

# SPIRIT LEVEL FOUNDATION

## GRANT GUIDELINES for APPLICANTS

Approved 7 February 2020 by the Board of Directors of the Spirit Level Foundation

**To access the grant application form, 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.

### Purposes of grants

All Foundation grants should support Unitarian Universalist values, and be for the purposes of

1. promoting the development and growth (broadly defined) of Unitarian Universalism and a UU congregation or congregations, and
2. making Unitarian Universalism more compelling, relevant, transformative, and spiritually nourishing.

### 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.

### Phased grants

Applications for multi-year grants and/or grants funded in phases are accepted. If the Foundation approves a phased grant, and if the grantee raises funds for each phase serially, the Foundation will grant final approval for each phase as the grantee provides sufficient documentation for that phase.

### Matching grants

All Spirit Level grants are matching grants: For every dollar raised for the project by the congregation, the Foundation will provide from between one and three dollars (depending on the type of grant), up to the full amount of the grant.

### Types of grants

- A. Grants for enrichment of worship and programs (matched 1:1). Examples:
  1. Projects intended to make UU worship services more compelling, spiritually nourishing, and transformative (e.g. better integration of music and embodied practices in worship, improvements to A/V technology, consultation and assistance from experts in contemporary worship, ...)
  2. Outreach projects
  3. Other projects relevant to the growth and development of Unitarian Universalism and UU congregations
- 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
  6. Purchasing furniture, fixtures, flooring, or equipment in conjunction with construction, remodel, or repair
- C. Experimental grants for innovative programs and ministries (matched 3:1). This grant category is for projects that, in addition to furthering the grant purposes listed above, create or support inclusive,

welcoming communities that provide hope and spiritual sustenance and that are relevant to people's lives and concerns. **We are looking for creative solutions to challenges our congregations face.**

### 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 2020 must be for projects that will begin prior to December 31, 2021.)
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 under category C above.
3. The Foundation requires that matching funds be raised specifically for the project. This fundraising may occur before or after the application is submitted, but matching funds raised prior to the submission of the application must be received no earlier than one year prior to the application date. 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. 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.
5. Grant projects must be authorized by the applicant congregation's Board of Trustees. If authorization by congregational vote is required, such authorization must be obtained within three months of the Foundation's approval of the grant.
6. Grantees must comply with the documentation and reporting requirements below.

### Grant cycle

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

### Priorities

The Foundation gives priority to congregations that

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

### Application procedures

The Foundation will make grant applications available on its website. **All applications must be emailed to [admin@spiritlevel.org](mailto:admin@spiritlevel.org) and submitted by April 1.** There is no application fee.

### 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 and confirming receipt of bids and contracts for the intended expenditure of the funds. This documentation is provided on a Spirit Level Certification form. A copy of this form with instructions will be provided to all grant awardees upon notification of approval. When the congregation submits satisfactory documentation, the Foundation will fund the grant. Note that the Foundation will not provide matching funds for pledges before the pledges are fulfilled.

### Reporting

1. The grantee must specify two contact people who will be available for the duration of the project.
2. The Foundation requires periodic reporting, including 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?
  - 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 visits to see the project in action, or the progress of construction or remodeling.

END

(02-07-2020)