



# TT Fundraising Societies Handbook



A RESOURCE GUIDE TO ASSIST SCHOOL  
FUNDRAISING SOCIETIES IN ST. THOMAS  
AQUINAS ROMAN CATHOLIC SCHOOLS

# About this Handbook

## Fundraising Society Handbook

STAR Catholic Schools has been blessed with wonderful growth in our schools and communities. With this growth comes the want by community members to get involved and lend a hand to make our school communities even better.

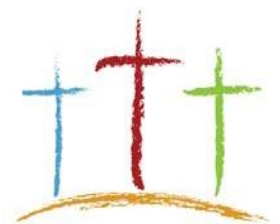
To that end, STAR Catholic's Board of Trustees saw the need to develop a resource to help fundraising societies in their efforts and enhance the relationship between our schools and the community.

## Using this Handbook

The STAR Catholic Fundraising Societies Handbook is a resource that can be used to guide fundraising societies in their efforts to not only streamline the process of forming and operating a society, but to aid in its relation with the school, parish and school division.

In the Fundraising Societies Handbook, fundraising societies will find Guiding Principles, Roles and Responsibility, as well as a Tool Kit featuring important links to documents and contacts needed through the lifespan of a fundraising society. Through this document, the Tool Kit will be referred to with a notation directing you to the corresponding Tool Kit resource.

In addition to the Tool Kit, there are also STAR Catholic Board Policies, a School Council and Fundraising Society Comparison, Incorporation Checklist and Meeting Prayers.



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# Fundraising Societies Handbook



SECTIONS: I-VI

## A Message to Fundraising Societies

One of the most memorable writings in the Gospel of Matthew is the parable of the talents.

The lesson shared in this parable is that we are all given talents and when we use our skills and resources to grow the kingdom of the Master, we glorify God.

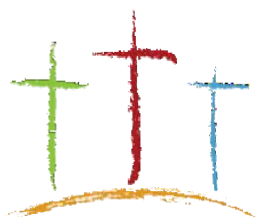
St. Thomas Aquinas Roman Catholic School's Board recognizes and appreciates those individuals and groups who give of their time, talents and treasure to enhance student wellbeing and learning opportunities. In your dedication, hard work and resourcefulness you bring to students opportunities and events that can enrich their school experiences, which can further develop their knowledge, physical wellbeing and character.

When these experiences are rooted in Catholic teaching and an environment that encourages the formative development of mind, body and spirit, it is our hope and desire that this will lead our students to be Christian witnesses and servants of God.

By working together with individual autonomy but with common purpose and shared values we can benefit our students as well as enrich and strengthen our broader school community.

It is with most sincere gratitude that we extend our thanks and pledge our commitment to assist you in appropriate ways to bring your projects to fruition.

— STAR CATHOLIC  
BOARD OF TRUSTEES



# Foundation

## Our Vision

Souls seeking Christ on a journey of faith, learning and love

## Our Mission

Rejoicing in the way of Christ, we nurture a love of learning in faith-filled Catholic Schools!



## Background

For many years fundraising societies have offered substantial contributions to their local school communities in the St. Thomas Aquinas Roman Catholic School Division.

Whether it be in building playgrounds to purchasing musical instruments to sponsoring student trips, these fundraising societies have enriched student opportunities in learning and development. The serious commitment of time and resources that are sacrificed by parents has not gone unnoticed by the school division.

It is apparent to the Board that harnessing the experience and knowledge of fundraising societies that have completed projects is incredibly valuable to new fundraising societies undertaking new challenges. It was from this realization that the idea to develop a Fundraising Societies Handbook was born.

The two main purposes of this Fundraising Societies Handbook are to assist in streamlining the process of establishing a fundraising society and to provide resources that are helpful to groups in completing their projects.

By meeting these two purposes we hope to foster positive relationships of support and collaboration between the fundraising society, the school and the Board as partners that honour common values in education.



# Guiding Principles

## Purpose

The Fundraising Societies Handbook is designed to be helpful to both new and existing fundraising societies.

It can be used as a workbook that a group could sequentially progress through to establish a fundraising society and proceed on fundraising initiatives or it can be used as quick reference to existing fundraising societies requiring specific information.

To that end, all reference materials can be found throughout the document as well as in the Tool Kit in the final section of the handbook.

Recognizing the importance of synergy between the work of the fundraising society, the school administration, the school council and the school division is essential to gaining optimal benefits from coordinated efforts.

Open communication is critical in developing project goals to ensure objectives are aligned and desired by all parties.





## Governance

Societies are governed by the Alberta Societies Act and are their own governing entity.

There are implications for fundraising societies participating in projects to benefit STAR Catholic schools. The STAR Catholic School Board is a governing body as well and has limitations placed on it by both the Alberta Education Act and by its affiliation with the Catholic Archdiocese of Edmonton.

Some of those limitations are reflective in our policies relative to:

- Board Policy 18 — School Fundraising
- Board Policy 19 — Charitable Donations
- Administrative Procedure 113 — Parent Fundraising Societies

We look at the project work and resources that are produced by societies as gifts to our school division.

We appreciate the efforts of organizers and volunteers to generate such valuable contributions. As a division we are committed to only accepting gifts that align with the moral direction set forth by our Archbishop.

That being said gifts that are associated with high stakes gaming cannot be accepted by our school division. A focus for our division is to encourage fundraising activities that build and strengthen our communities without causing hardship to others.

We appreciate the efforts by our affiliated societies to honour and support the school division's position. Through this commitment we truly walk as partners upholding the values of our faith and strengthening our communities.



# Guiding Principles

## The False Eden of Gambling Pastoral Letter

The letter found in Appendix A is a detailed pastoral letter comprised by the Alberta Conference of Catholic Bishops with respect to gambling and high stakes gaming. In order to ensure successful relations and avoid potential misunderstandings between the Board and the Fundraising Societies, it is imperative that these societies familiarize themselves with the following documents fundamental to the Board's governance.

