

Funding Guidelines 2010

Jones Partnership Fund

FIRST PARISH CHURCH IN WALTHAM

Intent of the Fund

Ted and Nathalie Jones were longtime members of First Parish in Waltham who were known for their spiritual and social commitment not just to the church but also to the community at large. The *Jones Partnership Fund* was established through their generosity.

The *Jones Partnership Fund* allows First Parish in Waltham to offer grants that support programs and projects outside the annual budget. The purpose of these grants is to deepen the relationship between the congregation and the community at large, as well as to promote Unitarian Universalist values. Partnership is central to the intent of the fund as First Parish seeks new ways to forge meaningful connections beyond the walls of the church.

Funding Priorities/Criteria

Priority in approving a grant will be made according to the following criteria:

- (1) meet the legal requirements of the Jones Fund which are that funds may not be used for the general operating support of the church
- (2) reflect Unitarian Universalist principles and values
- (3) support or create partnerships within and/or outside the church community
- (4) indicate ways to ensure measurability of success and sustainability capacity
- (5) create a new or support an ongoing program that meets the above criteria

Eligible Applicants

Grants are available only through Sponsors who are at least 18 years old and have been Members of the First Parish Church in Waltham for at least one year.

A person or group may apply for a grant in partnership with a Grant Sponsor.

Grant Distribution

The goal of the fund is to approve as many diverse requests as possible considering annual fluctuations in available money, number of applicants, and size of funding requests.

The Jones Partnership Committee anticipates total grant money available in 2010 to be \$20,000.

Up to one-half of the annual grant money available for disbursement can go to a single proposal deemed especially significant.

Application Process/Timeline

Grants are disbursed on an annual basis.

Grant applicants who request multi-year funding must reapply each year.

All grant requests should use the forms available online at www.walthamuu.org

from the church office at wauu-office@verizon.net or from partnershipfund@verizon.net

As part of our church's Green effort, we prefer that grant requests be made online. But, if your request is submitted on paper, please supply three copies for the committee's use. We recommend that the entire proposal, including budget page, total no more than five pages (plus attachments, e.g. letters of support).

Assistance in making a grant request is available from any member of the Jones Partnership Committee. The 2009-2010 members are: Mary Ann Taylor, Jim Ohm, and Ron Adams.

The deadline for receipt of all requests is April 15, 2010.

Final approval of grant requests is made by vote of the congregation at its Annual Meeting in June.

Funds are available for disbursement after June 15, 2010.

Reporting Requirements

Grant recipients may be invited to meet with the Jones Partnership Committee or the congregation in order to share information about the design, implementation, and impact of their projects.

At the completion of their project/program, grant recipients are asked to submit a brief written Final Report summarizing the outcomes of their efforts referring to sections 9, 10, and 11 of their application. The Final Report shall be submitted no later than 2 months after completion of the project/program.

11. **Budget Details:** Use the Project Budget form to complete a budget that lists anticipated expenditures by line item. Be sure to show in kind donations or matching funds you've already raised. Please provide written cost estimates where applicable (e.g. costs of renting audio equipment, costs of catering a meal for 100 people etc.) Please note that no sponsors or partners can personally benefit financially from this project.

12. **Required Attachments:**

- Budget –complete provided Project Budget form
- Letters of commitment/support from FPW partners
- Letters of commitment/support from partnering organizations
- Written cost estimates (where applicable)

Optional Attachments/Presentations:

- If your project requires a lot of planning and coordination work or has several stakeholders, the Jones Partnership Committee can put you in contact with project planners who may be able to help you — wauu-office@verizon.net.
- If your project is best described verbally, or if you feel you can make the best case for it personally, please contact the Jones Partnership Committee to arrange for a short presentation.
- Pictures or photos that can demonstrate the concept
- Letter of interest/support from individual partners
- Relevant history from similar projects that were successfully completed
- Information demonstrating current community needs that are to be addressed by the project

Grant Sponsor Responsibilities

A Grant Sponsor is a member of the First Parish in Waltham who supports a particular grant application by:

- (1) promoting and explaining the project to the Jones Partnership Committee prior to approval and to the congregation if approval is granted. (The Sponsor does not need to be the grant writer, but does need to act as advocate.)
- (2) acting as ongoing liaison to First Parish promoting and sharing information with the congregation as the project develops.

When First Parish is designated as the financial agent, the sponsor keeps the records of expenditures and requests funds from the church Treasurer as expenses are incurred using our standard requisition forms. The church Treasurer is only responsible for limiting the project to the funds approved for it. The sponsor is responsible for ensuring that requests are properly documented and keeping a detailed record for submission to the Jones Partnership Committee as part of the project's Final Report.

Where some partner other than the church has been designated as financial agent by the Jones Partnership Committee, the sponsor only needs to see that the Final Report is submitted within two months after the project is completed.

Project Budget - Final Report 2010

Jones Partnership Fund

FIRST PARISH CHURCH IN WALTHAM

Project: _____ Date Grant Approved: _____

Project Budget Dates: From _____ To _____

Final Report is to be submitted to the Jones Partnership Committee no later than 2 months after completion of the project/program.

Amount of the **JPF** Grant: \$ _____

Expenses

Expense Items (e.g. labor, copying, advertising, etc.)	Line Item Total	Amount Requested from JPF
*Totals	\$	\$

Income

Income Source (e.g. individual donors, events, etc.)	Line Item Total	Amount Paid by JPF
*Totals	\$	\$

**NOTE: Total Project Expenses and Total Project Income must be equal.*

Name & contact info for person submitting report: _____

*Final Report may be filed by the First Parish **Grant Sponsor** or other financial agent approved by Jones Partnership Committee.*

For All Applicants: Use this format for your Project's Final Report. You may add additional lines, if needed.

Send to: Jones Partnership Committee at wauu-office@verizon.net .	Submitted by due date? Yes No
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