



March 1, 2018

Greetings Friends in Christ:

We are pleased to offer you the opportunity to apply for monies available from unassigned General Assembly Mission Restricted Funds. These funds were created in past years by the gifts of individual Presbyterians or by small groups such as Presbyterian Women's groups. We are sending this information to all sessions, presbyteries, and synods so that they may apply to have specific funds granted to them for mission efforts that fulfill the intent of the donor. The application process is repeated on an annual basis in early March.

Specifically, enclosed are the following: (1) 2018 list of restricted funds available [on the reverse side of this letter], and (2) application form.

You may review and download application instructions from the Presbyterian Church (U.S.A.) Mission Budget and Financials website address <https://www.presbyterianmission.org/who-we-are/financials/>. The site also includes Grant Application Instructions and Guidelines, the list of unassigned funds, a Word version of the application, and a supplemental form that you can review and download. Applicants requesting \$10,000 or more **must** complete the supplemental form.

Please read the instructions carefully before completing the application form. The application must be typed (minimum 10-point font) so that all information fits within the application form (four 8½- by 11-inch sheets of paper). We will not review excess information, including brochures and/or photographs.

While these requirements may seem rigid, they are needed to help deal with the volume of applications received and to help control the costs involved in copying and handling applications. Thank you for taking care to observe these guidelines.

Please note that approval at the presbytery or synod level is only another step in the process and does not guarantee approval by the Restricted Funds Oversight Subcommittee (RFOS). Each presbytery can only forward **one** application per fund to the synod and each synod can send only **one** request per fund to the RFOS. The request may not exceed the total amount available from the restricted fund.

Session applications must be sent to the presbytery of jurisdiction by May 1, 2018, and sent to the synod with endorsement, if appropriate, by the presbytery by June 1, 2018. More timelines are provided at <https://www.presbyterianmission.org/who-we-are/financials/>.

For questions, please contact Shelly Lewis at 1-888-728-7228, Ext. 8023 or E-mail shelly.lewis@pcusa.org.

Sincerely,

A handwritten signature in blue ink that reads "April Davenport". The signature is written in a cursive, flowing style.

April Davenport
Staff, Restricted Funds Oversight Subcommittee

Enclosures



**GENERAL ASSEMBLY
2018 Unassigned Funds**

Fund Number	Restriction¹	Amount Available
F51067	For Appalachian health care, preferably near White Rock, Madison County, North Carolina	\$3,282
F53536	To the Assembly's Home Missions [n/k/a General Assembly Mission Board of the Presbyterian Church (USA)] for the use and benefit of this cause	\$1,341
F54201	For education of Native Americans; historical use benefitted tribes in North Fork, California	\$5,297
F58189	To be used for medical research where most needed ²	\$24,803
F58504	For the evangelistic work of the Board [of National Missions of the PCUSA]	\$1,477
F58529	Used to provide for any educational opportunities which support the work of individuals who are involved in any way in ministry that benefits those who have mental retardation or other mentally or physically disabling conditions; this income may also used to support ministry which specifically benefits those who have mental retardation or other mentally or physically disabling conditions	\$3,504
F58691	Helping meet economic needs of people needing food, clothing, and other wants	\$1,453
F58879	Mission work among Chinese and Spanish Americans	\$1,142
F59239	Mission program with preference given to advocacy for the environment and evangelism	\$6,899
F59251	Mission support within the U.S.	\$3,287
F59263	Income for the support of medical work of the United Presbyterian Church with emphasis if possible in the field of diabetes and/or related diseases	\$1,380
F59413	For the national missions work of the United Presbyterian Church in the U.S.A., in the area of greatest need	\$1,563
F70047	Train ministers for preaching and teaching the Bible, Western U.S. area ³	\$9,002
F70725	To be used for establishing, maintaining or otherwise providing a home or homes for aging people or for similar purposes as determined by said Trustee	\$2,639

¹These restrictions were drafted and provided by the donor.

²Applicants requesting \$10,000 or more from this fund must also complete the supplemental form, which is located at <https://www.presbyterianmission.org/who-we-are/financials/>.

