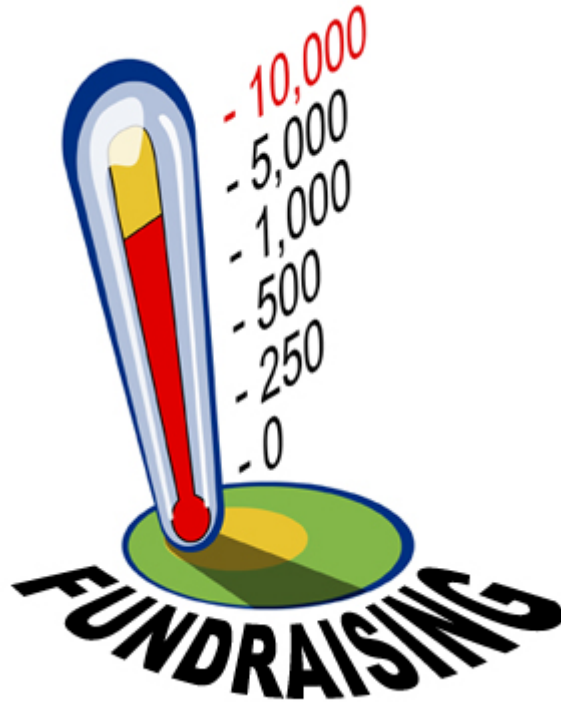


St. Boniface Parish



FUNDRAISING POLICIES & PROCEDURES

ST. BONIFACE PARISH FUNDRAISING POLICIES AND PROCEDURES

I. Rationale

Fundraising activities serve at least two important purposes beside the obvious one of raising needed money for Parish ministries. First, they highlight the specific mission, importance, and needs of the organization 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 unnecessary items when other essential needs in the Parish are not being met.

II. 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 way it is conducted to the identity and mission of St. Boniface 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.

III. Definition of Fundraising Activities

Fundraising is defined as any sale of goods or services to Parish members and/or School Families, or any solicitation (including special collections during Mass) of cash or goods from Parish members and/or School Families in the name of St. Boniface Catholic Parish and School. 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:

Proceeds	Must be Approved by in Order Stated
less than \$500.00	Director of Administrative Services (DAS)
\$500-\$1000	DAS and Pastor
Over \$1000	DAS, Pastor, Parish Finance Committee then Parish Council

* All school fundraisers are to obtain approval through the ***School Ministry Finance Committee*** in addition to the DAS regardless of funding proceeds amount.

IV. Policies

These policies are to be followed strictly by all Parish, School and all other Committees and all other committees who associate themselves with St. Boniface and participate in fundraising. Exceptions are noted, and will be granted as it is judged appropriate.

1. Approval:

- a) Fundraising activities may not be entered onto the Parish fundraising calendar until approved by the Parish Director of Administrative Services (DAS) in conjunction with the Pastor and/or Pastoral Associate.
- b) The Parish calendar operates under a fiscal schedule and begins on July 1st. All requests for fundraising **MUST** be received no later than June 1st for the forthcoming fiscal year. Submissions after July 1st for the same fiscal year will be approved and evaluated on an individual basis on the availability of the Parish resources and other events already on the calendar.
- c) Applications (see attached) will be reviewed within two weeks after being submitted, on a first-come, first-served basis.
- d) The decision for or against approval may not be immediate, depending on the need for further information or consultation.
- e) Event requiring contractual services must be authorized by the Director of Administrative Services (DAS). Contracts must be submitted to the DAS and will be approved as required by the office staff.

2. Use of Parish facilities and common spaces:

- a) Fundraisers on Parish grounds or under Parish sponsorship are not to take place on the following weekends:
 - Palm Sunday
 - Easter Sunday
 - Christmas Eve
 - Christmas Day
 - Festival Weekend
 - Sacramental Weekends (1st Communions, Confirmations, etc.)
 - Holy Days
- b) Each group may conduct weekend fundraising activities for up to two consecutive weekends if available. Exception requests need to be submitted to the Parish Office Staff for approval.
- c) Fundraisers taking place on Parish grounds will occupy predetermined locations as designated by the Parish Office Staff. Designated areas are:
 - Parish Center
 - Franciscan Room
 - Seminarian Room
 - Ghana Hall
 - Outdoor Areas
- d) Requests for fundraisers on Parish grounds to be located other than designated areas will be considered on an individual basis.

