**Theological Education Fund Bursary Application**

These bursaries, funded by the Percy Simpson Bailey and Rouff/Mackie-Jenkins funds, and by special collections at ordinations and installations, are intended to further the cause of Unitarian and Universalist (UU) theological education in Canada by supporting:

* UUs in Canada with expenses incurred annually by studying for the Ministry;
* Canadian UU ministers with continuing education expenses; and
* Canadian UU congregations who wish to support an intern minister (as of 2021).

Bursaries are awarded based on financial need. An individual may receive a bursary up to three times in each category (three times for a student and three times for a minister).

**ELIGIBILITY REQUIREMENTS**

Students

* Canadian citizenship or non-citizen currently working or studying in Canada;
* Aspirant or Candidate status with the Unitarian Universalist association;
* Be in active study for the ministry or recognized internship;
* Financial need

Ministers

* Minister serving a Canadian congregation or community ministry in Canada;
* Preliminary or Full Fellowship with the Unitarian Universalist Association;
* Plan to pursue continuing education that is not (fully) covered by your employer;
* Financial need

**INSTRUCTIONS**

Please complete the section in the form that is relevant to you (Students or Ministers), the Financial Disclosure statement, and include the documents noted in your section. The **deadline to apply is March 31** of each year. You may submit your application by e-mail to tef@cuc.ca or by mail to:

Theological Education Fund

Canadian Unitarian Council

302-192 Spadina Ave

Toronto, ON M5T 2C2

Any information submitted will be treated as confidential. Only the Theological Education Fund committee and relevant CUC staff will have access to it. Only the names, congregations, and award amounts for successful applicants will be publicized.

**STUDENTS**

Full name: Phone number:

Email address:

Street address:

City, Province: Postal Code:

Are you a Canadian citizen? ☐ Yes ☐ No

If no, please give details:

Congregation where you are a member:

Theological School & Address:

Date Entered: Expected date of graduation:

What is your current status with the UUA Ministerial Credentialing Office?

 ☐ Candidate ☐ Aspirant

Date of Aspirant or Candidate Status:

(Expected) Dates of Internship: Location:

(Expected) Dates of CPE: Location:

Have you previously received a Theological Education Fund bursary? ☐ Yes ☐ No

If yes, please indicate year(s) and amount(s) awarded:

Year Amount Year Amount

**Additional documents to submit:**

1. Financial Disclosure Statement (below)
2. Brief biographical sketch including your interest in and involvement with Unitarian/Universalism (maximum 1 page)
3. Current copy of all post-undergraduate transcripts
4. Letter from the UUA’s Ministerial Credentialing Office confirming status
5. Letter of recommendation from the governing body of your local/sponsoring congregation, minister or resident professional
6. Letter of recommendation from a faculty advisor involved with your ministerial studies

 **MINISTERS**

Full name: Phone number:

Email address:

Street address:

City, Province: Postal Code:

Are you a Canadian citizen? ☐ Yes ☐ No

If no, please give details:

Name of congregation/organization you serve:

What continuing education are you pursuing / do you plan to pursue?

(Expected) Start Date: (Expected) End Date:

Total cost of tuition/fees: Estimated other costs:

Please briefly describe other costs (travel, books, etc.):

Annual professional development budget from your employer:

Have you previously received a Theological Education Fund bursary as a minister (not as a student)? ☐ Yes ☐ No

If yes, please indicate year(s) and amount(s) awarded:

Year Amount Year Amount

**Additional documents to submit:**

1. Financial Disclosure Statement (below)
2. Letter of support from the governing body or executive of your congregation/organization
3. Confirmation of enrollment in program (this may be provided later if not yet enrolled; proof of participation will be required to issue award.)

**FINANCIAL DISCLOSURE STATEMENT**

For this section, we refer to your “family” as **anyone for whom you are directly financially responsible or who is financially responsible for you**. This often includes your partner and children but usually does not include your parents unless you are responsible for financial supporting them or they have made a long-term commitment to support you.

How many people are in your family? Adults (including you) Children

PART 1: Annual Family Income

|  |  |  |  |
| --- | --- | --- | --- |
| *Annual Income* | *Self* | *Other Family* | *Total* |
| Earned income (after taxes) |  |  | 0 |
| EI, pension or other benefits |  |  | 0 |
| Investment income |  |  | 0 |
| Scholarships & grants |  |  | 0 |
| Gifts |  |  | 0 |
| Other income (specify below) |  |  | 0 |
| **Annual Total** | **0** | **0** | **0** |

If other income, please specify:

PART 2: Monthly Family Expenses

Please indicate your family’s total monthly expenses (housing, utilities, food, transport, tuition, medical, donations, etc.):

Do you have any unusual expenses that the committee should be aware of (e.g., childcare, medication, etc.)? If so, please briefly describe:

PART 3: Family Assets and Liabilities

Please list your family’s total assets and liabilities. If you co-own an asset with a person who is not part of your “family” (as defined above) only include the portion you own. If you own a house or other property, list the full current market value (estimated) in assets and any mortgage owing under liabilities.

|  |  |
| --- | --- |
| *Assets* | *Total* |
| RRSP |  |
| Pension - current total value |  |
| Other savings and investments |  |
| Real estate |  |
| Automobile |  |
| Other (specify below) |  |
| **Total** | **0** |
|  |  |
| *Liabilities* |  |
| Student loans |  |
| Credit card debt |  |
| Other loans/mortgage |  |
| Outstanding taxes due |  |
| Other (specify below) |  |
| **Total** | **0** |
|  |  |
| *Net Worth* |  |
| **Total** | **0** |

If other, please specify:

**Reminder**: If you are eligible for the Canada Training Credit, claim it on your tax return. For every year from 2019 onward that you earn between $10,000 and $250,000, you will accumulate $250 that you can claim toward education in Canada. Specifically, you can claim up to 50% of the cost of a course provided by:

* A university, college or other post-secondary institution in Canada or
* An institution in Canada providing occupational skills courses that is certified by the Minister of Employment and Social Development

Further details are available on the Government of Canada website under [Canada Training Credit.](https://www.canada.ca/en/revenue-agency/programs/about-canada-revenue-agency-cra/federal-government-budgets/budget-2019-investing-middle-class/canada-training-credit.html)