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## 602.4 – FUNDRAISING

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**Purpose:** : To ensure responsible and sound fundraising practices are utilized in Catholic schools.

**Additional Authority:**

Canon 1262

Bishop's Directive 2008

United States Conference of Catholic Bishops

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### **A. Definitions**

**Fundraising** is any program for solicitation of funds undertaken either directly by a Catholic institution itself or in the name of a Catholic institution (such as by booster or alumni associations) and which is intended to raise a net total of \$40,000 or more. Excluded from this definition are:

- Student-led efforts to raise monies, such as candy bar sales, magazine sales, car washes, etc.
- All fundraising efforts which have a goal of raising less than a net total of \$40,000
- All applications for grants
- Advancement solicitations targeting specific individuals

### **B. Requirements**

All fundraising activity for Catholic schools must be approved by the Diocesan Bishop. Approval should not be presumed and therefore no steps should be taken to implement the proposed fundraising activity (e.g., advertising the fundraising activity, enlisting volunteers to assist, or signing contracts with professionals to conduct fundraising activities) until the Bishop's approval has been granted in writing.

Diocesan fundraising instructions and forms may be found at the Office of Financial Services website under the link for the Parish Financial Practices Policy manual.

The request for the Bishop's approval must:

- Be submitted in writing to the Bishop via the Director of Parish & Financial Services during the initial stages of the planning for fundraising activities.
- Be responded to in a timely manner, normally within 30 days of the request having been received by the Bishop's Office. Some requests may take longer to process.
- Include any items required by law.

The Bishop can give standing (enduring) permission for repetitive fundraising efforts, such as a school's annual appeal.

The standing (enduring) request of the Bishop's approval must:

- Clearly indicate that the permission being requested is for standing permission

- Only those permissions are considered to be standing permissions which expressly state such
- Standing permissions will remain in effect only as long as there are no substantive changes in the information originally submitted with the request for approval
- The Bishop is the one to judge when such a substantive change has occurred
- For a just cause, the Bishop can revoke the standing (enduring) nature of a permission at any time after it has been given

Those who request and obtain the Bishop's permission to solicit funds are to submit annual reports concerning their fundraising activity to the Director of Parish & Financial Services. Copies of annual reports sent to benefactors and financial statements also are to be sent to the Director of Parish & Financial Services.

### **C. Legal Ramifications**

The Bishop is the final and ultimate authority to practice oversight of fundraising activities.

Compliance with government regulations and laws must be strictly adhered to concerning fundraising activities, such as auctions, small games of chance and bingo. See Policy 602.1.