

**Unitarian Universalist District of Metropolitan New York**

**Chalice Lighters Program**

*Interim* Policies and Procedures

May 2008

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## 1. Purpose

### 1.1. Mission Statement

The Chalice Lighters program seeks to increase the impact of Unitarian Universalism on both individuals and the world by supporting long range planning and growth initiatives by District congregations.

### 1.2. Statement of Intent

The Metro NY District Growth Team endeavors to promote and utilize the Chalice Lighters program to support congregations, regardless of size, to grow in number, generosity, vitality, and cooperation. Grants will be awarded to support projects that are sustainable and consistent with a long range plan, and that reflect a congregation's commitment to the growth project and to growth in general. Chalice Lighters grant recipients are expected to actively partner (see 4.1) in the fundraising for their projects, some part of which may be reserved by the Growth Team to fund other growth projects and initiatives.

### 1.3. Purpose of the Policies

The purpose of the policies and procedures described herein are to:

- Reinforce and expand the Metro NY District's Chalice Lighters program to facilitate growth within the Metro NY District and within Metro NY District congregations;
- Encourage and promote intercongregational cooperation in support of growth;
- Improve the quality and quantity of Chalice Lighters applications by assigning a Grant Manger to assist congregations in developing their Chalice Lighters applications, and by requiring applications to be associated with a long-term growth plan.
- Improve accountability of the Chalice Lighters program by requiring periodic reporting on the use of Chalice Lighters funds and on the effectiveness of the project funded by the Chalice Lighters program in achieving growth objectives.

## 2. Application Basics

### 2.1. Who May Apply

- Individual congregations of any size or a congregation in formation.
- Clusters of congregations

### 2.2. Selection of Recipients

- Qualified applications will be evaluated with regard to:
  - Consistency of the project with long-term growth plan;
  - Likelihood of growth through implementation of the project;
  - Commitment to financially support the project and other components of the congregation(s)'s long-term growth plan;
  - Long-term sustainability of the project;
  - A record of support to previous Chalice Lighter Calls

- One or more recipients may be designated for each Call held with the funds allocated on a percentage basis as determined by the Growth Team.

### 2.3. Deadlines

The Intent to Apply and Application forms are available on the Metro NY District web site. Congregations are encouraged to submit their Intent to Apply as early as possible. Before the Intent to Apply is submitted, questions should be addressed to Bill Slezak at [bill.slezak@gmail.com](mailto:bill.slezak@gmail.com). After the Intent to Apply is submitted, contact Bill Slezak for the assignment of a Chalice Lighters Grant Manager.

	Intent to Apply	Application	Grant Awarded
Fall Call	November 15	March 15	April
Spring Call	May 15	October 15	November

## 3. Requirements for Applicants

### 3.1. Make Fair Share contributions to the UUA and Full Share contributions to the Metro NY District.

- A single Metro NY District congregation applying for a grant should have contributed its Fair Share to the UUA and Full Share to the Metro NY District for the previous fiscal year. Also, the congregation must commit to contributing its Fair Share and Full Share for the duration of the grant.
- A cluster of congregations applying for a grant should exhibit a significant majority of Fair Share and Full Share congregations. All congregations in the cluster must commit to contributing their Fair Share and Full Share for the duration of the grant.
- A waiver of the Fair Share and Full Share requirements will be considered in cases of hardship or other extenuating circumstances.

### 3.2. Support Prior Chalice Lighter Calls.

While no minimum financial contribution is specified, support of prior Calls by the applicant is expected and will be considered in the evaluation of the application.

### 3.3. Submit a Long Range Growth Plan.

- An application should include a long range plan written or updated within one year prior to submitting the application.
- The long range plan should be approved by the congregation(s) or, in the case of an update, accepted by a formal vote of the board(s). Cluster plans should include a list of congregations involved.
- The plan should include growth goals, specific projects or initiatives to fund growth, costs and how the congregation(s) proposes to fund the various initiatives outlined in the plan, and how results will be measured.
- Congregations are encouraged to be at or moving toward UUA Fair Compensation Guidelines regardless of the type of grant they are seeking. This information should be included in the Long Range Plan.

