

Administration Seminar - 2008

Kaikohe

June 23 2008

Headline Topics

- **Planned Giving and Donations.**
- **Charities Act – Parish obligations.**
- **Diocese Financials 2007 and 2008.**
- **Issues raised by Northern Parishes.**
- **Open session for Questions / Answers.**

Charitable Donations

- **Tax change from 1 April 2008.**
- **Individuals = can claim 33.3% tax rebate.**
- **Before 1 April 08, rebate cap of \$630.**
- **Companies = full deduction now available.**
- **Promote this change to your Donors.**

Parish Giving and Donations

- **Charitable Donations – tax change.**
- **Planned Giving – programs & renewals.**
- **Fundraising – external funders.**
- **Donations and bequest programs.**
- **Build relationship with Parishioners, Donors.**

Parish Giving – St Thomas More Parish

- **Planned Giving “template” – see website.**
- **Research, Plan, Communicate, Follow-up.**
- **Create as a project with timelines.**
- **Well constructed Giving brochure.**
- **Keep the message regular and relevant.**

Charities Act – Registration

- **Diocese has filed a “Group” registration.**
- **Parishes are included in the “Group”.**
- **Each Parish is a separate entity in Group.**
- **Registration maintains tax exempt status.**
- **Donee status unchanged [IRD will reconfirm].**

Charities Act - Annual Filing

- **Parishes “aggregated” in annual returns.**
- **Annual Return due 30 June 2009.**
- **Parish returns due 31 March 2009.**
- **Report 1 - copy of Parish annual accounts.**
- **Report 2 – standard “Charities” template.**

Charities Act - Parish Reports

- **Report 1– Income Statement, Balance Sheet.**
- **Report 2 – Staff and volunteer statistics.**
- **Report 2 – Specified items for income, expenditure, assets, liabilities.**
- **Evaluate Parish accounting capability NOW.**
- **Cash or accrual accounting accepted.**

Diocesan Financial Results : Consolidated

	2008 Budget	2007 Actual
Operating Income:		
Chancery	\$4.5m	\$4.0m
CDF	\$1.6m	\$1.5m
Operating Expenses:		
Chancery	\$4.8m	\$4.4m
CDF	\$1.2m	\$1.1m
Operating Surplus	\$0.1m	\$0.06m

Issues raised by Northern Parishes

- **Role of Finance Committee [FC].**
- **Relationship of FC and Pastoral Council.**
- **1st & 2nd Collection; Diocesan Norms.**
- **Processing collections – House & Parish.**
- **Collections reporting – annual returns.**

Open Session – Questions & Answers