

**Campaign Policies
and Guidelines**
Developed in Consultation
with the
Priests' Advisory Committee

**UPDATED: May 2016
See Addendum**

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Priests' Advisory Committee Membership

Most. Rev. Wayne Kirkpatrick

Monsignor Joseph Shiels C.H.H. – Chair
Rev. Pat O’Dea – Vice Chair

Rev. Damian Ali
Rev. Keith Callaghan
Rev. Edward Murphy

Rev. Liborio Amaral
Rev. Janusz Blazejak O.M.I.
Rev. Michael Pace, S.D.B.
Rev. Vid Vlasic

Rev. Peter Chin C.Ss.R.
Rev. Gregory Choi
Rev. Fernando Couto
Rev. Paul Lininger OFM Conv.
Rev. Vito Marziliano
Rev. Frank McDevitt
Rev. Frank Wagner C.S.C.
Rev. Jimmy Zammit O.F.M.

Rev. Ernesto De Ciccio
Rev. Anthony Iacobelli
Rev. Tad Walczyk

Role of Priests' Advisory Committee

- a. Assist the Cardinal, Auxiliary Bishops, Campaign Office and Development staff in formulating campaign precepts
- b. Reviewed and provided input on the Case for Support, campaign brand and logo, and the overall communications approach
- c. Campaign policies were developed in consultation with the Priests Advisory Committee, who reviewed policies and made suggestions
- d. During the campaign, will continue to meet to review the progress of the campaign

Three meetings of the Priests' Advisory Committee were held:

- a. August 14
- b. September 18
- c. October 8 (full day session)

Campaign Precepts

The following precepts are the foundation for a successful campaign:

1. The campaign will be conducted based upon the core concepts of Catholic Stewardship;
2. The campaign will seek pledges of equal sacrifice not equal gifts;
3. All parishes in the archdiocese will participate fully in the campaign;
4. Parishes will share parishioner information confidentially to ensure a successful effort and support the larger Catholic community;
5. Each parish will receive a specific fundraising goal; and
6. All parishes will adhere to the campaign plan.

Full Parish Participation

1. Every parish is expected to participate in the campaign:
 - a. All parishes will participate in the diocesan effort in an appropriate “wave” (Pilot, Wave I, Wave II or Wave III) of campaign solicitation between January 2014 and July 2015.
 - b. Parishes will conduct their campaign within the archdiocesan timetable and its pilot and track format.
 - c. This format provides flexibility and should accommodate all parish situations.
 - d. It is understood that this campaign is over and above ShareLife. Every parish is expected to participate in ShareLife. To ensure the success of the annual appeal, in 2015, the ShareLife campaign will be advanced to start earlier in Lent. This will allow for the ShareLife appeal to complete the first two collections between the completion of the second wave and active solicitation of the third wave of parishes.
2. It is a priority of Cardinal Collins that the campaign be conducted in a dignified and spiritual manner. The campaign will complement the Pastoral Plan. This document provides inspiration for a compelling case for support for the future of the Church of Toronto, to our responsibilities as stewards, and for the need for equal sacrifice but not equal gifts by all Catholics throughout the four regions of the Archdiocese of Toronto.
3. Funds will be requested over and above current giving to ensure that the future ordinary income is not jeopardized. All funds raised in the campaign will be used only for the objectives and programs outlined in the program’s case for support.

