

ST. ANTHONY ON THE LAKE FUNDRAISING OBJECTIVES AND POLICY

St. Anthony Parish, School and Christian Formation programs are supported primarily through general parish funds, tuition, and other direct-participation fees that are forecasted, allocated, and tracked by the Parish Finance Committee. In addition, supplemental funding for targeted incidental program expenses is recognized as a legitimate purpose of Parish Affiliated Organizations through special fundraising initiatives.

St. Anthony Parish Council has assigned responsibility to the Parish Finance Committee for reviewing, coordinating, and forecasting, the various fundraising and special activities (such as food/clothing collections for outreach) organizations, committees or ministries plan to undertake during a given fiscal year. Together with the Director of Administrative Services and Staff representatives, Finance Committee will provide an oversight mechanism for fundraising and special activities and will facilitate constructive communication among the various parish organizations. The purpose of the policy is to assure that controlled supplemental fundraising is consistent with the mission of St. Anthony's Parish and fundraising activities are perceived in a positive manner by Parishioners and other members of the community.

All ministries and organizations anticipating fundraising shall provide to the Finance Committee, via the Parish Office, the information requested by **April 1st** of each year. The fundraising period is to coincide with the parish Fiscal Year (July 1st to June 30th). Please contact the Director of Administrative Services with questions.

The Fundraising and Special Activities Policy was initially approved April 2003 by the Finance Committee and Parish Council and amended December 2005

ST. ANTHONY ON THE LAKE FUNDRAISING AND SPECIAL ACTIVITIES POLICY

PURPOSE: The purpose of this policy is to ensure a cohesive calendaring of fundraising initiatives/activities on a fiscal year basis. Requests for additional fundraisers after the Fundraising Calendar has been completed will need to be approved on an individual basis by the Parish Staff.

ALL FUNDRAISING AND SPECIAL ACTIVITIES MUST:

1. Reflect our Parish mission.

Fundraising and special activities shall reflect the mission and ministry of St. Anthony Parish.

2. Affiliated Organizations

Fundraising activities shall be restricted to those organizations that are designated as Affiliated Parish organizations.

3. Offset costs.

Any fundraising event conducted by an Affiliated Organization or events where the parish is anticipated to participate must be directed at raising revenue that is intended to directly benefit and/or offset costs for the Church, School, Christian Formation, or Parish Outreach.

4. Benefit a large group.

The general purpose of a fundraising event should benefit the Parish, not individual projects.

5. Avoid conflict.

A member of the Parish Staff shall review all new fundraising and outreach written proposals before being submitted to the Finance Committee for approval. The Finance Committee, with input from the Parish Staff, will review proposed initiatives and activities from all organizations, committees or ministries to ensure they do not conflict with other existing or previously planned Parish activities. Finance Committee will also maintain and periodically monitor the **Parish Schedule of Fundraising Initiatives and Special Activities Calendar**, which will be posted in the Parish office. Any conflicts or issues associated with planned fundraising initiatives and special activities will be resolved after consultation with the Parish Organizations and if necessary, the Parish Council.

6. Be included in the annual budget.

All fundraising income and expenses shall be included in the annual budget process for each ministry or organization and verified by Finance Committee during annual audits of the Affiliated Organizations conducting the fundraising.

7. Utilize request forms.

Completed **Proposed Fundraising / Activities** request forms are to be forwarded by sponsoring organizations, committees or ministries by **April 1st** of each calendar year to the Parish Office for review by Parish Staff and the Finance Committee. These forms are available in the parish office. It is expected all fundraising or special activities proposals submitted for review reflect the plans and intentions of the

Affiliated Organization following any necessary internal planning and resolution of concerns by key members of each organization, committee or ministry.

8. **Announcement timing.**

Fundraising initiatives/activities are not to be announced prior to Finance Committee approval.

9. **Appropriate advertising.**

Each committee, organization or ministry is responsible for fundraising promotion and advertising and general planned methods shall be included in the fundraising proposal submitted for Finance Committee review. Final fundraising and special activities promotional materials are to be reviewed by the appropriate member of Parish Staff prior to publication.

LIMITS: Fundraisers and outreach efforts that do not meet the scope and intent of this policy will not be allowed. Organizations may invite parishioners to participate in their fundraising effort.

December 2005