

New York State Convention of Universalists

Grant/Loan Application

For

Unitarian Universalist Societies and Organizations

**Reaching out to your community?
Collaborating with other UU organizations?
Starting an exciting new program?
Looking to expand and strengthen your society?
Engaging in leadership training?**

Innovative programs take initiative.
They require finances.

**If you have the initiative,
the New York State Convention of Universalists
may be able to help you with the finances.**

Submit a grant proposal or a capital-project loan application
to the New York State Convention of Universalists (NYSCU).

Annual deadline for submission is January 31st

This is a hard deadline: Except in emergencies, proposals or applications postmarked
or electronically dated after 11:59 pm on Jan. 31 will not be considered.

Under special, emergency and/or other urgent circumstances, loan and grant applica-
tions may be considered out of cycle at the sole discretion of the Board of Trustees.

NEW YORK STATE CONVENTION OF UNIVERSALISTS

GRANTS AND LOANS PROGRAM

Each year the New York State Convention of Universalists (NYSCU) accepts proposals for funding under its Grants and Loans program. Applications must be postmarked or electronically dated by 11:59 pm on January 31 of a given year to be considered in that year's funding cycle (e.g., by 11:59 on January 31, 2024, to be considered for 2024 funding). This program is intended to fulfill the guidelines of the NYSCU Mission Statement, found on page 3.

The objectives of the NYSCU Grant and Loan program are to:

- a. Support the development of innovative programs which will enhance the effectiveness of congregations or benefit their local communities or region. Programs in this category will include, but not be limited to, those associated with social concerns, growth of the congregation or of Unitarian Universalism, or improved methods of operation within a congregation. Support of organizations associated with Unitarian Universalism are included under this clause.
- b. Support the operation of the Central East Region of the Unitarian Universalist Association (UUA), including select special programs administered by the Region.
- c. Support the documentation and dissemination of Universalist history and the ongoing significance of Universalism within the Unitarian Universalist movement.
- d. Support select capital projects.

The Board of Trustees encourages submission of applications that meet one or more of the above criteria. Projects that serve several congregations, or that can be demonstrated and then applied at other churches and/or fellowships, are especially welcome.

Limited grant money may be awarded for partial costs of staffing - salaries, wages, or stipends - in support of a program that meets the objectives listed above but shall be limited to one-time funding for temporary positions or "seed money" to fund an initiative.

Lists of projects funded in the recent past can be found on the Convention website (www.nyscu.org). Limited grant money may be awarded for partial costs of a capital project that meets the objectives listed above. In no case shall a capital project grant exceed \$5,000. Capital projects which are awarded grant money shall not be eligible for an NYSCU loan.

Proposals will be considered annually at the spring meeting of the NYSCU Board. Decisions regarding proposals will be sent to all applicants by March 31st. If a grant is awarded, the Grants and Loans Chair will send a Project Progress form to all successful applicants in August of the award year. Completed forms should be sent to the Grants and Loans Chair by September 30th for presentation at the Annual Meeting of the Convention, usually in October. A final report is due at the completion of the project. Funds granted but not claimed by December 31st of the granting year shall be forfeited.

Applications for grants or loans should be mailed to: Tom Hackett, Clerk, 70 Wall Street, Kingston, NY 12401 or emailed to NYSCUTom@gmail.com. ***Note: If sending by email, please request a return receipt (if your email program supports that function). In any case, please contact the Clerk (845-464-2177) if you do not receive an acknowledgment within five days.***

THE MISSION OF THE NYS CONVENTION OF UNIVERSALISTS IS:

To advance the principles of Universalism through missionary, educational, and charitable work, and to promote the interests of its member societies. In furtherance thereof the Convention shall:

1. Preserve, nurture and enhance the Universalist heritage.
2. Cooperate with the Unitarian Universalist Association, related organizations and the Central East Region of the Unitarian Universalist Association (UUA).
3. Maintain a continuing relationship with the St. Lawrence Foundation for Theological Education.
4. Maintain a Service Gratuity fund for retired ministers, and surviving spouses, and religious education directors who qualify under provisions of the Service Gratuity. Plan adopted by the Convention from time to time.
5. Receive and administer real estate and other assets.

