

***UNASSIGNED
GENERAL ASSEMBLY MISSION
RESTRICTED FUNDS***

Funds Designated for Use in the United States and Puerto Rico

***GRANT APPLICATION PROCESS
INSTRUCTIONS AND GUIDELINES***

June 15, 2023

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INSTRUCTIONS AND GUIDELINES**

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APPLICATION PROCESS

Unassigned Funds are available for application by all councils and General Assembly entities. Some permanent funds generate an annual income stream; others on the list are primarily dependent on monies received in the previous year. Only the Presbyterian Church (U.S.A.)'s councils and General Assembly entities may apply. These organizations are described under "Applicant" in the "Specific Instructions" section. Councils may apply on behalf of racial-ethnic constituency groups for mission work within its bounds or with a view to make a grant to another organization.

This process applies only to funds, or the applicable portion thereof designated for use within the United States and Puerto Rico. ***Grants are not made for mission work outside the United States and Puerto Rico, and the mission work must occur within the applicant's bounds. The grant process is not intended to encourage work by one council within the jurisdiction of another council, and funding for mission trips is precluded.*** In addition, grants are not made for church construction/repair, student financial aid, audiovisual/computer equipment, and, typically, the Committee does not fund salary/staff support.

Sessions must send applications to their presbytery, which shall review the applications to determine which to send to the synod. Presbyteries and synods may forward only one application per fund to the next stage in the review process (see the section titled "Mid Council Participation"). Presbyteries and synods are encouraged to notify all applicants whether (or not) their application was sent to the next stage.

Grants are made on a one-time basis, distributed in a lump sum, and must be used within two years from the date a grant is distributed. Grants are distributed following the fall meeting of the Presbyterian Mission Agency Board. Ordinarily, a council that has previously received a grant from a fund cannot accept additional grants from that fund until an evaluation has been submitted.

APPLICATION REVIEW PROCESS

The Restricted Funds Oversight Subcommittee meets, reviews each application, and makes funding recommendations to the Presbyterian Mission Agency Board through the Presbyterian Mission Agency Board Executive Committee.

To be considered, application descriptions must be consistent with donor restrictions. Because there is a limited amount of money in each fund, the **Committee makes every effort to review each application based on completeness of the application, evaluation guidelines in the instructions, merit of the program/project, and whether the program/project can be accomplished with less than the full funding request. In addition, the Committee encourages partnership with other councils whenever possible.**

Timeline and Deadlines

Jul. 10 – Updated information on funds and amounts available released by the Presbyterian Mission Agency.

Sept. 1 – Last day for sessions to submit applications to the presbytery.

Oct. 1 – Last day for presbyteries to submit recommended applications to the synod.

Presbyteries to notify applicants whose applications were not forwarded to the next stage of the process.

Nov.1 – Last day for synods to submit applications to Restricted Funds Oversight Subcommittee. Applications must be postmarked by **November 1**.

Synods to notify applicants whose application was not forwarded to the next stage of the process.

Nov. – The Restricted Funds Oversight Subcommittee meets, reviews, and discusses each application and makes funding recommendations to the Presbyterian Mission Agency Board (PMAB) through the Resource Allocation and Stewardship Committee (RASC) to vote on at its fall Board meeting.

Dec. – Restricted Funds Oversight Subcommittee with administrative support from Presbyterian Mission Agency (PMA) staff will notify grant recipients about application status.
– The Presbyterian Mission Agency (PMA) staff will distribute monies granted to councils.

The Restricted Funds Oversight Subcommittee will notify applicants whose grant proposals were considered and not approved by the Restricted Funds Oversight Subcommittee.

The Restricted Funds Oversight Subcommittee does not have the names of applicants whose proposals were not forwarded and has no way of responding to questions about such applications.

EVALUATION GUIDELINES

The Restricted Funds Oversight Subcommittee will review applications and make recommendations based on the factors set out below. Synods and presbyteries should use these guidelines in conjunction with their mission priorities to evaluate each application.

1. What is the degree of Presbyterian involvement?
2. What is the availability of matching funds?
3. What amount of other support is provided by the applicant, including volunteer time and in-kind services?
4. What percentage of the applicant's mission giving supports General Assembly?
5. What length of time has the applicant supported the project?
6. For start-up programs, what is the availability of other monies to continue the program in the future?
7. How does the program promote the goal of partnership in carrying out the applicant's mission?
8. Where does this fall within the mission priorities of the applicant?
9. How many people does the program serve?
10. What is the amount of local support?
11. What is the evidence of ongoing commitment?
12. What is the program's record of accomplishment?
13. What is the total program cost compared with the application request?
14. What will be the direct impact of the program on people?
15. For new programs, how quickly can the program begin?

MID COUNCIL PARTICIPATION

Councils are asked to evaluate applications from within their bounds and forward no more than one application per fund to the next stage of the application process (see below for an exception for certain funds). The goal is to allocate funds in line with mission priorities. Accordingly, an application should not be forwarded, even where it is the only application, if that application does not fit within the mission priorities of the mid council. Please be sure that the request fits the description of the fund.

