

# Indiana Conference Church Development

## Vital Merger Grant Application Overview

### DESCRIPTION

Vital Merger grants of up to \$100,000 are offered by the Indiana Conference of The United Methodist Church to its churches for the purpose of establishing new church in order to reach and disciple unreached population groups. Any United Methodist churches in Indiana are eligible to apply if they meet the Vital Merger criteria listed below.

### GRANT CRITERIA

Applicant churches must meet the following criteria:

- Be a United Methodist church located in the State of Indiana.
- Have a Church Development staff train your key leadership in the model prior to applying.
- The merger has not yet occurred.
- The resulting merged church must relocate to a new location with a new name.
- Its pastor must have gone through the conference's Church Leadership Academy.
- The churches' pastors and administrative boards or councils must fully support the merger.
- The district superintendent and Cabinet must support the merger.
- There must be a strategic plan that includes clear mission and vision statements, and a focus on new mission and ministry. (What will this new, vital church offer that neither of the former churches could?)
- The resulting church must be willing to report its project's progress to the Church Development Ministry Team.

**Please note that in order to apply for this grant, applicant churches must first have their key leaders trained by Church Development staff in the Vital Merger model. Contact your staff person to schedule.**

The size of the grant is contingent upon the size of the congregation being created. For example, a church that will average fewer than 100 people in worship might be eligible for \$30,000; whereas, a church establishing an off-site congregation that will average over 300 people in average weekly worship might be eligible for a grant of up to \$100,000 paid out over a period of up to three years.

Approval of this grant is made by the conference's Church Development Team and its decision is based on the information provided in the application, as well as the overall planting needs of the conference. Payment of this grant is contingent upon the applicant providing the Church Development Team with a quarterly report that includes progress toward meeting the project's benchmarks. The Church Development Team will evaluate the project every three months. As

long as its benchmarks are being met, the grant will be paid out according to the agreed upon payment plan.

All grants will be paid out on an annual basis. Applicants can request funding for a second or third year; however, payment will be contingent upon the first year's success as measured by the established benchmarks. (Additional information is provided.)

This grant is intended to supplement the applicant's financial support. Thus, in most cases, the applicant will be expected to significantly support the project with its own funds. The grant money may be used for any aspect of the project's expenses, including paying staff salaries.

This grant is funded by tithe giving from the churches of the Indiana Conference. It is expected that any church receiving this grant would be faithfully tithing gifts to the conference as well.

### **APPLICATION PROCESS & DEADLINES**

The application for this grant begins on page 5. The application, once completed, should be returned to Steve Clouse, Senior Associate Director of Church Development. Electronic submission is preferred. It will then be dealt with by the Church Development Committee at its quarterly meetings. **Grant deadlines are January 1<sup>st</sup>, April 1<sup>st</sup>, August 1<sup>st</sup>, and November 1<sup>st</sup>.** Grants received by Rev. Clouse by these dates will typically be considered by the committee within six weeks. Contact your Church Development staff for the committee's exact meeting dates.

At that meeting, the team will either approve full funding, partial funding, no funding, or may table the application. Following the meeting, the applicant will be informed as to the team's decision. Applicants whose application is tabled or denied can submit an amended or new application following the same procedure as stated above.

In order to have the strongest application possible, applicants must have a representative from the Church Development Team review this application and application process with them prior to completing the application.

### **REQUIRED ATTACHMENTS**

Sections A-E must be completed and returned along with the items listed below.

1. Project Description. Attach a project description that includes the following:
  - a. A brief (paragraph) description of the project and how it got started.
  - b. A strategic plan that includes clear mission and vision statements, and a focus on new mission and ministry. It should explain what this new, vital merged church will offer that neither of the former churches could.
  - c.. The anticipated timeline, including when the merger is expected to take place and when weekly worship will begin at a new site.
2. Project Leadership. Attach the following regarding the project's leadership:
  - a. Project leader's name, how they were selected, their qualifications, experience, and training.
  - b. A list of the key members and staff of the new church and their responsibilities.

3. For applications requesting over \$5,000, the applicant must set benchmarks by which the project's progress can be measured. (See Appendix A for an explanation.) Attach benchmarks.

4. For applications requesting over \$5,000, the applicant must have a coach who will meet at least monthly (by phone is okay) with the project leader/s for at least the first 12 months to make sure the project is on track. The coach will help the church achieve the benchmarks it sets. This person must be approved by the Director of Church Development.

Attach the name of the coach, their email address and phone number, and a copy of their coaching agreement with the church. (See Appendix B for a sample agreement.)

5. Coordinator/Helper Matrix. Attach a Coordinator/Helper Matrix that shows the types of coordinators, apprentice coordinators, and helpers your project will require. (See Appendix C for an example.)

