



ENDOWMENT GRANT REQUEST FORM

TODAY'S DATE _____

CONTACT PERSON _____ PRESENTER(s) _____

DEPARTMENT _____

PHONE _____ EMAIL _____

NAME OF GRANT _____

Project overview

☐ Additional documentation attached

Briefly explain how your project will benefit the church

PROJECT BUDGET

EXPENSE	AMOUNT	DETAIL
TOTAL AMOUNT		Attach additional financial information if needed

Expected outcome an impact (Measurable outcomes anticipated)



SUPPORTING DOCUMENTATION (Optional)

- ☐ Additional financial documents
- ☐ Project timeline/work plan
- ☐ Other (please specify) _____

Give or email completed applications and policy signature form to Casey Proch at cproch@fumcbirmingham.org or office of Senior Pastor.

ENDOWMENT BOARD USE ONLY BELOW LINE

- ☐ Reviewed by Casey Proch on _____ ☐ Approved on _____
- ☐ Grant rejected _____
- ☐ Follow-up request _____
- ☐ Post event/project report _____
- ☐ Funds remaining after the project/event? (If box is checked, please indicate amount remaining) _____
- ☐ Promotional materials have been approved by Karen Murphy _____



Birmingham and Berkley First United Methodist Church Endowment Request Policy

Purpose

The purpose of this policy is to provide a clear and consistent process for departments within our organization to request funds from the Endowment. The Endowment exists to support the mission, vision and long-term sustainability of our church.

Eligibility

All official departments, ministries or programs of the organization are eligible to apply.

Funding Priorities

The Endowment Board gives priority to funding requests that:

1. Align with the organization's core mission and values
2. Represents innovative projects, pilot programs or capacity building efforts that support church growth.
3. That does not duplicate services that are already funded by the annual operating budget
4. Promotes spiritual growth, community engagement, education, outreach, facility sustainability or other church program needs.

Funding Limitations

1. Emergency funding requests will be considered on a case-by-case basis.
2. Capital expenditures may be considered only with demonstrated need and trustee's approvals
3. The purpose of the operating budget is to be responsible for operational expenses; approvals can be granted by exceptional circumstances.

Request Process

1. Application submission
 - a. Departments complete the application process by sending requests directly to the Executive Director of Worship, Music and Operations
 - i. Executive Director of Worship, Music and Operations approval then sends to endowment staff representative 15 business days before upcoming endowment board meetings.
 - ii. Emergency requests may be submitted outside of normal schedule with approval from endowment chair.

Evaluation

1. The Endowment Board will evaluate requests based on:
 - a. Alignment with mission and/or strategic plans
 - b. Impact and reach of project
 - c. Financial stewardship and feasibility
 - d. Sustainability and long-term benefit

Approval

Endowment board will review and vote on recommendations of grants

1. Departments will receive written notification of approval or denial within 30 days of the decision.

Post Funding Requirements

Those receiving endowment funds must:

1. Submit a final report (narrative + financial accounting) within 30 days of project completion or November 21 of that fiscal year.
2. Engage with endowment staff regarding any public advertising/communications regarding endowment support.

**Failure to comply with reporting requirements may impact eligibility for future funding.*

Oversight/Accountability

The Endowment Board reserves the right to request additional information or to withhold funding if proper stewardship cannot be demonstrated.

All disbursements will be reviewed annually as part of the organization's financial audit(s) & requirements.

Your agreement of this policy

Signature

Signature