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# Policy on Directed Donations for St. Joseph's Parish

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## 1 Objective

- Whereas Saint Joseph's Parish (the Parish) receives contributions from parishioners, the public and other organizations to support its Mission;
- And, these contributions frequently have terms and conditions restricting their disbursement;
- It is proposed that the Parish adopt a policy to ensure that these terms and conditions are clearly articulated by donors, communicated to responsible staff and volunteers, and scrupulously respected.

## 2 Roles and Responsibilities

- The Executive Director and other volunteers will always make a "best effort" to respect the intended purpose of any directed donation to the Parish, regardless of the amount.
- For each single or cumulative donation over \$5,000 from a household directed to a specific Ministry/purpose, the **Executive Director** is responsible for establishing if terms and conditions have been set by the donor, or if the funding is to be allocated toward those areas of *greatest need* in the Parish.
  - With approval from the Parish Council, the Executive Director may choose not to accept a donation if it is not consistent with the Mission of the Parish, or in its financial "best interests".
- If terms and conditions have been set, then the **Executive Director** must request that the head of the Ministry most directly aligned with the intent of the donation (*e.g.* for purchase of a piano, this would be the Music Ministry) draft a short framework document that delineates:
  - The terms and conditions set by the donor (*e.g.* to purchase a piano), including those regarding recognition;
  - The types of expenditures that could be undertaken with this donation (*e.g.* cost of piano; tuning; moving expenses).
  - The expected timing of disbursement (*i.e.* year(s) in which the funds will be used).
  - Any reporting that will be provided to the donor regarding results.
- The draft framework document will be submitted to the **Finance Committee** (FC) for review and then recommended to the **Parish Council** for approval. Following this, the framework will be appended as a schedule to this policy.
- Finally, when authorizing any disbursement from these directed donations, the **Ministry Head** responsible for the directed donation will ensure that the proposed

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disbursements are consistent with the types of expenditures that are outlined in the attached schedule.

- The Ministry Head will need to identify when a proposed disbursement is to be made from a directed donation.
- No disbursements will be made unless a schedule is attached to this policy.

### 3 Schedules


- Schedule A: **TBD**
- Schedule B: **TBD**

### 4 Effective Date

This Policy on Directed Donations for St Joseph's Parish comes into effect on the date of approval by Parish Council.

### 5 Approvals

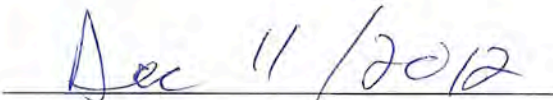
Parish Council approved by consensus on December 11, 2012.



Donald Duthie

Chair

St. Joseph Parish Council



Date