

## **Congregational Development Grant Application**

### **Overview**

The objective of the Congregational Development Grant (CDG) Program is to support and encourage congregational vitality through assisting congregations in the implementation of our Diocesan Mission - Growing Congregations in Mission. The CDG Program exists to challenge and to support all of our congregations as they prayerfully reflect on current and proposed programs that deepen and strengthen congregational life.

The grant program seeks to support congregations in providing projects and programs for strengthening the congregation itself. These include, but are not restricted to:

- Strengthening congregations in order to better Invite, Form, Send and Serve
- Inviting people into the life of our congregations in a more effective manner
- Providing forming (learning) opportunities to various age and interest groups in our congregations
- Identifying members' qualifications, gifts and callings and connecting members with appropriate ministry opportunities
- Equipping people for ministry in their daily lives.

Successful grant applications will address new or expanded programs. Some examples might be: a new members' ministry workshop, the expansion of an existing youth program, a project to increase church visibility in the community and an adult education program. The committee encourages congregations to join to submit a grant application where appropriate. For purposes of this grant program, "congregations" include campus ministries, chaplaincies, deaneries and parish partnerships, as well parishes and missions of the diocese.

Although most grants will be for between \$2,000 and \$10,000, the committee will consider larger requests for appropriate programs.

The Congregational Development and Support Ministry Area is the grantor of the program and has commissioned the Congregational Development Grant Committee to administer the grant program which includes the review of the applications and the recommendation to the ministry area of action on the application.

### **Application Procedure**

Completed applications must be received at the Diocesan Offices on or before Tuesday, May 20, 2008.

Please mail or deliver twelve (12) collated copies of both the completed application and the supporting materials to:

Office of Congregational Development  
Attention: Ms. Clare Moffitt  
Episcopal Diocese of Massachusetts  
138 Tremont Street  
Boston, MA 02111

### **Contact Information**

For questions, comments or suggestions please contact committee through Lynn Smith, Congregational Development Grant Committee, telephone (617) 482-4826 ext. 888 or email [lynn@diomass.org](mailto:lynn@diomass.org).

## Application Format

Application packet, submitted on standard 8½” x 11” paper, in not less than 12-point type, 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.
2. The name(s) of all the congregations sponsoring the program and specify the congregation administering the grant funds.
3. The key grant-contact persons (Please include title, mailing and email addresses, day and evening phone number and parish affiliation).
4. The congregational contact, clergy of each participating congregation. (Please include title, mailing and email addresses, day and evening phone number and parish affiliation.)
5. The congregational contact, Senior or Junior Wardens of each participating congregation. (Please include title, mailing and email addresses, day and evening phone number and parish affiliation.)
6. The amount requested for the current grant cycle.
7. The status of the program for which the grant is applied (new program or the expansion of an existing program).
8. Program summary in one or two paragraphs.
9. Dated signatures of the clergy and lay leader must be included.

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

1. Goals
  - a. Describe the need or issue of the congregation(s) to be addressed by the proposed program
  - b. State the long-term and short-term goals of the program.
  - c. Identify the relationship of the program goals to the Diocesan Mission Strategy-Growing Congregations in Mission: Inviting, Forming, Sending and Serving.
2. Description
  - a. Describe the specific ways you hope the program will transform participants, facilitators, your congregations, community, deanery, etc.
  - b. Describe the specific activities involved in the program. Include who will implement them and where they will take place.
  - c. Estimate the number of members of the congregation(s) who will participate in the program.
  - d. State the duration of this program.
  - e. Describe plans for building support to continue the program beyond the life of the seed grant.
  - f. Describe any test or pilot projects you have undertaken related to the program; include significant lessons learned from these projects.
3. Evaluation
  - a. State the method and frequency of program evaluation.
  - b. Describe the key features that will be used to evaluate the success of the program.
4. Support
  - a. State the financial resources needed to conduct the program for one year.
  - b. State the financial resources needed to conduct the program for each subsequent year.
  - c. Describe the non-financial assistance necessary to conduct the program for one year.
  - d. Describe the non-financial assistance necessary to conduct the program for each subsequent year.
  - e. Describe the effect of partial funding of your Congregational Development 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 3). 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.