- Board Policy 18 — School Fundraising
- Board Policy 19 — Charitable Donations
- Administrative Procedure 113 — Parent Fundraising Societies

In light of the Board's limitations in receiving donations associated with high stakes gaming, it is important for societies to understand these limitations before embarking in fundraising endeavors.

## Policies and Procedures

Administrative procedures and Board policies are documents that direct the School Board and school administrations in decision making and conduct relative to receiving proceeds from fundraising initiatives and partnerships.

To be transparent with fundraising societies, it is imperative that these societies have full understanding of documents fundamental to our governance.

- Board Policy 18 — School Fundraising
- Board Policy 19 — Charitable Donations
- Administrative Procedure 113 — Parent Fundraising Societies



## Board of Trustees

The Board consists of elected community members known as Trustees who serve a term of four years. The Board establishes policy and set goals and directions to guide education in the School Division.

The Board of Trustees governs with an emphasis on an outward vision, encouraging diversity in viewpoints, strategic leadership, collective decisions, the future and proactivity.

As a Catholic school board, STAR Catholic is accountable to the provincial government, the local bishop and the local Catholic community.

## Superintendent of Schools

As the sole employee of the Board, the Superintendent serves as the chief executive and education officer of the School Board.

Generally the Superintendent establishes and implements accountability measures and upholds the Education Act, School Council Regulations and other related policies.



## School Principal

The school principal is the instructional leader who manages the day-to-day operations of the school and is a key member of the school council who promotes cooperation between the school and the community.

A school principal may often seek advice of local and relevant topics with the school council. The school principal is encouraged to foster and maintain open communication and working relationships with the school council and the Fundraising Society.

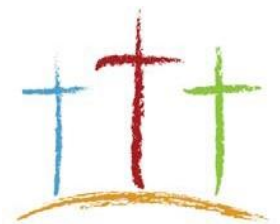
The school principal is responsible and accountable to the Superintendent for all activities taking place at the school. The school principal implements the regulations of Alberta Education and the School Board's policies and administrative procedures.

## School Council

A school council is a collective association of parents, principal, staff, secondary students (where applicable) and community representatives as mandated by the Alberta Education Act.

School councils provide a means for parents and community to work together with administration, staff and high school students to promote the wellbeing and overall effectiveness of the school community, to enhance student learning and to facilitate cooperation among parents and participants in the local school.

Its main purpose is advisory; they provide an opportunity for members of the school community to provide advice and consult with the school principal. A secondary purpose of school council is to support education through advocacy.



## Fundraising Society within the School Division

Fundraising societies are a formal group of people, incorporated under the Societies Act for the purpose of providing additional financial resources and support to the school. A society is a separate legal entity from the school council.

A good working practice suggests a fundraising society should maintain high ethical standards, that align with the school council's, the school's, and the School Board's mission and vision.

Values form the basis and success for the development and support of societies. Those values should include: success for each student, respectful relationships between all persons that have a stake in the education system and open communication.

The society's purpose should be in direct relation to the school to which the fundraising society wishes to contribute society funds, and gifts resulting from society endeavours.

## Parish

Local parishes/churches are a vital partner in support of Catholic education.

Fundraising societies need to be mindful of this relationship and there may be different levels of engagement from one community to another.

The triad of Home, School and Parish benefits students, their families and the community as a whole.



# Society Functions

## Fundraising Societies as a Function to Support Local Schools

Each school within the Division and across the province is diverse in its own community and unique in individual need and requirement.

Raising funds to enhance the learning environment for students may be performed by both school councils and societies. Fundraising is not an expected activity of school councils, however, many school councils partake in such activities. It may be beneficial at times to separate the fundraising activities to allow the school council to focus on its mandated purpose of advising and advocacy. It is within that thought that some school councils decide to implement a fundraising society to support its efforts and projects.

St. Thomas Aquinas Roman Catholic School Division believes that the goals of these societies go beyond money to reflect the creative and collaborative efforts of parents, students and the school community for the support of school initiatives, enhanced student learning and enriching school programs.

A fundraising society is a self-governing legal entity, under the Societies Act (see Tool Kit A-1) or Part 9 of the Companies Act, with the authority and responsibility to make necessary decisions to manage the operations and activities.

A society consists of a board of directors, chosen according to the bylaws/operating procedures established and maintained by the society. Their mission, vision and goals should align closely with the school council's, the school's, and the School Board's.



## What to consider

It is beneficial to those who wish to initiate a fundraising society, or if one already exists to review annually the purpose of the intended society. Here are some questions to think about before endeavouring on this journey:

- Are you starting a society on a long term or short term basis?
- If it is intended for a long term purpose, do you have enough interest and volunteers to contribute to the success of the proposed society over an extended time period?
- What will the intended purpose of the society be?
- Who will benefit from creating a society?
- Is it beneficial to separate the fundraising operations from the school council?
- Do you plan on fundraising large amounts of monies or apply for a grant for an intended purpose?

If you find that your answers to these questions support and align with your school council, your school and its principal and the School Board, it may be time to create a fundraising society.

## How to Create a Society

There are four steps to creating a fundraising society:

1. Choose a name.
2. Complete required forms.
3. Create bylaws.
4. Submit application package with required fee.



# Society Functions

## Choose a name

The first step in creating a society is to choose a name. The name of the fundraising society will imply its purpose and or relate to the school that it is aligned with. It is required to obtain permission from the school principal if using the name of a school in the division for the fundraising society as well as doing an Alberta name search report. The second step in creating a fundraising society is to craft bylaws.

## Complete Required Forms (see Tool Kit B-1 to B-6)

- Application to Form a Society
- Bylaw Development
- Annual Return
- Dissolution of a Society
- Revival of a Society

## Create Bylaws (see Tool Kit B-2)

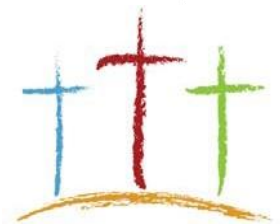
Bylaws are the rules that govern the internal management of an organization. Bylaws must include and deal with, but are not limited to:

- Membership
- Withdrawal of membership
- Meetings
- Directors & Officers
- Exercise of borrowing powers
- Audit of Accounts
- Custody & use of seal
- Preparation & custody of minutes
- Inspection of books and records by members
- Altering, rescinding and adding bylaws

It is important to note that within your bylaws, there will be aspects that are unique to the school, its membership and the community.