³Grants from this fund must be used within the “Western Five” synods (Alaska-Northwest, Pacific, Rocky Mountains, Southern California & Hawaii and Southwest).



**PRESBYTERIAN CHURCH (U.S.A.)
 APPLICATION FOR USE OF RESTRICTED FUND (2018)**

All applicants should read the instructions carefully before completing the application. Please type, or the downloadable application form along with instructions and guidelines are provided at <https://www.presbyterianmission.org/who-we-are/financials/>. Applicants will be notified of application status in October 2018.

Complete the form below and send to

Session: Proposals must be sent to the Presbytery by May 1

Presbytery: Recommended proposals must be sent to the Synod by June 1

Synod: Recommended proposals must be sent to the Restricted Funds Oversight Subcommittee by July 1

1. TO BE COMPLETED BY REQUESTING COUNCIL OR GENERAL ASSEMBLY ENTITY

Pin Number:	E-mail:	Fund Number:
Fund Restriction (see General Assembly Mission 2018 Unassigned Funds list):		
Grant amount requested (must equal or exceed \$1,000): \$	Total Program/Project Budget (please complete budget worksheet): \$	
If application was made to other restricted funds for <u>same program/project</u> , please list fund number(s):		
Have you previously received a restricted fund grant? <input type="checkbox"/> Yes <input type="checkbox"/> No	If so, which year did you receive the restricted fund grant? Year:	
	For Committee Use Only – Amount Granted \$	

Applicant name and address (Council or General Assembly Entity):

Designated program/project contact person:

_____ Name

_____ Name

_____ Address

_____ Phone Number

_____ City, State, and ZIP Code

_____ E-mail

If applicant is a church (session), please provide the following information:

2017			
Church Membership		Operating Budget	\$
Average Worship Attendance		Amounts Contributed to Presbytery, Synod, and GA (Excluding Per Capita)	\$

Proposed Use:

This should be responsive to Evaluation Guidelines on page 5 of the grant application process instructions. If proposed use is for church building/repair or a scholarship, **STOP** [see Church Building Aid and Student Financial Aid Inquiries on page 7 of application instructions]. Approved applications receive a one-time grant in October, distributed in a lump sum. Grants must be used within two years of distribution.



**PRESBYTERIAN CHURCH (U.S.A.)
APPLICATION FOR USE OF RESTRICTED FUND (2018)**

Applicant:	Pin Number:	Fund Number:
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Proposed Use (continued):

a. Please provide a brief description of the program/project for which funding is requested:

b. Is the program/project ongoing or is it a new initiative (please explain):

c. Are funds being received from other sources to support this program/project? If so, what are the sources and how much?

d. Background (more detailed description of program/project, and please show partnership with other mid councils):



**PRESBYTERIAN CHURCH (U.S.A.)
 APPLICATION FOR USE OF RESTRICTED FUND (2018)**

Applicant:	Pin Number:	Fund Number:
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2. BUDGET FOR PROJECT/PROGRAM (REVENUE SHOULD EQUAL EXPENSE)

REVENUE ITEM	AMOUNT	EXPENSE ITEM	AMOUNT
Total GAM Grant Funding Request		Planning	
Individual Contribution(s)		Promotional Materials and Advertising	
Presbytery		Leadership Honoraria	
Synod		Leadership Travel/Housing/Meals	
Other: (Describe each item over 10% of budget)		Other: (Describe each item over 10% of budget)	
Tuition and Fees from Participants		Subsidies to Participants	
Total Project Revenue		Total Project Expense	

3. COMMENTS

Presbytery

Synod



**PRESBYTERIAN CHURCH (U.S.A.)
 APPLICATION FOR USE OF RESTRICTED FUND (2018)**

Applicant:	Pin Number:	Fund Number:
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4. REQUIRED SIGNATURES

Councils

Clerk of Session	Church Name	Signature	Date
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Presbytery Representative	Presbytery Name and Address	Signature	Date
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Synod Representative	Synod Name and Address	Signature	Date
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General Assembly Entity

Division Director (GA Only)	Signature	Date
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Executive Director/President/Stated Clerk	Signature	Date
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SUPPLEMENTAL FORM
PROPOSAL OUTLINE FOR USE OF RESTRICTED FUND
(AMOUNT REQUESTED MUST EQUAL OR EXCEED \$10,000)

All applicants should read the instructions carefully before completing the application. Please type, or the downloadable application form along with instructions and guidelines are provided at <https://www.presbyterianmission.org/who-we-are/financials/>. Applicants will be notified of application status in October 2018.

