

MEMORANDUM

To: Organizers of Parish Fundraisers

From: Bill Flynn; Vice-Chair Finance Council

Date: March 8, 2012

Re: Parish Fundraising – Guidelines

Four members of Finance Council recently attended a workshop on Parish Finance Councils. The workshop was presented by Reverend Francis Morrissey, a Professor at St. Paul's University in the faculty of Canon Law. Many topics were covered in relation to the administration of the temporal affairs of Parishes.

This memorandum deals specifically with fundraising at the Parish level. There are several principles but the list below deals essentially with those guidelines governing Parishes:

- Fund-raising appeals are to be truthful and forthright, theologically sound, and should strive to motivate the faithful to a greater love of God and neighbor.
- Fund-raising efforts are to be for defined needs.
- The relationship of trust between donor and fund-raiser requires that funds collected be used for their intended purposes and funds collected are not absorbed by excessive fund-raising costs. Donors are to be informed regarding the use of donated funds and assured that any restrictions on the use of the funds by the donor will be honored.
- Approval for fund-raising by the competent authority is to be given in writing with reference to the purpose for which the funds are being raised, the time frame, and the methods to be used in raising them.
- Annual fund-raising reports are to provide both financial information and a review of the apostolic work for which the funds were raised. They are to set forth, at the least, the amount of money collected, the cost of conducting the fund-raising effort, and the amount and use of the funds disbursed.
- Competent authority is to ensure that fund-raising organizations: make available fund-raising reports to benefactors on a regular basis or upon reasonable request

To summarize, the organizers of a Parish Fundraiser must seek pre-approval from the Pastor and must define the purpose for which the funds are being raised. At this stage, the Pastor may not approve if the purpose is not reasonable or in-keeping with the Parish plan. Once the Pastor has approved the fundraiser, the event should be advertised indicating the purpose of the fundraiser. Finally, these funds can be used for no other purpose so it is very important to carefully define the purpose. Reverend Morrissey suggested it may be a good idea to avoid getting too specific and to ensure that there exists an option for the Parish to redirect the funds in the instance where the project does not go forward or where fundraising proceeds exceed the cost of the project.

I trust this information is useful.

Bill Flynn