



The Episcopal Diocese  
of Massachusetts

# Green Improvement:

## A Green Grants Initiative

Working Together

Deadline December 15

### Green Improvement

On-Demand Hot Water Heaters

Programmable Thermostats

CF Lighting

Energy Saving Insulation and Windows



The Episcopal Diocese of Massachusetts

138 Tremont Street

Boston, MA 02111

[WWW.diomass.org](http://WWW.diomass.org)

617-482-5800

2010.9 L.S.

Oh Lord, how manifold are your works!

In wisdom you have made them all; the earth is full of your creatures.  
Yonder is the sea, great and wide, creeping things innumerable are there,  
living things both small and great.

There go the ships, and Leviathan that you formed to sport in it.

These all look to you to give them their food in due season;

When you give to them, they gather it up;

When you open your hand, they are filled with good things.

When you hide your face, they are dismayed;

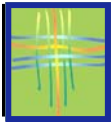
When you take away their breath, they die and return to their dust.

When you send forth your spirit, they are created;

and you renew the face of the ground.

May the glory of the Lord endure forever; may the Lord rejoice in his work.

*Psalm 104 (24-31)*



### PROGRAM OVERVIEW

The Green Grants Program exists to encourage, challenge and support all the congregations of the diocese in environmental stewardship. Congregations are invited to participate in one or both of the Green Grants Initiatives: *Simple Acts of Stewardship* and *Green Improvement Grants*. Green Improvement assists congregations in determining their purchase of energy saving equipment and supplies, while Simple Acts supports congregationally or community based programs that foster environmental appreciation, education and conservation. The Diocesan Annual Appeal and your generous contributions to the Green Grants Program are the sources of funding for this program. The following describes the application process for support for *Green Improvement*.

### GREEN IMPROVEMENT

Some congregations are ready to take action to reduce their carbon footprint by upgrading their facilities. Green Improvement is a process designed to help these congregations identify and accomplish their projects. In this process each participating congregation identifies an Environmental Team who attend Sustainable Houses of Worship (SHOW) Workshops. The workshop is the opportunity for the Team to explore the various energy-saving options available to them. Supported by energy audits of their church's property, the Environmental Team works with the congregation to complete a needs analysis, set priorities for upgrades, and plan approaches to address those needs which may include the application for Green Improvement Grant funding.

The congregation's Environmental Team consists of four or more parishioners who will work with the vestry to lead the church through its green project. Environmental Teams from several congregations attend a SHOW Workshop conducted by representatives of Massachusetts Interfaith Power and Light. The workshops are designed to point out the common challenges to energy conservation faced by churches, to propose various approaches to addressing these opportunities, to review project planning and funding practices, and to provide assistance in completing the grant application. Because the individual congregation's energy audit points out focus-areas for energy saving, it is recommended that, if possible, the Environmental Team bring their completed Utility Tracking Spreadsheet and the results of their audit to the workshop. Using the audits and workshop information the Environmental Team and congregational leadership set priorities for addressing the congregation's energy saving opportunities and create a plan for its Green Improvement projects. The congregation then completes and submits its grant application. Examples of Green Improvements are listed on page 4. A summary of the steps in the Green Improvement application process is included on page 2.

Green Improvement Grants will provide support up to \$10,000. The Grant Committee will consider the planning and applicability of the project, as well as the projected environmental impact in determining the amount of the grant. Congregations are encouraged to match grants with local contributions to fund projects.

### REQUIREMENTS AND PROCESS

All diocesan grant and loan programs support healthy congregations that are prepared to undertake their proposed projects. Timely reporting and fiscal responsibility are indicators of both congregational health and effective leadership. A congregation unable to meet the reporting requirements may also be unprepared to undertake demands presented by additional, ambitious programs. Compliance requirements for funding can be found on page 3.

Completed applications are due at the Diocesan Offices on or before December 15, 2010. The diocesan staff along with lay and clergy representatives from across the diocese will review applications and award support. The diocesan staff administers the program and welcomes the opportunity to work with potential applicants in all aspects of its process.

Please address questions and comments to the Rev. Karen B. Montagno at [KMontagno@diomass.org](mailto:KMontagno@diomass.org) or at 617-482-4826 ext. 413.



