

Matching Funds 2021 – Procedures

The CLC Council has established a Matching Gift Fund for 2021 in the amount of **\$17,308** available to all CLC Mission Partners, with the following parameters:

1. All recipients of funds must be pre-approved 501(c)(3) organizations per the Matching Funds Policy.
2. CLC will make a **50%** match of contributions made by Mission Partners.
3. The maximum matching funds for any one donor applicant will be **\$1,000**.
4. The maximum matching fund contribution by CLC to any one recipient organization will be **\$2,000**.

Application for Matching Funds Organization Approval

Any organization not included on the list of *Approved/Historically-Supported CLC Benevolence Recipients* requires pre-approval to ensure it meets the requirements outlined in the Matching Funds Policy. This application can be found on the CLC website or in hardcopy at the Church Office. It must be submitted by a potential donor to the CLC Business and Office Manager or designate no later than Friday August 20, 2021. When the application is received, it will be processed for approval as follows:

1. The application will be reviewed by the CLC Business and Office Manager (or designate) to confirm the organization meets policy requirements (such as program objectives and non-profit status).
2. The application will be forwarded to all church council members for approval consideration (along with the monthly financial reports). This will allow all members to be prepared to vote on approval of the application at the next council meeting.
3. The date of referral to council will be noted on the application form at the bottom of the page.
4. If the donor applicant has requested time to make a presentation at the council meeting, the CLC Business and Office Manager will coordinate the date, time and location with the donor applicant and request this presentation be added to the council agenda.

Applications will be reviewed and require Church Council approval at its regularly scheduled meeting on September 14, 2021.

Application for Matching Funds

An application for matching funds is available on the CLC Website or via US mail by request. A separate form must be used for each donor and for each recipient organization. (It is acceptable for one application to be submitted where multiple donors have coordinated fund-raising.) Completed applications are to be mailed in via US Post office in a stamped and postmarked envelope, postmarked on or after the start date of the program (October 1, 2021). **Applications can only be submitted via US mail with a stamp and postmark.** The CLC Business and Office Manager or designate will be responsible for maintaining and distributing a supply of print copies of the application form and for updating the list of *Approved/Historically-Supported CLC Benevolence Recipients* (on page 2 of the application). This will prevent vetting the same organization more than once.

Application forms will be completed by the donor along with a donation check and submitted to the CLC Business and Office Manager for processing, as follows:

1. Ensure applications are properly submitted via US mail with an applicable postmark.
2. Ensure applications are reviewed and approved in the order of application receipt, noting the postmark date at the bottom of the application.
3. Confirm the application has been completed fully. If not, communicate with the donor applicant to secure missing or incomplete information.
4. Confirm that the Recipient Organization is on the list of *Approved/Historically-Supported CLC Benevolence Recipients*.
5. Confirm the matching fund request is within the maximum per donor of \$1,000 and initial the application form at the bottom. If the amount is not within the maximum, consult with the donor applicant to reach agreement to adjust the amount or cancel the application.
6. Confirm the matching fund request is within the CLC maximum per Recipient Organization of \$2,000 and initial the application form at the bottom. If the amount is beyond the maximum, consult with the donor applicant to reach agreement to adjust the amount requested, select another recipient organization or cancel the application.

Approval of Application for Matching Funds

The CLC Business and Office Manager or designate will verify the application was properly submitted and the recipient organization is on the *Approved/Historically-Supported CLC Benevolence Recipients* list. If so, the Manager or designate will approve the application and notify the donor applicant (usually within two weeks).

Distribution of Funds to Recipient Organizations

Once a Matching Fund application has been approved, the CLC Business and Office Manager or designate will advise the donor applicant and arrange for payment of the donor's portion of the contribution through any of the church's acceptable payment methods. (The donor's portion may include multiple donations in the case of fund-raising groups.)

When the donor's funds are received, the payment to the recipient organization will be processed by the end of the same month. The check will be sent along with a letter prepared by the CLC Business and Office Manager and signed by the Council President and Treasurer. (If either of these people is not available, another member of the Council's executive team may sign the letter.)

Communications with the Donor Applicant

The CLC Business and Office Manager or designate will notify the donor applicant of any additional information needed, application approval or disapproval, distribution of funds to the recipient organization or other information appropriate to provide a status to the donor applicant. A brief note and date of these communications should be included at the bottom of the application.

Donor contributions made through the Matching Fund program will be included in the quarterly contribution reports mailed to each Mission Partner or other donor.