THE MISSION OF THE NYS CONVENTION SHALL BE ACHIEVED THROUGH THE FOLLOWING ACTIONS:

- a. Funding of proposals which develop public awareness and interest in Unitarian Universalism and which will lead to support or activity in furtherance of the UU movement.
- b. Funding of proposals which promote growth through improved operations in local societies.
- c. Funding of the publication or presentation of an Annual or Biennial paper related to Universalist Heritage and its contemporary value.
- d. Pursuit of the above through the administrative action of the Executive Board of the Convention; and
- e. Carrying out of such additional responsibilities as are required under its By-Laws and the statutes under which the New York State Convention of Universalists is incorporated.

Note: When submitting your application, please detach the first three pages.

NYSCU Grant or Loan Application

Grant _____ Loan _____ Application Date _____

Applicant Organization _____

Title of Project _____

Approved by:

_____ Local Congregation Board _____ Affiliate Org. Board or other Group _____ UU Camp

Contact Person _____

Title/Position _____

Mailing Address _____

Telephone (____) _____ Cell _____

E-mail _____ Website _____

TYPE OF PROJECT (*CIRCLE OR INDICATE ONE*)

- a. Support the development of innovative programs which will enhance the effectiveness of congregations or benefit their local communities or region. Programs in this category will include, but not be limited to, those associated with social concerns, growth of the congregation or of Unitarian Universalism, or improved methods of operation within a congregation. Support of organizations associated with Unitarian Universalism is included under this clause.
- b. Support the operation of the Central East Region of the Unitarian Universalist Association (UUA), including select special programs administered by the Region.
- c. Support the documentation and dissemination of Universalist history and the ongoing significance of Universalism within the Unitarian Universalist movement.
- d. Capital project.

Total amount requested \$ _____ Starting date _____ Ending date _____

Have NYSCU funds been provided to this organization previously?

Yes _____ No _____ If so, what year(s)? _____

Would additional NYSCU funds be required to complete this project? Yes _____ No _____

Identify other organizations asked for funding for this project:

| Organization | Amount | Received? Yes/No/Pending |
|--------------|--------|--------------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

If funding is for a leadership training scholarship, please provide name, location, and date of program.

An accompanying letter from your society or organization will often help the Board get a sense of local priorities.

Provide a brief description of the project, its purposes and values, and the work to be accomplished. Attach additional pages if necessary.

Project Budget: Estimate cost of each applicable category.

Category (e.g., honoraria, publicity, travel, copying, etc. [please specify])

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Total Request (should equal amount on p. 4) _____

Please provide a summary budget for the present year for your congregation or UUA affiliated organization.

Income

| | |
|----------------------------------|-------|
| Pledge Income | _____ |
| Endowment Income | _____ |
| Other Income (e.g. Bldg. Rental) | _____ |
| Fundraising | _____ |

TOTAL _____

Expenses

| | |
|---|-------|
| Salaries | _____ |
| Administrative Expenses | _____ |
| Maintenance | _____ |
| Faith Development / Religious Education | _____ |
| UUA Annual Program Fund | _____ |
| Other | _____ |

TOTAL _____

Number of members _____ Number of pledge units _____

Change in pledge income this year _____

Change in membership this year _____

Number of “Chalice Lighters” _____

Fair Share congregation (past year) Yes____ No____

Are you a Fair Compensation congregation? Yes____ No____

Identify organizational participation in training programs relative to leadership, canvass, growth, religious education, or long-range planning.

Identify any ways in which your organization has improved accessibility, in any form.

Identify any ways in which your organization is actively working towards dismantling systems of oppression.

LOANS ONLY: Outline provisions anticipated for repayment. **Please note: loans are interest free and awarded for a term of three (3) years, starting the day the loan contract is signed by the applicant’s representative (Closing Date), providing that repayment is timely made.** Starting the first (1st) day of the fourth (4th) year, interest on any unpaid amount begins to accrue at the prime rate in effect on the third (3rd) anniversary of the Closing Date until repaid in full.