## **Deadline for Green Improvement Application is December 15, 2010**

### **Five Steps for participating in the Green Improvement Initiative**

- Step 1.** Obtain a vote of the vestry agreeing to consider congregational participation in the Green Improvement Initiative. The vestry appoints an Environmental Team of at least four to oversee the church's project. A member of the Team is designated as the Environmental Contact.
- Step 2.** The Environmental Contact registers for both a Sustainable House of Worship (SHOW) Workshop and an Energy Audit. At least two members of the Environmental Team must attend the SHOW Workshop.
- To register for a workshop, the Contact sends the name and location of the congregation, along with his/her name and email address, and daytime phone number to:
- The Rev. Karen B. Montagno  
kmontagno@diomass.org or 617-482-4826 ext 413
- Step 3.** The Environmental Contact will receive confirmation of registration. The Environmental Team is encouraged to complete the church's utility tracking spreadsheet, to review the grant application form and to have results of the Energy Audits of the church property available prior to attending the SHOW Workshop
- Step 4.** The representatives of the Environmental Team who attend the SHOW Workshop will address project planning to include needs analysis, priority setting, as well as the identification of approaches and resources available to churches which may include Green Improvement Grant funding. The Workshop will also cover other questions related to the completion of the Green Improvement Application.
- Step 5.** In conjunction with the vestry and clergy, the Environmental Team completes the application form and returns it to:

**Green Grants Initiative**

**Attention: The Rev. Karen B. Montagno  
Episcopal Diocese of Massachusetts  
138 Tremont Street  
Boston, MA 02111**

OR

**Email: KMontagno@diomass.org  
Subject line: Green Improvement**



## What will the application form require?

*A copy of the Green Improvement Grant Application can be found in the Appendix of the present document. The application form will be discussed at the SHOW Works shop.*

*The application shall be submitted either as an email attachment in MSWord or PDF format or paper copy.*

*Please check that your application follows the suggested format and includes all of the following required material:*

*A. Certificate of attendance at a SHOW Workshop for at least two Team members.*

*B. Copy of your energy audit*

*C. A description of the congregation's utility tracking process*

*D. Completed application form including:*

*Cover Sheet*

*Two-Page Program Description*

*Program Budget modeled on template*

*For each participating congregation:*

*Checklist A*

*Checklist B with required supplementary explanations.*

*Checklist C with required back-up documents*

*Supporting Documents including:*

*The congregations' most recent annual report (Report of 2009).*

*Income and expense reports for 2008 and 2009 including operating and non-operating accounts*

*Balance sheet for the fiscal year ending December 31, 2009.*

*The congregations' 2010 budget.*

## What are the requirements to obtain the grant funds?

*The congregation must have filed:*

- The 2009 Annual Parochial Report.*
- An Annual Clergy Compensation Worksheet with the clergy insurance and pension payments current.*
- The Annual Audit.*

*Applicants filing for grant funds must have their congregation's 2009 audit accepted and on record with the Treasurer's Office to receive funds.)*

*The congregation must be current with:*

- Annual Assessment or Assessment Payment Plan.*
- Stokes Loan Payments*

*Also:*

- The congregation must commit to providing an Annual Utility Tracking Report as Evaluation*
- It is strongly recommended that all clergy are compensated at or above the diocesan minimum.*



### **I. What is the goal of the Green Improvement Program?**

The Green Grants Program exists to encourage, challenge and support all the congregations of the diocese in environmental stewardship. Green Improvement guides congregations in systematically identifying needs and prioritizing opportunities for conservation. The program assists in selection and purchase of energy saving equipment and supplies. The program strives to reduce our diocese's carbon footprint while saving the congregation green dollars.

### **II. What programs qualify for Green Improvements Funds?**

Example of Green Improvement Projects eligible for grant funds to defray all or part of the costs are:

- Programmable thermostats, tune-up of heating, air conditioning and ventilating systems
- Occupancy sensors for room lighting, compact fluorescent light bulbs, energy efficient exit signs, energy efficient T8 fluorescent bulb tubes
- Energy saving windows, caulking, upgraded insulation, ceiling fans
- On-demand hot water units, and where appropriate, blanket older water heaters
- Water-saving faucets
- Energy star rated large appliances
- Energy efficient furnaces or boilers

### **III. What are the criteria for selection of successful applicants?**

Applicant must complete the workshop, audit and utility tracking requirements or their equivalent. Successful applications will be chosen based on their presentation of the cost/benefit analysis for their program. This will include a description of the facility's present needs, the setting of priorities for upgrades, and the planning of approaches to addressing identified needs. Financial and in-kind contributions from the congregation will be a consideration for funding. Application should include estimates of cost and energy reduction for the proposed project.

