

POLICY 3.4.3 Parish Project Fundraising

SUMMARY

1. The Parish Finance Council (PFC) is responsible for developing, implementing and reporting on all parish fundraising activities. Parishes deposit collected funds into the parish's single bank account.
2. Fundraising activities must be Catholic in nature and respect all relevant policies and procedures of the Archdiocese.
3. All donations must be made to the parish, not to any individuals. Donations may be cash, cheque, credit card and e-transfer. Credit card and e-transfer donations must be made using the portal on the Archdiocese's website. Personal information of donors is collected for issuing charitable receipts. Collection of donor information is subject to the *Personal Information Protection Act*.
4. The parish bookkeeper issues charitable receipts once a year, in January or February of the year following the date of donation.
5. Donated funds are deposited immediately into the parish bank account. Funds are kept separate by creating ledger accounts. For long-term project fundraising, the collected donations are moved to the parish investment account with the Archdiocese, monthly.
6. Project contracts are handled solely by the Archdiocese Finance Administrator.
7. Projects carried out without a contract must be approved by the PFC and the approval must be recorded in PFC meeting minutes. The approved, signed and dated minutes must be included with the parish petition for extraordinary expenditure (Policy 3.4.2).

FORMS

N/A

RELATED POLICIES

Policy 3.1.1 Parish Financial Procedures
 Policy 3.4.1 Guidelines for Building...or Major Alterations
 Policy 3.4.2 Extraordinary Expenditures
 Policy 7.1 Gambling Policy

The Archdiocese and its parishes rely on the financial giving of the Catholic faithful to sustain them. This giving takes many forms: the Sunday collection, testamentary gifts and bequests, free will offerings, and participation in all kinds of fundraising activities and events.

This policy addresses the fundraising events in parishes that are directed to a specific, well-defined parish need that is not a part of the ordinary operations and ministries of a parish.

1. Roles and responsibilities

a. Parish Finance Council

The Parish Finance Council (PFC) is the body responsible for fundraising activities in a parish.

The PFC defines the parish need and sets the fundraising goal.

The PFC will make periodic reports to the parish on the fundraising and the related project financial status. The reporting period will depend on the duration of the campaign and the project, but there should be updates provided within one month of a major fundraising activity or event.

i. Fundraising committee

Whenever possible, the PFC should set up an ad hoc fundraising committee to take the lead on developing and implementing the fundraising campaign. The Parish Finance Council shall present the fundraising strategy to the Archbishop for approval.

The fundraising committee, with oversight by the PFC Chairperson and parish priest, is responsible for:

- planning and promoting fundraising activities.
- ensuring that all activities comply with the policies of the Archdiocese and the regulations of the Government of Alberta, especially those that apply to charitable gaming activities. (cf. Policy 7.1 *Gambling Policy* for directions on licensing and types of activities covered.)
- reporting to the PFC on the expenditures for and the results of fundraising activities.

b. Parish bookkeeper

As specified in Policy 3.1.1 Parish Financial Procedures, parishes are to have only one bank account. Parishes are not permitted to open a bank account for fundraising for parish projects. See 5. Banking and bookkeeping, below, for more information.

c. Archdiocese Finance Administrator and Finance Section

Donations may be made online through the Archdiocese's website. The Archdiocese Finance Section is responsible for transferring the collected funds to the parish bank account or investment fund and for providing the parish with the donor information.

The Finance Section provides monthly reports to the parish priest and his delegate on the status of the investment fund.

The Finance Administrator is responsible for negotiating project contracts and making the contracted payments.

2. Acceptable fundraising activities

The fundraising activities in parishes shall have a Catholic nature. This means that the activities contribute to a sense of community and cooperation, they unite and do not divide, and at least some are designed to include the entire family.

Fundraising activities cannot include commercial sales of products with a share of the sales price given to the parish.

3. Handling donations

All donations are to be made to the parish. Individual members of the fundraising committee or PFC are not authorized to receive payments or donations in their own name or any other name but that of the

parish or the Archdiocese. The parish or the Archdiocese must be the named recipient or payee of each donation.

a. Collecting donations

Financial donations are eligible for charitable receipts that can be reported in federal personal tax returns (see below, 4. Charitable receipts). At the time of donation, the donor provides his/her name and mailing address. The person receiving the donation records the amount. The donor is to be informed that the information is gathered principally for the purpose of issuing charitable receipts.

