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Vision Statement

The *Northern Lights* Chalice Lighter Program (*Northern Lights*) nurtures and supports Unitarian Universalists in building healthy and sustainable communities within Canada. The Unitarian Universalist Ministers of Canada (UUMOC) and the Canadian Unitarian Council (CUC) have created this program specifically to support grassroots, transformative initiatives. *Northern Lights* recruits and maintains an ongoing pool of individual donors (Chalice Lighters) who pledge to provide twice annual donations toward selected projects.

The program has been named to recognize the generosity of two individuals: Elinor Gill Ratcliffe and Dr. Phillip Hewett. Each of them exemplifies selfless giving to our Canadian Unitarian Universalist movement.



Who can apply for a *Northern Lights* Grant?

Unitarian Universalist communities of any description may apply for a *Northern Lights* grant. Applicants may include individual congregations of any size, established or emerging, as well as other Unitarian Universalist communities. Any project not submitted by a congregation must detail both the group's and the project's relationships to Unitarian Universalism in Canada. If the applying community is not a registered charity, the application must identify the registered charity that serves as its fiscal agent and include a copy of the vote taken by the charity's governing body that assumed fiscal responsibility for the project.

How does *Northern Lights* work?

1. *Northern Lights* solicits and encourages individual Unitarian Universalists and other interested individuals to financially support up to two transformative projects per year. These individuals are *Northern Lights*' Chalice Lighters. Information about becoming a Chalice Lighter can be found at <http://cuc.ca/northern-lights/>
2. Projects come from Canadian Unitarian Universalist communities and congregations that submit applications to *Northern Lights* and are approved by the *Northern Lights* Grant Selection Panel.
3. Up to two awards will be made by the end of April each year (application deadline March 31st). Projects should be for more than \$5,000. (Sharing Our Faith grants are for less than \$5,000).
4. By mid/end May, the grant recipient(s) are asked to clearly explain their project in a call letter/email sent to each Chalice Lighter. It is recommended that each Chalice Lighter receive three different emails from the grant recipient, one at the beginning, one in the middle and one at the end, including a thank you letter.
5. All monies collected for selected initiative(s), go toward the project. If the collection does not reach the goal identified in the application, the grant recipient receives only the amount collected.
6. Grant recipients (or their identified charitable organization partners) provide tax receipts directly to individual Chalice Lighters.

What kind of grants does *Northern Lights* support?

Northern Lights seeks to fund grassroots, transformative initiatives that nurture and promote Unitarian Universalism in Canada. Any project that meets this description will be considered. Some examples are:

1. To establish first-time positions of minister, religious educator, music director, administrator, or membership coordinator – or other staff position – demonstrated in the application to be a transformative initiative.
2. For a second minister, religious education professional, or staff position – or to increase the hours of existing personnel – in the interest of strengthening the health and vitality of an organization or congregation.
3. To an emerging congregation's application for an organizer or other organizing activities. The plan and application must indicate local sources of support for the project.
4. For land, buildings or a significant increase in space – provided the applicant has other resources to finance at least 80% of the total cost of the project.
5. Grants may be given to fund a creative project that does not fall into any of the categories listed above. The project must clearly show how it will result in the promotion of Unitarian Universalism at a local, regional, or national level.



How is *Northern Lights* administered?

1. The program is administered by the *Northern Lights* Grant Selection Panel, with support from CUC staff. (See page 4 for how the panel is recruited/chosen.)
2. The *Northern Lights* Grants Selection Panel will receive applications, provide advertising, web and print materials, keep Chalice Lighter lists current, and complete any other administration duties as needed.
3. In the interest of building and renewing the pool of Chalice Lighters, UUMOC and the CUC will publicize and promote *Northern Lights* through their various communication channels as recommended and directed by the *Northern Lights* Grant Selection Panel.
4. *Northern Lights* works in conjunction with other Canadian Unitarian fundraising efforts (e.g., Sharing our Faith and Friends of the CUC). Every fundraising effort has its strengths, and they co-exist because each offers a unique way to foster the growth of Unitarian Universalism in Canada.
5. To support the on-going work of the *Northern Lights* Chalice Lighter Program, grant recipients are required to contribute three per-cent of the total funds they receive. Expenses for the administration of the program (e.g., pamphlets, communications, pins, posters, staff time) are paid from these contributions.
6. The *Northern Lights* Grant Selection Panel reviews applications once a year and chooses the grant recipient(s). Guidelines that inform the Panel's choices can be found on page 6.
7. Grant recipients provide tax receipts directly to individual Chalice Lighters, and provide a detailed accounting to the *Northern Lights* Grant Selection Panel – both of individual donations received and of project financial records.

