

United Thank Offering Grant Application Instructions 2010

Contents

This packet includes six pages of instructions and a six-page application form with a checklist.

Deadlines

UTO Office Deadline

The application from the Bishop's Office with all required attachments and signatures are required to be:

- Postmarked January 31, 2010 or earlier, **or**
- Hand delivered to a United Thank Offering staff person at The Episcopal Church Center by January 31, 2010 or earlier, with written acknowledgement, **or**
- Faxed to the United Thank Offering office and received on January 31, 2010 or earlier (with original to follow)

Bishop's Office Deadline

- To determine your bishop's deadline, contact your diocesan office. All applications must be submitted to the UTO Office from the diocesan office.

Invitations to Apply

The grant application and instructions will be emailed to diocesan offices in The Episcopal Church and the Anglican Communion in October.

The Process at the Applicant Level

Contact your diocesan office to request the grant application and instruction package, available in October 2009. You can also find the application online at www.episcopalchurch.org/uto.

Please submit the grant application and all required attachments to the diocesan office by the deadline set by the diocese. Make sure to keep a copy for your files, as the application cannot be returned. *Applications should be submitted to the diocesan office only. The diocesan office is responsible for submitting the application to the Provincial Representative, the Diocesan Coordinator, as well as to the UTO Office in New York.*

Outside The Episcopal Church, in other Anglican Provinces, the grant applicant is responsible for sending the grant application and all required attachments to the provincial office, where endorsement is necessary. The provincial office is responsible for sending the endorsed application to the UTO office in New York.

The Process at the Diocesan Level

We recommend that you include your Diocesan UTO Coordinator on a diocesan-level screening committee to review the grant applications. Remember that the application is due in the UTO office no later than January 31, 2010. Once the diocesan screening process is complete and the bishop(s) has signed page 6 of the application, the diocesan office should forward the application form and all attachments to the United Thank Offering Office at The Episcopal Church Center in New York by the January 31st deadline.

Where to send the grant application:

United Thank Offering
815 Second Avenue
New York, NY 10017
212-983-6377 (FAX)

The diocesan approved grant application and all attachments **may be submitted electronically** to: utoapps@episcopalchurch.org. If you **fax** or **e-mail** the diocesan approved grant application and all attachments, please also mail the signed original to the UTO office. **Please also mail a copy of your completed application to your UTO Provincial Representative (see list on page vi).**

Incomplete applications

Make sure your application is fully completed before submittal, as the United Thank Offering Board **will not** consider incomplete applications.

Grant Applications for Companion Diocese

Dioceses in The Episcopal Church may elect to submit one grant in conjunction with an overseas companion diocese that is part of TEC or the greater Anglican Communion.

- The grant application is for implementation within the companion diocese.
- The sponsoring diocese is responsible for the grant accounting.
- All UTO grant criteria apply.
- The signatures and comments of both bishops are required.

The Grant Calendar

The United Thank Offering operates on a one-year grant cycle. Grants for 2010 are to be expended from June 2010- June 2011.

October 2009 – January 2010

- Application packets will be available in diocesan/provincial offices and on the web site.
- Grant applicants follow local requirements to include bishop's comments and signature.
- **Grant application deadline: January 31, 2010**

February 2010 - April 2010

- The UTO network, which includes diocesan coordinators, provincial representatives, members-at-large, and Church Center staff members, review applications.
- UTO office processes applications for review.

April 2010

- The UTO Board makes grant decisions.

May 2010-June 2010

- Funds are available for release.

October 2010

- Year 2011 application packets are distributed and posted on the web site.

