

**Jefferson Unitarian Church**  
**Endowment and Memorial Gift Trust**  
**Special Project Guidelines**

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](#).
2. All proposals will originate from or through [a standing committee or other recognized group of JUC](#). 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 in the [application](#).
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 [EMGT Grant Interim Report](#) form. A final report will be required at project completion that will include comments about the accomplishment of objectives, using the [EMGT Grant Final Report](#) form. 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)

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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.