Adherence to the Campaign Plan

1. Every parish is expected to adhere to the campaign plan, which underlines the core values of effective donor stewardship. The plan involves a phase-by-phase approach to fundraising as well as proportionate and specific gift and pledge requests payable over three to five years.
2. Parishes will be supported by professional fundraising counsel throughout the process. This includes counsel, coaching of pastors and volunteers, and material development.
3. All leadership gifts (\$100k+) prospects will be cleared by and assigned to solicitors through the Development Office and the Campaign Office. No prospect will be solicited without consulting the Campaign Office, Development Office and the parishioner's pastor. After being consulted, an appropriate strategy will be developed. The pastor will be kept abreast of any visitation.
4. The role of the pastor in the campaign is crucial. The pastor should espouse a positive attitude regarding the campaign to the parish finance and pastoral councils, and strongly encourage parishioner-to-parishioner visits throughout the parish. The pastor will be asked to:
 - a. Provide spiritual guidance and leadership.
 - b. Conduct personal visits with projected large donors (major gift requests).
 - c. Recruit parish-based leadership committees for each phase of the campaign.
 - d. Make use of all operative materials, which include personal letters to all parishioners, pulpit announcements and homilies from clergy, and appropriate recognition of all parishioners who make gifts to the campaign.

Information Sharing

1. Throughout the campaign, parishes will be **required** to submit specific parishioner data in written and electronic form to the Development Office / Campaign Office.
2. This information will be kept confidential and will not be shared with individuals outside of the respective parish, Development Office or Campaign Office. Information attained will be shared back with the parishes upon completion of the active solicitation in July 2015.

3. As part of the archdiocesan plan, the Campaign Office will use Parish Tools or other data management system to obtain a parishioner's:
 - a. Full name, address, telephone number, e-mail address;
 - b. Previous offertory giving, including ShareLife and second or special collections, from the past three years; and
 - c. Other pertinent information such as local parish campaign data, programmatic support and ministry involvement.
4. The Campaign Office staff will use this information to assist parishes in planning and executing their local fundraising efforts.
5. **Parishioner data obtained from parishes will benefit local parish fundraising and the campaign.** With accurate data, the Campaign Office can conduct individual wealth capacity research to identify previously unknown public information on a parishioner's philanthropic giving to other institutions. This will allow the Campaign Office to determine appropriate gift request levels; ultimately maximizing a parishioner's giving capacity.

Campaign Policies

Parish Goal Setting

1. Each Parish will be assigned a campaign goal.
2. The goal is not an assessment; rather it represents a fair, proportionate share of the Archdiocese goal for parishes based on:
 - a. The needs of the archdiocese
 - b. Parish priorities
 - c. Campaign costs
 - d. Pledge / payment attrition
3. The goal for the campaign's parish phase will be 130% of the Fiscal Year 2012 collective parish offertory (\$75 million,) to enable the campaign to recover overall campaign costs, allow for attrition of pledges, and achieve net proceeds of \$80 million.
4. To determine each parish goal, a parish's ordinary income from FY 2012 will be multiplied by 130%.

Example: A parish offertory in Fiscal Year 2012 was \$500,000. Multiplied by 130%, the parish goal would be \$650,000.

5. Parish goals are rounded either up or down to the nearest \$5,000.

Example: If a parish goal equated to \$604,211, the goal would be rounded to \$605,000.

6. Parishes are expected to make every reasonable attempt to follow the Campaign Plan to realize their goal; however, a parish will not be assessed for falling shy of goal provided that the parish leadership makes a good faith effort to implement the Campaign Plan.
See Precept 2: **Adherence to the Campaign Plan**

Goal Review Process

1. Members of the Campaign Office, Development Office, Temporal Affairs and Auxiliary Bishops will serve as the Goal Review Committee.
2. Preliminary goals will be reviewed by the Goal Review Committee, who may recommend increasing or decreasing a parish's goal based on local prevailing conditions.
3. Parish goals will be submitted to His Eminence for approval.
4. Parishes will be informed of their goal and the timing of their campaign through a letter explaining the goal review process in early 2014.
5. A deadline (four weeks from the receipt of this letter) will be set for goal adjustment requests; a letter from the pastor, after consultation with his Finance Council, must initiate the request.
6. The Goal Review Committee will consider appeals for reductions and then review goal adjustment requests and make recommendations to His Eminence.
7. All goals will be finalized after review of requests for adjustments. Parishes that appealed will be notified of final goals.