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### Program Budget

<i>Income</i>		<b>Cash</b>	<b>In-Kind</b>
	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.**

**D. Checklists.** Applications shall include both Checklist A (page4) and Checklist B (page5) for each congregation that will participate in the proposed program.

## Checklist A

(In the case of joint applications, each congregation shall submit a separate Checklist A.)

**20 practices that often contribute to long-term congregational vitality**

**Which of these have we engaged in during the past year or 18 months?**

(✓, if apply)

<b>Name of Congregation:</b>		
<b>Location:</b>		
1		Mutual ministry review of/by vestry and clergy
2		Vestry goal-setting
3		Vestry review of progress on goals previously set
4		Creating or revising a parish mission or vision statement
5		Creating or updating a long-range parish plan
6		Obtaining or studying a demographic profile of our ministry area (such as a Percept profile)
7		Obtaining an independent audit of our books
8		Graphing and tracking our average Sunday attendance over at least the last ten years
9		Creating or revising a comprehensive parish profile (the kind produced in a clergy search or a major strategic planning process)
10		Undertaking a building audit (the kind offered by the Diocesan Property Committee)
11		Undertaking an energy audit (the kind offered by a local energy company, or by Massachusetts Interfaith Power and Light)
12		Conducting a face-to-face stewardship canvass of our parish households
13		Developed a planned giving program
14		Special Vestry day or weekend retreat focused on team-building, planning, or spiritual growth
15		Sending staff or parishioners for Anti-Racism training
16		Sending staff or parishioners for Safe Parish training
17		Creating a Safe Parish policy
18		Involvement in an intentional partner relationship with another congregation
19		Use of a consultant (diocesan consultant or other) to help us address an opportunity or challenge
20		Applying for a grant (from diocese funds or elsewhere) to help us start or expand a ministry

## Checklist B

**(In the case of joint applications, each congregation shall submit a separate Checklist B.)**

Name of congregation:	Town:	(Yes/No)
1.	Is the congregation current with its filing of the Annual Parochial Report? (The 2007 Parochial Report is due in May 2008. All successful grant applicants MUST file completed 2007 Parochial Report to obtain grant funds.)	
2.	Is the congregation current with its filing of the Annual Clergy Compensation Worksheet?	
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 9/1/08 must have their congregation's 2007 audit accepted and on record with the Treasurer's Office to receive funds.)	
4.	Is the congregation current with its Annual Assessment or Assessment Payment Plan?	
5.	Are all clergy compensated at or above the diocesan minimum?	
6.	If applicant is awarded a grant, does congregation commit to providing CDG Committee reports at six-month intervals for the duration of the funded program?	
7.	If applicant is awarded a grant, does congregation commit to providing CDG Committee a final report at the end of twelve months from date of notification?	

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).

- E. Supporting Documents.** Twelve (12) collated copies of the following information (from each congregation, if joint application) shall be included with the application:
- a. Income and expense reports for 2006 and 2007 including operating and non-operating accounts.
  - b. The congregation's balance sheet for the fiscal year ending December 31, 2007.
  - c. The congregation's 2008 budget.
  - d. The congregation's most recent annual report. Only two (2) copies are required.