3.4. Submit an Intent to Apply.

Submit an Intent to Apply at least four months prior to the application deadline to allow for assignment of a Grant Manager who will assist the congregation(s) in preparing or updating a long-term growth plan and in developing the application for the specific growth project.

3.5. Provide a Project Manager.

Provide a Project Manager to work with Grant Manager in preparing the application and to report on progress during and after the project.

4. Responsibilities of Grant Recipients

4.1. During the Chalice Lighters Call

- The recipient(s) will actively partner in the Chalice Lighters Call and will work closely with the Metro District Chalice Lighter Coordinators to arrange for personal contacts with other congregations within the District including sending “Ambassadors” to speak about their congregation and the specific projects for which Chalice Lighter funds are being requested.
- The recipient(s) will also provide periodic feedback and reports to the Metro NY District Chalice Lighters Coordinator on the progress in contacting and visiting the other congregations.
- The recipient(s) will provide written thanks after visiting a congregation and also after being advised by the Chalice Lighters Coordinator that the funds from the Call have been received by that congregation.

4.2. After Completion of the Call

- Advise the Grant Manager and/or Metro NY District Chalice Lighters Coordinator about the schedule for implementing the project and about when the funds are needed.
- Provide periodic updates as requested by the Grant Manager and/or Metro NY District Chalice Lighters Coordinator on the status and progress of project implementation,
- Provide an annual progress report during project implementation and for a minimum of three years after completion of the project that describes utilization of the grant, progress in implementation of project, and specific results, including measures of memberships, attendance, and growth.

5. Types of Projects

5.1. Staff Positions

- Grants may be given to establish and fill for the first time the positions of minister, religious educator, music director, administrator, membership coordinator or director, or other growth related staff.
- Grants may also be given for an additional minister or religious educator if a long range plan shows how this additional ministry will help the congregation grow.

- Staff grants can be made for moving from part-time to full-time.
- A staff position should be planned as a permanent position that is reflected in the congregation's long-range plan and that is consistent with UUA guidelines for fair compensation and benefits. . A five-year financial projection is required that describes salary and benefits (including COLA and potential merit increases), and the assumptions that are the basis for the projection.
- It is expected that the District Compensation Consultant be consulted to review compensation practices with the congregation.
- The usual payout schedule for a staff position is 50%-30%-20% over the three years. The grant recipient can negotiate a different payout schedule if there is a reason to do so.

#### 5.2. Lands, Buildings, Accessibility, and Other Improvements

- For a grant to help purchase land or construct a building or add significant additional space, the application should identify other sources of funding, including plans or results of a capital campaign
- Grants provided for land, new buildings, or a significant increase in space generally will not exceed 20% of the total cost of the project. Funding for less substantial projects will generally not exceed 50% of the project.
- For land and buildings, the grant is usually paid as a lump sum.

#### 5.3. Innovative Growth Projects

- Innovative growth grants, which may include leadership development, are to fund projects that are growth focused and practical. Joint applications from more than one congregation are encouraged, as are applications that are creative and innovative and that could serve as model projects for other congregations.
- The proposal should explain how growth is expected to take place, how much growth is expected, and how growth will be tracked and reported.
- Innovative growth grants are usually paid according to a schedule that meets the requirements of the project. This payout schedule should be agreed upon between the Grant Manager and the congregation.

#### 5.4. Organizing a New Congregation

- Grants for organizing a new congregation may be for an organizing event or for other organizing activities; the plan and application should indicate other sources of support for the project.
- Organizing grant applications must be accompanied by an organizing plan showing favorable demographics, commitments of financial and organizational support from sponsoring congregations, and the composition of a steering committee including members with UU experience and commitment to attending training in new congregation organizing.
- Organizing grants are usually paid in accordance with a schedule that meets the requirements of the project. This payout schedule should be agreed upon between the Grant Manager and the congregation.



Chalice Lighters Program

**Application (being revised)**