



4.2 Refugee Committee Reporting Procedure

Responsibility of the Synod and Parish

The Anglican Synod of the Diocese of British Columbia is the Sponsorship Agreement Holder (SAH) with the Government of Canada and is responsible for any financial shortfalls in the sponsorship of our refugees. Both the synod and parishes are also responsible for ensuring that all outlays (from the charitable donations received) are in accordance with the Canada Revenue Agency rules for outreach. The synod and parishes must demonstrate to our insurance provider that volunteers have received appropriate training. To that end, the following procedures have been established:

Sponsorship Group Quarterly Reports

Due dates are as follows:

Q1	Jan 1 to March 31	Due April 21
Q2	April 1 to June 30	Due July 21
Q3	July 1 to September 30	Due October 21
Q4	October 1 to December 31	Due January 21

1. Narrative / Check-in Report on the volunteers and the newcomer family:

- Prepared by the chair and submitted to Refugee Coordinator
- Required only once the family has arrived
- Provided form to be filled out and returned by email

2. Financial Reports:

- Prepared by the Sponsorship Group Treasurer and submitted to Refugee Coordinator and Parish Treasurer.
- Excel spreadsheets preferred for detail listings, but other formats acceptable.
 - **Detail listing of all donations and fundraising amounts**, from the group's inception to the current quarter-end. Please include a grand total.
 - **Detail listing of all disbursements paid to or on behalf of the family**, from the group's inception to the current quarter-end. Please include a grand total.
 - **Copy or scan of the CG's bank account statement as well as the parish's statement indicating moneys held on behalf of refugee sponsorship**, for the final month of the current quarter.

The Role of the Parish Treasurer

The sponsoring group bank account is an asset of the sponsoring parish. This is why the financial reports must also be submitted to the parish treasurer. The parish treasurer must then incorporate that information into the parish's financial reporting, and reflect the balance in that account on its own books at the end of the fiscal year.

If the treasurer for the Sponsorship Group is *not* the parish treasurer please make sure you share this information and collaborate on the report.

4.3 Funds Given for Refugee Settlement

As sponsorship groups near the end of their sponsorship commitment, some groups may have undistributed funds at the end of the 12-month period. This may have occurred for a variety of reasons ranging from generous donors in the initial fundraising to less financial requirements than budgeted.

During the fundraising, it was usually conveyed (or implied) that the funds would be used for family sponsorship and refugee resettlement. Any donations, receipted or not, must be used for sponsorship expenses as outlined in our SAH agreement (e.g. shelter, food, clothing, language learning, medical and dental expenses). Purchase of an automobile or a contribution to an RESP is not permitted with these funds. Expenditures outside of the parameters of the SAH agreement can be funded with other income sources of the family (e.g. Canada Child Benefits, employment, GST rebates).

Any surplus funds must be used for programs within the charity's (Anglican Diocese of BC) mandate and corresponding programs. If a group is planning to sponsor another family within the upcoming year, the monies can stay with the parish and be used to kick-start the fundraising for the next sponsorship. If a group is not planning on sponsoring another family, the monies should be transferred from the parish to the Anglican Diocese of BC (a qualified donee) to be used, at the discretion of the Diocesan Refugee Committee, towards upcoming sponsorships. If another Sponsorship Group operating under the Diocesan Sponsorship Agreement requires additional support, surplus funds transferred as per above, may be designated for that group.

Unused balances in a group's contingency fund should not be distributed to the refugee family at the end of the sponsorship. Those monies will be applied towards future sponsorships under the same circumstances stated above as they were raised for "settling" refugees.

Transfers to the Anglican Diocese of BC will not be used towards the administration of the program as this would contravene what has been conveyed or implied during the fundraising program.

If your group clearly indicated to donors that some monies raised would be used towards the cost of running the program, then the diocese should be notified, as we are looking for funds to offset the next fiscal year's program costs. The diocese has applied for grants through third party foundations to offset some of the costs, but in order to receive a grant we must demonstrate that the program is partially self-funded.