## Application Package

Fundraising societies are separate, legal entities with distinct rules to follow, responsibilities to comply with and liabilities to consider. The following information is a more in-depth look at fundraising societies and their roles, operations and responsibilities. It is suggested that the following information be fully understood when considering starting a fundraising society and may be good review for those schools that have established fundraising societies.





## Fundraising Societies within the Education Community

The main purpose of a fundraising society is to generate financial resources through fundraising efforts or collect in-kind resources to be used for the purpose as set out by the elected executive and its membership. A society has no authority to advise or consult the school regarding school based decision-making, this is the function of a school council.

Positive, collaborative, mutually respectful relationships with the principal, the school board and school council are integral to the success of a fundraising society. Respectful of the fundraising society's ability to raise and expense funds, it is imperative that fundraising activities and the expenditure of fundraised dollars be made in consultation with the school council and principal (ref. Fundraising Society AP 113).

Both school councils and fundraising societies rely on strong relationships between its members and other educational stakeholders. Building strong and meaningful relationships with the school council, the principal, and the School Board is an important factor to achieve both specific projects and long term goals.



# Society Functions

## Operations

### Membership & Executive

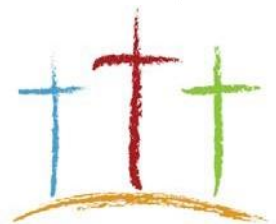
Executives are selected or elected as per the bylaws. For the directors/officers, the duties, terms of service, the powers of the executive and remuneration of executive will also be set forth in the bylaws, along with terms of membership.

According to Administrative Procedure 113, the Division does not permit its employees to be directors/officers on a society associated with schools. Often, but not always, the executive of the society may be the same executive as the school council.

### Meetings

Bylaws must set out the procedure for calling general and special meetings. This will include how members will be notified and the time frame for notification of meetings. Most times, fundraising society meetings will be held on school property for ease of the membership. This will require permission from the principal. Also, it is important to remember that the principal should be invited and encouraged to attend the fundraising society meetings to be aware of the goings-on of the fundraising society and to strengthen the relationship of all educational partners. In saying that, a representative from the school council should be attending the fundraising society meeting for the same reasons.

The bylaws should also set out how the members will vote, who will vote and what constitutes quorum. An Annual General Meeting (AGM) must be held for the purpose of presenting the audited financial statements to the society's members.



## **Record Keeping, Minutes & Audits**

It is the sole responsibility of the society to manage all of its own records. Within the bylaws it should state who will be responsible for managing and holding custody of the minutes and other records. Choosing a registered address that will be stable into the future is a requirement of the societies act. To ensure correspondence remains consistent, even if committee executives change, and to assist in ensuring that no records are lost forever, it is suggested that the address be the school as it is likely to be there for a long time.

It should also state who will perform audits and when. It will also state the time and place where books and records of the fundraising society may be inspected by its members.

All minutes **MUST** be separate and defined independently of the school council and its operations. Fundraising society and school council meetings must be separate from one another with a clear defined start and adjournment from one another.

## **Annual Filing** (see Tool Kit B-3)

Fundraising societies must send a completed Annual Return to corporate registries every year before the last day of the month following their anniversary month of incorporation. A list of directors and officers of the fundraising society along with the audited financial statement presented at the last annual general meeting of the fundraising society must be attached to the return being filed.

## **Dissolution of a Society** (see Tool Kit B-4)

Sometimes societies are created for specific projects that will be on a short term basis, or the fundraising society and its members, upon review, realizes that a society is no longer required for various reasons. Both of these scenarios can lead to dissolving the fundraising society. In order to dissolve a society an “Article of Dissolution” can be filled out and filed in duplicate with Corporate Registry. Before beginning the formal process for dissolving a society, which requires a Special Resolution of the members, the assets of the society should be disbursed as outlined in its bylaws.

## **Reviving a Society** (see Tool Kit B-5)

For various reasons, societies may lapse or dissolve upon agreement of its members. Any interested person wishing to revive a society to the active register may apply to the Registrar by completing and filing, in duplicate, Articles of Revival of a Society.



# Society Functions

## Charitable Receipts

One of the great benefits to making a donation is to receive a tax deductible receipt for that donation. It is important to private donors and corporations to receive that benefit as it is often a motivating factor for the donor.

To be able to issue tax-deductible receipts an organization must be a registered non-profit charity. Fundraising society status alone does not give an organization that level of status. To obtain registered non-profit status requires a different process. The Division acknowledges that this process can be an additional stress that volunteer organizations may wish not to undertake.

In order to simplify this process for fundraising groups and societies affiliated to our schools, STAR Catholic School Division has undertaken the process to have charitable status through the STAR Catholic Charitable Society. The division encourages fundraising groups and fundraising societies linked with our schools to utilize the STAR Catholic Charitable Society in order for tax-deductible receipts to be issued to donors and to hold donations in trust on behalf of specified fundraising groups and societies.

While holding funds in trust, the STAR's Charitable Society reconciles payables incurred by these groups (eg. playground equipment purchased by a fundraising society can be paid for by funds held in trust by the STAR Charitable Society). If your group would like to utilize this option please contact the Director of Finance and Business for STAR Catholic School Division at 780.986.2500.

## Making Donations Online

STAR Catholic Charitable Society allows donations to be made to specific fundraising groups and fundraising societies affiliated with the school division. To make donations online, please go to [www.starcatholic.ab.ca](http://www.starcatholic.ab.ca), and click on "Donations" and follow the instructions.



## Responsibility

As an independent legal entity, it is the responsibility of the executive to ensure ethical, financial and accountable stewardship of the society.

With good working relationships with all education stakeholders in the community, it is suggested that the fundraising society and its members conduct analysis and regular monitoring of fundraising policies and practices with the school and its board. This will ensure consistency and compliance with the society, the school and the Board.

