

# SAMPLE

## Endowment Fund Grant Request Process

**Prepared by:** United Methodist Foundation of Michigan

### 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 next regularly scheduled 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 earlier
  - 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 any 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 if, in the future, anything may be done to gain approval such as submitting the request for funds earlier.

**Adopted by** \_\_\_\_\_ **United Methodist**

**Endowment Committee on** \_\_\_\_\_ , \_\_\_\_\_ .

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**Note:** This sample document was prepared by the United Methodist Foundation of Michigan and is to be used only as a guide for local churches in developing their own statement of policy.

This sample document can be supplied in electronic media form (computer file). If you wish to have an electronic media copy, please contact the Foundation office at (888)217-1905 or our website [UMFMichigan.org](http://UMFMichigan.org).

# SAMPLE

## \_\_\_\_\_ UMC Endowment Fund Grant Application

**Prepared By:** United Methodist Foundation of Michigan

Entity Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (    ) \_\_\_\_\_ Fax: (    ) \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (    ) \_\_\_\_\_

Organization Federal I.D. Number: \_\_\_\_\_ Not-for-profit status?  Yes  No

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

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### **PROJECT INFORMATION:**

Project Name: \_\_\_\_\_

Total Cost of Project: \$\_\_\_\_\_ Amount Requested: \$\_\_\_\_\_ Date Project Begins: \_\_\_\_\_

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? \_\_\_\_\_

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(over)

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

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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** \_\_\_\_\_. (Any exceptions to this are by approval of the Endowment Fund Committee). You will receive notification of grant action by \_\_\_\_\_.

\_\_\_\_\_  
Applicant Name (Please print)

\_\_\_\_\_  
Date of Application

\_\_\_\_\_  
Applicant Signature

***(For Endowment Fund Committee use only)***

*Comments:*

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*Grant Comm. Recommendation:*   Ⓢ *Decline*   Ⓢ *Approve* - Amount \$ \_\_\_\_\_

*Date:* \_\_\_\_\_   *Signature:* \_\_\_\_\_

*Action by Endowment Fund Committee:*

Ⓢ *Decline*   Ⓢ *Approve* - Amount \$ \_\_\_\_\_

*Date:* \_\_\_\_\_   *Signature:* \_\_\_\_\_