

**Procedure: Fundraising and Grantseeking by Staff of ECC**

<b>Step</b>	<b>Person</b>	<b>Content</b>
1.	Originator	Written proposal should include: <ul style="list-style-type: none"> <li>• Description of project (e.g., dates, scope, people served, personnel involved)</li> <li>• Goal and measurable results</li> <li>• How will this benefit the church as a whole?</li> <li>• Estimated cost (provide detail)</li> <li>• Why are funds being sought (e.g., why not included in the operating budget?)</li> <li>• Identify potential donors who will be asked</li> </ul>
2.	Canon or Chief	<ul style="list-style-type: none"> <li>• Review with Originator</li> <li>• Review with CFO for accuracy and clarity of funding sought</li> </ul>
3.	Executive Leadership Team	<ul style="list-style-type: none"> <li>• Review and approve</li> <li>• If rejected by ELT, no further action shall be initiated by Originator, Canon or Chief</li> </ul>
4.	Executive Council	<ul style="list-style-type: none"> <li>• Present to EC if over \$10,000</li> <li>• If rejected by EC, no further action</li> </ul>

**Procedure: Fundraising and Grantseeking by Members of General Convention Activities**

(including General Convention Office; Executive Council; Interim Bodies; Archives; General Board of Examining Chaplains)

<b>Step</b>	<b>Person</b>	<b>Content</b>
1.	Originator	Written proposal should include: <ul style="list-style-type: none"> <li>• Description of project (e.g., dates, scope, people served, personnel involved)</li> <li>• Goal and measurable results</li> <li>• How will this benefit the church as a whole?</li> <li>• Estimated cost (provide detail)</li> <li>• Why are funds being sought (e.g., why not included in the operating budget?)</li> <li>• Identify potential donors who will be asked</li> <li>• Present to Executive Officer of GC and Chair of an appropriate EC Standing Committee (copying the PB and PHOD)</li> </ul>
2.	Executive Officer GC and Chair of EC Standing Committee	<ul style="list-style-type: none"> <li>• Review with Originator</li> <li>• Review with Treasurer of General Convention for accuracy and clarity of funding sought</li> <li>• Review with appropriate Chief or Canon to ensure adequate staffing</li> <li>• Discuss with Chair of Finance Committee who shall provide, in writing, any serious objections or questions</li> </ul>
3.	EC Finance Committee	<ul style="list-style-type: none"> <li>• Approve, reject or further question the EC SC Chair and modify</li> </ul>
4.	Executive Council	<ul style="list-style-type: none"> <li>• If FIN rejects, Originator and SC Chair may appeal and seek consideration by full Executive Council</li> <li>• If rejected by EC, no further action shall be initiated by Originator or SC Chair</li> </ul>



GENERAL CONVENTION / DFMS FUNDRAISING GUIDELINES						
Unsolicited Donations						
	Cash			Bequest		
	Unrestricted	Restricted		Unrestricted	Restricted	
		Existing budgeted expense item	Non-budgeted area		Existing budgeted expense item	Non-budgeted area
Acceptable	OK	OK	OK	OK	OK	OK
Prior Approval required	NA	NA	NA	NA	NA	NA
Deposited where	Checking	Checking	Short-term Custodial account	TF 927	Existing or New TF if needed	Existing or New TF if needed
How Used	Immediately available for general budget; credited to appropriate income line	Immediately available for general budget; credited to appropriate income line	Available for the specific unbudgeted purpose IF approved by ELT	Dividends available for budget	Dividends available for budget	Dividends available for non-budgeted area
Notes		Will not increase current spending in specific department.				
Examples	NA	Staff costs	Sharing Way of Love; Cuba pensions; Emergency assistance for refugees; Treasurer-approved discretionary funds			
Donations Solicited by Staff						
	Cash			Bequest		
	Unrestricted	Restricted		Unrestricted	Restricted	
		Existing budgeted expense item	Non-budgeted area		Existing budgeted expense item	Non-budgeted area
Acceptable	OK	OK	OK	OK	OK	OK
Prior Approval required	ELT	ELT	ELT	ELT	ELT	ELT
Advise EC if > \$10,000	Yes	Yes	Yes	N/A	Yes	Yes
Deposited where	Checking	Checking	Short-term Custodial account	TF 927	Existing or New TF if needed	Existing or New TF if needed
How Used	Immediately available for general budget; credited to appropriate income line	Immediately available for general budget; credited to appropriate income line	Available for the specific unbudgeted purpose pre-approved by ELT	Dividends available for budget	Dividends available for budget	Dividends available for non-budgeted area
Notes		Will not increase current spending in specific department.				
Examples		Staff costs	Sharing Way of Love; Cuba pensions; Emergency assistance for refugees			
Donations Solicited by Members of Executive Council or Interim Bodies						
	Cash			Bequest		
	Unrestricted	Restricted		Unrestricted	Restricted	
		Existing budgeted expense item	Non-budgeted area		Existing budgeted expense item	Non-budgeted area
Acceptable	OK	OK	OK	OK	OK	OK
Prior Approval required from EC	FIN	FIN	FIN	FIN	FIN	FIN
Deposited where	Checking	Checking	Short-term Custodial account	TF 927	Existing or New TF if needed	Existing or New TF if needed
How Used	Immediately available for general budget; credited to appropriate income line	Immediately available for general budget; credited to appropriate income line	Available for the specific unbudgeted purpose pre-approved by EC	Dividends available for budget	Dividends available for budget	Dividends available for non-budgeted area
Notes		Will not increase current spending in specific department.				
Examples		Staff costs	OOD focus areas			