3. Number of fundraisers:

- a) Each Parish organization will be allotted four fundraising activities per year, assuming the availability of the space and scheduled time.
- b) No more than two (2) fundraising events will be scheduled per weekend after Mass times.

4. Purpose of funds:

- a) The financial goal of the fundraiser, in dollar amounts, is to be indicated by the Parish organization on the fundraising application, as well as in any pre-event publicity. Publicity includes flyers, announcements, bulletin listings, or any other public medium to attract attention to the fundraiser.
- b) The purpose of the funds to be raised must be publicized before the fundraiser by way of the Parish newsletter, promotional flyers, and/or other means of publicity. These means of publicity must be mentioned in the application for approval.
- c) If the proceeds are to be divided among various accounts, recipients, etc., the amounts to be given to each are to be specified in detail on the fundraiser application. This is to be done either by percentage (e.g. 50% to recipient A, 30% to recipient B, etc.) or by dollar amounts (e.g. the first \$1,000 to recipient A, next \$ 500 to recipient B, etc)
- d) Proceeds of the fundraiser must go to the recipients designated in the predetermined amounts.

5. Reporting:

- a) The group conducting the fundraiser is responsible for reporting to the Parish the total amount of proceeds raised.
- b) If the proceeds are to be divided among various accounts, recipients, etc., this is to be included in the report.
- c) The report is to be made available to Parish members through the bulletin within four weeks of the completion of the fundraiser. If the final report is not ready at that time, an interim report is to be made at that time with weekly updates until the final report is published.
- d) A final, detailed financial report is to be submitted to the Parish Office no later than six weeks from the completion of the fundraiser. A form for this report is included with the application.

6. Handling of funds:

- a) All cash receipts of any fundraiser are to be submitted to the Director of Administrative Services within two weeks after the completion of the fundraiser.

- b) Receipts of all fundraisers will be placed in the appropriate restricted fund set up to receive funds from fundraiser.

7. Receipts and reimbursements:

- a) Private persons are not to be reimbursed directly from the original cash receipts of the fundraiser.
- b) Request for reimbursements are to be completed and submitted to the Director of Administrative Services by project leader on a timely basis.
- c) Checks will be disbursed on a bimonthly cycle payable on either the 15th and 30th of the month.

8. Compliance:

A group's compliance or lack thereof with these policies will be considered in future fundraising application requests.

9. Exceptions:

Exceptions to this policy or to any part of it should never be assumed by the fundraising group and will only be granted by way of the application process.

**ST. BONIFACE PARISH
FUNDRAISING REQUEST**

*Submit in advance of proposed fundraising event
(See Fund Raising Principles, Policies and Procedures)*

ORGANIZATION

Group Name

Project Leader

Phone

Email

Secondary Contact

Phone

Email

EVENT

Purpose and perceived benefit derived from the event:

Describe proposed event, including category and scope of audience *(See Section III, Definition of Fundraising Activities)*

Proposed dates/times:

(See section IV Policies Paragraph 2. Use of Parish Facilities & Common Spaces)

From: _____ To: _____
Event dates

Alternate Dates From: _____ To: _____
Event dates

PROPOSED LOCATION

(See section IV Policies Paragraph 2. Use of Parish Facilities & Common Spaces)

_____ Sunday morning locations _____ Other: _____

ANTICIPATED CONTRACTS/LICENSES (all contracts must be approved & signed by the DAS):

**ST. BONIFACE PARISH
FUNDRAISING FINANCIAL STATEMENT**

INCOME:	BUDGET	ACTUAL
Donations:	_____	_____
Sales:	_____	_____
Services:	_____	_____
Other:	_____	_____
Other:	_____	_____
Total Income:	_____	_____

EXPENSES:	BUDGET	ACTUAL
Advertising	_____	_____
Materials	_____	_____
Products	_____	_____
Services	_____	_____
Other:	_____	_____
Other:	_____	_____
Total Expenses:	_____	_____

NET PROJECTED INCOME: _____

NET ACTUAL INCOME: _____

VERIFICATION:

After careful consideration of potential expenses and income sources,
Project Leader please initial here: _____

Contracts Anticipated:
