

Mid-Hudson Region of the Episcopal Diocese of New York
Board of Managers Funds

GUIDELINES & PROCESS FOR THE APPLICATION FOR FUNDING

ELIGIBILITY

Board of Manager (BOM) Grants are made available to parishes, congregations, Diocesan recognized ministries and programs, for their work in the Mid-Hudson Region through benefactors who have designated their use for furthering the mission of the Episcopal Church in the Mid-Hudson Region. (These funds are independent of the Diocesan Assessment budget.)

ROLE OF EXECUTIVE COMMITTEE

The Executive Committee (EC) meets twice a year to review all applications to objectively identify those programs that meet the funding guidelines. The Executive Committee meets twice a year to review all applications to objectively identify those programs that meet the funding guidelines. The range for grant allocations varies, from as low as a few hundred dollars to a maximum of five thousand dollars. Programs that apply for more than the \$5,000.00 limit are considered extra-ordinary askings and may require a more detailed application, upon request, before consideration. Grants in excess of the \$5,000.00 limit will need the unanimous approval of the Executive Committee.

Having a firmly defined, \$5,000 grant maximum award limit, preserves a uniform fairness, and transparency, for all applicants.

The Executive Committee of the Mid-Hudson Region has the authority to designate the use of income from the Board of Managers Funds held by the Diocese in trust for use in the Mid-Hudson Region. The Mid-Hudson Region is currently defined as Episcopal parishes or congregations located in Dutchess, Ulster, Orange, and Sullivan counties of New York State. Members of the Executive Committee may serve as “shepherds” for applications.

GUIDELINES

“Funds are to be considered for use within the Mid-Hudson Region if they support the purpose of extending the ministry and mission of the Episcopal Church in the local community or the Region, or both.” The Committee encourages new and innovative ways of program outreach.

The first consideration will be given to those requests whose purposes reach beyond the single parish, collaborate with other parishes, or reach out to the wider, larger community; but this is not a requirement to receive a grant. Monies may also be requested for a special or new program, as the Executive Committee supports, and encourages new, innovative, experimental and collaborative initiatives that promote the Gospel imperative. Ecumenical and Inter-faith collaborations are given consideration, especially when they benefit local parish communities and their outreach.

Board of Manager Funds are designated for program expenses and not for parish operating expenses, which includes compensation for paid staff salaries. *Generally, there is an expectation that programs include volunteers from the sponsoring parish or local community.* If this is not possible, then a very detailed rationale must be provided to the Executive Committee explaining the reason for the deviation.

Monies are usually not intended for building projects or other capital expenses unless these are strategic to the implementation of the project or program; and funding is unavailable from other sources.

It is important that all applicants ask for what is truly needed to support a successful program, both for funding and coupled with a realistic completion timeline. If grant funds are not used for their designated purposes, or are unused within the specified timeline, they *must* be sent to the Regional Office for return into the Board of Managers Fund. This also applies if, after an award and disbursement, the proposed program will not be pursued as originally planned and described on the application. If situations change after the grant has been awarded, an amendment to the application must be made in writing and submitted to the Regional Office for approval by the Executive Committee.

The Regional Office will send out a “six-month review” form to each grant recipient. It must be completed and returned to the Regional Office within four weeks of receiving it. Failure to provide this information will jeopardize future funding requests.

Applicant parishes may not request monies more than once a year for a given project or program, and funding will not be granted for the same purpose for more than two (2) consecutive years. BOM grants are not intended to be a regular line item in your program budget. Instead, these grants are intended to support new work.

The Executive Committee of the Mid-Hudson Region may grant Board of Manager Funds either for specific programs or needs that are defined by the action of the Regional Council at its regional meeting.

EMERGENCY GRANTS

Emergency grants occur outside the biannual application cycle and may be disbursed at the discretion of the Executive Committee. These requests must clearly demonstrate or describe the emergency situation and need.

PROCESS

Applications for these grant monies will be received twice a year – Spring and Fall. Deadline dates will be decided and posted by the Mid-Hudson Executive Committee. Emergency requests will be considered outside the spring and fall cycles, but these applications must demonstrate a true emergency need.

Requests for grant money must be submitted using the application form along with the documentation detailed on the form. A cover letter must accompany the application that will provide the Executive Committee a clear understanding of what the program is attempting to accomplish as well as how the parish is, or will be, invested in this activity (e.g. time, treasure or talent). Programs budgets (*not the parish budget*), must be attached to the application. New programs with no established history, must submit a proposed budget, which must be attached.

Parishes who want to submit an application may ask that a member of the Executive Committee meet, or confer with them, individually, to help them with this process prior to submission. (Applicants are invited to contact the Regional Office for more information, or to coordinate a visit or conference call.)

SHEPHERDING

Once an application is received *Shepherd(s)* may be assigned to the grant request. The shepherd(s) will:

- review the application materials and alert the requestor to any missing or incomplete information;
- contact the requestor and may ask to schedule a meeting date for an on-site visit to discuss the program and become as thoroughly informed as possible; (if an onsite visit is not possible, a phone or online tele-visit interview may suffice)
- make recommendations that might help facilitate the request;
- the shepherd(s) will speak to the application with the Committee and make a recommendation for action;
- within a few days after the Committee takes action, the Shepherd(s) and/or the Regional Office will communicate decisions or recommendations regarding their application;
- if a grant is approved, communicate the committee's decision; and advise on an estimated funding date or disbursement details;
- if a grant is denied, the reasons for the denial will be communicated; and may include advice to whether the grant could be submitted again in the next cycle. If a grant request or other emergency funding is approved, the recipient must provide a brief, single page, written final status report to the Executive Committee within six months after receiving funding, detailing exactly how the funds are being, or were used, along with a brief program summary; specifically, whether the program was successful in meeting the original mission or program purpose, or if not, the lessons learned. Failure to provide this information will jeopardize future funding requests.

SUMMARY

As of July 2022, there were 50 congregations within the Mid-Hudson Region, of Dutchess, Ulster, Orange, and Sullivan counties.

The goal for these revised guidelines is to ensure every congregation, no matter their size or geographic location, has (1) a clear understanding of the funding parameters; (2) receives the same consideration as those who are more knowledgeable and proficient in writing these grant proposals; and finally (3) gives everyone an equal opportunity and the same consideration for their mission specific grant.