Application Instructions

Required Attachments

1. Please submit a separate **project budget**, or use page 3 of the application form.
2. When a parish, diocese, province, or not-for-profit organization submits a grant request, the current **operating budget** is also required.
3. If the organization is not a parish or diocese of The Episcopal Church, the most current **audited financial report** must be submitted.
4. **USA only:** For all capital requests (land purchase, building, or renovation) list the **loans** (diocesan, Episcopal Church, other) for which the project is eligible. Please include all pertinent loan information, such as the date of initial contact and current status.
5. Applications within companion dioceses need the signatures and comments of both bishops.
6. **Disclaimer Form:** You will find the disclaimer form on page 5 of the application. Please name the implementing organization, list the corporate officers, and have the Corporate Officer sign for accountability. For grant applicants in the United States, please list your Federal Tax Exempt Number.

Format

When filling out the 2010 grant application form:

- Use standard size 8 1/2" by 11" paper.
- Type everything except signatures.
- Use a font size of ten points (10) or larger.
- Do not change the content or sequence of the grant application.
- Attachments are in addition to the pages of the application.
- Photos are welcome as an additional attachment.

Language/Currency

The grant application must be submitted in English, with one exception. **Province IX must submit applications in both English and Spanish.** Spanish language versions of the application and instructions are available to make the application easier to understand. Please submit all financial information in US Dollars.

Page-by-Page Instructions for the Application Form

Page 1: This page is critical, as it provides all the contact information we will need to process your grant application. It also provides a summary of your project. Make sure that the final amount requested matches the amount requested from your project budget on page 3.

Page 2: This page describes the heart of your program. The project narrative provides a concise description of your project and explains what will be accomplished with the grant funds. It also provides an opportunity for you to share the background of your organization, the population you serve, and the strategies or methods you will use. Make sure that the content is clear and does not exceed one page.

Page 3: This page calls for all the financial information necessary to review your grant application. Your project budget includes: project income (sources and amounts); project expenses (items and amounts); the balance between income and expenses; and amount requested from United Thank Offering. If you create your own page, please ensure that all required information is included and listed in US dollars. In your project budget, specifically identify what is being requested from UTO.

Page 4: This page helps the UTO gain a clearer idea of the project specifics. Please make sure to answer all of the questions.

Page 5: The disclaimer form is found on page 5 of the application. Name the implementing organization, list the corporate officers, and have a corporate officer sign for accountability. This may be the board of directors of a not-for-profit organization, the vestry of a parish, officers of a diocese, etc. Name the person responsible for accounting. In the USA only, please give the USA Federal Tax Exempt Number. (If pending, send the application for Federal Tax Exempt Number as an attachment.)

Page 6: The diocesan bishop must fill out page 6. If the diocesan bishop is unable to sign page 6 by reason of extended absence, or if the bishop has transferred ecclesiastical authority, please contact your Provincial Representative for instructions.

- For grant applications from **provinces outside of The Episcopal Church**, where endorsement is necessary, be sure page 6 includes a signed endorsement from your province or provide a letter indicating provincial endorsement.
- For **companion diocese**, in addition to the comments and signature of the diocesan bishop responsible for submitting the application, comments and signature by the companion bishop are also required.

Please Note:

- Applications must demonstrate involvement by an entity of The Episcopal Church and/or worldwide Anglican Communion. Ecumenical or interfaith ventures may be included.
- Applications must indicate financial support by an entity of The Episcopal Church and/or the Anglican Communion.
- Applications must be complete, with all required attachments.
- Applications must include a current operating budget for the implementing organization as well as the detailed project budget for the grant request.

2010 UNITED THANK OFFERING GRANT POLICY

The United Thank Offering Board will make grant award decisions in April 2010, which they will announce in May. Funds will be available June 2010 for expenses incurred June 2010 through June 2011. In exceptional circumstances, project modifications and time extensions beyond this date may be approved by the UTO Board. The original intent of the grant award needs to remain the same. Grant monies are disbursed through the local diocese. Instructions for accessing granted funds are included in the grant award letter. Accounting is required. Instructions for accounting are sent to the contact person when funds are dispersed. Funds will not be released to the diocese until all accounting for previous UTO grants in that diocese is up to date.