What does *Northern Lights* require of applicants?

This is a general list of requirements. For specifics of each item, and additional information, please see the Northern Lights' Funding Guidelines, and Application documents.

1. All applications must include a long-range growth plan written or updated within the year prior to the application date.
2. Completed applications must be approved and submitted by the governing board of the congregation, the sponsoring agency, or the fiscal agent.
3. In the case of a congregation:
 - The congregation must have fully paid their CUC Annual Program Contribution (APC) fair share for the previous fiscal year and must commit to remain current with their APC contribution.
 - The congregation must have at least 20% of its members registered as Chalice Lighters.
 - Funds can be used to support professional leadership, for example, to subsidize ministers in fellowship (or in affiliate status), professional religious educators credentialed or willing to work toward credentialed status with the Unitarian Universalist Association.
4. For a Unitarian Universalist community other than a congregation:
 - The community must provide all information, similar to that required of congregations, which would assist the *Northern Lights* Grants Selection Panel in determining the suitability of the proposed project.
 - The application must include supportive information from and about any sponsoring or mentoring congregations or communities, if they exist.
 - If the applying community is not a registered charity, the application must identify the registered charity that serves as its fiscal agent and include a copy of the motion passed taken by the charity's governing body assuming fiscal responsibility for the project.



5. All applications must identify a contact person for the project, how cheques should be made out, and the address to which they should be sent.
6. Congregations will directly receive the cheques from individual *Northern Lights* Chalice Lighter donors and will track them. They will be responsible to:
 - Issue tax receipts to each Chalice Lighter;
 - Report to the *Northern Lights* Grants Selection Panel the names, contact information, and amounts of donations received;
 - Send thank-you notes to each individual donor.
 - Submit three per-cent of the total funds received to *Northern Lights* to support the on-going work of the program.
 - Provide periodic financial statements and implementation reports as required.

Timeline for Grant Applications & Reporting

- Application Due – March 31st
- Panel Review – April
- Recipient Notified – May 1st
- Call/Emails sent no later than – May 30th
- Report of Contributions Due – September 30th
- Project Implementation Reports – A progress report is due March 1st and a full report on the success of the project is due upon completion (or annually, depending on the scope of the project.)

Northern Lights Grant Selection Panel

In 2017, the *Northern Lights* Grant Selection Panel assumed the duties of the *Northern Lights* Administration Team, which was disbanded.

1. Members:

They can come from all and any Canadian Unitarian and Unitarian Universalist congregations and/or communities, the CUC Board of Trustees and UU ministers serving or living in Canada. Two members are appointed by the CUC Board of Trustees, two members are appointed by UUMOC Executive. Dr. Phillip Hewett and Eleanor Gill Ratcliffe are honorary members.

2. Terms:

- four years, with selection staggered so half the terms end every two years.
- the panel will share leadership and chairing duties
- the two honorary members will attend as they are able and willing.

3. Duties:

- Ensure that application deadlines are communicated and advertised.
- Support applicants in the application process.
- Review *Northern Lights* applications annually and select up to two to approve.
- Provide support to winning applications as they raise funds for their project.
- Assess the need for promotion materials, website updates, adherence to timelines;
- Ensure that the CUC has received the three per-cent administration fee;



- Assure that the funds are accounted for and any other administration of the program;
- Receive and distribute reports from the grant recipient as required;
- Assure that 20% of the applicant congregation or community are registered in the *Northern Lights* data base;
- Establish and regularly review guidelines for selecting projects, such as keeping a regional balance in the selection.
- Inform all applicants of the final decision of the panel.
- Meet as needed.

Application Guidelines

1. All applications will be reviewed for completeness by the *Northern Lights* Grant Selection Panel (see application for all relevant information needed).
2. Applicants must meet the requirements outlined in the application form with regard to participation in the *Northern Lights* program and status with the CUC. The *Northern Lights* Grant Selection Panel will use the database of *Northern Lights* participants to confirm compliance.

For a Unitarian Universalist congregation:

- The project's plan must be adopted by a formal vote of the congregation or the governing body of the congregation.
- The congregation must have fully paid their CUC Annual Program Contribution (APC) fair share for the previous fiscal year and must commit to remaining current with their APC assessment.
- The congregation must include information about its average pledge (per unit). While *Northern Lights* sets no average pledge requirement, the *Northern Lights* Grants Selection Panel uses this information as part of its evaluation.
- The congregation must have at least 20% of its members registered as Chalice Lighters.
- If a grant seeks assistance for the purchase of land, the construction of a building, or a significant addition, the application must include the results of any capital campaign or other resources of financing being pursued.

For a Unitarian Universalist community other than a congregation:

- The community must provide similar information to that required of congregations in order to assist the *Northern Lights* Grants Selection Panel in determining the suitability of the proposed project.
 - The application must include supportive information from and about any sponsoring or mentoring congregations or communities, if they exist.
 - If the applying community is not a registered charity, the application must identify the registered charity that serves as its fiscal agent and include a copy of the motion passed by the charity's governing body assuming fiscal responsibility for the project.
3. All applications must show what other sources and amounts of fiscal support the group expects in addition to the grant.
 4. All applicants that seek funding for employment must pay fair compensation and benefits consistent with current denominational guidelines.
 5. For an organizing project, the application must be accompanied by a needs survey and/or analysis showing favourable conditions and demographics. Commitments of financial and organizational support (perhaps from a mentoring congregation) must accompany the application. The application must also



show the composition of a steering committee, including members with Unitarian Universalist experience and a commitment to attend any available relevant training.

6. All applications must identify person as liaison for the project, how cheques should be made out, and the address to which they should be sent. Successful applicants must immediately notify the *Northern Lights* Grants Selection Panel if their contact person changes.
7. The liaison, on behalf of the successful applicant, must provide a report of contributions and three percent administration fee by September 30. Depending on the length of the project, an implementation report describing how the project is progressing, including relevant statistical information, may be required.
8. The liaison must supply a final financial statement and summary report of the project's success when the project has concluded.

Funding Guidelines for *Northern Lights* Grant Selection Panel

These guidelines are intended to give the *Northern Lights* Grant Selection Panel some broad parameters to consider as they choose the recipients of *Northern Lights* grants. The Panel will make final decisions based on their deliberations; however, these guidelines will help raise issues to be considered in that process.

1. Program Goals:

The Terms of Reference for the *Northern Lights* program note that it was created, “specifically to support grassroots, transformative initiatives.” It is a growth program, but the word ‘growth’ is not to be strictly interpreted as growth only in membership numbers. Literature in the field of growth argues strongly that size growth comes from strong, consistent, high quality programming and from congregations developing and fully supporting appropriate internal structures suitable for their present and future size. The goal of *Northern Lights* is to help fund the kinds of proposals that would bring these conditions about. Funding staffing is a high priority in the program's Terms of Reference and building acquisition and expansion are also mentioned. However, applications need not be limited to these two specific areas. Key questions the Panel might ask about the proposal are, for example: How will this project strengthen and shape the whole congregation/community? What will it help them to do better? Will this project lead to new directions and create new entry points in the congregation/community? Will this program relieve pressure on the ‘pinch points’ that are inhibiting development?

2. Regional Balance:

Ideally the distribution of grants over time will have some regional balance. By weight of numbers of congregations, Central and B.C. Regions are larger than Eastern and Western, but the *Northern Lights* Grant Selection Panel is asked to look at the previous distribution of grants so that *Northern Lights* grants are not disproportionately going to the same region(s). The challenge will come when the most excellent projects in consecutive cycles happen to come from the same geographic area.

3. Congregational Size:

The impact of several thousand dollars on a small congregation's budget is likely to be more dramatic than on a large congregation. The kinds of projects *Northern Lights* will be asked to fund are likely to be quite different in scope and proposed growth outcomes. *Northern Lights* Grant Selection Panel will need to look for some balance between grants to large congregations and small, taking into account the differences in access to CUC services that congregations experience.



4. Community Programs:

Northern Lights grants are also available to those community groups that promote the Unitarian religion and/or its Principles. Such groups may include professional groups, age specific groups (youth, young adults, etc.), or project specific groups. Applicants in this category must prove that they have an established association with a congregation or registered Canadian charity that will grant tax receipts to donors. The *Northern Lights* Grant Selection Panel will consider the degree of direct participation in local, regional or national Unitarian life by the applicants, the promise of the project for promoting the Unitarian name and values more widely and the potential for growing our religion.

5. Quality of Project and Growth Plan:

The key to any grant decision should be the quality of project, and its projected impact on the health and sustainability of Unitarian Universalist communities in Canada.