Policies and practices may be created for the ongoing operations of the fundraising society. These may include: how to handle communication, both internal and external, record-keeping, types of fundraising and common practices regarding the use of funds. Accounting, privacy, collection and recording information, location of meetings, official mailing address, new member orientation, group evaluation and social media use and policies may also be included in “best practices” or operations of the society

## Insurance options for a fundraising society

It is highly recommended that fundraising societies acquire their own insurance since they are a legal entity unto themselves and directors and officers have a personal stake in carrying out the duties of the fundraising society with diligence. It is also important to note that identifying and analyzing the full extent of risk exposures to each organization is very important prior to obtaining insurance.

Insurance considerations should include Contents, Extra Expense, Crime, General Liability and Directors and Officers Liability insurance. Fundraising societies may consider contacting the Division’s Secretary-Treasurer for assistance.



# Society Functions

## **Directors and Officers Liability Insurance**

Protects against possible legal claims for alleged wrongful acts performed by directors or officers in performing their duties. Directors and officers should be aware that they can be sued by shareholders, creditors, employees, suppliers, customers, competitors or regulators.

## **Commercial General Liability**

Insurance designed to protect associations and organizations from a wide variety of liability exposures which are predominantly based in tort law, that occur because of bodily injury, personal injury or property damage. These risks could include liability from accidents which occur as an outcome of an association's or organization's approved event or project.

## **Special Events Liability**

Insurance to cover liability arising out of short term events. One-time or per event/project insurance is not meant to cover an association's and organization's operations throughout the rest of the year.



## Resources

### A-1 Service Alberta

**Society Act; Chapter S-14:** <http://www.qp.alberta.ca/>

**How to Form a Society Tip Sheet:** <https://www.servicealberta.ca/Societies.cfm>

**Corporate Registry Fees to form a Society:** <https://www.servicealberta.ca/817.cfm>

### A-2 Alberta School Council Association

**Resource Manual:** <http://www.albertaschoolcouncils.ca/?page=CouncilsGroups>

**Fundraising Resources:**

<http://www.albertaschoolcouncils.ca/?page=FundraisingPage>

**Policy Advisory, Fundraising, Legislative Framework:**

<http://www.asba.ab.ca/services/resources/policy-advice/fundraising/>

**Bylaw Template:** <http://www.albertaschoolcouncils.ca/?page=templates>

### A-3 STAR Catholic Schools

**Admin Procedure 113:**

<http://www.starcatholic.ab.ca/division/administrative-procedures-manual/>

**Board Policy 18, 19:**

<http://www.starcatholic.ab.ca/division/board-policy-handbook/>

### A-4 Archdiocese of Edmonton

**Policy 216 Gambling & FAQs:**

<http://www.caedm.ca/AboutUs/PoliciesProcedures/GamblingFAQs.aspx>

### A-5 Alberta Education

**Education Act - School Councils Regulation**

Chapter/Regulation:

[www.qp.alberta.ca/documents/Acts/s03.pdf](http://www.qp.alberta.ca/documents/Acts/s03.pdf)

### A-6 Personal Information Protection Act (PIPA)

**Frequently Asked Questions for School Councils & Fundraising Societies:**

<http://servicealberta.ca/pipa/documents/SchoolFAQs.pdf>

### A-7 Alberta Culture & Tourism

**Resources & Links:** <http://culture.alberta.ca/community/resources-and-links/>



— Links and websites accurate as of time of print

# Tool Kit

## Forms

### **B-1 Application to Form a Society:**

<https://cfr.forms.gov.ab.ca/Form/REG3088.pdf>

### **B-2 Bylaw Development:**

[http://www.servicealberta.gov.ab.ca/pdf/Forms/Society\\_Bylaws\\_re-entered\\_%282%29.pdf](http://www.servicealberta.gov.ab.ca/pdf/Forms/Society_Bylaws_re-entered_%282%29.pdf)

### **B-3 Annual Return:**

<https://cfr.forms.gov.ab.ca/Form/REG3185.pdf>

### **B-4 Dissolution of a Society:**

<http://www.servicealberta.gov.ab.ca/pdf/Forms/REG3038.pdf>

<http://www.servicealberta.gov.ab.ca/pdf/Forms/REG3070.pdf>

### **B-5 Revival of a Society:**

<https://cfr.forms.gov.ab.ca/Form/REG3069.pdf>

<https://cfr.forms.gov.ab.ca/Form/REG0022.pdf>

### **B-6 Other Forms that may be required from time to time can be found at:**

<https://www.servicealberta.ca/Societies.cfm>

— Links and websites accurate as of time of print





## Valuable Contacts

### **C-1 Service Alberta**

Webpage: [www.servicealberta.ca/716.cfm](http://www.servicealberta.ca/716.cfm)  
Phone: 310.000  
Email: [cs@gov.ab.ca](mailto:cs@gov.ab.ca)

### **C-2 Alberta School Council Association**

Webpage: [www.albertaschoolcouncils.ca](http://www.albertaschoolcouncils.ca)  
Phone: 780.454.9867  
Email: [parents@albertaschoolcouncils.ca](mailto:parents@albertaschoolcouncils.ca)

### **C-3 Lloyd Sadd Insurance Brokers Ltd.**

Webpage: [www.lloydsadd.com](http://www.lloydsadd.com)  
Director & Officer Liability Account Manager Phone: 780.930.3850

### **C-4 STAR Catholic Schools**

Webpage: <http://www.starcatholic.ab.ca>  
Phone: 780.986.2500  
Email: [feedback@starcatholic.ab.ca](mailto:feedback@starcatholic.ab.ca)

### **C-5 Archdiocese of Edmonton**

Webpage: <http://www.caedm.ca>  
Phone: 780.469.1010  
Email: [archdiocese@caedm.ca](mailto:archdiocese@caedm.ca)

### **C-6 Alberta Education**

Webpage: <http://education.alberta.ca/>  
Phone: 310.0000 (toll-free anywhere in Alberta)

### **C-7 Personal Information Protection Act (PIPA)**

Webpage: <http://servicealberta.ca/pipa/>  
Phone: In Alberta, dial 310.000, followed by 780.644.7472

### **C-8 Alberta Culture & Tourism — Corporate Relationship Building, Funding Resources & Grant Writing**

Webpage: <http://culture.alberta.ca>

— Links and websites accurate as of time of print



# Notes

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# Fundraising Societies Handbook



APPENDIX: A-G

January 12, 1998

## The False Eden of Gambling

The proliferation of government-sponsored gambling in our society has become a significant concern both for our Catholic community and our society. With government backing, the implication seems to be given that what is legal is therefore moral. Governments and other gambling proponents argue that gambling provides significant benefits to society.