A goal of the Green Grants Initiative is education of the congregation and the wider community. A successful application will address the ways the proposed project will foster greater awareness of need for environmental stewardship not just at church, but also in the wider community at home, work and school.

### **IV. May a congregation apply for both Green Improvement Grants ?**

Congregations may apply for either or both programs; however a congregation may apply for funds only once to each initiative in a given granting cycle.

### **V. When are Green Improvements Grant Applications due? / Where should they be sent?**

Completed Green Improvements Grant Applications must be submitted by email either as MS Word format or PDF Format or by post in printed version. Please contact the Rev. Karen Montagno (617-482-4826 ext. 413) with questions concerning the filing of your application. Green Improvements Grant Application materials must be received at the Diocesan Offices to the attention of the Rev. Karen B. Montagno by December 15, 2010.

### **VI. When can grant recipients request funding?**

- a. Grant recipients can request funds as soon as they receive notice that their grant has been approved. Funds cannot be granted until all "conditions for funding" are met. Grant recipients will be supplied with an *Agreement and Request Form* that they must use to request their funds. Grant recipients may submit the *Agreement and Request Form* only after all conditions for funding are satisfied. See item VII, below, for more on the Agreement and Request Form.



**VII. What are the “conditions for funding”?**

Applicants are referred to Checklist B and Checklist C of the GREEN IMPROVEMENTS Grant Application. Grant recipients may receive funds only after the following conditions are satisfied:

- a. The congregation shall be current with its annual financial audit. All recipient congregations must have submitted acceptable 2009 Annual Audits in order to request their granted funds. After September 1, 2010, only congregations that have submitted 2009 Annual Audits are eligible to request any grant funds.
- b. The congregations must file a 2009 Parochial Report to be eligible to request their granted funds.
- c. The congregation must be current in its Annual Assessment payment or its Assessment Payment Plan.
- d. The congregation must be current in Annual Clergy Compensation Worksheet, Clergy Pension and Clergy Health Insurance.
- e. In subsequent grant cycles, congregations that have received grants in the previous grant cycle must report on progress before receive additional grant funding.

The following are required to complete the grant application:

- a. The congregation has identified an Environmental Team of at least four members who will oversee the proposed project.
- b. The Environmental Team has attended a Sustainable House of Worship (SHOW) Workshop
- c. The congregation has had an energy audit of the church buildings and the rectory
- d. Congregations will track utility bills necessary to document reduction of carbon footprint.

**VIII. Why does the Green Improvements grant program require “conditions for funding”?**

All diocesan grant and loan programs support healthy congregations that are prepared to undertake their proposed projects. Timely reporting and fiscal responsibility are indicators of congregational health and effective leadership. A congregation unable to meet the reporting requirements may also be unprepared to undertake demands presented by additional, ambitious programs.

**IX. What are the expectations from a funded congregation?**

Grant recipients agree to:

- a. Undertake the program described in their application or submit modifications for the committee’s review and approval.
- b. Submit year-end reports for the duration of the program and a final report upon completion.
- c. Allow the Diocese of Massachusetts free use of intellectual property resulting from the funded program.
- c. Congregations confirm that they have fulfilled all the conditions for funding.

Congregations will provide information and reasonable assistance to fellow congregations undertaking similar programs.

**X. To whom do we direct further questions and comments?**

For questions, comments or suggestions please contact committee through The Rev. Karen Montagno, Green Grant Program, telephone (617) 482-4826 ext. 413 or email [KMontagno@diomass.org](mailto:KMontagno@diomass.org).

# APPENDIX

# Green Improvement Grant Application Form

## Application Format

Application packet, submitted in not less than 12-point font, by email as Adobe 7compatible or MSWord 97compatible attachment or by post on standard 8½" x 11" paper. The document shall include:

**A. Cover Page.** A single page shall contain identification and contact information, in addition to a brief description of the project.