It will be the job of the Panel to seek out the best quality project among the applicants. Some criteria for determining the best project might be:

- Historical Data: Historical data can give some indication of whether a congregation is serious about growth. *Northern Lights* grants have the potential to push an attempt at growth over the top, but money alone cannot create growth. The Panel should look for clear indications that the congregation is on the path to growth:
 - Is the congregation on a growth curve or has their membership been stagnant?
 - Has there been a recent shift in the demographics of the congregation, e.g. more or fewer children or young adults etc.?
 - Does the budget reflect a commitment to growth? Is their average pledge at or above national standards?
 - Has their budget been increasing or decreasing in the past few years?
 - What efforts have been made to achieve growth in the past few years?
 - Have they established new 'entry points' for potential members?
 - What have they done to reach out to new people and new demographics?
- Growth Plan:
 - Is the vision clearly stated?
 - Is the vision compelling and exciting?
 - Does it have the potential for succeeding?
 - Does an analysis of the historical data suggest that the congregation is ready to embrace and enact the plan?
 - Is it a reasonable plan?
 - Do the proposed goals seem achievable within the scope of the plan, e.g., the hiring of a paid Director of Religious Education alone does not automatically translate into more children in the program. There needs to be committee support, outreach, etc.
 - Does the plan lay out specific criteria for the measurement of success, e.g., SAM models?
 - Will the grant be the sole funding source for the plan or is the congregation offering increased support as well? Note that the Terms of Reference imposes some limits of fund participation especially in building projects.
 - Are the proposed funded elements of the plan the whole plan or is it merely one piece of an integrated attempt to grow?



- Exclusions and Conflict of Interest

A congregational application will not be accepted if the congregation has received a *Northern Lights* grant within the past three years.

Should an application come forward from a congregation where a sitting member of the *Northern Lights* Grant Selection Panel has their affiliation, that member must self-exclude from the granting process in that cycle, and another Panel member will be recruited for that cycle.

While *Northern Lights* Grant Selection Panel members may encourage congregations to submit applications, under no circumstances will a panel member:

- advise a congregation where they have their affiliation on the preparation of an application
- advise potential applicants on the preparation of specific applications



APPLICATION FORM

Congregation/Organization _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Contact Person: _____

Phone _____

Email _____

We apply for a *Northern Lights* Chalice Lighter grant to contribute to the growth/transformation of Unitarian Universalism in Canada as described in the application below.

Section A - Project Description

On a separate sheet, describe the specifics of your proposed project. Give as much detail as possible for the Grant Selection Panel to be inspired by your project.

Section B – Growth Plan

Attach a copy of your growth plan. Describe how the proposed project implements that plan. Describe the potential effect on the growth of Unitarian Universalism through the project.

Section C - Project Financial:

Include:

- the proposed project budget
- list the local resources, including loans, matching funds, fundraising income, etc., that are available from your congregation or other agencies to help with the project.
- given that the amount of the grant is dependent upon the generosity of individual *Northern Lights* participants, outline your project's financial options if the call results in more than budgeted for or less than budgeted for from *Northern Lights*.

Congregational applicants, complete Section D.

Applicants other than congregations, complete Section E.



Section D - Congregational Application

1. Congregational Information

Name: _____

Address: _____

Contact Information:

Phone: _____ Email: _____ Website: _____

Application Contact Person:

Phone: _____ Email: _____

2. Membership

A. Adult voting members

B. Average Sunday attendance

Current _____

Current _____

One year ago _____

One year ago _____

Three years ago _____

Three years ago _____

Five years ago _____

Five years ago _____

3. Religious Education

A. Number of children enrolled

B. Average attendance

Current _____

Current _____

One year ago _____

One year ago _____

Three years ago _____

Three years ago _____

Five years ago _____

Five years ago _____

C. Number of classes _____

D. Do you have a youth group? _____ Number served _____

E. Do you offer child care? _____

4. Organizational Structure.

A. Number on governing board _____ Length of term _____

B. Lay leader (officer) positions: _____



C. Standing Committees: _____

5. Minister(s) and Staff.

Attach a roster of minister(s) and staff, including name, title, whether full- or part-time, and contact phone number. A letter of support from the Minister would be useful.

