

SPIRIT LEVEL FOUNDATION  
**GRANT GUIDELINES for APPLICANTS**

Approved 1/2/2024

**To access the grant application forms, choose “Applications” from the “more” tab on this website.**

**Eligible entities**

The Spirit Level Foundation (“The Foundation”) makes grants available to Unitarian, Universalist, and Unitarian Universalist (all abbreviated below as UU) congregations that are members of the Unitarian Universalist Association and that are located in one of six Southern California counties: San Diego, Orange, Riverside, Ventura, Los Angeles, and San Bernardino.

**Purpose of grants**

All Foundation grants should support Unitarian Universalist values, and be for the purpose of promoting the development and growth of Unitarian Universalism and a UU community/ fellowship/ congregation or congregation cluster. (referred to collectively as “congregations” below) Specific attention is given to applicants that seek to make changes and/or improvements that bring potential new members into their communities.

**Size of grants**

The Foundation’s maximum grant is \$50,000 (or \$50,000/year for phased grants) and the minimum grant is \$10,000.

**Matching grants**

All Spirit Level grants are matching grants because matching grants inspire commitment and generosity from congregants, strengthening connections within a community. For every dollar raised for the project by the congregation, the Foundation will provide a 1:1 match, up to the full amount of the grant. Exceptions are occasionally made for ambitious “innovative” grants that are exceptional. In this case the Foundation may choose to offer a 3:1 match.

If you believe your congregation has an ambitious, exceptional “innovative” idea that could qualify for a 3:1 match, please **submit a letter of inquiry describing the intended project and outcomes well ahead of the application deadline. Once it has been reviewed by the Foundation Board, a Board member will let you know if it qualifies as an “innovative grant. We want creative solutions to challenges our congregations face, particularly for membership sustainability and/or growth.**

**Types of grants**

**A. Grants for projects, programs, and/or worship (matched 1:1 or 3:1 if qualified as innovative).**

Examples:

1. Projects directly relevant to the growth and development of Unitarian Universalism and UU congregations (e.g. programs to outreach to, and/or deepen and/or expand involvement of youth and young adults, and/or black/indigenous/people of color, etc.)
2. Outreach projects (e.g., community partnerships, collaborative projects, social justice, or values based social actions, etc.)
3. Projects intended to make UU worship services more compelling, spiritually nourishing, and

transformative (e.g., better integration of music and embodied practices in worship)

**B. Capital facilities grants (matched 1:1).** Examples:

1. Buying land to build or to expand a UU congregation
2. Making improvements to land occupied by, or intended for, a UU congregation
3. Purchasing an existing building to house a UU congregation.
4. Constructing buildings for a UU congregation
5. Remodeling or repairing existing buildings for a UU congregation, including structural and facilities upgrades such as AV systems or HVAC systems.
6. Purchasing furniture, fixtures, flooring, or equipment in conjunction with construction, remodel, or repair

**Grant cycle**

The Foundation reviews grants twice a year. Completed applications are due by April 1 or September 1 of each year and any requested revisions or supplements are due by April 30 or September 30. The Foundation will attempt to notify each applicant of its decision no later than June 30 or November 30.

**Conditions on grants**

1. Congregations must intend or expect the project to begin before the end of the year *following* the year of the applications. (For example, applications submitted in April or September of 2025 must be for projects that will begin prior to December 31, 2026.)
2. The Foundation will provide no more than 50 percent of funds for a project approved under categories A and B above. The foundation will provide no more than 75 percent of funds for a project approved as “innovative”.
3. Congregations are asked to raise funds specifically for the applied grant. Fundraising may occur before or after the application is submitted. Matching funds must be segregated from other congregation funds in an account, or an accounting category separate from other congregation funds.
4. Matching funds must be cash or pledged specifically for the project being applied for; the Foundation will only provide matching funds for pledges once they are fulfilled.
5. The Foundation will not count the following as matching funds: general fund pledges, general fund donations, loans or loan commitments, or donated labor or materials.
6. The applicant congregation’s Board of Trustees must authorize grant projects. If authorization by congregational vote is needed it must be obtained within three months of the Foundation’s approval of the grant and prior to funds being issued.
7. Grantees must comply with the documentation and reporting requirements below.

**Priorities**

The Foundation gives priority to congregations that -

1. are located in San Diego County,
2. and/or have a project most likely to engage members, potential members, and the larger community, thus fostering membership sustainability and/or growth,
3. and/or have demonstrated an urgent need for funds (due to flood, fire, earthquake, and so forth).

### **Phased grants**

The Foundation accepts applications for multi-year grants and/or grants funded in phases. If the Foundation approves a phased grant, and if the grantee raises funds for each phase (year) serially, the Foundation will grant final approval for each phase as the grantee provides sufficient documentation of funds and progress for that phase.

### **Application procedures**

The Foundation will make grant applications available on its website. **Submit applications by email to [admin@spiritlevel.org](mailto:admin@spiritlevel.org) by April 1 or September 1.** There is no application fee.

Note, each type of grant has its own application (available on [www.SpiritLevel.org](http://www.SpiritLevel.org)).

Note, Congregations may submit more than one application in a year.

### **Grant approval and funding**

All Spirit Level Foundation grant approvals are contingent upon the congregation raising the required matching funds and documenting both the matching funds on a Funds Certification Form provided by the Administrator of the Foundation. When the congregation submits this form, the Foundation will fund the grant. Note that the Foundation will not provide matching funds for pledges before the pledges are paid by the donors.

### **Reporting**

1. The grantee must specify a primary contact and a minister or board president who will be available for inquiries for the duration of the project.
2. The Foundation requires periodic reporting, including progress reports on the permitting and construction bidding process for capital grants, and a final report, from grantees; the exact requirements will vary from project to project and will be spelled out in the grant acceptance letter, but grantees should expect to address the following questions:
  - a. What were the steps of project development?
  - b. What was accomplished, or what were the planned and/or unplanned results?
  - c. What was not accomplished? What changed? Why?
  - d. What have been the impacts of the project? Include objective measures, if possible, in addition to a subjective narrative.
  - e. Given what you know now, how would you have planned or executed the project differently?
  - f. What were the financial results? Were there cost overruns? Did things cost less than planned?
3. To help with project documentation, the Foundation will arrange for one or two representatives from the Foundation to make one or more calls and/or visits to see the project in action, or to check in on the progress of construction or remodeling.

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