Sharing Funds Raised up to Parish Goal

1. Each parish that implements the campaign plan will receive a portion of the proceeds from its parish campaign for projects outlined in its approved parish case for support.

The Campaign Office and Regional Bishop will be asked to assist the archdiocese by reviewing parishes' local case for support.

2. The proceeds of each parish campaign will be shared 75% to the archdiocese and 25% to the parish, as payments are received on previously recorded pledges up to the parish's established goal.

Example: If the parish target is \$1,000,000 the parish would receive \$250,000 (25%) or its needs outlined in the local case for support, and the Archdiocese of Toronto would receive \$750,000 (75%) for the archdiocesan campaign.

3. Sharing of funds will be made on the basis of actual cash received throughout the pledge redemption period on a semi-annual basis beginning six months after the completion of the active phase of a parish's campaign and semi-annually after that.

See Timing of Disbursement of Campaign Funds Policy.

4. Parishes that fully implement the campaign plan but are unable to reach their parish goal will also share in 25% of the funds contributed by their parishioners.
5. The Campaign Office will bring to the attention of the Regional Bishop any parish that has not followed the campaign plan with best effort.
6. For parishes that do not reach their campaign goal because they failed to implement the campaign plan, the archdiocese will receive all funds up to 75% of their parish goal. The parish will receive all other funds collected up to the parish goal.

Example: If the parish goal is \$1,000,000 and the parish raises \$800,000, the archdiocese would receive \$750,000 and the parish would receive \$50,000 (remaining balance).

Over Goal Sharing Formula

1. Parishes that exceed their assigned goal will receive a greater share of funds raised over the goal.
2. Funds raised over a parish's goal will be shared 25% to the archdiocese and 75% to the parish.

Example: A parish goal is \$500,000 and the parish raises \$700,000 towards the campaign. Funds raised would be allocated in the following way:

- a. Funds raised up to the assigned parish goal of \$500,000
 - i. The archdiocese would receive \$375,000 (75%)
 - ii. The parish would receive \$125,000 (25%)
 - b. Funds raised over the assigned parish goal (\$200,000)
 - i. The archdiocese would receive \$50,000 (25%)
 - ii. The parish would receive \$150,000 (75%)
 - c. Total dollars allocated to the archdiocese = \$425,000
 - d. Total dollars allocated to the parish = \$275,000
3. Sharing of funds will be made on the basis of actual cash received throughout the pledge redemption period and subject to the establish **Timing of Disbursement of Campaign Funds Policy**.

Campaign Costs

1. For standard campaigns, parishes will incur a proportionate share of the cost of the campaign.
2. The costs of additional mailings or campaign enhancements initiated by the parishes outside of the fundraising plan are costs for which the parishes will be responsible. Examples include, but are not limited to, additional pastor mailings or donor/volunteer receptions. Questions regarding the coverage of campaign expenses should be directed to the campaign office.
3. Parishes will be asked to cover costs associated with local parish campaign meetings (e.g., refreshments, parish hall and equipment rentals).

Coordination of all Parish Fundraising

1. The Priests' Advisory Committee recommends that, in so far as possible, and subject to reasonable exceptions, all parish fundraising efforts will be coordinated with the Development and Campaign Offices in advance of conducting their own major fundraising initiative during the archdiocesan campaign.
2. A major fundraising campaign or initiative is defined as attempting to raise \$500,000 or more, or 50% or more of a parish's annual offertory income.

3. The coordination of major campaigns for parishes pertains to extraordinary or major fundraising efforts. It does not include such activities as auctions, raffles, or regular appeals for operating needs. The coordinated approach also does not apply to recently completed capital campaigns on which pledges are being paid.
4. Effective July 1, 2013, unless a parish has already received permission to conduct a parish campaign in conjunction with the archdiocesan campaign, all new major campaigns for parishes will be coordinated with the archdiocesan effort. These coordinated efforts will be known as a **“combined” parish campaign** and will allow each parish to focus specifically on the archdiocesan campaign while also addressing its local needs.
5. These coordinated efforts will extend through July 31, 2015. Based on the preliminary campaign timetable, the Archdiocesan campaign will be completed by July 31, 2015.