Complete the form below and send to

- Session: Proposals must be sent to the Presbytery by May 1
- Presbytery: Recommended proposals must be sent to the Synod by June 1
- Synod: Recommended proposals must be sent to the Restricted Funds Oversight Subcommittee by July 1

		Year 2018
Applicant:		
Applicant Pin Number:		Fund Number:
Fund Restriction (see General Assembly Mission 2018 Unassigned Funds list):		
Grant amount requested (must equal or exceed \$10,000): \$	Total program/project budget (please complete budget worksheet): \$	

For applications requesting \$10,000 or more, the applicant must submit a supplemental form.

In addition to filling out the basic application for use of a restricted fund, the following proposal outline should be completed by all applicants requesting \$10,000 or more. Please attach separate sheets with your responses and mark each section clearly.

Proposal Outline (Proposals should be written in a concise, narrative format according to the following outline.)

Description of the Project

- A. Provide an overview of the project including goals and specific needs to be met.
- B. What is the intended audience?
- C. What is the projected number of participants or people served?
- D. What is the planned duration of the project including starting and ending dates? (Grants must be used within two years from the date the grant is distributed.)
- E. What is the budget for the project?

Project Management

- A. Provide the name of the office or committee of the governing body responsible for managing the project.
- B. What is the name and title of the project leader?
- C. If a new structure is being formed to direct this project, please specify its membership (how are they chosen and names) and frequency of reporting to the governing body.

Evaluation

- A. An evaluation is required of recipients of all grants. If a grant is not expended within one year of being awarded, the RFOS may request a mid-term evaluation asking about progress toward stated goals, activities, and financial accounting.
- B. Attach a description of the plan that will be used to evaluate the project for meeting goals and effectiveness.

Changes

- A. Requests to extend the time for spending the funds beyond the two-year limit must be made in writing, including reasons for requesting the extension, and must be approved in writing by the RFOS chair.
- B. Requests to modify the spending plan must be requested in writing, including reasons for the changes, and must be approved in writing by the RFOS chair.
- C. Any funds not spent for purposes specified in the grant must be returned.



Presbyterian Church (U.S.A.)
Presbyterian Mission

***UNASSIGNED
GENERAL ASSEMBLY MISSION
RESTRICTED FUNDS***

Funds Designated for Use in the United States and Puerto Rico

***GRANT APPLICATION PROCESS
INSTRUCTIONS AND GUIDELINES***

March 1, 2018



TABLE OF CONTENTS

**GRANT APPLICATION PROCESS
INSTRUCTIONS AND GUIDELINES**

<i>Application Process</i>	3
<i>Application Review Process</i>	3
<i>Timeline and Deadlines</i>	4
<i>Evaluation Guidelines</i>	5
<i>Mid Council Participation</i>	6
<i>Specific Instructions</i>	6
<i>Church Building/Student Financial Aid Inquiries</i>	7
<i>Signatures and Mailing</i>	7

Website link: <https://www.presbyterianmission.org/who-we-are/financials/>

APPLICATION PROCESS

Unassigned Funds are available for application by all councils and General Assembly entities. There are some permanent funds, which generate an annual income stream; others on this list are primarily dependent on monies received in the previous year. Only councils and General Assembly entities of the Presbyterian Church (U.S.A.) may apply. These organizations are described under “Applicant” in the section titled “Specific Instructions.” Councils may apply on behalf of racial ethnic constituency groups for mission work within its bounds or with a view to make a grant to another organization.

This process applies only to funds or the applicable portion thereof, which are designated for use within the United States and Puerto Rico. ***Grants are not made for mission work outside the United States and Puerto Rico. The mission work must take place within the bounds of the applicant. The grant process is not intended to encourage work by one council within the jurisdiction of another council. Funding for mission trips is precluded.*** Additionally, grants are not made for church construction/repair, student financial aid, audiovisual/computer equipment and, typically, the Committee does not fund salary/staff support.

