

JUC ENDOWMENT AND MEMORIAL GIFT TRUST SPECIAL PROJECT GUIDELINES FOR 2020-2021 GRANTS

1. Projects that are awarded funds will reflect the religious and social values expressed in the UUA Principles, the JUC Mission statement and JUC's Values and Strategic Outcomes. See <https://jeffersonunitarian.org/wp-content/uploads/2016/02/Values-and-Strategic-Outcomes.pdf>
2. All proposals will originate from or through a standing committee or other recognized group of JUC. A list of these committees and groups with point-of-contact is enclosed as Atch A. Any application requiring capital expenditures (e.g., building modifications, additional utility usage), must be reviewed and approved by JUC staff, coordinated through Carol Wilsey.
3. Proposals will be evaluated according to the criteria shown on the application page.
4. Projects shall not include: operating expenses; day-to-day expenses; expenses ordinarily included in the annual budget; and expenses that have been or will be incurred on a regular and ongoing basis. The Trust shall not be used for expenditures for which there will be no lasting benefit.
5. Projects to be funded will be chosen annually in the late spring on an individual basis. Grant funds will be available for expenditure in the following fiscal year (i.e., after July 1). Consideration will be given to proposals for projects that need funding greater than what is currently available. In such a case, funds could be granted for this fiscal year with additional funds set aside for future allocations. Generally, grant proposals must be submitted no later than the date specified below in these guidelines for award consideration. However, the EMGT Committee may, at its discretion, consider 'out-of-cycle' grant proposals for special, unforeseen or extraordinary projects to the extent funds are deemed available.
6. Project monitoring will be the responsibility of the committee or group awarded the funds. A person must be assigned by the applicant to monitor the grant and report to EMGT. This person will communicate with a member of the EMGT Committee assigned as liaison to the project. A written status report documenting progress and fund expenditures will be required by December 31 of the fiscal year for which the project received funding, using the enclosed Atch B, EMGT Grant Interim Report. A final report will be required at project completion that will include comments about the accomplishment of objectives, using the enclosed Atch C, EMGT Grant Final Report. The interim and final reports will follow the format established by the EMGT Committee.

7. Examples of types of projects include, but are not limited to:
 - Capital improvements (non-maintenance)
 - Education programs for congregation and/or community
 - Community outreach/social action
 - Wider mission of Unitarian-Universalism (e.g., new church development)

8. Grant money must be spent within the fiscal year (July 1 - June 30) awarded. If the project completion is not possible within that timeframe, the project contact person must submit a Request for Extension of up to six months until December 31. The Request for Extension must be received by the EMGT Committee before June 30 or the funds must be returned. The EMGT Committee will approve/disapprove the request within two weeks of receipt. Any funds not utilized within the allotted or extended time are to be returned to the EMGT pool for the next grant cycle. A new proposal can be submitted for the same project in the next grant cycle and will be evaluated strictly on its merit against other requests.

**JUC Endowment and Memorial Gift Trust
Application for Special Project Funding
For Church Fiscal Year 2020-2021**

Project title:

Project contact person, e-mail and phone:

Dollar amount requested:

Name of JUC sponsoring organization: Point of contact, email and phone

Project objective: What is the project is intended to accomplish; what outcomes do you seek?

Scope of work: Describe the work to be done, specifically:

Tasks (what) and responsibilities (who):

Timeline/schedule:

What metrics will you measure the project's success by? All grant projects can be measured.

Examples of metrics: If your grant funds a project to provide books to children, your metric could be: With the new books, 80% of the students will have started reading by the end of the program as measured by X.

If your grant funds volunteer service, your metric could be: A 5% increase or approximately 40 members will help with volunteer duties four times per year.

Non-measurable outcomes: Not all outcomes are quantifiable, some may further intrinsic value

Budget breakdown: How much money will go for salaries, travel, materials, overhead, etc. Describe any cost sharing for the project to come from other sources.

How will the project make a difference for JUC, the UU denomination, and/or the larger community? What impact will the grant enable? This should include how project meets JUC strategic outcomes, short-term benefits, lasting value and provide a brief evaluation plan.

Person or persons responsible for project oversight and reporting, and their contact information if different from the contact person above. What are their qualifications?:

Total funds available: \$40,750. Proposals will be accepted until all funds are awarded. Notice of grant awards will be made on a rolling basis for fiscal year 2020-2021.

Submit applications via email to EMGT@jeffersonunitarian.org, and deliver hard copy applications to the EMGT mail slot in the Mills building lobby. Provide an email copy of the application to Carol Wilsey, at:

carolwilsey@jeffersonunitarian.org

Please submit additional pages as necessary to address any of the items above.