Combined Parish Campaigns

1. The archdiocese recognizes that some parishes may have extraordinary local fundraising needs and wish to consider raising capital funds for parish needs in conjunction with the archdiocesan campaign during the established timetable. The following special provisions have been created to accommodate parishes wishing to conduct campaigns that combine both archdiocesan and parochial needs:
 - a. A parish wishing to conduct a combined campaign should comply with all existing archdiocesan policies and approval processes on capital projects and major fund-raising initiatives. Existing policies require parishes to request and receive approval for capital campaigns through the Office for Temporal Affairs.
 - b. Once a parish receives approval to conduct a combined campaign, the coordination, integration and implementation of the parish’s campaign timetable will be facilitated through the Development and Campaign Offices, and reviewed by the Regional Bishops.
 - c. All combined campaigns must receive approval no later than four months prior to the anticipated start date except for parishes assigned to the Pilot Phase.

- d. Parishes that conduct a combined campaign will be required to seek professional fund-raising counsel. Parishes will be responsible for costs above the proportionate share of the campaign cost assigned to the Parish. The archdiocese would cover the costs related to pledge redemption as it would for the standard campaigns.
- e. A parish that gains approval to conduct a campaign must guarantee the parish's share of the standard goal to the archdiocese. This will be done in a signed agreement between the parish and the archdiocese.

Example: If a parish has a standard goal of \$1,000,000, it would sign an agreement guaranteeing \$750,000 (75% of its goal – standard sharing formula) to the archdiocese.

- f. A Committee made up of members from the Development, Temporal Affairs and Auxiliary Bishops Offices will be established to review combined campaign requests.
- g. **Combined Campaign Parish Sharing** – In a combined campaign, the proceeds will be shared as follows: The archdiocese will receive funds up to a parish's share (75%) of the standard goal and the parish will receive the balance of funds (25%) up to its standard goal and all remaining funds up to its established combined campaign goal.

Example: If a parish establishes an overall goal of \$2,500,000, of which the archdiocesan goal is \$1.2 million, the parish will receive \$1.6 million (\$300,000, or 25% up to \$1.2 million, and \$1.3 million, or 100% between \$1.2 million and \$2.5 million.) All funds raised above the established combined goal will go toward parish needs.

- h. **Combined Campaigns Disbursement of Funds** – Funds raised in a parish conducting a combined campaign will be returned based on the existing sharing formula up to the standard goal (75% to the archdiocese and 25% to the parish). When a parish's cash total exceeds its standard goal, all funds (100%) will be distributed to the parish up to and above its combined campaign goal.

Crediting Leadership Gifts

1. The donor ultimately determines gift allocation.
2. Leadership Gifts are defined as gifts of \$100,000 and above.
3. Leadership gifts secured by a pastor or parish volunteer will be subject to the standard sharing formula (75% toward the archdiocese and 25% toward the parish up to a parish's campaign goal), assuming the pastor or parish volunteer followed the policy procedures for securing leadership gifts, whereby the gift request was carefully coordinated through the Office of Development and Campaign Office. The gift would be credited towards a parish's campaign goal.

Example: A parish has a goal of \$500,000. A pastor, following the policy procedures for securing a leadership gift, secures a gift of \$100,000. Based on the standard sharing formula, the archdiocese would receive \$75,000 and the parish would receive \$25,000. The gift amount of \$100,000 would be credited to towards the parish's target. Therefore the parish would have \$400,000 left to raise.

4. For unrestricted Leadership gifts secured solely by Cardinal Collins, Auxiliary Bishops or a member of the Leadership Gifts Committee, a donor's parish will receive credit and cash up to 20% of the gift, but no more than 20% of the parish's goal. The remaining amount will go toward archdiocesan projects.

