



## **A. REPORT/EVALUATION OF 2008 PROJECT**

**Please use the following questions as the basis for preparing your application.** They are mostly from Section 9 of the Mission Funding Handbook, "Reports/Evaluation." We recognize that by the time of this application, you will have completed only half of the project year. We are seeking a "picture" description of the results and learnings that have come out of this year's project to date. Please use these questions as points to touch on as applicable or provide any other information which you feel is important for the Committee to know.

How is the project going?

Describe where you are currently in the project timeline and your anticipated completion date (i.e., when will your project goals be reached and/or when will you no longer need diocesan grant funding?).

What project-related events and activities have occurred or are planned for the remainder of the year?

Who have you reached? (Your target audience? Another group?)

How has this project affected the life of your congregation? Of your local community?

Have you achieved the goals you intended? What data/measurements have you used to evaluate success and completion of the project?

What have you learned so far? Any surprises (good or bad) or unanticipated challenges?

Has the amount of your grant funding been sufficient to implement the project goals and objectives?

What non-financial resources have you used which might help other congregations in the Diocese?

Have there been significant changes in your Vision/Mission or Mission Context this year?

Have there been significant changes in the Resources (financial and non-financial) available to you?

**Please attach a statement of costs/expenditures to date related to the project.**

## **B. GOALS FOR 2009 PROJECT**

**We are seeking a description of how a renewal of funding for 2009 will enable you to further accomplish your mission goals. We are looking for evidence that you are intentionally working toward greater local support for your project and are engaged in a process of visioning, long-range planning and goal-setting.**

1. What mission goals do you intend to achieve in 2009 through the renewal of the project?
2. If this is a similar (but not identical) project to 2008, how and why is it different?
3. What measurements will you use to evaluate success and completion of the 2009 project?
4. What do you hope to learn from this project?

## C. INFORMATION UPDATE FORM

For any request over \$3,000, please provide the following information (as applicable):

**A. ANALYSIS OF CONGREGATIONAL GROWTH/DEVELOPMENT.** Please provide statistics for the first six months of the current year (2007) on the following areas of your congregation's life:

1. **Membership** (use the 2007 Parochial Report figures and note any changes through June 2008)
  - a. number of baptized members (adults & children)
  - b. net growth/decrease in baptized membership
  - c. average Sunday worship attendance in 2007 and for January-June 2008

How do these figures compare to the previous year?

2. **Stewardship**

- a. total number of potential household/pledging units in the congregation
- b. number of pledges received for 2008
- c. total amount pledged for 2008
- d. total amount received as of June 2008
- e. average amount per 2008 pledge

How do these figures compare to the previous year?

Describe your 2008 stewardship process and your plans for 2009 stewardship process.

Estimate the current average household income of the congregation.

3. **Program**

- a. description of current and planned programs in education, outreach, etc.
- b. attendance at programs and events

How does the current level of participation in parish activities compare to the previous year?

## B. ANALYSIS OF CONGREGATION'S FINANCIAL STATUS

1. Provide a copy of the congregation's budget (income and expenses) for 2007 and 2008.
2. Report on current and projected financial assets available to your congregation, including
  - a. pledge income
  - b. plate and other income
  - c. current assets: savings, investments
  - d. future/pending bequests
  - e. current indebtedness/loans (diocesan and other)
3. The most recent financial audit was sent to the Diocesan office on \_\_\_\_\_ (date).

## D. THE COVENANT OF MISSION FORM

**THE PROJECT:** \_\_\_\_\_  
**THE CONGREGATION or ORGANIZATION** \_\_\_\_\_

(TO BE COMPLETED BY MISSION FUNDING COMMITTEE)

**TYPE OF FUNDING APPROVED:** \_\_\_\_\_

**AMOUNT OF FUNDING APPROVED:** \_\_\_\_\_

**DATE OF APPROVAL:** \_\_\_\_\_

**DATE(S) TO SUBMIT REPORTS/EVALUATIONS:** \_\_\_\_\_

### EXPECTATIONS

#### **The Congregation or Organization (represented by appropriate lay leadership)**

- ❖ Will be partners in the task of evangelism and/or outreach
- ❖ Will provide application information as requested
- ❖ Will use funds consistent with the approved plan
- ❖ Will provide follow-up reports/evaluations as requested
- ❖ Will attend mission funding workshops as requested
- ❖ Will share its learnings with the Diocese

#### **The Rector/Vicar/Lay Missioner of the Congregation or the Director of the Organization**

- ❖ Will support this project or mission initiative, providing staff time where necessary
- ❖ Will interpret and integrate the project's objectives/goals throughout the congregation

#### **The Diocesan Mission Funding Committee**

- ❖ Will provide assistance to a congregation preparing a funding application as needed or requested
- ❖ Will carefully evaluate all funding applications
- ❖ Will commit to faithful stewardship of diocesan resources
- ❖ Will assess grant and loan applications within the "big picture" of funding in the Diocese
- ❖ Will celebrate risk and see mission funding as a learning opportunity for the Diocese
- ❖ Will schedule at least one Mission Funding Workshop for those receiving grants

#### **The Bishop or Trustees and Council**

- ❖ Will provide oversight for and counsel to the Diocesan Mission Funding Committee
- ❖ Will be an active participant in Diocesan Mission Funding processes and decisions

### THE PARTNERSHIP

\_\_\_\_\_  
(Sr. Warden of Congregation or Board Chair of Organization) (Date)

\_\_\_\_\_  
(Rector/Vicar/Priest in Charge of Congregation or Director of Organization) (Date)

\_\_\_\_\_  
(Diocesan Mission Funding Committee Chair) (Date)

\_\_\_\_\_  
(Bishop or V-P of Trustees and Council) (Date)