Obviously, they point out, people wish to gamble. It has become a form of entertainment, often, even if not always, innocuous. In meeting this desire of many people, the government argues that it can best regulate the provision of gambling services, treating the income as a form of 'voluntary taxation.' Furthermore, besides providing jobs, the monies raised are almost always earmarked either for 'charitable causes' or general government expenses. And finally, if there are people who become addicted to gambling, then part of the proceeds can be put aside to treat the addiction problem.

This burgeoning fact of modern society deserves a commentary based on our Christian faith.

Traditionally, gambling has been looked upon with great suspicion in the Christian community. Marriages and families have been hurt or destroyed by compulsive gambling. The 'fantasy' motivation of entering the lap of luxury through winning is suspect. And the use of time and money in ways that hardly model Christian virtue and character suggest that the practice reflects neither Gospel values nor Christian inspiration.

Nonetheless, the Catholic tradition has never simply condemned gambling as such. Our own history in Alberta provides ample evidence of the use of gambling to raise funds for everything from the construction of churches to charitable works. While most of this practice has been associated with the involvement of local communities in such things as raffles, bingos and draws, the presence and fact of gambling has not been lost in the public perception.

"Games of chance or wagers," says The Catechism of the Catholic Church are not in themselves contrary to justice. "They become morally unacceptable when they deprive someone of what is necessary to provide for his needs and those of others." (2413) The Catechism, of course, does not address the more profound questions associated with an elaborate system of gambling. Despite our history, there has also remained a deeper unease with compulsive gambling, ruinous gambling, and any gambling which detours the essentials of life, such as grocery money, away from their responsible use. This unease has at times in other Christian communities led to an understandable, complete moral condemnation of gambling in all forms.

Following our Catholic tradition, it seems important for the Bishops of Alberta to offer a more nuanced moral judgment of gambling and to issue a Gospel challenge to all Christians in the face of the increasing opportunities to gamble in our society.

## The Morality of Gambling

The 'harmless' entertainment of gambling can simply be immoral if the necessities of family life are sacrificed. These necessities are not simply monetary. When gambling steals time and attention from spouse, children and family responsibilities, it is immoral.

Gambling, of course, can also become an addiction. While the mechanisms of who gets addicted are not always clearly understood, it is estimated that between three and five percent of gamblers will have a serious problem beyond their ability to control. A simplistic solution to this problem would be to suggest that anyone in danger of an addiction avoid gambling completely.

Since this problem usually surfaces after recreational gambling or at the end of long-term gambling, recognition and remedies must become more than the responsibility of the individual gambler. Programs to deal with the admitted gambler need to be complemented by efforts to identify and aid the compulsive gambler before disaster takes over.

To associate all the evils of gambling with personal choice is to overlook the complicity of a system that needs gamblers in order to flourish. Thus, a major portion of an ethical response to gambling must come from a challenge to those who control the trade.

- First, problem gamblers need to be identified within the system and assisted before they 'hit bottom.'
- Second, those who are addicted need sufficient resources to help them.
- Third, those who commit crimes, especially theft, in order to feed a suddenly uncontrolled gambling habit should not be the only ones blamed for their crimes or be held solely responsible for restitution. When institutions are all-too-willing to take all the money a gambler throws away, ignoring the problems caused is not acceptable.
- Fourth, anything that contributes significantly to addictive forms of gambling - and video lottery terminals, which are proven to add the addictive power of television to that of gambling, must be mentioned here - should be banned or substantially altered in order to diminish the addictive power.
- Finally, if gambling is to be a personal choice, governments ought to restrict all promotion that serves to create a



need as opposed to advertising services. One need only look at the glitter associated with gambling to recognize the temptation to make gambling a self-serving, 'growth' business.

Governments need an ethical perspective on their involvement in gambling. First, studies ought to be done on where money that goes to gambling comes from; in other words, is this really disposable income or are such things as essential family needs or charitable donations or support for productive business being forfeited in favour of the easier, but less value-added dollar.

Second, as the major receivers of gambling monies, governments must take the responsibility for programs to aid addicts and to deter addictions. They also need to avoid seeing gambling as a cash cow to be milked for ever-increasing monies as pressure is liable to move gambling beyond entertainment.

#### A Christian Vision

If gambling is not to be decried as intrinsically evil, and if governments seem to think it is necessary to the economy, how should the Christian respond to this phenomenon? To begin with, a negative attitude of 'not doing anything wrong or harmful' is scarcely adequate as a Gospel based response. Of course, the Christian should avoid misuse or abuse of funds for gambling. However, the idea that gambling is simple entertainment needs to be challenged as well, for the involvement is often not simple.

An intrinsic part of the Christian tradition regards the monies available for gambling as the monies of the poor. That is to say, if those who gamble are wealthy enough to put money into games of chance, then a glance at Jesus' teaching in the Gospels suggests that they use the money to help the poor. The same could be said for much of the money and time most of us spend on various entertainments, so this is a meditation for all who have what is euphemistically referred to as 'disposable income.'

One might argue that the good causes to which wagered money is contributed fulfills this Christian challenge, as is often the case in local or community fund-raising events that use gambling. Many people do take advantage of such opportunities to donate to a good cause. However, when one participates in more serious 'gambling for entertainment', it becomes important to examine one's motivations.

