

Unitarian Universalist Association of Congregations

First Home Grant Program

Application

A. Background Data:

Today's date:

Legal name of congregation:	
Mailing address:	
Phone:	E-Mail:

Minister:	
Phone:	E-Mail:

Contact person:	
Daytime phone:	Evening phone:
Daytime email:	Evening email:

Congregational president:	
Phone:	E-mail:

Please include the following items with your application. Your loan cannot be processed if any of these items are missing.

- a. _____ Current budget
- b. _____ Last year's budgeted expenditures vs. last year's actual expenditures
- c. _____ Letter of recommendation from your field staff representative (district executive, administrator or consultant)
- d. _____ Governing board verification of the amount pledged to your capital campaign
- e. _____ Phase I Environmental Study
- f. _____ Copy of congregational vote to approve receipt of a UUA grant
- g. _____ Verification of property and liability insurance policy

B. Grant Amount Requested \$ _____

1. Purchasing your first spiritual home? Yes: _____ No: _____
2. Purchasing land for future use? Yes: _____ No: _____
3. Purchasing land and building your first spiritual home? Yes: _____ No: _____
4. How will you utilize a UUA grant?

C. Capital Campaign

1. Campaign financial commitment total: \$ _____
 Dates of capital campaign: From _____ to _____
2. Current congregational loans: \$ _____
 \$ _____ total of current loans total annual debt service
3. Will current loans be retired with capital campaign funds? Yes: _____ No: _____
4. Will current loans be retired with a UUA grant? Yes: _____ No: _____
5. Please list any planned sale of bonds or use of personal loans:
 \$ _____ % \$ _____ %
 bond total interest personal loan total interest

D. Project Finances	
1. Total project costs:	2. Sources of project funding:
a. Cost of land and/or building \$	a. Building fund or reserves \$
b. Design cost \$	b. Sale of current building \$
c. Construction cost \$	c. Capital campaign pledges \$
d. Contingency fund \$ (at least 10% of construction cost)	d. UUA loan \$
e. Landscaping cost \$	e. Bank loan \$
f. Capital campaign cost \$	f. Personal loans \$
g. Furnishings cost \$	g. Sale of bonds
h. Construction financing \$ (short-term bridge loan)	h. UUA grant \$
Total anticipated cost \$	i. Other: \$
	Total anticipated funding \$

E. Current Meeting Space Information

- 1. What is your current monthly rent? _____
- 2. How long have you been meeting there? _____
- 3. Is your space fully accessible? _____
- 4. Adult seating capacity _____
- 5. Number of rooms for religious education _____
- 6. Number of program/fellowship rooms _____
- 7. Number of off street parking spaces _____
- 8. Number of handicap parking spaces _____
- 9. Number of designated visitor parking spaces _____

F. First Spiritual Home Information

- 1. Is your new space fully accessible? _____
- 2. Adult seating capacity _____
- 3. Number of rooms for religious education _____
- 4. Number of program/fellowship rooms _____
- 5. Number of off street parking spaces _____
- 6. Number of handicap parking spaces _____
- 7. Number of designated visitor parking spaces _____

G. Current Finances 5 years ago 3 years ago current fiscal year

- 1. Number of contributing household units
- 2. Average financial commitment amount \$
- 3. Median financial commitment amount \$_____ \$_____ \$_____
- 4. Total restricted funds (endowment) \$_____ \$_____ \$_____
- 5. Total unrestricted funds \$_____ \$_____ \$_____
- 6. Annual contribution to UUA \$_____ \$_____ \$_____
- 7. Percent of suggested annual fair share _____% _____% _____%
- 8. Annual contribution to district \$_____ \$_____ \$_____
- 9. Percent of suggested annual fair share _____% _____% _____%

H. Cash Flow Projection Spreadsheet

20__-20__ 20__-20__ 20__-20__ 20__-20__ 20__-20__ 20__-20__ 20__-20__

Previous Current Next 1 Next 2 Next 3 Next 4 Next 5

1. Income:

- a. Financial Commitments
- b. Gifts and Endowments

- c. Fundraising
- d. Rental
- Income
- e. Plate Collections
- f. District or UUA grants
- g. Other Sources
- h. Total Income**

2. Expenses:

- a. Personnel
- b. Administration
- c. Programming
- d. Contributions
- e. Bldg. maintenance
- f. Debt service
- g. Other Sources

h. Total Expenses

3. Debt service as a percent of operating budget

_____ % _____ % _____ % _____ % _____ % _____ % _____ %

(Debt Service must not exceed 25% of operating budget. Do not include construction financing.)