Donors should be informed that the information may also be used by the parish and the Archdiocese to communicate other messages. Donors may decline to be included in these messages. The information may be provided in person, on the donation envelope, on fundraising promotional materials, and using any other appropriate means.

i. Cash and cheques

To ensure complete records for cash donations, donation envelopes should be created that capture the personal information of donors. The parish Sunday collection envelope is a good template.

ii. Credit cards and E-transfers

Credit card and e-transfer donations can only be made online through the Archdiocese's website at <https://archgm.ca/how-to-donate/>. The Archdiocese Finance Section is responsible for transferring the collected funds to the parish bank account or investment fund and for providing the parish with the donor information.

b. Confidentiality of donor personal information

The collection of personal information from donors is subject to the *Personal Information Protection Act* of Alberta. The personal information is gathered principally for the purpose of issuing charitable receipts. Donors should be informed that the information may also be used by the parish and the Archdiocese to communicate other messages. Donors may decline to be included in these messages. The parish is responsible for ensuring this refusal is included with the donor information kept in parish records.

c. Gift recognition/public acknowledgment

Parishes are discouraged from singling out individual donors for public acknowledgment of gifts made in support of parish projects. The Catholic faithful are the parish and their financial support of the parish is a filial obligation. However, for individuals who make very special efforts that surpass this normal obligation, appropriate tokens of recognition are acceptable.

4. Charitable receipts for donations

The parish bookkeeper is responsible for issuing charitable receipts for all eligible donations. Parishes issue charitable receipts once a year, in January/February for the previous year. Donors are to be informed of this policy. The parish bookkeeper is responsible for maintaining records of donations: donor names, address, amount(s).

For online donations made using the Archdiocese's website, the Archdiocese Finance Section is responsible for providing monthly updates of the donor information to the parish bookkeeper.

5. Banking and bookkeeping

The PFC shall ensure that all cash and cheques collected from the fundraising events, and all donations, are deposited directly in the parish bank account. For extended projects, the funds are to be transferred from the parish bank account to the parish investment account with the Archdiocese at least once per month. When project expenses are paid, the parish priest or bookkeeper will request a transfer of funds to the parish bank account, using the template in Appendix 1- Request Letter to Transfer Parish Funds, and issue cheques to pay the expenses. The parish will include a copy of the signed minutes of the PFC meeting where the payment or expenditure was approved.

The parish bookkeeper is responsible for maintaining a separate ledger account for each parish project's fundraising. That is, the monies raised are credited to that specific ledger account and the monies spent are debited to that specific ledger account. The bank deposit forms and the cheques issued will also have notes that link them to the specific ledger account.

6. Contracts and payments to contractors

All construction projects must be contracted.

All project contracts are between the Archdiocese ("La Corporation Épiscopale Catholique Romaine de Grouard") and the contractor. All contracted payments are made by the Archdiocese Finance Section from the parish funds deposited in the investment account.

7. Projects with no contracts

Purchases of equipment, material, etc. do not require a separate contract. The PFC must recommend the purchase. The recommendation and the details of the purchase (vendor, items, prices, taxes, other costs) must be specified in meeting minutes of the PFC which are dated and signed by the parish priest and the PFC secretary. A copy of the signed minutes must be included in the parish records of the purchase.

Promulgated on 05 October 2021

[Parish Name]

[Address]

[Town AB Postal Code]

[Date]

Re: Request to Transfer Invested Funds – Parish Project Payments

In the name of [NAME OF PARISH], we the undersigned are writing to request that \$[AMOUNT] of the funds on deposit with the investment account of the Archdiocese of Grouard-McLennan be transferred to the daily operations bank account of [NAME OF PARISH]. The funds are needed to cover costs related to the [NAME OR DESCRIPTION] project now in process at the parish.

Thank you.

Sincerely,

Rev. [NAME OF PRIEST]
Parish Priest

[NAME OF FPC CHAIRPERSON]
PFC Chairperson

encl. PFC meeting minutes