

**St. Aidan's United Church
Congregational Policy**

Fund Raising Policy

Approval: *Date the policy was approved by Council: September 21st, 2011*

Purpose: This policy is intended to ensure that fund raising initiatives are:

- consistent with the values and goals of the congregation and The United Church of Canada, and,
- are presented to the congregation in a manner likely to produce a favourable response from the congregation.

Policy Overview and Background: Many financial appeals have been presented or promoted to the congregation. Appeals have originated with internal Teams or groups from external organizations including the National Office of The United Church of Canada.

In the absence of a Fund Raising Policy and a process for discerning which appeals should be supported there is a risk that the primary stewardship goals of the congregation may suffer.

The objectives of all fund raising appeals to the congregation should be clearly understood and appeals should be planned and spread out throughout the church year.

With the creation of the Finance Team in early 2011, Council has requested that the Finance Team develop a Fund Raising Policy and Process for recommendation to and approval by Council.

Definitions: *Fund raising* – includes all appeals for financial support and assistance presented to or promoted by the congregation.

Policy:

1. Fund raising activities must have an objective which is consistent with the values and objectives of St. Aidan's United Church and The United Church of Canada.
2. Fund raising activities which sustain and grow the St. Aidan's congregation, such as a financial stewardship program, should have highest priority.
3. Appeals to support The United Church of Canada M & S program should be conducted in concert with congregational stewardship programs. Periodic "Minute for Mission" messages may be delivered at any time of the year.
4. Appeals to support other United Church of Canada sponsored or supported programs or missions such as, but not limited to, Camp Pringle, Our Place and the UVic Chaplaincy, or which support community outreach initiatives should be for limited time periods which are not concurrent with congregational stewardship programs. (Note: examples of community outreach initiatives are the Thrift Shop Fashion Show and the Afghan Women's dinner.)
5. Annual Council and Team workplans should identify the need for specific fund raising activities. This information will help the Finance Team and Council co-ordinate all fund raising activities each year.

6. Proposals for fund raising programs must be documented by the sponsoring Team or group and be presented to the Finance Team prior to initiation.
 - The proposal should:
 - State how the initiative relates to the values and objectives of St. Aidan's and/or The United Church of Canada.
 - State how much effort and/or time of staff is anticipated to be needed to support the initiative.
 - Indicate if the initiative will use copyrighted materials such as music which would require payment of SOCAN fees.
 - The Finance Team will:
 - Determine if the activity is consistent with the values and objective of St. Aidan's.
 - Confirm if funds generated are eligible for income tax receipts.
 - Where income tax receipts are to be issued by St. Aidan's, confirm the bona fides of external organizations and specifically, obtain the CRA Registered Charity number. This number is needed during the annual completion of the St. Aidan's Registered Charity Return.
 - Assess the likely workload impact on staff.
 - Confirm that the proposed timeframe for the activity does not conflict with other fund raising activities.
 - Consult with Teams and Council as needed.
 - Have the authority to approve or deny fund raising initiatives.
 - Regularly advise Council of fund raising proposals received, approved or denied.
7. Urgent appeals originating within The United Church of Canada to support disaster relief initiatives may be initiated immediately at the discretion of Clergy, Chair of Council or Chair of the Finance Team.