The UTO Board will accept one grant application per diocese within The Episcopal Church. The UTO will accept one additional grant application for a companion diocese from dioceses of The Episcopal Church who choose to form a relationship with a diocese from TEC or the greater Anglican Communion. The sponsoring diocese will be responsible for the accounting of the grant. All UTO grant criteria apply to companion dioceses. The companion diocese applications require the signatures of both bishops.

United Thank Offering grants support the Budget Priorities adopted by the 76th General Convention, the Millennium Development Goals, and the priority needs identified by the Primates for Theological Education for the Anglican Communion (TEAC). For overseas grant applications, there is a special interest in projects that address universal primary education for children as well as in those that promote gender equality and women's empowerment.

2010 UNITED THANK OFFERING GRANT CRITERIA

The United Thank Offering supports programs that address compelling human needs by supporting the alleviation of poverty, both domestically and internationally, within the Anglican provinces, dioceses, and companion dioceses.

The United Thank Offering supports projects:

- That address poverty of women and children
- That make significant impact
- That demonstrate new and innovative work
- That are a part of a planned diocesan/provincial mission strategy

The United Thank Offering will not fund:

- Capital fund campaigns or debt reductions
- Deferred maintenance
- Operational budgets, meaning the proposed budget and program is the same as the year before
- Debts obligated or incurred before the date of the grant award
- Purchase of consumable items (e.g., food, medicine, paper goods, toiletries, fuel, etc.)
- Scholarships, tuition, camp fees, and attendance incentives
- Emergency response

In Episcopal dioceses within the United States, the United Thank Offering will not fund:

- Previously funded requests
- Capital improvements that do not expand capacity to meet compelling human need or mission and ministry need in disadvantaged situations
- Programs regarded to be diocesan operating budgets

United Thank Offering Board 2010-2012

	Province Representatives	Diocese	Contact Info
I	Barbara "Barbi" Tinder 149 Butters Hill Road Stoneham, ME 04231	Diocese of Maine	H 207-928-3603 barbi@fairpoint.net
II	Lois J. Rodney 120-37 227 th Street Cambria Heights, NY, 11411	Diocese of Long Island	H 718-723-6050 loisjohnsonrodney@lycos.com
III	Anne Gordon Curran 1011 Francisco Road Richmond, VA 23229	Diocese of Virginia	H 804-285-4210 agcurran@comcast.net
IV	Georgie White 6945 Cainwood Drive College Park, GA 30349	Diocese of Atlanta	H 770-996-9081 georgiewhite@bellsouth.net
V	Carol Feller-Gottard 312 Dorr Street Antigo, WI 54409	Diocese of Fond du Lac	H 715-623-3004 caroljfg@newnorth.net
VI	Mari-Lou Triebenbach 16520 30 th Ave. North Plymouth, MN 55447	Diocese of Minnesota	H 763-559-4961 mlctbach@usfamily.net
VII	Sarita Redd P O Box 18892 Oklahoma City, OK 73154	Diocese of Oklahoma	W 405-427-0082 jana.redd@att.net
VIII	Martha Estes 874 Decatur Circle Claremont, CA 91711	Diocese of Los Angeles	H 909-482-0936 marthakestes@aol.com
IX	Olga Arevalo Amarilis Fuentee 603 y la D Barrio Centenario Guayaquil, Ecuador	Diocese of Ecuador Litoral	W (011 593) 42.44.66.99 olgamorantearevalo@hotmail.com
	Members at Large		
Africa	Jan Goossens 2400 Little Round Top Drive Edwardsville, IL 62025	Diocese of Springfield	H 618-655-0326 utospil@sbcglobal.net
Asia/ Pacific	Pamela Stewart 55 Mott Lane, Brookhaven, NY 11719	Diocese of Long Island	H 631-447-3996 W 631-632-8230 (SUNY) pstewart@episcopalchurch.org pstewart@notes.cc.sunysb.edu
Latin Amer.	Zona Tounsley 407 E. Charlotte Avenue Scottsboro, AL 35768	Diocese of Alabama	H 256-259-4748 ztounsley@scottsboro.org

