



## DIOCESE OF ST. PETERSBURG

### DIOCESAN POLICY FOR SOLICITATION EFFORTS

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#### VALUES

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- + Inviting Disciples to make a conscious decision to invest resources (time, talent or treasure) in the mission and ministries of the Diocese of St. Petersburg to further the development of the Kingdom of God.
- + Our requests for investment to those within the Diocese of St. Petersburg, will be intentional leading to a prayerful, planned, proportionate and sacrificial decision. We want to ensure that our donors are approached in an organized and professional manner, keeping in mind that our requests to them align with the mission of the Diocese as well as their desire to direct their gifts to selected ministries.
- + Abiding by Canon 1265, §1. “Without prejudice to the right of religious mendicants, any private person, whether physical or juridic, is forbidden to beg for alms for any pious or ecclesiastical institute or purpose without the written permission of that person’s own ordinary and of the local ordinary.”
- + We desire to honor the various means by which the supporters and friends of the Catholic Church in the Diocese of St. Petersburg, Florida may wish to contribute their resources.
- + We value the time and prayerful discernment of those inviting and those being invited to invest in the Diocese, its mission, ministries, programs and services as well as the time and effectiveness of diocesan leaders and staff, including the Bishop, in cultivation, invitation, engagement and solicitation process.
- + We are committed to being good stewards by using the solicited funds and donations wisely and keeping with the will of the donor.

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#### POLICY

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In accordance with canonical norms, the following policy is enacted for solicitation efforts done in the name of the Diocese of St. Petersburg, its mission, and the Diocese’s entities. Diocesan entities include diocesan ministries and organizations. Also bound are solicitations’ efforts for religious or non-profit organizations which are conducted on diocesan, parish, or school properties.

1. The categories of solicitation efforts governed by this policy are all efforts to receive/acquire funds, negotiable securities, temporal goods or services, and other resources.
2. Solicitation of funds within the parish for the purpose of supporting the parish or its parochial school require the approval of the pastor (with the exception of a Capital Campaign which requires the Ordinary’s approval – as cited in the Diocese of St. Petersburg Parish Financial Operations Manual, and Catholic Schools Financial Operations Manual). Solicitation of funds within the parish for anything other than for support of the parish and its school, by any organization or ministry, needs the prior approval of the Ordinary.

3. Solicitations/fundraisers within a parish for the parochial/interparochial schools (with the exception of Capital Campaigns) require the pastor's approval and must follow the parish's procedures for solicitation and acknowledgement. If the parish does not have written procedures, the diocesan procedures are to be followed.
4. All of the solicitations included in this policy (except for those stated in Part 2 above) require the written permission of the Diocesan Bishop or his delegate before any communication or solicitation efforts occur (Can. 1265 § 1.) and must follow the diocese's procedures for solicitation and acknowledgement.
5. The donation of funds that have been solicited cannot be refused except for a just cause and with the permission of the Ordinary. The permission of the Ordinary is also required to accept offerings burdened by obligations or conditions (Can. 1267 §2).
6. Anything received from solicitation efforts must be used only for the purpose they were acquired and the canonical norms for respecting the will of the donor. (Can. 1267 §3).
7. Special collections by visiting priests, deacons, religious and laity representing Catholic projects or missions require a letter of approval by the Ordinary, prior to the solicitation, including those that may take place during Parish Missions/Days of Reflection. Similarly, the pulpit is not to be used for any appeal for support, financial, or otherwise, for any other than a local parish project without the approval of the Ordinary. Consequently, pastors should negotiate in advance a set stipend with anyone preaching a parish mission or day of reflection. Any collection or "free will offering" during the course of a parish mission goes to the parish.
8. Bequests made either as a last will and testament (*mortis causa*) or as a gift during a person's lifetime (*inter vivos*) are subjected to the Ordinary's supervision as executor (Can. 1301 §1 & §2).

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## ADMINISTRATION

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- + The Bishop of the Diocese of St. Petersburg assigns the daily coordination and management of all solicitation efforts within the diocese to the Office of Mission Advancement (with the exception of the Propagation of Faith which is coordinated by the Chancellor for Canonical Affairs). Solicitation activity will be coordinated and overseen by the Executive Director of Mission Advancement, reporting to the Chancellor for Administration/Chief Operating Officer.
- + All planned cultivation, engagement and solicitation activities must be cleared through the Office of Mission Advancement. It is the responsibility of the Executive Director to ensure that prospects do not receive multiple solicitations and, when possible, combine solicitations into a singular meeting.
- + Quarterly meetings will be held with development staff of all diocesan entities. These meetings will focus on discussing any type of fundraising and solicitation plans, upcoming events and opportunities for combined solicitation and donor engagement.

- + Every meeting with a prospect must be documented using the provided form detailing the items discussed during the meeting as well as any follow-up plans (next meetings dates, etc.). This form will be submitted to the Executive Director of Mission Advancement and distributed to development staff of all diocesan entities, as appropriate, for their information.
- + Any requests for the involvement of the Bishop or other senior diocesan staff and leaders must be cleared through the Office of Mission Advancement first. The date and time will be placed on the Bishop's and on the senior diocesan staff and leader's schedule by their appointed staff and the Executive Director of Mission Advancement. Once scheduled, the responsible entity will be notified and should prepare a briefing outlining the expectation/purpose of the event as well as any background information and briefing memorandum (if appropriate) for any prospect who will be in attendance and should be engaged.
- + All parties will be expected to adhere to any "blackout" periods as announced by the Office of the Bishop. Any exceptions should be discussed with the Executive Director of Mission Advancement. All approvals to bypass this period will be documented in writing.
- + Requests will be prioritized and approved in accordance with the diocesan mission and initiatives. When there are competing solicitations of diocesan priorities, the Executive Director of Mission Advancement will discern with the Chancellor for Administration/Chief Operating Officer as to which solicitations will be granted.
- + Diocesan ministry leaders and staff may be required to accompany Mission Advancement staff in the identification, cultivation, invitation, engagement and solicitation process, especially in areas entrusted to them.
- + Remittance of funds for approved international organizations must be transmitted through the Diocese of St. Petersburg on behalf of the organization or through a diocesan approved organization with the capacity to transmit funds (such as the Pontifical Mission Societies).
- + Any requests for Capital Campaigns will need to follow the procedures for capital campaign requests. The Executive Director of Mission Advancement will assist the entity with the approval process.
- + This policy applies to solicitation of donors, advertisers, sponsors, underwriters (or equivalent) and all secured must not conflict with the mission and teachings of the Catholic Church and the mission and vision of the bishop for his diocese.
- + The diocesan entity will follow best practices and ethical Christian standards as they apply to solicitation and the acquiring of commitments to support the Mission of the Church. Any non-competitive or exclusivity stipulations when solicitation will be reviewed by the Executive Director of Mission Advancement, adhere to best practices and approved by the Chancellor for Administration/Chief Operating Officer.

Policy Status: Mandated by Canon law

Effective: August 18, 2023

Last Reviewed: June 14, 2024

Approved by: + 