Attachment A

JUC Ministry Leaders

(updated Jan. 31, 2020)

Worship (staff contact: Wendy) Chair, Gail Abbott, Sarah Babcock, Dindy Fuller, Anne Starace, Elizabeth Stamberger, Linda Hartman, Bob Drew

Going Deeper (staff contact: Nick Rogall) Wendy Williams, Jules Jaramillo, Jenny McCready)

Membership (staff contact: Nick) Nick Rogall, Pam Moser, Barbara Munson, Kathy Stroh, New Here Facilitators

Music (staff contact: Keith) Keith Arnold, Sarah Billerbeck, Laura Lizut, Adam Revell

Pastoral Care (staff contact: Eric) Deda Nelson, Lynne Haigh, Don Armstrong, Beth Finnell (Card Ministry), Jill Surber Blackwell, Susan Walker, Deb Kitner, Ira Ehrlich, Phyllis Bunting (Memorial Reception)

Social Responsibility (staff contact: Eric) Jill Armstrong, Don Armstrong, Don Macalady, Gilla Lachnitt, Carol Kolesnikoff, Laurie Scholl, Gretchen May, June LeCrone, Laura Hollingsworth, Martin Voelker, Andy Melick, Judy Douglass.

Becoming the Change/Faith Formation - will look at reforming the team in the spring of 2020

Young Adults (staff contact: Eric) Devon Hicks, Justin Blumenthal

Family Ministry Team (staff contact: Jules) Heather Kubert, Brooke Maddaford, Meggin Jackson, Heather DeCaluwe, Adam Mathiasen

Religious Education Theme Team (On hiatus)

OWL Council (staff contact: Jules) Dede Cross, Brian Fawns, John Kaltenbach, Kristine Mathiasen, Betty Lyn Ferguson

Planned Giving Bud & BJ Meadows, Mike Kramer

Board of Trustees (elected by Congregation) President, Paula Reed, Secretary, Ken Andrus, Pam Bond, David Fleck, Case Collard, Tom Goodreid, Heather Hagemann, Andrea Aikin, Derek Bassett

Leadership Nominating Council (elected by Congregation) Jane Keen, Mary Anne Schiff, John Hambright, Zack Schreiner, Brad West

Endowment and Memorial Gift Trust (Elected by Congregation) Mike Kramer, Chair; Pat Emery, David Entwistle, Rachele Trujillo, Bill Finley

Shared Mission Team (Formerly Committee on Ministry) (Appointed by BOT) Brooke Maddaford, Judy Douglass, Jon Hassinger, Jill Surber Blackwell, Sarah Davidon, Skylar Zilliox

Year-Round Pledge (Appointed by BOT) Wendy Williams, Carol Wilsey

Auction (Appointed by BOT) Sarah Babcock, Mary Ann Blumenthal, Darcy Stanton, Carol Wilsey

Making Room Posse Dea Brayden, Debby Bower, Chris Sealy, w/ Wendy and Carol both as staff point of contacts



Attachment B
Jefferson Unitarian Church
EMGT Grant Interim Report 2020-21

Grant Name:
Amount:
Prepared by:
Date:

