



# PUC Funding Procedure

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by Nancy Brigham, as per information received from Barbara Bunkle & others  
PUC History provided by Bill Dikeman

## ***History of the Pennsylvania Universalist Convention***

From its earliest stages, the Universalist denomination was organized on a state by state basis, while the Unitarians were organized on a district basis.

Pennsylvania had number of member churches in the Universalist Association of which Restoration was one, and most of these had in their by-laws a provision that if the church was to dissolve, the ownership of the funds from sale of their property and their other assets would become the property of the Pennsylvania Universalist Convention (PUC). Over time, this happened with some 30 (more or less) churches, whose funds became part of the PUC. In some cases, these funds were specified for specific uses, but most were placed in the general Universalist funds.

At the time of merger, there was a feeling among the Unitarians that these funds should go to the UUA for the general good of the association. The PUC successfully fought this approach, and the funds remained under the control of the Trustees of the Pennsylvania Universalist Convention. The principal role of the convention is now the administration and disbursement of these funds.

That fund is administered by the Trustees of the Pennsylvania Universalist Convention, and the income from the principal is distributed at the discretion of the trustees to the remaining churches in the convention (now five in number) or in other support of Universalism for such purposes as the trustees deem appropriate including such things as supporting annual salary payments for ministers, religious education programs, growth of individual churches and the like. Each year the remaining member churches submit proposals, as do other organizations that feel their kinship with Universalism qualifies them. These proposals are evaluated and acted upon at the spring meeting of the Trustees.



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## The *Mission* of the Pennsylvania Universalist Convention is:

- **To foster** an awareness of our Universalist heritage; to nourish and sustain our member churches; to promote and encourage the concepts and values of Universalism so that future generations will feel the benefits of our Universalist tradition.
- **To promote** and act within the framework of the Unitarian Universalist Association of Congregations and the “Purposes and Principles” of the Association.
- **To support** and motivate churches by requesting and evaluating proposals, exchanging program ideas, and maintaining member church funding; and also to add members through outreach programs which support existing congregations and encourage new ones in order to maintain the Universalist heritage.
- **To make** grants to programs beyond the limits of the Commonwealth of Pennsylvania if deemed to be of significant benefit to the Pennsylvania Universalist Convention member churches.

Adopted March 23, 1991.

## Grant request and reimbursement procedure

- Requests for PUC grants must fit within PUC mission.
- Application Process
  - In January, Unitarian Universalist Church of the Restoration’s (UUCR’s) PUC Trustee (currently Patricia DeBrady) will get a mailing from the PUC. It is the PUC trustee’s job to oversee the grant request process at Restoration.
  - Proposals are normally due to the PUC in mid to late February, i.e. the timetable is ahead of UUCR budget process, and turn-around time is short.
  - All UUCR proposals are submitted to a designated person at UUCR. (This year, to Jim Walters by Fri. Feb. 8<sup>th</sup> at 5:00 p.m.) (Barbara Bunkle wrote the 2007 grant requests based on what ministries requested in Jan. ’07 that fit within the parameters of the PUC mission statement.)
  - Submitted proposals are then copied and mailed to all PUC Trustees. (**Not clear who does this.**)
  - PUC Trustees meet in March and make funding decisions.
  - Amounts for approved PUC grants appear in the appropriate ministry or other appropriate budget.
- Procedure for receiving the funds
  - Long standing requests for ministerial salary support, religious education support, and sustaining staff support are paid by the PUC to UUCR on a quarterly basis.
  - In addition to these requests, grant money that is needed on a regular basis can be requested to be paid quarterly. (e.g. the 2006-2007 PUC grant to fund the Uncommon Denomination Program: since the bulk of the funds were to be spent on advertising which would be done on a regular basis, and a smaller fraction spent on the banner and demographic study, we requested that grant to be paid quarterly. It would have been a hardship for us to pay the advertising bill and then submit the receipt to the PUC.)



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- Other PUC grants that are for equipment, services, events, etc. are reimbursed when we submit the receipt(s) to the PUC. To receive reimbursement from the PUC, the appropriate ministry or other body should gather the receipts and draft a statement of how the money was spent, to provide a context for the PUC Treasurer. This packet should be submitted to the UUCR Treasurer via the Treasurer's mailbox at the church so that the UUCR Treasurer knows that grant money is to be sent to us. Copies of the submitted packet, including receipts, should be kept by the submitting party. The UUCR Treasurer (or the Treasurer's designee) will forward the request to the PUC Treasurer. A copy of the statement regarding how the money was spent should be sent to the UUCR PUC Trustee. The Trustee is responsible for officially reporting to the PUC regarding UUCR's use of the funds as specified in the grant request.
- The PUC will then send the reimbursement check to the church, usually within about two weeks of the date they receive the request.
- Forfeiture of PUC Grants
  - If the PUC grant money is not spent within the designated budget year, it is forfeited. The amount forfeited will be removed from the affected UUCR budget. (The 2006-2007 PUC grant to fund the Uncommon Denomination was extended into the 2007-2008 church year by special request. It must be spent by June 20<sup>th</sup>, 2008.)