (volunteers and staff) will be involved from beginning to end to host this event?

11) Will any temporary modifications to the parish be required (i.e. concert risers, temporary walls installed, etc.)?

12) List any special donors that will be contacted:

13) Who will be responsible for collection and accounting for the funds?

14) Where will the materials and/or contributions be stored?

15) How will the money be collected and secured until deposited with the parish office?

16) How does the fundraising activity or event you are sponsoring reflect the mission of the parish? How does the activity itself, not the proceeds of the activity, carry out the mission of the parish?