Office Contact

Corinne Goldenberg
815 Second Ave. New York, NY 10017
212-716-6022 or 212-922-5130 or 1-800-334-7626

cgoldenberg@episcopalchurch.org
Fax: 212-983-6377

2010 United Thank Offering Grant Application

<u>Contact Information</u>	
<u>Province and/or Diocese:</u>	
Name of Anglican Province <i>or</i> The Episcopal Church Province Number:	Name of your archbishop/ primate and provincial secretary (Anglican Communion): Address: Phone: E-mail:
Name of the applying diocese: Address: Phone: E-mail:	Name of diocesan bishop: Address: Phone: E-mail:
Person responsible for implementing the project: Name: Phone: E-mail:	Clergy (If Applicable): Name: Phone: E-mail:
Name of companion diocese where the project is to be implemented:	Name of companion diocesan bishop: Address: Phone: E-mail:
UTO provincial representative: Phone: E-mail:	UTO diocesan representative: Phone: E-mail:
<u>Implementing Organization:</u>	
Name of organization implementing the project Address: (including country) Phone: Fax: E-mail:	Web site: Cell phone: Other contact information:
Location where project will be implemented if different from above:	Person responsible for accounting: Name: Title: Phone: E-mail:
<u>Project Summary Information :</u>	
Project title:	
Type of project: New _____ Expansion _____ New phase _____ One-time _____ Other _____	
Grant request for : Program _____ Capital _____ Program and capital _____	
Complete within one year <input type="checkbox"/> yes <input type="checkbox"/> no	

Project Narrative- PLEASE LIMIT TO ONE PAGE

A) Summarize in a few sentences concisely how the grant monies will be spent. Include specific information on the amount of money requested.

B) Use the following questions as a guideline to elaborate on the Project Narrative. Who will be served in the project? What will be accomplished due to this project? Where will the project take place? Describe your environment. When will the project begin and end? How will the project be implemented? What methods and strategies will be used? What sources of funds will enable this project to be self-sustaining? Why is this project important? How does it address compelling human needs in the life of women and children?

Financial Information

These documents **MUST** accompany your grant application.

For all applicants:

1. **Project Budget** - A one-page detailed income/expense budget of the project. Use this page as a guide.
Identify which budget items are being requested from UTO.
2. **Operating Budget** - The current annual operating budget of the implementing organization (diocese, not-for-profit, parish) must be included as an attachment. The project budget is usually different from the operating budget of the organization.

For applicants that are NOT a mission, parish, or diocese of The Episcopal Church we will also need:

3. **Audited Financial Statement** - An audit report of the implementing organization.

<u>Project Income</u>	
List all sources of income for your project: • • •	Amount in US dollars
Total Income	\$
<u>Project Expenses</u>	
List all project expenses or projects costs (Prioritize your needs) • • •	Amount in US dollars
Capital: itemize all vehicles, equipment, capital requests. Describe plans and costs for operations, maintenance, and replacement.	\$
Total Project Expenses	\$
Income Less Expenses	\$
Amount Asked from United Thank Offering	\$
Total Project Budget	\$

Grant Questionnaire- please answer all of the following:

- 1. This proposal is for purchase of a VEHICLE yes no
- 2. This proposal is for purchase of EQUIPMENT other than a vehicle yes no
- 3. Do you have outstanding loans? yes no
- 4. Are you eligible for any loans? yes no

For all capital requests (for land purchase, building, renovation,) list the loans (diocesan, Episcopal Church, other) for which the project is eligible, the date contact was initiated with each, and its current status. The loan list may be included as an attachment.