Tracking and Reporting of Matching Funds

The CLC Business and Office Manager will maintain a tracking list for matching funds approved for Mission Partners and other donors to ensure the per donor \$2,000 maximum is not exceeded. This list is confidential.

The CLC Business and Office Manager will maintain an alphabetical tracking list for matching funds approved for each Recipient Organization to ensure the per Recipient Organization \$2,000 maximum is not exceeded. This will be summarized each month on the alphabetical Matching Funds Report and presented to Church Council along with other financial reports. This information is not confidential and may be shared with any Mission Partner or other donor upon request or under other circumstances if deemed appropriate by the pastor or Church Council.

Termination of the Matching Funds Program

Applications for matching fund contributions will be accepted with postmarks from Friday, October 1, until Friday, December 31, 2021 (or earlier if funds are exhausted). If any funds remain after approval of all applications, they will be donated to ELCA World Hunger. The CLC Business and Office Manager will prepare the final check (if appropriate) and prepare a letter and secure the council officer signatures (as done for all other Matching Fund contributions).

Attachments:

Approved/Historically-Supported CLC Benevolence Recipients (listing)
Application for Matching Funds Organization Approval (form)
Application for Matching Funds (form)

Summary Timeline:

June 8	Council Approval of Matching Gift Program 2021
July 1	Announcement of Program via Christ Connection and other methods
August 20	Deadline for Application for Matching Funds Organization
September 14	Council Approval of Matching Fund Organization list
October 1	Earliest postmark for Applications for Funds accepted
December 31	End of Program

Attachment 1
Approved/Historically-Supported CLC Benevolence Recipients

Agape House
Alabaster Jar Project
Big Brothers Big Sisters of San Diego
Center City Lutheran Mission
Children of the Immaculate Heart
Chula's Mission
Coastal Bay Girls Softball
Community Christian Service Agency (CCSA)
Doors of Change
ELCA Disaster Response
ELCA Good Gifts
ELCA Vision for Mission
ELCA World Hunger
Father Joe's Villages
Free to Thrive
Generate Hope
Gigi's Playhouse
Girl Scout Summer Camps
Holden Village
Homes for our Troops
Inspired Innovation
Interfaith Shelter
Juan Carlos Organization
Lutheran Immigration and Refugee Services (LIRS)
Lutheran Retreats, Camps and Conferences (LRCC)
Lutheran Social Services
Lutheran World Relief
Mama's Kitchen
Nile Sisters Development Initiative
Pacific Lutheran Theological Seminary
Publicworks Group
Reality Changers
Rwandan Orphans Project
San Diego Catholic Worker
San Diego Earth Day ("Friends of Rose Creek")
Simon's Walk/Going Home (TACO)
Sonshine Haven
Southern Poverty Law Center
Survivors of Torture International
The Elizabeth Hospice
Third Avenue Charitable Organization (TACO)
Winds of Africa
YMCA Kids to Camp Program

Attachment 2

Application for Matching Funds Organization Approval

Applicant

Name _____ Email _____

Address _____

Telephone Number _____

Proposed Recipient Organization

1. Full Legal Name of Organization _____

2. Organization's Address _____

3. Organization's Website _____

4. Briefly describe the organization's program objectives related to sharing God's Good News, health and/or education.

5. Would you be available to make a brief (maximum 5-minute) presentation on this organization at the church council meeting, if requested? Yes _____ No _____

Do you currently (or plan to) volunteer to work with this organization? Yes _____ No _____

If "Yes," in what way(s)? _____

Signature _____ Date of Submission* _____

*Note: Deadline for submission is 8/20/21

For Office Use Only – CLC Business & Office Manager

Date referred to Church Council _____

Date(s) and notes of status/approval provided to applicant:

Attachment 3

Application for Matching Funds

Amount Donated to be matched 50% from CLC Matching Funds \$ _____

[Please include your check to the benefitting organization]

Donor Applicant

Name _____ Email _____

Address _____

Telephone Number _____

Pre-approved Recipient Organization

Full Legal Name of Organization _____

Do you currently (or plan to) volunteer to work with this organization? Yes _____ No _____

If "Yes," in what way(s)? _____

Signature _____ Date of Submission _____

For Office Use Only – CLC Business & Office Manager (Please complete item 1 & 2 upon application receipt, initial items 3 & 4 and complete Item 5 as appropriate)

1. Date application received _____
2. Date of Postmark _____
3. Matching fund request is within the per Donor \$1,000 maximum _____
4. Matching fund request is within the per Recipient Organization \$2,000 maximum _____
5. Date(s) and notes of any communications with donor applicant _____