Example 1: If a donor pledges an unrestricted \$1,000,000 to the campaign and his/her parish's goal is \$2,000,000, the parish would receive the credit and cash for \$200,000 (20% of the gift) toward its goal, which **would not be** subject to the standard parish sharing formula (75/25). The remaining \$800,000 would go toward the archdiocesan campaign.

Example 2: If a donor pledges an unrestricted \$1,000,000 to the campaign and his/her parish's goal is \$500,000, the parish would receive the credit and cash for \$100,000 (20% of the parish goal) toward its goal, which **would not be** subject to the standard parish sharing formula (75/25). The remaining \$900,000 would go toward the archdiocesan campaign.

5. To ensure that all parishioners are asked to participate in the campaign, regardless of its financial situation, a cap on the amount of credit and cash parishes will be granted for Leadership gifts shall be set at 50% of the parish's goal.

Example: If a parish's goal is \$1,000,000 and five of parish households (secured by the Cardinal, Auxiliary Bishops or a member of the Leadership Gifts Committee) each pledge an unrestricted gift of \$1,000,000 to the campaign, which would amount to \$5,000,000, the parish would receive the credit and cash for \$500,000 (50% of the goal) toward its target. The remaining monies from Leadership gifts will be used for the archdiocesan campaign.

6. The applicable portion of unrestricted leadership gifts secured by Cardinal Collins, an Auxiliary Bishop or member of the Leadership Gifts Committee will be credited toward a parish's goal at the end of the parish's campaign.
7. Restricted leadership gifts of \$100,000 and above secured solely by Cardinal Collins, an Auxiliary Bishop or member of the Leadership Gifts Committee will be credited toward the archdiocesan campaign.
8. Any exceptions to the Leadership Gifts sharing formula must be approved by Cardinal Collins upon the recommendation of the Priests' Advisory Committee.

Gift Acknowledgement

1. The donor (or his/her designee) must formally document all gifts and pledges made to the campaign in writing.
2. The archdiocese will acknowledge all gifts and pledges. Parishes will also be expected to acknowledge their donors.
3. The collection of pledges will be the responsibility of the Development Office of the archdiocese. The Priests' Advisory Committee will be asked to review reports on the pledge processing and pledge redemption throughout the life of the campaign.

Pledge Collection, Reminders and Remittances

1. After the initial solicitation and collection of pledge forms at the parish level, pledge follow-up will be administered centrally by the Development Office of the archdiocese. Donors will be given the option of making payments annually, semi-annually, quarterly or monthly. Regular reports documenting the status of their donor accounts will be made available to parishes.

2. Campaign pledges may be redeemed on a schedule established by the donor, preferably within a five-year period from the date of the pledge for commitments of \$5,000 or more. It is suggested that all pledges below \$5,000 can be redeemed within three years.

Crediting Gifts to the Campaign

1. All gifts and pledges to the Archdiocese of Toronto in support of the published case statement objectives through 2015 will be counted toward the campaign goal.
2. Gifts of \$100,000 or more may be restricted for the program or project of the donor's choice. These gifts will be subject to Leadership Gift Crediting policies.
3. Individuals who are 70 years of age or older as of January 1, 2014, may receive campaign credit for confirmed outright bequest provisions and life insurance policies already established by the Archdiocese of Toronto.
4. Gifts of paid-up (fulfilled) life insurance policies should receive campaign credit for the market value of the policy.
5. Some gifts may include a planned gift component to benefit the published case statement objectives.
6. Donors of real estate and personal property (such as paintings, antiques, sculptures, etc.) should be credited at the market value of the gift at the time it is made, provided there is no restriction on its sale. The parish will be credited with the net of the sales price, minus any appraisal fees and commissions. All fees related to the sale of the item(s) will be shared between the parish and archdiocese; in cases pertaining to Leadership Gift crediting between the parish and archdiocese. The Development Office will administer these gifts.

