**Some Questions You May Have about Requesting Funding**

# What if my unit is not planning to request funding for FY 2022? Will that set any precedent for future years?

Funding is now being addressed on a yearly basis. We are phasing out multi-year allocations. A decision not to request any funding for FY 2022 will have no impact at all on your opportunities to request funding in future years. Also note that a unit that is not requesting funding has a grace period until Monday, November 30, for submitting the unit’s Report to the Board (though sooner is always better than later!). It would, however, be kind and helpful if you would send a note to Andrea Taylor ([sce@scethics.org](mailto:sce@scethics.org)) on or before November 1 to let her know that your unit has no budget request this year. That will spare you any follow-up emails asking why your report and funding request have not been received.

# What paperwork is involved in making a funding request?

You will need to **submit two documents** by the November 1 deadline:

1. Your unit’s standard Report to the Board—this is the same report that you would normally prepare for the Board, but you will need to submit it by the November 1 deadline. A copy of the template is available on the website ([bit.ly/3jl8wql](https://bit.ly/3jl8wql)).
2. A standardized form on which you provide the necessary information about the amount of and reasons for your request. A copy of this form is available on the website ([bit.ly/3jl8wql](https://bit.ly/3jl8wql)).

*How do I submit the request?*

The Report to the Board and the request form should both be sent, together, to Andrea Taylor at [sce@scethics.org](mailto:sce@scethics.org). Andrea will both keep a record of the request and forward the request to the Treasurer and members of the Finance and Long-term Planning Committee of the Board.

# What period will be covered by the budget the Board will approve in January 2021?

The budget the Board will approve in January will be for the fiscal year that runs from October 1, 2021, to September 30, 2022. It includes the 2022 Annual Meeting to be held in Costa Mesa, CA. If you have a project that involves expenses beginning in the summer or early fall of 2021, it is OK to request such funding; there are accounting techniques that would allow such expenditures to be made in one fiscal year but expensed in the following fiscal year.

# If my unit doesn’t request funds by the November 1 deadline, can we change our minds and submit a request later?

No.

# Can I use this opportunity to request additional funds for what my unit now plans to do at the 2021 meeting?

No. Funding levels for the 2021 meeting were approved last January. I know it is hard to lay accurate plans so far ahead, but as we move toward turning our management over to an outside firm, we will all have to live into this kind of anticipatory envisioning.

# If I need to request an expense reimbursement for expenses that my unit will have at the 2021 meeting, can I use this form?

No, reimbursement of expenses at the 2021 meeting should be requested on the “Expense Reimbursement Form” that is available on the website ([bit.ly/3jl8wql](https://bit.ly/3jl8wql)).

# If I need to have a check cut for expenses that my unit will incur at the 2021 meeting in can I use this form?

No, there is a separate “Arrangements and Expenditures for AM” form on the website ([bit.ly/3jl8wql](https://bit.ly/3jl8wql)).

# If my Working Group needs to request that travel arrangements be made for a speaker at the 2021 meeting, can I use this form?

No, use “Arrangements and Expenditures for AM” form on the website ([bit.ly/3jl8wql](https://bit.ly/3jl8wql)).

# If I am the convener of a Working Group that wishes to continue to provide participating eligible student members of the Working Group with refunds for their payments of dues and registration fees, do I need to include the cost of those refunds in my funding request?

Yes. Those refunds (formerly called waivers) are now funded out of the strategic initiative budget class and those costs do need to be included in your funding request. We do recognize that (1) there is no way you can know how many eligible student participants you will have attending your Working Group sessions in 2022 and (2) no one will know on November 1, 2020, what the student registration fee for the 2022 meeting will be. Still, should you wish to request funding to enable you to continue to offer such refunds, it would be extremely helpful if you would make a good faith effort to estimate the likely cost. Andrea Taylor can provide you with the actual expenditures for this purpose over the past several years from which you could develop a fairly reliable figure. An alternative, if you don’t want to develop an estimate based on your particular Working Group’s history but do wish to request this funding, would be to use a figure between $800 and $1,000. For the 2017 meeting, the total cost of these refunds (for all three Working Groups together) was $3,060, and for the 2018 meeting, it was $2,295. Provided the Board approves this aspect of your budget request, if the refunds requested by participating eligible student members of your Working Group exceed the amount you have requested, all of the eligible students will still receive the requested refunds and the Working Group will not be considered to have overspent.

# Why does the Fund Request Form say “Strategic Initiatives Budget Class”?

In our general budget, we now recognize four budget classes:

* *Annual meeting:* the income (almost entirely from registration fees) and expenses related to the annual meeting,
* *Operations:* the income (mainly from dues) and expenses related to the day-to-day operation of the Society as a non-profit organization,
* *Journal of the Society of Christian Ethics*: the income and expenses related to the publication of the *JSCE.*
* *Strategic Initiatives:* This budget class includes expenditures related to units generated from strategic planning initiatives such as the 21st Century Committee (the Working Groups, for example); units formed by the Board to address particular planning needs (the Task Force on Contingency, for example); membership building initiatives; and other expenses of a similar nature.

Caucuses, Working Groups, and task forces are line items in this budget class; therefore requests from these units will be considered in relation to the revenue available in this budget class. Revenue for expenses in this budget class is provided by (a) donations specifically given for one or another of these initiatives and (b) an annual percentage draw on investments. Only those committees (for example, the International Scholarly Relations Committee) that are charged with the administration of a particular strategic initiative must submit funding requests if they anticipate expenditures.

# Do the chairs of the Nominating Committee, the Professional Conduct Committee, and the Program Committee need to submit budget requests?

No. The expenses associated with the normal work of the Nominating Committee and the Professional Conduct Committee are rolled into the overall Operations budget class. The expenses associated with the work of the Program Committee are rolled into the overall Annual Meeting budget class. Chairs of these three committees do, however, need to submit the committee’s annual report to the Board by November 30.

# Suppose I am the head of a unit for which members have made donations that are restricted for the use of my unit (funds donated to support bringing an international speaker would be an example). And suppose I know that there are sufficient funds in that restricted account to cover the expenses that my unit projects for the 2022 Annual Meeting. Do I still need to submit a funding request?

Yes. Requests to fund activities for which restricted donations have accumulated will automatically be granted, but because this is money from investments that will be spent in FY 2022, it needs to be included in the budget that is prepared for the Board’s consideration.

# November 1 seems like an unnecessarily early deadline!

Between November 1 and mid-December the Treasurer and the Finance and Long-term Planning Committee of the Board will develop the proposed fiscal 2022 budget that will be sent to the Board of Directors before Christmas. Board members need to receive it before Christmas so that they have adequate time to go over it carefully in preparation for discussing and voting on it at the Board meeting in January 2021. Taking account of the AAR and Thanksgiving, the November 1 deadline allows only about five weeks for doing this important and time-consuming work.

*If my unit has had funding in the past, is this a pro forma request, and if so, why are you making me do this extra work?*

SCE funding for your unit's initiatives falls into the budget class of strategic initiatives, which is funded either by member donations or by a 4.5 percent draw on SCE investments at the end of the fiscal year (excluding the investments set aside for self-insurance).  The amount of money available for strategic initiatives will therefore fluctuate from year to year.  While we hope that the market remains strong and that we will be able to maintain donations at the current level (or even increase them!), if funding requests exceed the amount of money available, then it is likely either that not all requests will be granted or that not all requests for continuations will be renewed at their current level.