Donating to a good cause can often be completely lost track of in the thrill of gambling, in the escape from responsibility, in the almost antisocial atmosphere of commerce with a machine for hours. If there is money for gambling, perhaps we have simply not looked seriously enough at the gift of extra monies that God has given us to be used for good purposes. And if there is time for gambling, perhaps we need to look at whether we are allowing boredom to push us not into concern for others but the bright lights and action that will fill our hours for a price. The Christian challenge in the face of gambling is not to stop with a moral evaluation. Rather it is to look into the face and heart of Christ and see how Love motivates us to love our neighbour. Perhaps we cannot make this demand of governments, although if the poor are neglected because of gambling, then we must all raise our voices to demand at least a morally responsible control.

However, as Christians we can examine our own actions regarding gambling. And we can continue to look out for those who are harmed by gambling. And we can lobby that gambling is not allowed to harm communities and neighbourhoods. And we can preach and live the Word that ought to make gambling irrelevant in our lives. And we can live the hope of our faith that unmasks the false hope of greed.

We are the Body of Christ, living and carrying out His Will in our world. How Christ might respond in our place ought to be a constant reminder that we are standing, by His grace, in His place.

Joseph N. MacNeil  
Archbishop of Edmonton  
President, Alberta Bishops' Conference

Paul J. O'Byrne  
Bishop of Calgary

Thomas Collins  
Bishop of St. Paul

Denis Croteau, OMI  
Bishop of MacKenzie-Fort Smith

Lawrence Huculak, OSBM  
Eparch of Edmonton

Henri Goudreault, OMI  
Archbishop of Grouard-McLennan



# Policy 18

## Policy 18 • School Fundraising

The Board believes that the operation of the Division's educational programs should be funded from local taxation and provincial grants. However, the Board recognizes the value of schools carrying out extra-curricular activities and projects aimed at extending and enhancing school program offerings which often require additional financial support. The Board permits individual schools to supplement available funds for school-related activities through fundraising initiatives. Similarly, the Board recognizes the educational value of student involvement in fundraising activities in support of worthwhile charities. The Board permits school support of the fundraising initiatives of registered societies and/or charitable organizations insofar as these initiatives are congruent with Board policies and Catholic values.

Specifically,

1. School-related Fundraising Activities: For fundraising activities sponsored directly by the school, the following applies:
  - 1.1 Student participation must be voluntary;
  - 1.2 Fundraising activities shall not detract from the curricular program;
  - 1.3 Fundraising activities must have adequate adult supervision and not place students at risk; and
  - 1.4 The purpose of the fundraising activities and the intended use(s) shall be made known to students and parents in advance.
2. Fundraising Activities Sponsored by Charitable Organizations or Groups Registered Under the Alberta Societies Act: For fundraising activities sponsored by charitable organizations or groups registered under the Alberta Societies Act, the following applies:
  - 2.1 Fundraising and canvassing initiated by a legally recognized society falls outside the Division or the Board.
  - 2.2 For schools participating officially in fundraising activities sponsored by registered societies the following applies:
    - 2.2.1 Student participation must be voluntary;
    - 2.2.2 The activity cannot detract from the school's curricular program; and
    - 2.2.3 The purpose(s) of the fundraising activities and intended use(s) must be made known to students and parents.
3. The Superintendent or designate must approve use of the school name for fundraising purposes.
4. The Board prohibits any school related fundraising activities tied to casino gambling or high-stakes bingo
5. Assistance in establishing budgets, proper accounting records and the maintenance thereof will be provided by the Superintendent or designate.

Legal Reference: Section 51, 52, 53, Education Act  
Societies Act

Archdiocese of Edmonton Gambling Frequently Asked Questions Document, October 2010



# Policy 19

## Policy 19 • Charitable Donations

The Board graciously welcomes charitable donations of cash and donations in kind for the benefit of the students it serves. Specifically,

1. All cash donations received as donations eligible for income tax deduction must meet the requirements of Revenue Canada and be for the advancement of education, specifically:
  - 1.1 To purchase library and religious materials;
  - 1.2 To improve recreational facilities;
  - 1.3 To upgrade the information technology program;
  - 1.4 To establish student scholarships to recognize student scholastic, community or athletic achievement; and
  - 1.5 To enhance student programs.
2. The Division appreciates and welcomes the donation of goods.
  - 2.1 Goods may include such things as materials, supplies, playgrounds and other furniture/equipment;
  - 2.2 All goods donated will become the property of the Division;
  - 2.3 Receipts will be issued at a fair market value as determined by the Division.
3. The following will not be considered as donations eligible for income tax deduction:
  - 3.1 Tuition fees or other payments for which any right, privilege, benefit, or advantage may accrue to the donor;
  - 3.2 Payments for rentals or usage of books, facilities, transportation services, equipment, musical instruments, or other instructional resources which are normally paid for by way of a fee;
  - 3.3 Payments which cannot be identified as having been made by a particular donor;
  - 3.4 Donations of services or gifts 'in kind';
  - 3.5 Donations of old clothes, furniture, home baking, hobby crafts or property of little or nominal value;
  - 3.6 Amounts paid for school fundraising events; where a service or item is being received and
  - 3.7 Amounts paid for admissions to concerts, dinners, athletic events, social functions, graduations or similar activities.
4. All donations must be for application within St. Thomas Aquinas Roman Catholic School Division for the benefit of students of the Division.
5. All funds received shall be processed through the Board's regular accounting system, specifically identified and appropriately recorded.
6. Receipts for income tax purposes shall not be issued for donations of less than \$20
7. The practice of issuing tax receipts shall remain in effect only for that period of time that the Board continues to qualify for Revenue Canada tax exempt status as a charitable organization.
8. Any changes to the practice of issuing tax receipts are to be made only after review with Revenue Canada.
9. All donations received are to be forwarded to the Superintendent or designate for consideration as a valid donation for the advancement of education. Any donation may be refused, if, in the opinion of the Superintendent or designate, it is not in the best interest of St. Thomas Aquinas Catholic Schools or is not of a charitable nature.
10. The Board and its schools are prohibited from receiving donations from activities tied to casino-style gambling, such as video lottery terminals, electronic gaming devices, highstakes bingo or other high-stakes gaming.
11. All proposed uses for the donation must be submitted to the Superintendent or designate for his/her approval before any commitment is made to the donor(s).
12. All approved donations shall be disbursed as directed by the donor for the activity approved, as soon as possible. In the case of donations being received without specific instructions for their use, the Finance Committee, after consultation, will make a recommendation for the use of the funds as soon as possible. The Finance Committee will bring this recommendation to the Board for the disbursement of funds not later than the June Board meeting of each year.
13. After consultation with the donors, the Board may transfer restricted funds to the unrestricted account when the funds are inadequate for the purpose named or when the request is no longer appropriate.
14. The Superintendent or designate shall issue official receipts in the format prescribed by Revenue Canada.

