

THE EPISCOPAL DIOCESE OF HAWAII

GUIDELINES FOR THE SOLICITATION AND RAISING OF FUNDS BY PARISHES, MISSIONS, AND INSTITUTIONS/GROUPS ANCILLARY TO THE DIOCESE

Policy Statement

Major capital fund raising campaigns and grant applications made to foundations by parishes, missions, and institutions ancillary to the Diocese (hereinafter Diocesan Entities) 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.

Policy Authority

- Recommended by Commission on Finance and Administration (COFA) and adopted by Diocesan Council
- On: COFA (8-13-2019) and Diocesan Council (8-17-2019)

Procedures

Capital Fund Raising and Grant Applications:

- Diocesan Entities planning a capital fund raising campaign with a goal in excess of \$100,000, or applying for grants to foundations in excess of \$25,000 should notify the Diocesan Council through the Diocesan Support Center of their intent to do so.
- Direct solicitation of congregations, other than yours, must have the approval of Diocesan Council and the respective vestries or Bishop's Committees 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 Diocesan Entities and Their Programs:

- The appropriate governing body of the Diocesan Entity must approve any fund raising undertaken by a program or group to benefit the organization and recorded in the governing body's minutes.
- Fund raising must comply with tax laws.
- Advice about the liability exposure in certain fund-raisers such as selling food, car washes, etc. 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 Diocesan Entities are advised to consider the implications of fundraising for the entity's mission and understanding of stewardship.

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Format and Layout

Use the following standard formatting to maintain a cohesive appearance among policies.

- Margins: 1"
- Font
 - Header/Footer: 14-point Calibri, bold, small caps
 - Title: 14-point Calibri, bold, small caps, underline
 - Text: 12-point Calibri
 - Section titles: 12-point Calibri, bold
- Left justified
- Generous use of white space
- Structured so the user can quickly focus on the aspect of policy or procedure that is relevant to the task/decision at hand (ex: outline format)
- Use labels to introduce key points (headings and labels are consistent, including location on each page, type size, etc).

Writing Style

Use a writing style that meets the following standards:

- Is concise, minimum use of words
- Is factual (double-check accuracy)
- Doesn't include information that may be quickly outdated (ex: names)
- If an acronym is used, spell it out the first time you use it
- For procedures, include step-by-step or bulleted instructions
- Is not too technical
- Avoids gender-specific language

Forms

- No forms are associated with this policy.