

**UNIVERSAL APPLICATION FOR DIOCESAN FINANCIAL ASSISTANCE**

(check one)

- Apportionment for the Common Good     Loan     Grant

We, the Vestry/Bishop's Committee of the parish/mission named below, request financial assistance from the Diocese to support our mission and ministry. We understand that financial assistance may be granted in the form of an Apportionment reduction, a loan, a grant, or some combination thereof.

Name of Parish/Mission \_\_\_\_\_

City \_\_\_\_\_ Church Code \_\_\_\_\_ Region \_\_\_\_\_

Dollar amount of requested assistance \$ \_\_\_\_\_

Reason for requested assistance \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Persons to contact for assistance review:**

Name \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

Day Phone \_\_\_\_\_ Alternate phone \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

Day Phone \_\_\_\_\_ Alternate phone \_\_\_\_\_

We understand that financial assistance from the Diocese is given to support the mission and ministry of the Church as it is expressed in the local congregation. Costs for program, staff, and building are part of the necessary support for mission and ministry. We understand that asking for assistance involves opening our congregation to partnership and cooperation with the Diocese, including possible designation as a distressed parish according to diocesan Canons. We understand that our congregational information will be referred to the Trustees, the Loan Committee of Trustees, the Real Estate Committee of Trustees, the Apportionment Review Committee, the Department of Congregational Development, and others as need be, and a total assistance package will be developed, to help further the mission of the Church in our congregation.

I certify that the Vestry/Bishop's Committee of the named parish/mission approved this request on:

Date \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_

I, Area Canon Missioner, have reviewed this request prior to its submission.

Signature \_\_\_\_\_ Date \_\_\_\_\_

All applications for reductions to the **Apportionment** must be received on or before **January 15** and late applications will not be considered. Applications for all other financial assistance may be submitted at a later date as an exception with the approval of the appropriate Canon Missioner. The congregation must not assume that financial assistance will be given until a final decision is made. It is important that the congregation not budget and spend as if the financial assistance will be available, until actually notified by the Diocese. Upon receipt of this application, the review committee will request supporting information for its consideration. Parish/Mission Financial/Statistical Data Templates will be provided upon request.

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### **Supporting Information**

Upon receipt of the Universal Application form, congregations may be asked to submit all or part of the following information in support of their request. Note: Parish/Mission Financial/Statistical Data Templates will be provided upon request in order to help them a) answer the questions and b) provide for consistency among all the requests.

1. Mission and vision statements.
2. Current balance sheet, including all endowments, funds and property held by, for, or on behalf of the congregation.
3. Current budget.
4. Past two (2) years financial data.
5. Comprehensive list of indebtedness (including unpaid bills and outstanding Apportionment payments).
6. Description of previous year's stewardship program and the most recent every-member visitation. A stewardship and evangelism plan for future growth, which may be in narrative form, including relevant demographic data analysis of your area. The plan should include spreadsheet presentations indicating when the congregation will achieve a balanced budget, taking into consideration payment of full Apportionment asking, no more than 5% draw on investments, and payment of clergy salaries up to diocesan minimums. The plan should be accompanied by supporting data showing projected attendance, households, pledging units and average pledge amounts. A spreadsheet presentation showing statistical information for a minimum of the most recent three (3) years, including statistics on baptized membership under sixteen, baptized membership over sixteen, average Sunday attendance, confirmations, number of households, number of pledging units, average pledge amount, and annual pledge income.
7. History of Apportionment participation for the past eight (8) years, including initial allocations, reductions (if any), and amounts actually paid for each year.
8. A letter of audit certification that the congregation has undergone an authorized audit no more than sixteen (16) months prior to the date of the application.
9. The process used to come to the decision to request assistance.

If this application is for assistance with a building project, then specific information regarding that project will also be required:

10. Building plans.
11. A narrative building plan which discusses:
  - a. How the congregation got to this point.
  - b. What the benefits are expected to be.
  - c. How the congregation expects to pay for it.
  - d. What other future plans exist for added building expenses and additions.
  - e. How the building proposal creates more flexibility in how the space of the congregation may be used for ministry.
  - f. How the proposal strengthens the mission and ministry of the whole Diocese.
  - g. How the building plan will not affect current/future operating budgets.
12. Cost estimates.
13. Other potential funding sources, including grants from sources both within and without the Diocese.

**Canon Missioners will be available to coach the congregation in compiling the information.**