Please include all of the following information on the cover page of your application:

1. The name of the Program for which you seek funding and, please identify as Application for "GREEN IMPROVEMENT" Grant
2. The name of the congregation sponsoring the program
3. The ENVIRONMENTAL CONTACT for the congregation (Please include US Postal address and email addresses, daytime phone number)
4. The congregational contacts, clergy. (Please include email addresses, phone number)
5. The congregational contacts, Senior or Junior Wardens. (Please include email addresses, phone number)
6. The amount requested for the current grant cycle
7. Program summarized in one or two paragraphs
8. Either dated signatures of the clergy and lay leader or emails from each acknowledging congregational participation in the proposed project are required.

**B. Two-Page Program Overview.** The application shall include a two page narrative of the program that shall address:

1. Goals
  - a. Describe the goals of the program. What specific needs will the program address?
2. Description
  - a. Describe the specific ways you hope the program will fill the stated needs, transform participants, and serve your community.
  - b. Describe the specific activities involved in the program. Include who will implement them and how they will be funded.
  - c. Estimate the number of members of the congregation who will participate in the program.
  - d. Briefly describe the congregation's long-term commitment to sustainability, the environment, and conservation.
  - f. Describe the studies, data gathering, and selection process you have undertaken related to the program; include significant lessons learned from these activities.
3. Evaluation
  - Describe the key features that will be used to evaluate the success of the program including but not limited to saving in energy costs. How will information be collected?

4. Support

- a. State the financial resources needed to complete this phase of your Improvement Program
- b. Describe fund raising and matching funds efforts
- c. Describe the non-financial assistance necessary to conduct the program for one year
- d. Describe the effect of partial funding of your Green Grant request.

**C. Program Budget.** Applications shall include a description of your program's financial story in the context of your congregations' budgets. Please follow the format of the "Program Budget" template (page 3A of this section). For the budget of your program, include all other grants, gifts or contributions to be applied to the proposed program. List all other income and expenses related to the proposed program. Identify all in kind services available for the program.

**D. Checklists.** Applications shall include both Checklist A (page 4A of this section), Checklist B (page 5) and Checklist C (page 6) for each congregation that will participate in the proposed program.

**E. Supporting Documents.** Copies of the following information shall be included with the application:

Required for Grant Application:

- a. Certificate of attendance at a SHOW Workshop for at least two Team members
- b. Copy of your energy audit
- c. A description of the congregation's utility tracking process
- d. The congregation's most recent annual report
- e. Income and expense reports for 2008 and 2009 including operating and non-operating accounts
- f. The congregation's balance sheet for the fiscal year ending December 31, 2009
- g. The congregation's 2010 budget.

**Please see Final Checklist for Applicants on page 6A of this application.**

### Sample Program Budget (Your may substitute your program's budget)

<i>Income</i>		Cash	In-Kind
	Diocesan Grants		
	Other Grants (from all sources for this program)		
	Secured Grants		
	Pending Grants		
	Fee for service		
	In-kind contributions		
	Fundraising		
	Congregation's Contribution		
	From Annual Budget		
	From Bequests		
	Other income for program		
	<b>Total Program Income =</b>		
<i>Expenses</i>			
	Personnel		
	Telephone & utilities		
	Training		
	Insurance		
	Printing / duplicating		
	Supplies		
	Materials		
	Transportation		
	Rent		
	Other expenses		
	<b>Total Program Expenses =</b>		

**\*\*Please identify each grantor, amount and restrictions on secured grants. In the case of pending grants, please identify the potential grantor, amount requested and granting date (approx.). Please use additional pages if necessary.**

## Checklist A

required for all applicants

Please indicate which your congregation has done during the past year or 18 months?  
**20 practices that often contribute to long-term congregational vitality**  
**(It is not necessary to complete all of these to receive funding.)**