Sessions must send applications to their presbytery, which shall review the applications to determine which, if any, to send to the synod. Presbyteries and synods may forward only one application per fund to the next stage in the review process (see section titled “Mid Council Participation”). Presbyteries and synods are encouraged to notify applicants if their application was not forwarded to the next stage.

Grants are made on a one-time basis, distributed in a lump sum, and must be used within two years from the date a grant is distributed. Grants are distributed following the fall meeting of the Presbyterian Mission Agency Board. Ordinarily, a council that has previously received a grant from a fund cannot receive additional grants from that fund until an evaluation has been submitted.

APPLICATION REVIEW PROCESS

The Restricted Funds Oversight Subcommittee meets in September, reviews each application, and makes funding recommendations to the Presbyterian Mission Agency Board through the Presbyterian Mission Agency Board Executive Committee.

To be considered application descriptions must be consistent with donor restrictions. Because there is a limited amount of money in each fund, the **Committee makes every effort to review each application based on completeness of the application, evaluation guidelines in the instructions, merit of the program/project, and whether the program/project can be accomplished with less than the full funding request. In addition, the Committee encourages partnership with other councils whenever possible.**

TIMELINE AND DEADLINES

Mar 1 - Updated information on funds and amounts available released by the Presbyterian Mission Agency.

May 1 - Last day for sessions to submit applications to the presbytery.

Jun 1 - Last day for presbyteries to submit recommended applications to the synod.

Presbyteries notify applicants whose application was not forwarded to the next stage of the process.

Jul 1 - Last day for synods to submit recommended applications to Restricted Funds Oversight Subcommittee. Applications must be postmarked by July 1.

Synods notify applicants whose application was not forwarded to the next stage of the process.

Sep - The Restricted Funds Oversight Subcommittee meets, reviews, and discusses each application and makes funding recommendations to the Presbyterian Mission Agency Board through the Board Executive Committee to vote on at its fall Board meeting.

Oct - Restricted Funds Oversight Subcommittee with administrative support from Presbyterian Mission Agency staff will notify grant recipients about application status.

The Restricted Funds Oversight Subcommittee will notify applicants whose grant proposals were considered by the Restricted Funds Oversight Subcommittee and not approved.

The Presbyterian Mission Agency staff will distribute monies granted to councils.

NOTE: The Restricted Funds Oversight Subcommittee does not have the names of applicants whose proposals were not forwarded and has no way of responding to questions about such applications.

EVALUATION GUIDELINES

The Restricted Funds Oversight Subcommittee will review applications and make recommendations based on the factors set out below. Synods and presbyteries should use these guidelines in conjunction with their mission priorities to evaluate each application.

1. What is the degree of Presbyterian involvement?
2. What is the availability of matching funds?
3. What amount of other support is provided by applicant, including volunteer time and in kind services?
4. What percentage of applicant's mission giving goes to support General Assembly?
5. What length of time has the applicant supported the project?
6. For start-up programs, what is the availability of other monies to continue the program in the future?
7. How does the program promote the goal of partnership in carrying out the applicant's mission?
8. Where does this fall within the mission priorities of the applicant?
9. How many people does the program serve?
10. What is the amount of local support?
11. What is the evidence of ongoing commitment?
12. What is the program's record of accomplishment?
13. What is the total program cost compared with the application request?
14. What will be the direct impact of the program on people?
15. For new programs, how quickly can the program begin?

MID COUNCIL PARTICIPATION

Councils are asked to evaluate applications from within their bounds and forward no more than one application per fund to the next stage of the application process (see below for an exception for certain funds). The goal is to allocate funds in line with mission priorities. Accordingly, an application should not be forwarded, even where it is the only application, if that application does not fit within the mission priorities of the mid council. Please be sure that the request fits the description of the fund.

