

THE SCHLEGEL FUND
of The First Congregational Church of Waterbury

222 West Main Street
Waterbury, Connecticut 06702-1286
203-757-0331

GRANT/LOAN REQUEST FORM

Information for Applicants

Following is an information package for applicants which explains the history, philosophy and purpose of the Fund. It also contains information regarding the areas of interest and types and amounts of grants typically made by The Fund. We wish to inform you of the following policies of the First Congregational Church Schlegel Committee: 1) The Committee leans heavily toward funding specific projects and program starts rather than supporting the ongoing operational budget of recipient organizations; 2) the Committee normally does *not* pay salaries for ongoing programs; and 3) we usually require 3 quotes for specific items, except in circumstances where the item is unique and available from less than three vendors; the quotes are to be included with the application.

We will only consider requests from not-for-profit organizations which have obtained federal tax-exempt status.

An application for funding is enclosed in this package. Proposals received by the deadline date will be considered at our next quarterly grant-making meeting. Deadline dates are normally the last business day of January, April, July and October each year.

If you have any questions, please call the First Congregational Church office at (203)757-0331.

**FIRST CONGREGATIONAL CHURCH of WATERBURY
LUCY EDWINA SCHLEGEL FUND**

Application for Funding

Date: _____ Nature of Request: Grant _____
(Check one) Loan _____

Organization Name: _____ Amount Requested: _____

Address: _____ Telephone No.: _____

_____ Director Name: _____

Briefly describe purpose for which funds will be used:

List specific objectives for the project:

How will this project benefit the Community?

How will this project be implemented to meet the objectives and satisfy the need?

What funding sources are considering this project and for what amounts?
Please identify sources and amounts already committed to this project.

Describe your plans for future funding of this project:

Please attach a budget for this project and a list of the organization's Board of Directors and principal staff.

FIRST CONGREGATIONAL CHURCH -- SCHLEGEL FUND INFORMATION FOR APPLICANTS

Background Information

The First Congregational Church of Waterbury has, since 1691, played a guiding role in the religious and civic life of Waterbury. It has a long history of initiating and supporting projects and programs which enhance human welfare and social reform. These efforts have emerged under the leadership of members of this Church who believe that at the heart of their faith is the public expression of Christian principles in addressing human need.

In 1985 the late Lucy Edwina Schlegel willed a substantial bequest to First Church. A significant portion of this bequest has been reserved to generate income for distribution to a wide variety of human needs primarily in the Greater Waterbury Area and, in certain cases, beyond. The Schlegel Committee, comprised of a broad representation of First Church members, meets regularly to review requests for funds and to determine the appropriate recipients of grants and loans which are congruent with the Fund's philosophy and its current objectives as determined by the members of the congregation.

Inquiries and requests for funds are invited from religious organizations, human service agencies and associations which hope to alleviate human suffering and achieve social justice by addressing the causes of human impoverishment.

Philosophy of the Schlegel Fund

We, the members of The First Congregational Church of Waterbury, Connecticut, through the application of the Schlegel Fund, affirm our covenant with God and each other to do His Will by discerning needs through prayer and study. We shall respond through Christian servanthood, nurture and education, and with the vision and goal of working for the quality of life which God intends for human society. It is our belief, by so doing, we will be strengthening His Church and our faith by displaying, through living application, the all-embracing nature of Christ's love.

Purpose of the Schlegel Fund

The Fund's purpose is to address human needs in the Greater Waterbury Area through the disbursement of grants or loans to non-profit organizations seeking to re-mediate the root causes of impoverishment and to empower individuals to achieve self-determination.

FIRST CONGREGATIONAL CHURCH - SCHLEGEL FUND INFORMATION FOR APPLICANTS

Areas of Interest

Because the history of the Schlegel family and the generation of these resources is integral with the history of Waterbury and its residents, the primary thrust of these funds will be to provide resources for projects or programs which address urgent human needs of persons living in the Waterbury area. Although the needs exist among many population groups, the Schlegel Fund will focus on the special unmet needs of the elderly, low income individuals, disabled persons, children, teenagers, and minorities. Of particular concern are their food, housing, education, employment, and spiritual development needs.