### A Final Check

*Thank you for completing your Congregational Development Grant Application.*

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

- I. *Cover Sheet*
- II. *Two-Page Program Description*
- III. *Program Budget*
- VI. *For each participating congregation:*
  - Checklist A*
  - Checklist B with required supplementary explanations.*
- IV. *The twelve (12) collated packets with Supporting Documents including:*
  - a. Income and expense reports for 2006 and 2007 including operating and non-operating accounts for both.*
  - b. Balance sheet for the fiscal year ending December 31, 2007.*
  - c. The congregations' 2008 budget.*
- V. *The congregations' most recent annual report (Report of 2007). Only two (2) copies are required. Twelve (12) copies of all other material are required.*

## Frequently Asked Questions

### **I. What types of programs may be funded with a Congregational Development Grant (CDG)?**

CDGs can be used to fund programs directed toward the development, formation and growth of congregations. Examples include programs designed to invite, welcome and integrate new members. Education, formation and leadership development programs for people of all ages fall within the scope of CDGs as well. Grant funds are not intended for the hiring of personnel; the Congregational Development and Support Committee strongly discourages the use of grant funds for the hiring of personnel.

Grant applicants for outreach, community service and similar programs are encouraged to contact the Sending and Serving Grant Program, a parallel grant program also administered by the Congregational Development and Support Committee.

### **II. May two or more congregations apply jointly for a CDG?**

Yes. The committee encourages congregations to work together toward their goals. Congregations may submit a joint application to fund shared programs. Deaneries may also apply. CDGs can be used to fund consulting services for multiple congregations if those services are part of a program that supports development, formation and growth. Groups, such as deaneries, encouraged to apply for a CDG.

### **III. May a congregation apply for multiple CDGs simultaneously?**

The committee discourages this. It prefers that congregations focus their individual grant requests on a single program. Congregations may, however, be included in joint applications with others even if they are applying for their own individual grants.

### **IV. When are CDG applications due? / Where should they be sent?**

Completed, collated CDG application materials must be received at the Diocesan Offices by Tuesday, May 20, 2008. Please send applications, complete with all required copies, to Ms. Clare Moffitt, Congregational Development Office, Episcopal Diocese of Massachusetts, 138 Tremont Street, Boston, MA 02111.

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

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 on or before September 30, 2008. Grant recipients may submit the *Agreement and Request Form* only after all conditions for funding are satisfied. See item VIII, below, for more on the *Agreement and Request Form*.

### **VI. What are the “conditions for funding”?**

Grant recipients may request funds only after the following conditions are satisfied:

- a. The congregation(s) shall be current with its/their Annual Audit(s). Before September 1, 2008, all recipient congregations must have submitted acceptable 2006 and/or 2007 Annual Audits in order to request their granted funds. After September 1, 2008, only congregations that have submitted 2007 Annual Audits are eligible to request grant funds.
- b. The congregations must file a 2007 Parochial Report to be eligible to request their granted CDG funds since Annual Parochial Reports are due in May 2008.
- c. The congregation must be current in its Annual Assessment payment or its Assessment Payment Plan.
- d. The congregation must be current in filing its Annual Clergy Compensation Worksheet.
- e. Congregations or congregational groups that received grants in the previous grant cycle must be current in their progress reports for those programs.

**VII. Why does the Congregational Development Grant Program require “conditions for funding”?**

CDGs support programs for healthy congregations that are prepared to undertake projects directed at their development, formation and growth. Timely reporting and fiscal responsibility are indicators of congregational health and good leadership. A congregation unable to meet the reporting requirements may also be unprepared to undertake demands presented by additional, ambitious programs.

**VIII. What is the *Agreement and Request Form*?**

This form identifies the key contact(s) for the funded program and the clergy leader of the congregation. It states the amount of the grant and the mailing address for the grant check. In addition, the form contains the statements of agreement the congregations or groups receiving funds make with the Congregational Development and Support Committee. Grant recipients agree to:

- a. Undertake the program described in their application or submit modifications for the committee’s review and approval.
- b. Submit six-month 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.
- d. Congregations confirm that they have fulfilled all the conditions for funding.

**IX. Comments or other questions?**

For questions, comments or suggestions please contact committee through Lynn Smith, Congregational Development Grant Committee, telephone (617) 482-4826 ext. 888 or email [lynn@diomass.org](mailto:lynn@diomass.org).