When there are multiple applications for the same restricted fund from within a presbytery, the presbytery, in a manner of its own choosing, will decide which one request except as noted below, if any, to forward to the synod. A presbytery may *not* combine multiple requests from congregations into a single presbytery request. After consultation, the original applicant and the presbytery may revise an application before forwarding to the synod. The request will not exceed the total amount available from the restricted fund.

When there are multiple applications for the same restricted fund within a synod, the synod, in a manner of its own choosing, will decide which one request, if any, to forward to the Restricted Funds Oversight Subcommittee. A synod may *not* combine multiple requests from presbyteries into a single synod request. After consultation, the original applicant, presbytery, and synod may revise an application before forwarding to the Restricted Funds Oversight Subcommittee. ***The request(s) will not exceed the total available from the restricted fund.***

Presbyteries and synods are encouraged to notify all applicants if their application was not forwarded to the next stage in the application review process. ***The Restricted Funds Oversight Subcommittee does not have the names of applicants whose proposals were not forwarded and has no way of responding to questions about such applications.***

SPECIFIC INSTRUCTIONS

Fund Number - Five-digit number that identifies a fund.

Applicant Pin Number - The five- or six-digit number assigned to an applicant as listed in the General Assembly minutes.

Applicant - Only sessions, presbyteries, synods, and General Assembly entities (Presbyterian Mission Agency, Office of the General Assembly, Presbyterian Foundation, Board of Pensions, Investment and Loan Program, and Presbyterian Publishing Corporation) may apply. However, application may be made with the intent of making a grant to another organization, such as a racial ethnic constituency group.

Amount - The amount must equal or exceed \$1,000. Applications for less than \$1,000 will not be considered. All requests for \$10,000 or more will need to include completion of a supplemental information form. The supplemental form is available on the website (<https://www.presbyterianmission.org/who-we-are/financials/>).

Contact Person - This does not need to be the person signing the application, but must be a representative of the applicant. This person will be contacted if additional information is needed, and will represent the applicant in any necessary consultation. This person must have the authority to reach a binding consultation agreement.

Restriction - Must quote exactly from “Restriction” column in the Unassigned Funds list.

Budget - A detailed budget and budget justification constitute part of the application process and will be evaluated for appropriateness as part of the Committee’s review process.

Proposed Use - Be as specific as possible. It must be clear from this description that the proposed use will satisfy the restriction. Any questions on this point should be referred to contact listed under “Questions and Comments” at the end of these instructions. The description should be responsive to the “Evaluation Guidelines.” If making a grant to another organization, be specific as to the proposed use by that organization.

The application must be typed in 10-pitch or larger type, and all information must fit within the application. The application should be submitted as four 8½ x 11 sheets of paper (expanding the length of the application with a word processor is not permitted). Excess information (including brochures and photographs) will not be reviewed. These requirements are necessary to maintain the costs involved in copying and handling applications.

The report approved by the General Assembly stated that the “process should maximize the use of existing structures and any operational procedures that may already be in place.” The General Assembly has well-established ongoing programs dealing with church construction and financial aid for students. **To avoid duplication and to ensure that all have equal access, the process, as described in these instructions, will not accept applications for church construction/repair or student scholarships.**

CHURCH BUILDING AID AND STUDENT FINANCIAL AID INQUIRIES

Presbyterian Church (U.S.A.)
Investment and Loan Program, Inc.
100 Witherspoon Street
Louisville, KY 40202-1396
Telephone: (800) 903-7457

Presbyterian Mission Agency
Presbyterian Church (U.S.A.)
Financial Aid for Service
100 Witherspoon Street
Louisville, KY 40202-1396
Telephone: (800) 728-7228

Signatures - All applications must be signed on behalf of the applicant.

- Session - Signed by the Clerk of Session, Presbytery Representative, and Synod Representative of jurisdiction
- Presbytery - Signed by Presbytery Representative and Synod Representative of jurisdiction
- Synod - Signed by Synod Representative of jurisdiction

Mailing - Grant applications should be mailed as follows:

Session: Mail to the presbytery of jurisdiction

Presbytery: Mail to the synod of jurisdiction

Synod and Mission Agencies:

RESTRICTED FUNDS OVERSIGHT SUBCOMMITTEE
PRESBYTERIAN CHURCH (USA)
100 WITHERSPOON ST ROOM 6629A
LOUISVILLE KY 40202-1396

Questions and Comments - Send to the address listed under “Mailing,” or call Shelly Lewis at (888) 728-7228, Ext. 8023 or E-mail shelly.lewis@pcusa.org.

