

Endowment Fund Grant Request Process

A. General Information

Disbursements from the Endowment Fund, administered by the Endowment Committee (EC), for either Designated or Undesignated funds will first be determined by availability of funds for such disbursements. The availability of funds will be determined by other existing EC policies, which assist in the administration of the Endowment Fund.

B. Request Process

To make a formal request for funds, the potential recipient of Endowment Funds must complete the following steps:

1. A written request must be submitted to the EC for initial review. This request should include:
 - a. The name of the entity and contact person submitting the request
 - b. The specifics relating to the project needing funds
 - Scope and goals of the project
 - History of the project
 - Annual budget of the project
 - Planned use for the requested funds
 - c. Any timing restraints foreseen for the receipt and use of the requested funds
2. The EC will review the request at its Annual Grant meeting.
 - a. The request will be reviewed in conjunction with:
 - the availability of funds
 - the EC spending policy
 - the specifics of the project and how they relate to either Designated or Undesignated funds
 - the timing of receipt of other requests for the same funds that may have been received
 - the appropriateness of funding by EC
 - b. If any questions arise during this review, the submitting individual will be contacted for further information
3. Following the review of the request for funds, or after receiving additional requested information, the EC will vote on the disbursement of the funds to the project.
 - a. If the vote passes and the funds are approved for disbursement, the EC will direct that a check be written to the requesting source at a point-in-time deemed appropriate by the EC.
 - b. If the vote is against disbursement, a written communication will be generated by the EC to the requesting party identifying, as clearly as possible, the reasons for the denial and any recommendation for future funding request.

Adopted by _____ United Methodist

Endowment Committee on _____, _____.

Portage First UMC Endowment Fund Grant Application

Before completing the following form, prayerfully consider that the Endowment Committee's guiding principles and purpose can be found in the Endowment Committee's charter.

Significantly,

Income from the Endowment Fund shall be used to assist The Church in fulfilling its purposes in Christian ministry and mission. This includes support of ministries of PFUMC, ministries of the Indiana Conference of the United Methodist Church, ministries of the United Methodist Church nationally or internationally and any other Christian ministry or mission deemed appropriate by the Endowment Committee.

This Endowment Fund and resulting income is intended for purposes that are not a part of the local Churches' established programs, which are funded, or should be funded, through the annual operating budget of the church and the regular giving of those attending. It is not intended that Endowment Fund income provide for local Church general operating expenses. It is intended that the Church annual budgetary process, together with annual giving, shall support normal and customary Church activities. Endowment Fund income should only be used to support ministries beyond normal local Church activities or to provide temporary assistance in starting new ministries in the local church.

Ministry Area: _____

Contact Person: _____ Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: () _____

Please describe the mission and major goals of your entity this year:

(Over)

PROJECT INFORMATION:

Project Name: _____ Date Project Begins: _____

Total Cost of Project: \$_____ Amount Requested: \$_____

What areas of ministry will be impacted by this project? _____

How many people do you anticipate will benefit from this project? _____

How will this project bring unchurched people into a saving relationship with Christ and/or begin a discipling process? _____

How will this new ministry follow up and disciple those it reaches? _____

On separate paper, please describe in detail how these funds will be used and how this project enhances the mission of Christ and the ministry of the Church. Explain the project's goals and objectives and how they enhance the mission of Christ and the Church (Attach additional pages).

GRANT APPLICATION DOCUMENTATION:

To evaluate your application properly, the following documentation must be attached:

1. A copy of your entity's current budget and the project budget, showing all project revenues and expenses.
2. The names, addresses and phone numbers of the entity's leaders and/or project leaders.
3. Any other supplementary materials that would describe the need for the project.

Grant application deadline is April 30. (Exceptions to this are only by approval of the Endowment Fund Committee).

Applicant Name (Please print)

Date of Application

Applicant Signature

(Over)

(For Endowment Fund Committee use only)

Comments:

Action by Endowment Fund Committee:

Decline *Approve* - Amount \$ _____

Date: _____ *Signature:* _____