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## **Guidelines to Grants Program approved by Board April 9, 2019**

### **History**

In December 2016, the congregation voted to establish a Short-Term Microloan/Matching Grant program with funds from Judy Cole's bequest to the church. The BOT at that time established a task force to establish guidelines for the program. The original task force included Rich Little, Charles Coley, Heather Fox, Nick Hernandez, Lindsay Bartlett, Dorothy Ramsey, and Kristi Wamstad.

This task force decided to split the \$56,000 allocated for this effort into two pathways implemented over 3 years:

- \$20K for Short-Term Revolving Microloan program (as startup or catalyst funds for activities that could become self-sustaining)
- \$36K for Matching Grant (to be matched 50/50 with funds outside of the church's budget; \$12K allocated per year, starting in 2017/2018)

It was also decided that we would conduct two rounds of application submittals with one being in the fall and one in the spring. The application period was open for 1 month in October 2017 and 1 month in March 2018. The task force streamlined to include 3 board members: Emily Cameron Shattil, Mark Sheffield, and myself.

In the first round, we received one grant submittal that was withdrawn after confirming the match would come from the budget. We awarded one loan application, but conditions were not met to launch that effort. In the second round, we received many applications related to General Assembly participations and other activities. Funds were allocated for youth attendance, ambassadors, and a loan for securing housing.

The remaining funds associated with the program should be roughly \$20K for the loans and \$32K for the grants.

The eligibility criteria include:

- Applicants must be from a pledging member family. It is preferred that the application is committee endorsed. Grant Task Force participants must recuse themselves from decisions if applying for the grant.
- Activity is expected to commence within 1 year of award. Duration for loan is that payback completed within 3 years. Match (in-kind or financial) must be received by entity within one year of award.
- The amount available for any single interest-free loan or grant is \$3,000. Exceptions may be made by the task force for exceptional submittals.
- Reporting requirements include written or oral report to the congregation and availability to speak at annual meeting.
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## **Proposal**

Implementation of the grant program would benefit from regular participation from the Board. It is proposed to alter this program from a “seasonal application period” model to “rolling applications” that can be submitted by church members as they are inspired. This will ensure some continuity in messaging and hopefully engage more members with creative ideas.

The eligibility criteria would remain the same (substituting Board for Grants Task Force), except for it could be matched with budget funds. However, the projects would have to be a demonstrated enhancement above and beyond the expected budget item. Also, the application process would continue to ask the following key questions:

- Does the project support the seven guiding principles?
- What is the potential benefit?
- Does it benefit UCL as a whole?
- What is the congregational impact?
- Does it promote UU principles beyond the walls of the church?

As a rolling application program, members could submit their ideas to the Board at any time. ..Grant applications will be included in the pre-board meeting packet.

The Grants Task Force can still take responsibility for administering the grant after selection. This would involve connecting with the applicant, confirming any conditions being met, and authorizing expenditures.