

## Local Missions Funds Allocation Procedure

**Background:** Included in the WPC Local Missions budget is a wide variety of 1) agencies and organizations that provide assistance to those in need and 2) others that support the health and vitality of WPC and our denomination. Each of these two groupings deserve our continued support, but the differing criteria for success makes direct value comparison difficult. Therefore, this procedure provides guidance for the Local Missions budget to be split and a different funding matrix be used for each of the two segments.

The Local Missions Outreach Benevolence budget will be divided to provide 85% of the budget to external organizations that provide assistance to those in need and 15% to support the health and vitality of WPC and our denomination. This allocation can be changed with the approval of the Session.

### Local Missions Ranking Matrix for Partner Agencies (85%)

Use this matrix for 501c3 agencies requesting grant funding from Westminster Presbyterian Church Local Missions. Using information from agency grant requests, agency WPC Liaisons and congregational input, rate each agency using the following 13 questions. Score each question using the scale shown below:

- 3 Points: Outstanding conformance to our desired objectives
- 2 Points: Good conformance
- 1 Points: Partial conformance
- 0 Points: Does not conform

Agency Name: \_\_\_\_\_

Questions for Partner Agencies of Westminster Presbyterian Church Local Missions	Points
<p>Does the organization’s mission fit with Christ’s teachings? (3)</p> <ul style="list-style-type: none"> <li>○ Does it help those who can’t help themselves with immediate and/or ongoing assistance?</li> <li>○ Alternatively (or in addition), does it help people help themselves, providing support for long term improvement in the client’s life situation through education, training and/or mentoring in life skills to facilitate changed behavior</li> </ul>	
<p>Does the organization provide services in a nondiscriminatory, nonjudgmental manner, eliminating barriers to the extent feasible and consistent with the organization’s stated mission? (3)</p> <p>(An organization may provide service to specific populations, such as a women’s shelter, without being considered discriminatory, and may require reasonable qualifications for entry into its programs if necessary to achieve success of its mission.)</p>	

<p>Does the organization’s mission and location of its activities or clients match the goals and emphasis of the current WPC Strategic Plan? (3)</p>	
<p>Does the organization meet high standards of financial stewardship? (3)</p> <ul style="list-style-type: none"> <li>○ Does it provide audited financial records or reports?</li> <li>○ Does a high % of funds go toward programming (i.e. 15% maximum administrative costs)</li> </ul>	
<p>Is the organization able to demonstrate its effective use of programming resources? (3)</p> <ul style="list-style-type: none"> <li>○ Has the organization clearly articulated what it plans to achieve and its targeted clientele?</li> <li>○ Does the organization demonstrate measureable results over time?</li> </ul>	
<p>Does the organization collaborate appropriately with other organizations? (3)</p> <ul style="list-style-type: none"> <li>○ Does it refer clients as needed to address total client needs?</li> <li>○ Does it partner with other agencies to provide complementary services?</li> <li>○ Does it offer services that are not redundant with other Durham organizations?</li> </ul>	
<p>Is the organization’s service model sustainable over time? (3)</p> <ul style="list-style-type: none"> <li>○ Does it have multiple ongoing funding sources?</li> <li>○ To the extent it requires collaboration from other organizations, are those organizations stable?</li> </ul>	
<p>Is the number of people served by the organization meaningful? (3)</p> <ul style="list-style-type: none"> <li>○ In the case of an organization providing immediate or emergency assistance to those who cannot help themselves, the focus should be on whether the overall number of people served is meaningful and represents an efficient and appropriate response to their needs.</li> <li>○ In the case of an organization providing life skills assistance, the focus should be on whether the population served is one with demonstrated needs and on the level of difference the organization is able to make in their lives.</li> </ul>	
<p>Does the organization serve a diverse population or, alternatively, serve an underserved population in a manner that promotes general diversity within the community? (3)</p>	
<p>Does the organization promote lasting change, demonstrating a long-term impact on its clients, their families and/or the community? (3)</p>	

<p>Are WPC members involved with the organization as board members, volunteers and/or donors? (3)</p> <ul style="list-style-type: none"> <li>○ Is there a WPC member liaison who is actively involved in the organization?</li> <li>○ Is there a WPC member who is involved in the management of the organization?</li> <li>○ Do multiple WPC members donate services and/or money to the organization?</li> </ul>	
<p>Is there an opportunity for 'hands on' involvement by WPC members? (3)</p> <ul style="list-style-type: none"> <li>○ Are there opportunities for learning / changing member's lives through involvement with the organization?</li> <li>○ Are there opportunities for members to provide hands on service to others?</li> </ul>	
<p>Does WPC have a significant historical connection to this organization? (3)</p> <ul style="list-style-type: none"> <li>○ Was WPC or any of its members instrumental in the organization's founding / growth / maintenance?</li> <li>○ Have there been ongoing and active involvement/financial support by WPC or its members for many years.</li> </ul>	

**How Much Should We Give Financially:** (factors to consider in determining our financial gift)

1. How does the organization rank from our matrix?
2. How important is our support to the organization?
  - What percentage is our contribution to the total operating budget of the organization
    - Is our gift financially meaningful?
  - What percentage is our contribution to total non-grant funding of the organization
    - Is our gift important to secure grant funding from others?
3. Our historical giving to the organization ( Major changes to financial support should be done with communication and over time to allow for agency planning)
  - Degree to which the organization expects our support
  - Degree to which our membership expects us to provide support
  - How much have we been giving

### Local Missions Ranking Matrix for Church Related Partners (15%)

Use this matrix for denominational and church related partner activities. Over the last few years the following organizations would be in this category; the 3 Campus Ministries, DCIA, Camp New Hope and the Hispanic church ministry.

Score each question using the scale shown below:

- 3 Points: Outstanding conformance to our desired objectives
- 2 Points: Good conformance
- 1 Points: Partial conformance
- 0 Points: Does not conform

Partner Name: \_\_\_\_\_

Questions for Church Related Partners of Westminster Presbyterian Church	Points
How important is this activity to the mission and vitality of: <ul style="list-style-type: none"> <li>• Westminster Presbyterian Church (3)</li> <li>• The Presbyterian denomination (3)</li> <li>• The Durham Faith Community (3)</li> </ul>	
How important is our contribution to the viability of the organization? (3)	
Does the organization meet high standards of financial stewardship? (3)	
Does the organization provide long term benefit to the recipients? (3)	

**How Much Should We Give Financially:** (factors to consider in determining our financial gift)

1. How does the organization rank from our matrix?
2. How important is our support to the organization?
  - a. What percentage is our contribution to the total operating budget of the organization
    - i. Is our gift financially meaningful?
3. Our historical giving to the organization ( Major changes to financial support should be done with communication and over time to allow for agency planning)
  - a. Degree to which the organization expects our support
  - b. Degree to which our membership expects us to provide support
  - c. How much have we been giving