General Assembly Restricted Funds Unassigned Funds Grants

Frequently Asked Questions (FAQs) and Additional Guidelines for Fund 70047

1. What are General Assembly Unassigned Restricted Funds?

A: Certain existing restricted funds and new funds intended for use in the United States and Puerto Rico that do not specifically designate use by a Presbyterian Mission Agency ministry area are used to fund a program that provides grants to other PC(USA) mid councils. These are known as Unassigned Funds.

2. Who is responsible for this program?

A: The Restricted Funds Oversight Subcommittee (RFOS) is responsible for this program.

3. When is the list of funds available for application released?

A: By March 1 of each calendar year.

4. When is funding made available to grant recipients?

A: Grants are distributed in early October of each calendar year.

5. Are grants made for mission work outside the United States and Puerto Rico?

A: No, grants are not made for mission work outside the United States and Puerto Rico.

6. Is funding available for mission trips?

A: No, funding is not available for mission trips.

7. Are grants made for church construction and/or repair?

A: No, grants are not made for church construction and/or repair.

8. Are grants made for student financial aid?

A: No, grants are not made for student financial aid.

9. Is unassigned funding available for audiovisual/computer equipment?

A: Typically, the RFOS Committee does not fund audiovisual and/or computer equipment.

10. Is unassigned funding available for salary and/or staff support?

A: Typically, the RFOS Committee does not fund salary/staff support.

11. We would like to pay young adults who participate in the internship program. This program would include their education in the church, specialized tasks, etc. To apply for the funds, is it necessary to meet the specific needs of the provider? Or, is it a more general type of inquiry?

A: The donor places restrictions on these funds, and the project/program has to meet the donor's intent in order for it to be considered for funding. The Committee does not fund salary/staff support.

12. Can an application be submitted for a program that is scheduled to be held this summer?

A: No, an application cannot be submitted for a program that is scheduled to be held this summer. The RFOS committee meets in September to review applications and make funding recommendations, and grants are disbursed in early October.

13. Can you explain more about fund 59239—mission program with preference given to advocacy for environment and evangelism? What do you mean by "advocacy for environment?"

A: The proposal should demonstrate a connection to the environment and God's creation. In addition, the application should demonstrate that the program will likely draw new members and/or expose nonmembers to the beliefs of the Presbyterian Church. For example, a compost bin in unused space in the church's backyard and a meditation garden; this will be used for VBS, church school, meditation and worship.

14. Is fund 70047 only for people who are training to become ordained, or does it also apply to ministers who are already ordained but are receiving additional education and training?

A: The pool of money for this grant is restricted to use in the "Western United States area to train ministers for preaching and teaching of the Bible." Based on the wording of the bequest and the donor's residence (Oregon) the Restricted Funds Oversight Subcommittee (RFOS) determined that grants would be for use in the Western 5 synods (Alaska-Northwest, Pacific, Rocky Mountains, Southern California & Hawaii and Southwest).

Seminary students, who are just learning to preach, would not qualify for funding from this grant. The emphasis must be on training ministers; therefore, scholarships should go to ministers from the western five synods. Commissioned Ruling Elders ("CREs") may attend training programs so long as those programs are primarily designed for, and attended by, ministers.

15. Does this apply to location of events? To participants?

A: The funds must be used in these synods and primarily benefit ministers from these synods. Ministers from outside these synods may attend programs/events planned with money stemming from grants but should not receive scholarships. Scholarships should only go to ministers from the noted five western synods.

16. Are individual scholarships given to ministers to attend training programs/events outside the five western synods?

A: No. The purpose of this grant is not to give individual scholarships to attend events outside the five western synods. It is intended that monies from this fund be used to plan and develop preaching and teaching programs/events within the governing body. Scholarships should only go to ministers (from the noted five western synods) to support participation in those programs/events.

