

1. Distribution Procedures

- a. Committee will determine the dollar amount available for distribution (4.5% based on the fund total December 31st previous year.)
- b. The Committee will setup schedule for the year (applications, reviews on application, submission to Council of Deacons and distribution)
 - i. Update the application form and test it. Make sure it sends emails to applicants and committee.
 - ii. Update the [tinyurl/cbtsEndowment](#) page with current info
- c. The Committee will announce that schedule to the congregation
 - i. Calvary Caller
 - ii. Sunday printed announcements
 - iii. Temple talk at the beginning of time of Distribution and at the end
 - iv. CBTS website
 - v. Facebook
- d. Based on the schedule, the Committee shall solicit and consider spending proposals from members of the Congregation.
- e. Congregation members, committees, or groups seeking resources for a project within the mission and purpose of the Endowment Fund may submit to the Committee requests for distributions of the Fund. An ENDOWMENT team member may not submit a request.
- f. All the applicants will be contacted by phone or in person and informed / consulted with on the following topics:
 - i. Thank them for taking the time to complete the request
 - ii. Ask them if there was anything that was not clear or that they would suggest we did different in the application
 - iii. Clarify what the project is going to accomplish
 - iv. Who is doing the work?
 - v. If it could not be fully funded by Endowment are there are other sources of funding?
 - vi. What is the minimum that would be helpful? And how would lesser funding affect the outcome
 - vii. How will you report back to Endowment? We would like pictures and updates to include in our annual report.
 - viii. Thank them again.
 - ix. Ask for any additional info they might want to provide
 - x. Go over process
 - i. we meet and review applications,
 - ii. make a recommendation to COD,
 - iii. COD decides at a regular meeting,
 - iv. We inform Applicants within 2 weeks of cod approval,
 - v. when the funds will be available
- g. The Committee evaluates requests based on the following aspects:
 - i. Whether the request is consistent with the mission and purpose of the Fund and CBTS
 - ii. The perceived need (see below for categories listed in Endowment team charge)
 - iii. Completeness of the application, is the budget real or a guess?
 - iv. All the stakeholders involved in the project been consulted (e.g. choir clothing.. did they ask the choir first?)
 - v. Can it be completed in 1 year?
 - vi. Is there joint funding form others?
 - vii. The amount of request in relation to the total available for distribution

- viii. The number of other requests received, and
- ix. Whether the individual or group has received a distribution in the past.
- h. The Committee shall make distribution recommendations to the Council of Deacons for its approval. The Committee may make recommendations for distribution at least on an annual basis and the recommendations shall be presented to the Council. (see sample letter to COD to recommend Funding)
- i. The Council of Deacons votes whether to approve the Committee's recommendation.
- j. Endowment team calls all applicants and informs them of the COD decision
- k. Endowment team sends email letters to all applicants and related organizations (see sample letters, Non funding, Funding an organization, Funding a project proposed by staff, Funding a project which a CBTS member will be heading up)
 - The Endowment will submit the information from the application process and to the Church Staff Finance person for the permanent endowment file (keeping all applications including a list of distributions made. (to whom, to support what) and the applications not funded) Include meeting notes as well and letter to COD
 - All recipients will be requested to acknowledge receipt of funds, and provide information on the funded project. Add to funding letter. photos nice
 - Monies must be utilized within 1 year of allocation or they will revert to the endowment fund. (Need to monitor and notify recipients before this happens, like maybe: 90 days, 60 days, 30 days and 15 days before monies revert.)

2. Examples of Perceived Need in no particular order

Mission and Ministry Projects Outside of Our Congregation
 Mission and Ministry Projects Within Our Congregation
 Youth Program
 Scholarships
 Music and worship
 Funded maintenance
 Educational speakers, programs etc.
 Technology enhancements
 New building projects or property acquisition
 Evangelism

3. Restrictions

- a. Borrowing Against the Fund Prohibited
- b. Anything inconsistent with the mission and purpose of the Endowment Fund or CBTS.

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