	<input checked="" type="checkbox"/>	Name of congregation:	Location:
1		Conducted a Mutual Ministry Review of/by vestry and clergy	
2		Vestry goal-setting	
3		Vestry review of progress on goals previously set	
4		Created or revised a parish mission or vision statement	
5		Created or updated a long-range parish plan	
6		Obtained or studied a demographic profile of your ministry area (such as a Percept profile)	
7		Obtained an independent audit of your books	
8		Graphed and tracked your average Sunday attendance over at least the last ten years	
9		Created or revised a comprehensive parish profile (the kind produced in a clergy search or a major strategic planning process)	
10		Undertook a building audit (the kind offered by the Diocesan Property Committee)	
11		Undertook an energy audit (the kind offered by a local energy company, or by Massachusetts Interfaith Power and Light)	
12		Conducted a face-to-face stewardship canvass of your parish households	
13		Developed a planned giving program	
14		Special Vestry day or weekend retreat focused on team-building, planning, or spiritual growth	
15		Sent staff or parishioners for Anti-Racism training	
16		Sent staff or parishioners for Safe Parish training	
17		Completed a Safe Church policy	
18		Participated in an intentional partner relationship with another congregation	
19		Used of a consultant (diocesan consultant or other) to help you address an opportunity or challenge	
20		Applied for a grant (from diocese funds or elsewhere) to help us start or expand a ministry	

## Checklist B

**With respect to Checklist B: Complete applications shall contain satisfactory explanations of circumstances related to all questions answered in the negative.**

**Please note: No funds will be distributed to congregations that are delinquent in Parochial Report filing, Clergy Compensation Worksheet filing, Stokes Loan payments, Annual Audit, and Assessment payment (or Assessment Payment Plan compliance).**

	(Yes /No)	<b>Name of congregation:</b> <span style="float: right;"><b>Location:</b></span>
1.		Is the congregation current with its filing of the Annual Parochial Report? (The 2009 Parochial Report is due in May 2010.) Required to obtain grant funds
2.		Is the congregation current with its filing of the Annual Clergy Compensation Worksheet? Are clergy pension payments current? Required to obtain grant funds
3.		Is the congregation current with its filing of the Annual Audit? (Congregations must submit completed audits to the Office of the Treasurer by September of the following year. Applicants filing for grant funds after 9/1/10 must have their congregation's 2009 audit <u>accepted and on record with the Treasurer's Office</u> to receive funds.) Required to obtain grant funds
4.		Is the congregation current with its Annual Assessment or Assessment Payment Plan? Required to obtain grant funds
5.		Are all clergy compensated at or above the diocesan minimum? Encouraged
6.		If applicant is awarded a grant, does congregation commit to providing reports at six-month intervals for the duration of the funded program? Agreement required to obtain grant funds
7.		If applicant is awarded a grant, does congregation commit to providing a final report at the end of the funded program? Agreement required to obtain grant funds

## Checklist C

	<input checked="" type="checkbox"/>	Name of congregation:	Location:
1		Your congregation has identified an <b>Environmental Contact</b> person and an <b>Environmental Team</b> of at least four members of your congregation. Please include with your application the Team list with an email address of each member.	
2		Your Environmental Team has attended a Sustainable House of Worship (SHOW) Workshop. Please include with your application a copy of your certificate of participation	
3		MIP&L has conducted an energy audit of your church building and other public buildings used by your congregation. Please include a copy of this audit with you application.	
4		Your congregation is tracking utility bills necessary for tracking reduction of carbon footprint, and has included those spreadsheets with this application. Please include a copy of your congregation's spreadsheets with your application.	

## A Final Check for Applicants

*Thank you for completing your Green Grant Application.*

*The application shall be submitted either as an email attachment in MSWord or PDF format or as paper-copy by mail.*

*Please check that your application follows the suggested format and includes all of the following required material:*

*I. Certificate of attendance at a SHOW Workshop for at least two Team members.*

*II. Copy of your energy audit*

*III. A description of the utility tracking process at use by the church*

*IV. Completed application form including*

*Cover Sheet*

*Two-Page Program Description*

*Program Budget modeled on template*

*Checklist A*

*Checklist B with required supplementary explanations.*

*Checklist C with required back-up documents*

*Supporting Documents including:*

*The congregation's most recent annual report (Report of 2009).*

*Income and expense reports for 2008 and 2009 including operating and non-operating accounts for both.*

*Balance sheet for the fiscal year ending December 31, 2009.*

*The congregation's 2010 budget.*