17. As scholarships are given to ministers for preaching and teaching programs/events, are they restricted to Presbyterians?

A: Scholarships should be given only to Presbyterian Church (U.S.A.) ["PC(USA)"] ministers or ministers from full-communion denominations as defined by the *Book of Order* (Evangelical Lutheran Church in America, Reformed Church in America, and United Church of Christ).

18. Are grants awarded for reimbursement of individual seminar expenses?

A: No. The RFOS does not award grants for reimbursement of individual seminar expenses.

19. Are Commissioned Ruling Elders ("CREs") included in events? Is it possible to have events for CREs independently of ordained ministers?

A: PC(USA) CREs may attend events but the events should primarily benefit Teaching Elders ("TEs"). There should not be separate events for CREs and TEs.

Additional Guidelines for Fund 70047

Restriction: Train ministers for preaching/teaching Bible, Western U.S. area

Grants from fund 70047 must be used within the “Western Five” synods—Alaska-Northwest, Pacific, Rocky Mountains, Southern California and Hawaii and Southwest.

The gift from which this grant originates is restricted to the training of “ministers.” The Book of Order creates a clear distinction between ministers and Commissioned Ruling Elders (“CREs”). Accordingly, this grant may not be used to provide programs designed solely for CREs or to cover the expenses (including travel and registration) of CREs. CREs may attend training programs as long as those programs are primarily designed for, and attended by, ministers.

The Restricted Funds Oversight Subcommittee (RFOS) has established additional guidelines for the administration of fund 70047 “for training of ministers in the West in Biblical preaching/teaching.”

Specifically, we want to identify the following guidelines for you:

1. No presbytery or synod will be considered for a grant if it has applied before and failed to submit a compliance report for the funds received.
2. The grant is to provide funding primarily for Presbyterian pastors. Others who may be included are pastors of churches in the Formula of Agreement (with which we are in full communion). These are UCC, ELCA, and Reformed Church in America. It cannot be used ecumenically.
3. The donor was quite specific about the funds being used for ministers. The bequest was written at a time when commissioned ruling elders (“CREs”) were already part of the polity of our church. The latitude we have been given is that CREs may participate in the event, but the event may not be marketed for CREs.
4. The funds are to be used within a two-year period. An extension may be applied for, but should not be automatically assumed.
5. Funds are not given for staff to administer a program but are designed primarily for the program itself and its participants.
6. All requests should show the date of the action of a presbytery and/or synod council in support of the proposal. This assures us that this is a proposal that has been discussed and for which there is support of a governing body.
7. Compliance reports are expected quarterly and upon completion of the program.
8. A final report, along with an evaluation of the program, is expected. The final report should include a full budget report and provide information on how all funds have been expended. Terms of the grant stipulate that any unexpended funds must be returned to the following address:

PRESBYTERIAN CHURCH (USA)
RESTRICTED FUNDS OVERSIGHT SUBCOMMITTEE
100 WITHERSPOON ST ROOM 6629A
LOUISVILLE KY 40202-1396

9. Funds are to be administered by a governing body. Normally, the expectation is that a mid council will be a grant applicant/recipient.
10. Grant monies may not be used for candidates for Minister of Word and Sacrament who are not yet ordained.
11. The restriction for geography is the five (5) western synods (Alaska-Northwest, Pacific, Rocky Mountains, Southern California and Hawaii and Southwest).
12. Funds must be used within the bounds of these synods, primarily to support participation of ministers from these synods. Ministers from outside these synods may attend events planned with money stemming from grants but they should not receive assistance to participate.
13. Assistance should be given only to Presbyterian Church (U.S.A.) ["PC(USA)"] ministers or ministers from full-communion denominations as defined by the Book of Order (Evangelical Lutheran Church in America, Reformed Church in America, and United Church of Christ).
14. Keynote speakers must be primarily from the Presbyterian and Reformed Tradition and present a balanced perspective if non-Presbyterian and Reformed Tradition speakers are included.
15. This fund is not for individual scholarships to non-governing body events but is to be used to support participation within the bounds of the requesting governing body.