**Application form for a West Trust Grant from a Unitarian and/or Universalist Church or Fellowship in Canada.**

(Revised June 2023).

The objective of the West Bequest Trust is to affirm and promote the eight principles of Universalist/Unitarian (UU) Churches, as adopted by the Canadian Unitarian Council https://cuc.ca/unitarian-universalism/principles\_sources/

GUIDELINES REGARDING WAYS TO PROMOTE THESE PRINCIPLES:

The promotion of the eight principles may be done by:

1. publishing books, pamphlets, periodicals or other modern forms of media (such as tapes, DVDs, websites, podcasts etc.) as well as programs to attract new UU members.
2. providing partial support towards employing a minister (either clergy or lay person); or a religious education director for children and young adults.
3. assisting financially weak or small UU congregations or founding new ones; and
4. such other methods of promoting UU principles as the West Trustees shall deem appropriate.

Applications for funding which best reflect the above objectives and means have the most chance of success.

Only one application per UU church or fellowship will be considered.  The application must be supported and forwarded by the Board or other Governing Body of the applying church or fellowship.

West Trust Trustees will meet in the third week of October 2023 to make decisions on grant applications. In a typical year the Trust has about $8,000 to distribute to support the applications that are accepted.  Most grants range between $400 and $3,000.

An application form is attached. You can fill it in and save it.   It can be sent in Word or as a PDF. If you have some difficulty in opening the form, please let me know as soon as possible but no later than 15 September 2023.

WHEN, WHERE AND HOW TO APPLY:

Applications for consideration at the October 2023 Trustees' meeting should be received by

Friday the 6th of October 2023.

Please include the name of your UU Church or Fellowship in the subject line and add “2023 West Trust Application”.

Thus, the Subject Line in your email should have the following form:

“XYZ Church (or Fellowship) ABC city.  2023 Application for a West Trust Grant”.

Late applications may be considered at the discretion of the Trustees.

Applications should be submitted as Email ATTACHMENTS in Word or as PDF and addressed to

Shripad Pendse, President, Board of Trustees of the West Trust at

shripen@yahoo.ca

and copied to shripad.pendse@smu.ca and also to Kathy Spencer, Secretary, Board of Trustees of the West Trust, kathy.spencer@dal.ca

If it is necessary for you to send an application by mail, it should be sent by the 25th of September 2023.  Please e mail shripen@yahoo.ca to get the most up to date Canada Post mailing address.

ACCOUNTING AND EVALUATION

If you received a West Trust grant in a previous year and are applying for another grant for the current year, a report on the previous grant must be submitted as part of your application. It should include a statement of income and expenses of the project and a narrative of at least 200 words of what was accomplished in your West Trust-assisted project.

Grantees who fail to account to the West Trustees for grants previously received may not be considered for future assistance.

APPLICATION FOR WEST TRUST

FUNDING

Please examine the Guidelines above carefully before applying for a grant and ensure that the subject line in the e mail uses the format indicated earlier.

A. APPLICANT: (UU Church, Congregation or Fellowship and authorized contact person)

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B. APPLICANT’S MAILING ADDRESS:

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C. APPLICANT’S TELEPHONE:

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D. APPLICANT'S E-MAIL:

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E. DATE SUBMITTED:

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F. Have you received a West Trust grant previously?  Yes.     No.

If Yes, in which year(s)?

REPORT ON PREVIOUS GRANT(S) RECEIVED (if any): Please provide in this section a

summary of expenses and a narrative of at least 200 words concerning what was accomplished with the grant.  Enclose an attachment as necessary. Applications that do not include a report on the previous grant may not be considered for new assistance. If the grant was received in 2021 or earlier, and if you have already submitted a report on it, please so indicate.

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G. PROJECT NAME (Provide a working title for your project. Only one application will be

considered from each UU Church, Fellowship or Congregation)

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H. SUMMARY/DESCRIPTION (Describe the project in about 200 words.).  Use an attachment as necessary.

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I. BUDGET (How much will the total project cost, what are the major cost items of the project and what will each of them cost?)

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J. AMOUNT SOUGHT from the West Trust Fund

K. OTHER INCOME SOURCES AND AMOUNTS (List other amounts to be obtained from other sources and names of those sources for that funding).

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L. TIME FRAME OF PROJECT: (Provide start and end dates, major milestones and the

date by which a grant from the Trust would be required.)

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How does the project support the objectives of the West Trust?

Please Note:  Funding available through West Trust is typically quite limited and often far less than the total sum requested annually.   In light of thisyour answers to the following questions will be very useful to the Trustees in evaluating applications and deciding on how the limited amount of money should be distributed among many worthy projects proposed in the applications received

a) Comment briefly regarding the likelihood of this project proceeding should full funding not be possible.

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b) What is the minimum amount needed from West Trust in order for your initiative to move ahead within the coming year?

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c)  Which of the following 2 funding strategies do you consider preferable from a broad Canadian Unitarian perspective?

Please mark an "X" beside your preferred approach for the administration and disbursement of West Trust funds:

​\_\_\_ Awarding adequate or nearly adequate funding to a very small number of projects. Or

\_\_\_ Providing some "seed money" to the majority of applications, as an incentive to move ahead with their new initiative.

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SIGNATURE and TITLE OF APPLICANT

(Application should usually be signed by the President of your Board)

As mentioned earlier, please send your application as an Email ATTACHMENT in Word or as PDF.  Please include the name of your Church or Fellowship in the subject line, and “2023 West Trust Application” and send it by e mail to:

Shripad Pendse, President, Board of Trustees of the West Trust at,

shripen@yahoo.ca

and with copies to shripad.pendse@smu.ca and to Kathy Spencer, Secretary of the Board, Kathy.spencer@dal.ca