Legal Reference: Section 53, 188, Education Act  
Societies Act



St. Thomas Aquinas R.C.S.S.D.  
Board Policy Handbook

September 2006  
Revised June 2018  
Reviewed December 2019

# Procedure 113

## Administrative Procedure 113 - November 2015

### Parent Fundraising Societies

#### Background

The Division recognizes the importance of Parent Fundraising Societies as a means for parents and community members to contribute positively to a student's experience. It also acknowledges the valuable contribution that Parent Fundraising Societies renders the Division by providing additional financial resources to the schools.

Schools may have a Fundraising Society, separate and distinct from the School Council. A Fundraising Society is a self-governing legal entity incorporated under the Societies Act or Part 9 of the Companies Act. School councils are primarily advisory in nature. The School Councils Regulations prohibits school councils from incorporating under the Societies Act or part 9 of the Companies Act.

All fundraising initiatives by the Division must adhere to the moral teachings of the Catholic Church, reflecting the mission, values and system direction principles of the School Board. Similarly, the Division cannot accept funds from parent fundraising societies (or Charitable Donations) which are in opposition to the moral teachings of the Catholic Church or reflect the mission, values and system direction of the School Board.

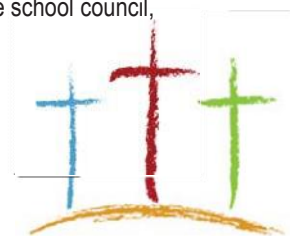
#### Procedures

##### 1. Operations

- 1.1. A Society is a self-governing legal entity, under the Societies Act or Part 9 of the Companies Act, with the authority and responsibility to make necessary decisions to manage its operations and activities.
- 1.2. St. Thomas Aquinas Roman Catholic Schools employees must not
  - 1.2.1. Be signing officers of Parent Fundraising Societies for the school in which they work, unless they have received the approval in advance of the Superintendent or designate and
  - 1.2.2. Form a majority of the members of a Parent Fundraising Society for the school in which they work.
- 1.3. In order to avoid potential conflict of interest issues and possible disagreements between the employee and the employer, employees of St. Thomas Aquinas Roman Catholic Schools should refrain from becoming officers of Parent Fundraising Societies.
- 1.4. The Division's liability insurance does not extend to a Society and its Directors as the Society is its own legal entity, separate and distinct from the Division. Even though the Societies are acting on behalf of the Division, the Division does not directly control their activities. A Society has its own executive which makes decisions on behalf of the group. Societies may choose to purchase their own liability insurance.
- 1.5. Although distinct from School Councils, Parent Fundraising Societies are encouraged to work collaboratively with the school community to establish common purposes and work towards complementary goals through a process of consultation, transparency and accountability.
- 1.6. A Parent Fundraising Society has no authority to advise or consult for school-based decision-making purposes.

##### 2. Fundraising activities

- 2.1. Fundraising activities should support student achievement and should not detract from the learning environment.
- 2.2. There must be no additional cost to the Division as a result of any fundraising activities.
- 2.3. All school fundraising activities shall be carried out under the jurisdiction and supervision of the Principal and in consultation with the school community as represented by the School Council.
- 2.4. If a society wishes to use the name of the school for any reason other than in the name of the school council,





# Procedure 113

prior approval of the principal is required.

- 2.5. Requests to use a school name for fundraising must be in writing and must outline the purpose or reason for use of the school name and the date of an event, if applicable.
  - 2.6. If the stated purpose for the use of the school name is fundraising, the decision to allow the use of the name of the school is made by the principal on a case by case basis and must be communicated in writing to the society.
  - 2.7. Superintendents may disallow or discontinue any fundraising activity in the name of the Division or School if it is believed to be contrary to the spirit and intent of the policies and procedures.
  - 2.8. Fundraising by a society in the name of a school, or for a designated school purpose, must have the prior written approval of the school principal.
  - 2.9. For liability reasons, Parent Fundraising Societies may not use the Board's name or logo in advertisements, promotions, etc.
  - 2.10. All fundraising activities must be complimentary to, and not a replacement for, funding for public education and all capital projects must receive prior approval as prescribed in Administrative Procedure 515.
3. Fundraising proceeds
    - 3.1. The Division can only accept funds from Parent Fundraising Societies:
      - 3.1.1. that support the moral teachings of the Catholic Church;
      - 3.1.2. that reflect the mission, values and system direction principles of the Board;
      - 3.1.3. that comply with current legislation and ministry policies and/or guidelines.
    - 3.2. In accordance with Policy 19, the Division cannot accept donations from activities tied to casino-style gambling, such as video lottery terminals, electronic gaming devices, high stakes bingo or other high-stakes gaming.
    - 3.3. Fundraising proceeds shall not be used to replace public funding for education and shall not be used for items funded through provincial grants including, but not limited to, classroom learning materials, textbooks, and repairs or capital projects that increase the student capacity of a school or significantly increase the operating or capital costs of the Division or school.
    - 3.4. Funds raised by the society become the property of the Division once they are given to the Division and therefore subject to the legislative authority and accountability ultimate control of the Division and delegated to the school principal.
    - 3.5. Funds raised by the Society and donated for a specific purpose, in compliance with this administrative procedure, shall only be used for that purpose unless mutually agreed by the Principal and the Parent Fundraising Society.
  4. Financial Accountability
    - 4.1. A Parent Fundraising Society has its own bank account and accounting records. Therefore the School Division, its schools or its school councils will not manage the bank accounts, funds or financial records of the society.
    - 4.2. Financial reporting and accountability procedures must be adhered to in accordance with governing statutes.
  5. Under the Freedom of Information and Protection of Privacy Act (FOIPP) and the Personal Information Protection Act (PIPA), no personal information of staff, students or other individuals shall be collected, used or disclosed for the purposes of fundraising activities, without express consent.