I. Membership Growth Plan

The Unitarian Universalist Association First Home Grant Program is intended to facilitate the growth of the UUA by providing financing for congregations seeking to purchase their first piece of land and/or building or to construct their first spiritual home. We recognize, however, that if growth is to be realized, congregations must plan their membership strategy as carefully as they plan their facilities.

This guide is designed to help you develop an effective membership plan. If you would like a sample of a comprehensive congregational growth plan or if you have any questions about this form, please contact the Congregational Fundraising Services Administrator at (617) 948-4251 or aschuber@uua.org

1. Congregational Data

- a. Congregational membership: 5 years ago _____ 2 years ago _____ currently _____
- b. Projected membership: in 2 years _____ in 4 years _____ in 5 years _____
- c. R.E. membership: 5 years ago _____ 2 years ago _____ currently _____
- d. Projected R.E. membership: in 2 years _____ in 4 years _____ in 5 years _____

2. Community Demographics

- a. Total population of the area from which you draw your members: _____

b. Other UU congregations in this demographic area:

c. Demographic area population: 10 years ago _____ 5 years ago _____ currently _____

d. Projected population: in 5 years _____ in 10 years _____ in 15 years _____

3. Congregational Vision and Mission

a. Please indicate your congregational vision or mission statement and date of adoption: _____

b. Please indicate the process used to develop this statement:

4. Membership Growth Goals (Please attach a copy of your membership growth plan document to supplement this information.)

a. Please indicate your membership growth goals:

5. Membership Growth Initiatives

a. Please explain your plan to attract visitors:

b. Please explain your plan to welcome and integrate newcomers:

c. Please explain your plan to develop a spirit of financial generosity within the congregation:

d. Please explain your plan to increase the racial, ethnic and cultural diversity of your congregation:

J. Field Staff Recommendation

Directions: Please ask your district field staff representative to complete the following recommendation.

When completed, it can be submitted directly to:

Wayne B. Clark, Ph. D.

P.O. Box 378

Cumberland, ME 04021

wclark@uua.org

Your application cannot be processed without this completed recommendation.

Date:
Name of field staff:
Name of district:
Name of congregation requesting a UUA grant:

1. Are you familiar with the congregation's project? Yes _____ No _____

- Replacement Cost Coverage – up to the limits of the policy
- Agreed Amount Coverage
- Minimum Deductible (consider \$500 and \$1,000 quotes)
- Backup Sewer and Drains Coverage
- \$100,000 Building Ordinance Coverage. Includes Contingent Liability from Operation of Building codes,

Demolition, and Increased Cost of Construction

- Flood, if in a recognized flood plain
- Earthquake, if in an earthquake-prone zone

Casualty:

- \$1,000,000/\$3,000,000 Liability Limit
- \$5,000 Premises Medical Coverage
- \$1,000,000/\$3,000,000 Counseling Professional Liability Limit
- \$100,000/\$300,000 Sexual Misconduct Liability Limits – Minimum Limits
- \$1,000,000/\$3,000,000 Trustees, Officers, Employees and Volunteers Liability Limit including Employment

Practices Liability Insurance Coverage

- Employee Benefits Liability – Asset valuation / coverage: \$500,000 assets / \$250,000 coverage, \$500,000 to \$1,000,000 assets / \$500,000 coverage, \$1,000,000+ assets / \$1,000,000 coverage
- Hired and Non-Owned Automobile Liability

Crime (Theft and Dishonesty):

- Suggested Minimum Limit \$25,000

Umbrella Liability:

- Available \$1,000,000 to \$5,000,000 Limits

Business Automobile Policy:

- Available (Suggested Bodily Injury and Property Damage Liability Limits, \$1,000,000)

Equipment Breakdown:

- Include on All Accounts

Workers' Compensation:

- Include on All Accounts

Revised 01.12.09. All previous versions are obsolete and should be discarded.