6. Congregational Finance

A. Attach a copy of your current budget.

How many pledging units this year? _____

B. Historical data:

| Category | Last year | 3 years ago | 5 years ago |
|--------------------|-----------|-------------|-------------|
| Total expenditures | _____ | _____ | _____ |
| Pledge income | _____ | _____ | _____ |
| Investment income | _____ | _____ | _____ |
| Other Income | _____ | _____ | _____ |
| Pledging units | _____ | _____ | _____ |

D7. Congregational Meeting place

A. On a separate sheet, describe building, grounds, parking, signs, and location within community. Attach photos or maps if that helps. If project involves a new building at a new site, describe the new site and include information on building plans.

B. Owned or rented? _____ Monthly rent or loan payment _____

C. Current Principal Balance on loan _____

D. How long have you met at this location? _____

E. Age of building _____

D8. Other information

A. Chalice Lighter grantees must have and maintain status with the CUC. Are you a CUC Full Share congregation? _____

B. Chalice Lighter grantees must have and maintain at least 20% of membership enrolled in the Chalice Lighter program. Have you met this requirement? _____



C. This application was approved by the congregation's Board of Trustees in a meeting held _____ . Provide the actual wording of the motion.

D. The congregation has designated the following person to be liaison for this grant:

Name _____

Title (if any) _____

Address _____

Phone (day) _____ (eve.) _____

Email _____

E. Prepared by _____ Title _____

Date _____ Phone _____

We understand and agree that if awarded a *Northern Light* Chalice Lighter grant:

- we will provide full accounting to the *Northern Lights* Grants Selection Panel of all monies received (amounts and from whom) within three (3) months of the call letter being issued. We also agree to remit three per-cent of the total amount received to the *Northern Lights* Grants Selection Panel along with the full accounting report.
- we will provide thank you notes and tax receipts to all contributors.
- To submit a full report of the success of the project upon completion or annually depending on the scope of the project.
- this project may be publicized as part of the ongoing promotion of the *Northern Lights* Chalice Lighter Program.

Project Contact Person _____

Signature

Print Name

Please notify the Northern Lights Grants Selection Panel immediately of any contact information changes. The Northern Lights Chalice Lighter coordinator will contact your project contact person upon receipt of the application to confirm the application is complete or notify you of additional information required. All completed applications will be forwarded to the Northern Lights Grants Selection Panel for consideration. northernlights@cuc.ca



Section E - Community Application (complete Sections A & B)

Community applications can only be made by CUC members (with membership through congregational affiliation or as Members at Large). Applicants are urged to read through the congregational portion of this application and respond to as many questions as might be relevant.

1. Community Information

Name: _____

Address: _____

Contact Information:

Phone: _____ Email: _____ Website: _____

Application Contact Person: _____

Phone: _____ Email: _____

Members of the Community Application Team and their CUC affiliation (list all).

1. _____

2. _____

3. _____

4. _____

2. Organizational Structure.

A. Please outline your organizational structure

B. Leadership positions:

C. How are decisions made:



3. Reporting Agency Relationship:

A. Describe the relationship with the agency or congregation that will be issuing tax receipts

B. What is the agency's U*U connection?

C. What is your accountability to the agency?

D. Agency contact person and contact information

4. Other information

A. *Northern Lights* grantees must have and maintain relationship with the CUC. What is your community/organization's affiliation with the CUC? _____

B. *Northern Lights* grantees must meet the following requirements:

- If the sponsoring agency is a congregation(s), at least 20% of its membership must be enrolled in the Chalice Lighter program.
- All individual members of the Community Application Team must be Chalice Lighters

Have you met this requirement? _____

C. This application was approved by the sponsoring agency's Board of Trustees in a meeting held _____. Include wording of the motion:



D. The sponsoring agency has designated the following person to be liaison for this grant:

Name _____ Title (if any) _____

Address _____

Phone (day) _____ (eve.) _____

Email _____

We understand and agree that if awarded a *Northern Light* Chalice Lighter grant:

- we will provide full accounting to the *Northern Lights* Grants Selection Panel of all monies received (amounts and from whom) within three (3) months of the call letter being issued. We also agree to remit three per-cent of the total amount received to the *Northern Lights* Grant Selection Panel along with the full accounting report.
- we will provide thank you notes and tax receipts to all contributors.
- To submit a full report of the success of the project upon completion or annually depending on the scope of the project.
- this project to be publicized as part of the ongoing promotion of the *Northern Lights* Chalice Lighter Program.

Project Contact Person _____

Signature

Print Name

Please notify the Northern Lights Grants Selection Panel immediately of any contact information changes. A member of the Northern Lights Grants Selection Panel will contact your Project Contact Person upon receipt of the application to confirm the application is complete or notify you of additional information required. northernlights@cuc.ca