The Schlegel Fund Committee welcomes requests from church-related and other non-profit agencies and organizations which request either seed money or program expansion funding to creatively and effectively alleviate human suffering and elevate the quality of life for those targeted by the Schlegel Fund.

It is the intention of the Schlegel Fund to strengthen the work of existing organizations and agencies and to enhance cooperation among community service providers in accomplishing their good work.

It is hoped that opportunities will exist to involve, at some level, the members of The First Congregational Church in those projects funded by the Schlegel Fund Committee. Although this is not a requirement for funding, it is another resource to which the Schlegel Fund Committee has access and which may be helpful in achieving both the organization's and the Schlegel Fund's objectives in the community.

Types of Support

Grants or loans will be available for Operating Expenses or for the capital needs of an organization in amounts up to \$20,000. Details regarding loans will be negotiated with each applicant. No grants or loans are made directly to individuals, although requests on behalf of individuals will be considered. The Schlegel Fund has a particular interest in organizations and projects which would maximize use of the contribution in leveraging other needed support. Generally speaking, projects which are supported by the Schlegel Fund are not to be duplicated by other agencies or organizations in the area.

FIRST CONGREGATIONAL CHURCH - SCHLEGEL FUND INFORMATION FOR APPLICANTS

Who May Apply

The Schlegel Funds makes grants and loans to any non-profit organization or agency either in the Greater Waterbury Area or one which will primarily benefit the residents of the Greater Waterbury Area. A funded organization must demonstrate its capacity to accomplish the proposed project by: (a) either possessing a positive track record in the community; or (b) involving community leaders in its organizational structure. Applications for Capital Improvements or Operational Expenses will be accepted. Preference will be given to projects or programs which are not duplicated in the community. All applications will be evaluated on their merit and suitability for the Schlegel Fund.

When to Apply

Applications may be submitted before deadline dates (see front cover sheet) and all requests will be acknowledged. Proposals received by deadline dates will be reviewed at Quarterly Distribution Meetings of the Schlegel Fund Committee. Requests are limited to **ONE** proposal within a 12-month period.

How to Apply

1. Complete the Application Form using no more than one additional page for expanded explanation.
2. Attach to the Application Form:
 - a. Budget for the proposed project.
 - b. List of the Board of Directors and principal staff
3. Deliver (by hand or mail) nine (9) copies of the Application Form and Attachments to:

The Schlegel Fund Committee
First Congregational Church of Waterbury
222 West Main Street
Waterbury, CT 06702-1286

The Schlegel Fund Committee will review all complete applications received, selecting those which will require a more complete review. All applicants will be notified of the status of their request shortly after the Quarterly Distribution Meeting.

**FIRST CONGREGATIONAL CHURCH - SCHLEGEL FUND
INFORMATION FOR APPLICANT**

4. **If the request has been approved for a complete review, the following MAY be requested by the Committee:**
- a. Copy of the organization's IRS Tax-Exempt letter.
 - b. Description of the applicant's plan for conducting its own evaluation of the project.
 - c. Current and prior years' budget of organization.
 - d. Audited Financial Statements and IRS Form 990 for most recent two years.
 - e. Complete Budget for project, listing all sources of income and expenditures, noting when this grant will be expended. Funds should be used within 12 months of grant approval. If this is a capital request, submit two signed estimates for work or equipment.
 - f. Letters of support, endorsement, or references.
 - g. Annual Report from preceding year.
 - h. Personal interview with key staff and Board members.

For More Information

Contact the Schlegel Fund Committee Chairperson with questions or requests for application materials. Direct your inquiries to:

**Schlegel Fund Committee
First Congregational Church of Waterbury
222 West Main Street
Waterbury, CT 06702-1286
203 757-0331
fcchurch02@adelphia.net**