Clergy Gifts

All gifts given to the campaign by a member of the clergy will be credited to the parish designated by the individual priest or deacon, unless restricted otherwise.

Corporate Gifts, Matching Gifts and Gifts of Appreciated Securities

1. Matching gifts from corporations will be encouraged. In order to receive corporate matching gifts, specific areas of the case statement could be designated.
2. If a parish wishes to solicit a corporation for a gift, the pastor should contact the Development and Campaign Office before making contact with a corporate representative to prevent duplicate solicitations.
3. The Development and Campaign Office will work with the pastor to determine the solicitation team to maximize the corporate gift.
4. Parishes and the archdiocesan Leadership Gift effort may each share in the gift crediting for corporate gifts.
5. Donors of appreciated securities will receive credit for their gift based on the value of the shares on the day they enter the account of the Archdiocese. The Archdiocese will sell the shares as soon as possible and credit the campaign with the net of the sale, minus any brokerage fees.

Timing of Disbursement of Campaign Funds

1. Funds raised in capital campaigns at Diocesan parishes will be returned six months after completion of the parish's active period of solicitation (to be deposited to the parish's archdiocesan account on deposit at the Chancery) based on the sharing formula and the cash received at the time of disbursement.
2. These months will allow for proper auditing and accounting of funds raised. After the initial disbursement, funds will be added to the parish's archdiocesan account on deposit with the Chancery on **a semi-annual basis** as cash payments are received on pledges. The archdiocesan capital approval processes will remain in place.

Funds raised in pleno iure parishes will be returned to these parishes as per the agreements with the respective parish.

An example of the schedule for earliest disbursement of parish funds is illustrated in the chart below:

Phase	Solicitation Commencement	Solicitation Completion	First Funds Disbursed*
Pilot	November 2013	April 2014	October 2014
Wave I	May 2014	September 2014	March 2015
Wave II	September 2014	January 2015	July 2015
Wave III	February 2015	June 2015	December 2015

***Note:** Typical parish campaigns have a one month preparation period followed by four months (20 weeks) of active solicitation. In some instances, parish campaigns may run over this timeframe. In all cases initial funds will be distributed six months following the completion of a parish’s individual campaign.

Campaign Components

1. **Prayer** - Prayer is a vital component of every campaign and is the key to our overall success. Priests in each parish are looked to for their spiritual leadership. They will be asked to lead parishioners in prayerful support of the campaign.
2. **Phase-by-phase Approach** - Just as the archdiocesan campaign is being conducted in phases, so too will each parish campaign. The campaign office has developed a sound approach that has been specifically tailored to meet the unique needs of the parishes of the archdiocese.

Each parish campaign will be conducted in phases encouraging larger gifts to be requested first. This approach builds momentum, provides credibility, creates enthusiasm, and ensures that the maximum number of gifts is attained.

3. **Pledge Commitment over a Multi-Year Period** - All gifts to the campaign can be paid over a three-to-five year period. This allows parishioners an opportunity to make a gift that they may not otherwise consider through a one-time gift. Pledges of \$5,000 or more may be paid over a five-year period. All other gifts will be paid within three years.
4. **Proportionate Gift Requests Rather than Equal gifts** - Each parishioner in the archdiocese cannot give at the same level and will not be asked for the same gift. The

campaign subscribes to the ideals of Christian stewardship, which calls for equal sacrifices – not necessarily equal gifts.

5. **Parishioner-to-Parishioner Solicitation** - Parishioners give to parishioners. Personal visits by the Pastor and parishioners provide opportunities to discuss the campaign in detail and request generous and sacrificial support. All those involved in making personal requests will be trained by the Parish Campaign Director and provided with the appropriate materials.

