

# Pilot Project Application and Interest Form

## UMC Clergy Financial Well-Being Initiative

Complete and submit this form to apply for funds supporting a proposed pilot project or other effort to improve clergy financial literacy and competence.

### Pilot Project Grants

The UMC Clergy Financial Well-Being Initiative began with the Lilly Endowment's desire to strengthen congregations by equipping pastors with stronger financial literacy skills and helping pastors address their financial challenges. The UMC expression of the Initiative is being implemented by Wespith Benefits and Investments (formerly the General Board of Pension and Health Benefits), General Board of Higher Education and Ministry, and the National Association of United Methodist Foundations. Pilot project funding is available to annual conferences, conference/area foundations and other United Methodist entities that will advance the aims of the Initiative.

### General Information About Grants

- Projects should align generally with a pilot project description (see **"Pilot Project Frameworks"** at [naumf.org/resources/umclilly/](http://naumf.org/resources/umclilly/)) or otherwise improve the financial competency of pastors as they manage personal finances and lead congregations.
- Grants can fund up to one-third of project costs.
- Grant amounts depend on the project scope and total costs. Funds are limited and will not be available indefinitely.
- Grant amounts will be determined based on the number of pastors and congregations participating, the expected impact on participants, and the follow-up and ongoing assessment, among other factors.
- Funds are limited and applications will be evaluated for awards based on order of receipt, until available grant funds have been committed.
- To support reporting obligations to the Lilly Endowment, grant recipients will be asked to periodically report to the UMC Initiative on:
  - How grant funding is used,
  - Outcomes from the pilot project, and
  - Number of clergy, laity and congregations reached.

### Request for Information

Name \_\_\_\_\_ Organization \_\_\_\_\_

- Please contact me—I would like to talk further about the Initiative.

Phone #: \_\_\_\_\_

E-mail: \_\_\_\_\_

- Please send me future e-mail communications about the Initiative.

E-mail: \_\_\_\_\_

(over)

### Project Description

Attach additional pages to provide the information requested in numbers 1-3 below, then include a breakdown of the project’s expenses in the chart that follows.

1. Briefly describe your idea or pilot project model, including the timeframe (anticipated dates and amount of time), educational content and delivery method, and the target audience.
2. Identify partners participating in the project design and implementation.
3. Describe the intended outcomes and expectations for participants, and how they will be measured or tracked (for reporting, assessing progress and accountability). Explain any plans for follow-up and ongoing support.
4. Indicate the projected total cost of the project and the contributions of all partners (cash and in-kind), including the UMC Initiative request (which can be up to one-third of total costs).

#### Expense Items and Sources

1.	
2.	
3.	
4.	
5.	
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11.	
12.	
13.	
14.	
15.	
A. Total Project Expenses (all partners—cash and in-kind)	
B. Initiative Support Amount Requested	
C. Organization and Partners’ Financial Responsibility	

5. Contact information for at least three local advocates or leaders for this project.

Name	Phone #	E-mail

Interested parties are encouraged to initiate this process with a conversation with the UMC Clergy Financial Well-Being Project Manager **Bonnie Marden** at [clergyfinance@wespath.org](mailto:clergyfinance@wespath.org) or **1-978-846-1260**.