When there are multiple applications for the same restricted fund from within a presbytery, the presbytery, in a manner of its own choosing, will decide which one request except as noted below, if any, to forward to the synod. A presbytery may **not** combine multiple requests from congregations into a single presbytery request. After consultation, the original applicant and the presbytery may revise an application before forwarding to the synod. The request will not exceed the total amount available from the restricted fund.

When there are multiple applications for the same restricted fund within a synod, the synod, in a manner of its own choosing, will decide which one request, if any, to forward to the Restricted Funds Oversight Subcommittee. A synod may **not** combine multiple requests from presbyteries into a single synod request. After consultation, the original applicant, presbytery, and synod may revise an application before forwarding to the Restricted Funds Oversight Subcommittee. ***Where the amount available for a particular fund exceeds \$150,000, a synod may forward two applications for that fund. The request(s) will not exceed the total available from the restricted fund.***

Presbyteries and synods are encouraged to notify all applicants whether or not their application was sent to the next stage in the review process. ***The Restricted Funds Oversight Subcommittee does not have the names of applicants whose proposals were not forwarded and has no way of responding to questions about such applications.***

SPECIFIC INSTRUCTIONS

Fund Number – Ten-digit number that identifies a fund.

Applicant Pin Number – The five- or six-digit number assigned to an applicant as listed in the General Assembly minutes.

Applicant – Only sessions, presbyteries, synods, and General Assembly entities (Presbyterian Mission Agency, Office of the General Assembly, Presbyterian Foundation, Board of Pensions, Investment and Loan Program, and Presbyterian Publishing Corporation) may apply. However, application may be made with the intent of making a grant to another organization, such as a racial ethnic constituency group.

Amount – The amount must equal or exceed \$1,000. Applications for less than \$1,000 will not be considered. All requests for \$10,000 or more will need to include completion of a supplemental information form. The supplemental form is available on the website (<https://www.presbyterianmission.org/who-we-are/financials/>).

Contact Person – This does not need to be the person signing the application, but must be a representative of the applicant. This person will be contacted if additional information is needed, and will represent the applicant in any necessary consultation. This person must have the authority to reach a binding consultation agreement.

Restriction – Must quote exactly from “Restriction” column in the Unassigned Funds list.

Budget – A detailed budget and budget justification constitute part of the application process and will be evaluated for appropriateness as part of the Committee’s review process.

Proposed Use – Be as specific as possible. It must be readily apparent from this description that the proposed use will satisfy the restriction. Any questions on this point should be referred to contact listed under “Questions and Comments” at the end of these instructions. The description should be responsive to the “Evaluation Guidelines.” If making a grant to another organization, be specific as to the proposed use by that organization.

The application must be typed in 10-pitch or larger type, and all information must fit within the application. The application should be submitted as four 8½ x 11 sheets of paper (expanding the length of the application with a word processor is not permitted). Excess information (including brochures and photographs) will not be reviewed. These requirements are necessary to maintain the costs involved in copying and handling applications.

The report approved by the General Assembly stated that the “process should maximize the use of existing structures and any operational procedures that may already be in place.” The General Assembly has well-established ongoing programs dealing with church construction and financial aid for students. **To avoid duplication and to ensure that all have equal access, the process, as described in these instructions, will not accept applications for church construction/repair or student scholarships.**

CHURCH BUILDING AID AND STUDENT FINANCIAL AID INQUIRIES

Inquiries on Church Building Aid and Student Financial Aid may be sent to:

Presbyterian Investment & Loan Program, Inc.

Director, Lending Services
Presbyterian Investment & Loan Program, Inc.
100 Witherspoon Street
Louisville, KY 40202-1396
(800) 903-7457, Ext. 5231
loan.help@pcusa.org

Financial Aid for Service

Coordinator, Financial Aid for Service
Presbyterian Church (U.S.A.)
100 Witherspoon Street
Louisville, KY 40202-1396
(800) 728-7228, Ext. 5735
finaid@pcusa.org

Signatures – All applications must be signed on behalf of the applicant. E-signatures are acceptable.

- **Session** – Signed by the Clerk of Session
- **Presbytery** – Signed by Presbytery Representative
- **Synod** – Signed by Synod Representative

Mailing – Grant applications should be mailed as follows:

- **Session** – Mail to the presbytery of jurisdiction
- **Presbytery** – Mail to the synod of jurisdiction
- **Synod and GA Entities** – Email to RFOS-PCUSA@pcusa.org

OR

Mail to RESTRICTED FUNDS OVERSIGHT SUBCOMMITTEE
PRESBYTERIAN CHURCH (U.S.A.)
100 WITHERSPOON ST, ROOM M007
LOUISVILLE, KY 40202-1396

Questions – Contact Catherine Reuning at Catherine.Reuning@pcusa.org or (888) 728-7228 x5732.