Chalice Lighter Grant Application for New Congregation Organizing

To be submitted to the Chalice Lighter Program Committee

of the Central East Region

 Revised: September 9, 2020

Please refer to [Chalice Lighter Grant Policies and Procedures](https://www.uua.org/files/2020-12/cercl-policies-procedures.pdf) for grant-related policy, deadlines and information about assistance in completing this form.

Name of Congregation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Meets at (address): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Website: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: ( ) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Preferred Phone: ( ) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The following CER Chalice Lighter Program Committee Policy is applicable to any group or congregation contemplating a grant request for New Congregation Organizing.

Section 1 – Information regarding the grant being requested

(attach separate pages as necessary)

**1. Type of Grant:**

**New Congregation Organizing**: A one time grant to provide assistance with gathering and organizing a new congregation of any size within the geographical limits of the Central East Region.

**2. Grant Summary**:

On a separate sheet, please briefly summarize how you will use these funds.

3. **Funding Summary:**

 A. By year, how much funding do you expect to provide for this function in addition to the grant?

 Year 1 \_\_\_\_\_\_\_\_\_\_\_ Year 2 \_\_\_\_\_\_\_\_\_\_\_ Year 3 \_\_\_\_\_\_\_\_\_\_\_

 B. Please briefly describe how you plan to continue funding the function once the grant is completed.

 C. When do you want/expect to begin using your grant? (Month/year) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. **Other Considerations:**

 A. Describe how your grant application relates and/or contributes to regional growth.

B. Describe your congregation’s efforts (such as policies, programs or events) to support the anti-racist, anti-oppressive, multicultural goals of the UUA.

**New Congregation Organizing Grant Program Entry Requirements**

**In order to be considered, the initial application must demonstrate that these benchmarks have *already been met:***

◻ Feasibility statement completed (includes demographic studies) and accepted by the Central East Region.

◻ Affirmation of CER is obtained (documentation of this is required).

◻ Case Statement presented to CER Chalice Lighter Program Committee

◻ Evidence of financial and logistical support from a sponsoring congregation or congregations, including one willing to act as fiduciary agent.

◻ Steering Committee/Core Group will have a minimum of 10 individuals.

◻ 90% of Steering Committee Core Group will pledge at the “visionary level” of 5% or more of Adjusted Gross Income.

## Section 2 – Information about your congregation

1. Please attach a copy of your preliminary long-range plan that addresses these five areas:

A. Membership B. Programs C. Facilities D. Finances E. Staff

When was it approved by your steering committee?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Staff is available to work with your congregation to develop a long-range plan if you do not have one. If interested, please reach out to your CER Primary Contact or contact Cristina Sanchis at csanchis@uua.org.

2. Financial Information (if applicable)

 Number of pledge units \_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_

 Total amount pledged \_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_

 Total income (all sources) $\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_ $ \_\_\_\_\_\_\_\_\_\_

 Total expenses $\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_ $ \_\_\_\_\_\_\_\_\_\_

Please attach:

 A. The current year's budget.

 B. Estimated budgets for the next 3-5 years showing how the proposed project will be supported in the future.

Section 3 – Application requirements

1. **Preliminary** **Long-range plan**. Have you attached your plan? Yes \_\_\_

2. **Financial information**: Have you attached a proposed annual budget Yes \_\_\_

 for the current fiscal year and a proposed 3-5-year budget projection?

3. **Affirmation from CER:** Please attach documentation showing affirmation of

 this proposal from CER.

4. **Evaluation**. Two measurement tools are required for the life of the grant.

 A. Annual Grant Implementation Report: The Project Manager must provide a

 quarterly membership statistics and weekly attendance report.

 B. Annual Grant Report: A written report that describes the efficacy of the grant,

 using whatever indicators the congregation believes are meaningful. The

 annual grant report should include the congregation’s annual report, if one is

 produced. Do you agree to write and submit these evaluations and report? Yes \_\_\_

5. **UUA Honor Congregation**. Grant recipients must intend to be a UUA Honor Congregation at the time of affiliation. Does your congregation intend to

 be a UUA Honor Congregation? Yes \_\_\_

6. **Communication**. Do you agree to send a copy of your newsletter during the period

 of the grant to the Grant Manager identified in the letter notifying the

 applicant of the grant award? Yes \_\_\_

Authorized by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_

 Steering Committee Chair

Deadlines for Applications:

|  |  |  |
| --- | --- | --- |
| **Intent to Apply due:** | **Full Application due:** | **CL Committee Grant meeting** |
| June 1 | August 1 | September |
| October 1 | December 1 | January |
| January 2 | March 1 | April |

Send the completed application and pertinent attachments electronically to csanchis@uua.org and to chalicelighters@cerguua.org by the appropriate deadline.

Revised: September 9, 2020

**New Congregation Organizing Multi Grant Program**

**Grant 1 - New congregation organizing**

1. CER-appointed organizer to assist with long-range strategy and planning

2. Assist steering committee with start up/gathering activities

3. Facilitation of a mission/vision/covenant process with Steering committee and/or core group

4. This phase would ordinarily take 6 months to one year.

Supporting documents for entry into the New Congregation Development Program and Grant 1

1. Feasibility statement

2. Report of the New Congregation Committee

3. Letter(s) of Support from Sponsoring Congregations

4. Letter of Commitment from Sponsoring Congregation acting as fiduciary agent

5. List of Steering Committee/Core Group members

6. Report on pledged financial support from Steering Committee/Core Group

**Benchmarks to be met before moving on to Grant 2:**

◻ Mission, Vision, Covenant Completed

◻ Preliminary Long-Range Plan and Long-Range Financial Plan are completed

◻ Date for initiation of Public Worship and Religious Education Program set.

◻ First Public Worship Target Attendance: 100 children and adults.

◻ Average pledge is at the sustaining level of 3% or more of Adjusted Gross Income.