Reference: Policy 18 – School Fundraising  
Policy 19 – Charitable Donations  
Administrative Procedure 515 – Purchasing  
Administrative Procedure 520 – Fundraising Projects in Schools  
Alberta School Council Resource Manual (2007)



# Council & Society Comparison

## School Councils and Fundraising Societies Comparison\*

	School Councils	Society
<b>Authority</b>	School Council can only do what the Education Act allows	Societies can do anything within the <i>Societies Act</i>
<b>Responsibilities</b>	Defined by the <i>Education Act</i>	Defined by the <i>Societies Act</i>
	Defined in the <i>School Councils Regulation</i>	Defined in the society's objects and bylaws
<b>Accountability</b>	School Councils are ethically accountable to the school community	Societies are legally and ethically accountable to their members. The Board of Directors has legal responsibilities
	School Councils can change their operating procedures (bylaws) as defined by the procedures in those operating procedures (bylaws) without further authorization	Societies can change their objects or bylaws by specific procedures outlined in their bylaws and in the Societies Act, with final approval given by Corporate Registries
	Accurate minutes, reports, records are available to the public.	Accurate minutes, reports, records are available to Society members.
	Subject to Personal Information Protection Act (PIPA not FOIP)	Subject to Personal Information Protection Act (PIPA not FOIP)
<b>Reporting</b>	School Councils Regulation requires a report be filed by September 30th with the School Board	Society's Annual Report is due yearly the month following the incorporation date anniversary. I.e.: Incorporated in August 1992, report due yearly in September
	School Council's Report includes the activities of the previous school year and financial statements detailing money collected and spent by the School Council in the previous school year	Society's Annual Report, filed with Corporate Registries, includes the specifics of the Board of Directors and an audited financial statement
		Societies licensed by AGLC must complete AGLC issued financial reports specific to their gaming activities in order to maintain their license

\*Courtesy ASCA



# Council & Society Comparison

## School Councils and Fundraising Societies Comparison\*

	School Councils	Society
<b>Operation</b>	Utilize school building and resources for duties as per the Education Act	May request of principal permission to use school building and resources for duties
	Establish as per the Education Act and hold Annual General Meetings to ensure leadership is elected	Establish as per the Societies Act and hold Annual General meetings to ensure leadership is elected
	May maintain bank accounts, or may ask the school to track financial transactions or may not handle funds	Maintain bank accounts and signing authorities
	Orient members and general school community to their purpose and duties	Orient members to their duties and purpose; may extend to general community
	Hold regular meetings to discuss relevant issues, plan activities and gather input	Hold regular meetings to discuss relevant issues, plan activities and gather input
	Discuss and decide matters of policy, priorities and operations	Discuss and decide matters of policy, priorities and operations
	Coordinate/follow through on activities as planned	Coordinate/follow through on activities as planned
	Provide for 2-way communication with school community	Request permission of principal for 2-way communication with members and school community
	Build strong working relationships with others in the school community	Build strong working relationships with others in the school community
	Provide advice and parental perspective on matters related to the school	Provide funding, upon approval of members, to the school, School Council, or <b>others</b> as requested
	Liability for legislated duties and activities is held by the School Board - School Board insurance is sufficient	Liability for duties and activities is held by the Society – private insurance is recommended/required



# Checklist

## Checklist of Incorporation for a Society

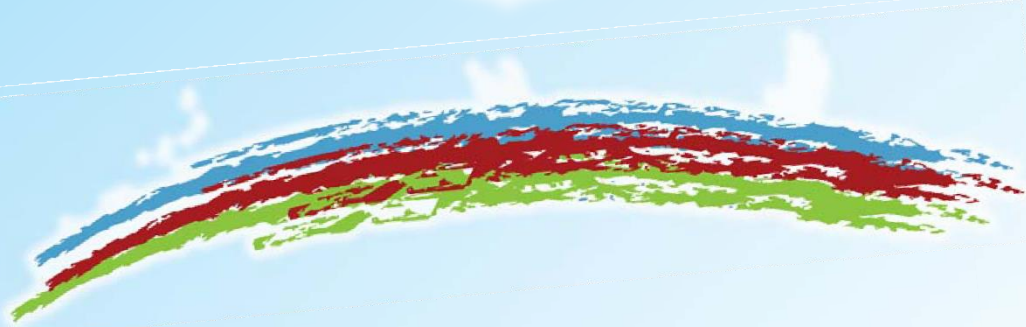
- Are all the forms and documents enclosed?
- Original Alberta Search Report, less than 91 days old.
- Request for Corporate Services.
- Application.
- Bylaws.
- Notice of Address (REG3016 Form 3).
- Filing Fee.
- Is the name of the society identical on all incorporation documentation?
- Are the application and bylaws complete? Signed by the same people (at least five (5) signatures required)?
- Are the documents dated?
- Are the documents witnessed?
- Are the signatures legible? If not, print the names under the signatures.
- Is the notice of address signed and dated and is the title of the person signing stated?
- Do all the addresses include the street, town or city, province and postal code?
- Are all the documents clear? There should be good contrast between the background and the wording.
- Have you enclosed a cheque for the proper fees, payable to the Minister of Finance?
- Submit documents in duplicate.







# Fundraising Societies Handbook



A RESOURCE GUIDE TO ASSIST SCHOOL  
FUNDRAISING SOCIETIES IN ST. THOMAS  
AQUINAS ROMAN CATHOLIC SCHOOLS  
SPRING 2020