

Endowment Fund Grant Processing Procedures August 2018

To submit a grant request, complete [this form](#).

Mission

The UUCF Endowment Fund, made up of monies collected primarily from the wills and trusts of departed members and friends, annually disburses a portion of its proceeds to seed focused campaigns for systematic change or capital improvement projects that represent the Seven Principles of Unitarian Universalism, with an emphasis on those efforts that will lead to long-term positive influence at UUCF or in the larger community.

UUCF members, friends, committees, youth, and staff are eligible to submit grant requests. Youth applicants must apply through the Religious Exploration Committee.

Priorities

Priority is given to the requests that best reflect UUCF's Mission and Strategic Goals:

- To strengthen, streamline and evaluate the focus on our mission to grow, connect and serve.
- To work with local UU congregations to identify innovative ways to share and leverage resources for the purpose of growing Unitarian Universalism in depth, size and impact.
- To develop projects that demonstrate and practice UU values in new ways beyond our campus.
- To intentionally grow our cultural competency in ways that challenge our comfort, expand our awareness, and promote social and spiritual healing.

Repeat requests are not discouraged, but priority will be given to new requests. The Endowment Fund does not serve as a sustaining funder.

Funding determination

The Endowment Fund Committee (EFC) will annually complete a calculation to determine the total funding that may be disbursed from the Endowment Fund during that year. The formula used will preserve principal, adjust for inflation and average out grants so that there is consistency in funding from year to year. Administrative expenses, including support for recognition of donations to the Endowment Fund, will be part of the total disbursement. The maximum grant is determined by the amount of funding available and the number of grant requests.

Sequence of actions

The Endowment Fund grant request process takes place throughout the year, with most activity occurring during the fall to allow for evaluation of proposals, disbursement and expenditure of funds, and preparation of a report to the congregation on the use of Endowment Funds at the Annual Meeting or other appropriate venue. The following is a guide to the grant request process beginning in September:

- Grant request forms are available online.
- Grant requests may be submitted at any time during the year, but applicants are strongly encouraged to submit their applications as early as possible in the fall, preferably by Nov. 1.
- Grant requests are evaluated by the EFC based on the priorities noted above, the date of receipt of the grant request and the availability of EFC funds for disbursement for the current year. Early requests have a better chance of approval because funds are more likely to still be available.
- The EFC evaluates each grant request and presents to the Board of Directors those for which it recommends funding.
- Board-reviewed projects are announced to the congregation as awarded.
- Grant funding is dispersed to the selected projects immediately upon review by the board or its representative.

Ineligible activities

Requests to support the following will not be considered:

- Individual needs such as tuition, food or medical care.
- Government institutions.
- Organizations outside of the Washington, DC, metro area.
- UUCF Annual Operating Fund (except as an interest-paying loan).
- Organizations that wish to re-grant the funds.
- Medical or scientific research.
- Films or publications (except as they are an integral part of a collective action for social change).

Follow-up

Within 30 days of completion of their project, recipients will be required to provide a short report to the EFC detailing how the funds were spent, the amount spent and the impact. The report may indicate that use of the grant is a work in progress. The EFC will report to the congregation. The EFC may request that the point of contact for the grant speak at an annual recognition event to encourage further participation in the UUCF Endowment Fund.