Visitation of Parishioners throughout the Archdiocese

One of the key components of a parish campaign is a personal visit to potential donors. A face-to-face meeting is more likely to lead to a larger gift than a letter or phone call. In this regard, the following guidelines apply:

1. Each parish may only approach parishioners registered in that parish. If any parish wishes to solicit a gift for its campaign or for any combined campaign from an individual or family not registered in that parish, it must notify the Development and Campaign Offices to ensure a coordinated approach and to avoid duplicate gift solicitations.
2. If a parishioner or family is not registered to any parish but uses a particular parish as its principal place of worship or resides within a parish's territorial boundaries that parish may solicit the parishioner or family but is asked to notify the Campaign Office to avoid duplicate gift solicitations. This policy also applies to local businesses.

Parish Case Statements

1. Each parish is expected to prepare a case statement identifying, in writing, the use of their share of funds. The parish's case statement will be published in a brochure unique to each parish, as a means for motivating parishioners to be generous to the campaign.
2. Examples of parish case components may include parish ministerial needs, capital needs, parish expansion, renovation and debt reduction. The individually prepared case statements would be subject to existing Archdiocesan policy with regard to project and dollar cost approvals.

3. If a parish establishes a local endowment with its share of campaign funds, this endowment must be created in accordance with Archdiocesan policy.
4. Parishes with existing archdiocesan debt are required to designate 50% of their parish share revenue to pay down the debt.

Parish case statements will be reviewed by the Campaign Office and Regional Bishops to offer advice on the articulation of the parish's goals and objectives

ADDENDUM

In May, 2016, the Priests' Advisory Committee approved two additional policies, as follow:

Policy for spending campaign proceeds above parish goal

For parishes where campaigns generate more proceeds than planned in the parish case statement, pastors must adhere to the following principles and processes.

The important **principles** behind the process are that:

- a. The priorities identified in parish case statements and any new spending are commitments to donors in exchange for their participation in the campaign;
- b. Pastors should consult as much as practical with parishioners - the donors of Family of Faith funds;
- c. Pastors should inform parishioners of new projects being supported at their parish.

The **process** for identifying new projects is as follows:

1. New items may not be undertaken until the commitments made in the parish case statement have been completed;
2. Up to half of all parish proceeds, including funds received over goal, are to pay down any archdiocesan debt outstanding;
3. The pastor must consult the groups he would normally consult before making a decision. These groups would normally include the Finance Council and the Parish Council;
4. The pastor must also keep the parish community informed of new projects through bulletin and pulpit announcements;
5. Approval for the new spending is required from the regional bishop and the Chancellor, Temporal Affairs before any new projects are announced or commenced;
6. The pastor must communicate any decision to parishioners – through the bulletin and from the pulpit;
7. Approval of the new items in the case does not negate the requirement for standard archdiocesan approvals from the Planning Properties & Housing Department and the Sacred Art & Architecture Committee.

Policy for changing parish case priorities

For parishes where the pastor deems that case statement funding priority should change, pastors must adhere to the following principles and processes.

The important **principles** behind the process are that:

- a. The priorities identified in parish case statements are commitments to donors in exchange for their participation in the campaign;
- b. Pastors should consult as much as practical with parishioners - the donors of Family of Faith funds;
- c. Pastors should inform parishioners of changes to the Family of Faith campaign spending plans.

The **process** for changing case statement components is as follows:

1. Approval to change plans is required from the regional bishop and the Chancellor, Temporal Affairs before they are announced or commenced;
2. Up to half of all parish proceeds, including funds received over goal, are to pay down any archdiocesan debt outstanding;
3. The pastor must consult the groups he would normally consult before making a decision. These groups would normally include the Finance Council and the Parish Council;
4. The pastor must also keep the parish community informed of new projects through bulletin and pulpit announcements;
5. Implementation of plans are subject to standard archdiocesan approvals from the Planning Properties & Housing Department and the Sacred Art & Architecture Committee, as may be required.