- 5. This proposal is for LAND AND/OR BUILDING PURCHASE yes no
 - If yes, have you located the land/building to purchase? yes no
 - Is ownership title clear? yes no
 - Do local authorities assure you it will not be appropriated for other uses? yes no

If the site/building has not been located, how do you propose to find the land/building and within what period of time? _____

- 6. This proposal is for construction of a NEW BUILDING yes no
 - If yes, do you hold title to the land? yes no
 - If no, how does that affect your plans? _____

- 7. This proposal is for an ADDITION TO AN EXISTING BUILDING yes no
 - Do you own the existing building? yes no

- 8. If your request is for a NEW BUILDING, ADDITION, OR RENOVATION, were your projected costs arrived at:
 - By general estimate based on local conditions?
 - By a professional?

If by a professional estimate, by whom? _____

Please remember all building plans must be completed within in the one-year grant cycle.

Describe your plans to maintain the buildings:

ACCOUNTABILITY

UNITED THANK OFFERING DISCLAIMER

I agree that _____ will use any grant that the
(Name of implementing organization)

United Thank Offering (UTO) may award in the manner described in this application and in compliance with applicable law and will comply with the requirement of the UTO for accounting and narrative reports.

Neither the UTO nor the Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States (DFMS) shall be liable in any way, and we agree to indemnify and hold harmless the UTO and DFMS, for any and all loss, claims, expenses and damages arising out of, resulting from or in connection with any actions we take or fail to take, or that may be taken or fail to be taken on our behalf, in connection with any such grant and the project(s) described in this application.

Signature of Corporate Officer

Name of Corporate Officer (print or type)

Accountability Information

List of Corporate Officers of the implementing organization

(This may be your board of directors, parish vestry, diocesan, or provincial officers. You may attach a list if you prefer.)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

For those applying in the United States of America ONLY

USA Federal Tax Exempt Number: _____

(Attach a copy of the application if pending)

BISHOP’S COMMENTS AND APPROVAL

Diocesan Bishop/Archbishop Comments and Approval (required for all applications). For Companion Diocese applications, please include comments and approvals from both Bishops.

yes no This project demonstrates involvement by an entity of The Episcopal Church and/or the Anglican Communion.

yes no This project shows financial support by an entity of The Episcopal Church and/or the Anglican Communion.

COMMENTS

(1) Describe how this program/project implements the mission strategy of your diocese or province.

(2) Please list the sources, amounts, of financial, human and/or in-kind support from within the diocese/province. If none, please explain.

APPROVALS

Date _____ Name of Diocesan Bishop _____

Signature of Diocesan Bishop _____

(Type or print)

Date _____ Name of Companion Diocese Bishop _____

(Type or print)

Signature of Companion Diocese Bishop _____

- ***Applications from Anglican Provinces outside of The Episcopal Church, where endorsement is necessary.***

This United Thank Offering application has the endorsement of the Anglican Province.

Name of Archbishop or Provincial Secretary

Signature of Archbishop or Provincial Secretary

Note: A letter of provincial endorsement may be sent to the UTO Office in lieu of this signature.

Checklist for a Complete Application from the Grantee before sending to the diocesan office: (check as completed). Please be sure to check with diocesan or provincial office for deadline:

- Read instructions, policy, and criteria
- Contact information
- Project narrative
- Financial information – project budget, operating budget, audited financial statement
- Grant Questionnaire
- Accountability statement
- Bishops signature and Comments (If Companion Diocese please include both Bishop’s signatures and comments)
- Complete all six pages of the application form
- Corporate officer signature on the United Thank Offering disclaimer
- Will inform the United Thank Offering Office of any circumstance that substantially affects the application after it is submitted and before April 1, 2010.

Checklist for the Diocesan Office:

- Send original of the completed application and all required attachments to the United Thank Offering Office.
- Send one copy of the completed application and all required attachments to your UTO Province Representative in dioceses of The Episcopal Church USA. (See UTO Board List.)
- Retain a copy at the diocesan or provincial office.
- Applicant retains a copy

NO APPLICATION WILL BE CONSIDERED UNLESS ALL OF THE ABOVE CRITERIA ARE MET.