

The Episcopal Diocese of Hawai'i
Guidelines for the Solicitation and Raising of Funds by Institutions/Groups
Ancillary to the Diocese

Introduction: Major capital fund raising campaigns and grant applications made to foundations by institutions ancillary to the Diocese have implications for the Diocese as a whole. The same pool of major donors may be solicited by one or more entities of the Diocese. Effective fundraising for all concerned is enhanced by coordination of fundraising efforts among the various entities of and related to the Diocese.

Therefore, we recommend that institutions ancillary to the diocese follow the guidelines below.

Capital Fund Raising and Grant Applications:

- Ancillary institutions planning a capital fund raising campaign with a goal in excess of \$50,000, or applying for grants in excess of \$10,000 should notify the Diocesan Council through the Office of the Bishop of their intent to do so.
- Direct solicitation of congregations must have the approval of Diocesan Council and the respective vestries of the congregations.
- Reports regarding time, types of solicitations, and progress of fundraising should be shared with the Diocesan Council in a timely manner.

Other Fund Raising by Ancillary Institutions and Their Programs:

- The Board of Directors of the institution should approve any fund raising undertaken by a program or group to benefit the organization.
- Fund raising must comply with tax laws.
- Advice about the liability exposure in certain fund-raisers such as selling food, car washes, et al is available from the Diocesan Treasurer.
- Fund raising has implications for individual and corporate donors. Knowledge of those tax implications should be clearly understood and stated for the benefit of all parties.
- The Board is advised to consider the implications of fundraising for the institution's mission and understanding of stewardship.