1. Grant Mission/Goals:

2. Summary of Efforts in Progress:

3. Summary of Efforts Not Yet Started:

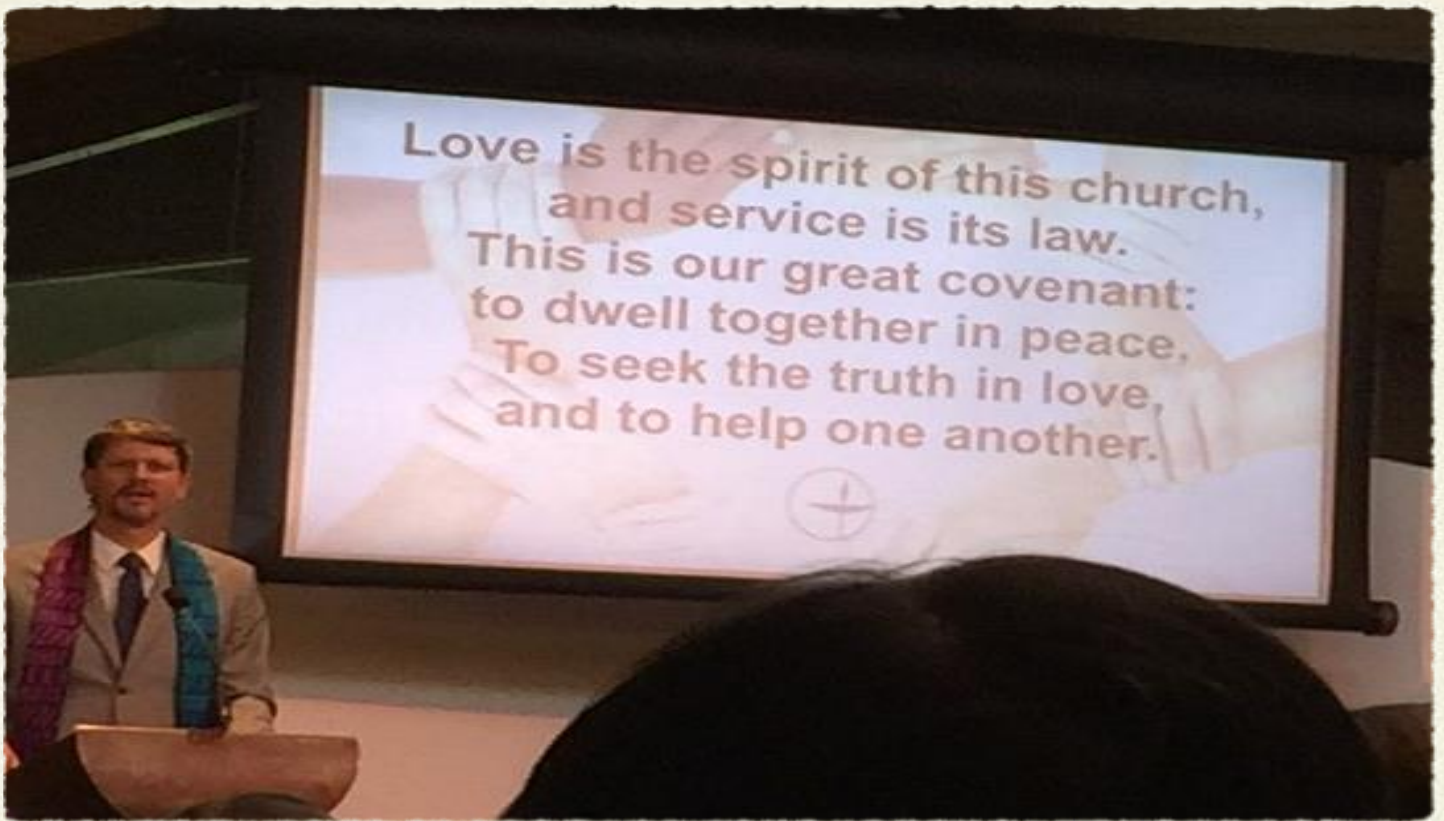
4. Update on Issues Encountered, if Any, From Grant Original Goals and Timelines:

5. Update on Funds Spent to Date, if Any:

Description	Quantity	Unit Price	Total Cost
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
Total			\$ 0

Any Other Pertinent Details for EMGT Board Regarding Grant, if Any

ATTACHMENT C
JEFFERSON UNITARIAN CHURCH
EMGT FINAL GRANT REPORT : 2020-21



Grant Proposal Name: _____

Prepared for: EMGT Board Members

Prepared by: _____

Date: _____

Revised by EMGT Board on 011920

Overview

1. Objective and Scope of Grant (State original grant objective)

2. Grant Goals and Metrics Used to Measure Desired Outcomes to help determine the success of grant

3. Describe Grant Success and Challenges (please comment if above described metrics used to measure grant successes was achieved as well as language that balances the metrics with non-numerical comments)

3a. Successes:

3b. Challenges:

4. Conclusion: Please state if grant was successful; why or if not successful and what you would do differently, if anything. Also please add any key information about grant effects desired. Not all grants will be successful and efforts matter. Knowing what doesn't work helps with future grants.

5. Please write a 150 to 250 word statement describing the impact of the grant to share with the JUC congregation. What difference did the project make for JUC or community? If available, please attach a jpg photo showing the grant in action.

Budget

Amount of Grant Awarded: \$ _____

Please itemize expenditures for grant

List the type of expenditure under description and if quantity is 1 put 1 in and the cost of the item. Total cost will be calculated for you.

Examples; Consultant fees for description; 1 for quantity and \$5,000 for unit price. Total cost will calculate at \$5,000. If 20 books were purchased at \$10 each, quantity would be 20, unit price \$10 and total cost would calculate for you at \$200.

Total expenditures will automatically calculate from each total cost.

Description	Quantity	Unit Price	Total Cost
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
			\$ 0
Total			\$ 0