6. Project Finances. Attach the following:

- a. A budget showing anticipated income and expenditures for each year of the grant. Include the amount requested from the conference through this grant, as well as the amounts anticipated from other sources including the applicant.
- b. A detailed budget for at least the first twelve months of the project that shows both income and expenditures.
- c. An explanation as to how the project will be funded once the grant ends.

7. For applications requesting over \$5,000, the applicant must attach a Racial Equality Action Plan (REAP). See Appendix D for details and examples.

## **REQUIRED MEETING**

Before submitting this application, the applicant must hold a meeting at which the project's benchmarks can be discussed and approved by the following persons:

- churches' pastors and Administrative Council/Board chairs,
- district superintendent,
- project coach,
- representative from the conference's Church Development Team.

It is the responsibility of the applicant to convene this meeting. Contact the Director of Church Development to determine who the Church Development Team representative will be.

## **REQUIRED SIGNATURES**

The final step in the application process is for the applicant to secure the signatures listed in the Signature section (Section E of the application). The signatures indicate support for the project. Electronic signatures are acceptable.

## **SUBMISSION OF APPLICATION AND QUESTIONS**

The application, once completed, should be sent to the Senior Associate Director of Church Development, Rev. Steve Clouse. Electronic submission preferred. Contact Rev. Clouse if you have any questions regarding this application. **You should receive confirmation within a week of submission that your grant has been received. If you don't receive confirmation, contact Rev. Clouse.**

Rev. Steve Clouse  
Senior Associate Director of Church Development  
Indiana Conference of The United Methodist Church  
301 Pennsylvania Parkway, Suite 300  
Indianapolis, IN 46280  
Phone: 877 781-6706  
Email: [steve.clouse@inumc.org](mailto:steve.clouse@inumc.org)

# Indiana Conference Church Development

## Vital Merger Grant Application

**DEADLINES: JANUARY 1, APRIL 1, AUGUST 1, NOVEMBER 1.**

**Submit completed application to Rev. Steve Clouse.**

Mail to: Indiana Conference of The United Methodist Church, 301 Pennsylvania Parkway, Suite 300, Indianapolis, IN 46280. Or email to: [steve.clouse@inumc.org](mailto:steve.clouse@inumc.org). **Electronic submission preferred.**

**Applicant's Name (church/district)** \_\_\_\_\_ **Date** \_\_\_\_\_

### A. Application Check List

Check if you've included the following:

Note: All below items must be completed in order for this application to be considered.

- ☐ Application check list. (Section A, this page.)
- ☐ Applicant information. (Section B below.)
- ☐ Grant request. (Section C below.)
- ☐ Grant Criteria. (Section D below.)
- ☐ Signatures. (Section E below.)

Check if these additional items are attached:

- ☐ 1. a. A brief (paragraph) description of the project and how it got started,
- ☐ b. A strategic plan that includes clear mission and vision statements, and a focus on new mission and ministry. It should explain what will this new, vital merged church will offer that neither of the former churches could.
- ☐ c.. The anticipated timeline, including when the merger is expected to take place and when weekly worship will begin at a new site.
- ☐ 2. a. Project leader's name, how they were selected, their qualifications, experience, and training.

- ☐ b. A list of the key members of the implementation launch team, and their areas of responsibility.
- ☐ 3. a. Project benchmarks.
- ☐ b. Held a meeting with the district superintendent, project coach and leader, Church Development representative, pastor and Ad. Council chair to approve these benchmarks.
- ☐ 4. Name of project coach, their contact information, and a coaching agreement.
- ☐ 5. Coordinator/Helper Matrix.
- ☐ 6. a. A budget showing anticipated income and expenses for each year of the grant. Include the amount requested from the conference through this grant, as well as the amounts anticipated from other sources including the applicant church (or district).
- ☐ b. A detailed budget for at least the first twelve months of the project that shows both income and expenditures.
- ☐ c. An explanation as to how the project will be funded once the Church Development grant ends.
- ☐ 7. Racial Equality Action Plan (R.E.A.P.).

## B. APPLICANT INFORMATION

### 1. Church submitting this application:

Church's name \_\_\_\_\_ District: \_\_\_\_\_  
 Church's address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_  
 Church's phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

### 2. Person submitting this document:

Name \_\_\_\_\_ E-mail \_\_\_\_\_ Date \_\_\_\_\_  
 Person's phone (day) \_\_\_\_\_ (evening) \_\_\_\_\_ Fax \_\_\_\_\_  
 Person's address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

## C. Grant Request

Grant amount requested: \$ \_\_\_\_\_ total over \_\_\_\_\_ years (not to exceed three)  
 Year one: \$ \_\_\_\_\_, Year two: \$ \_\_\_\_\_, Year three: \$ \_\_\_\_\_  
 Preferred date of first payment: \_\_\_\_\_

## D. Grant Criteria Support

Check those that apply. Note: All must be checked in order for this grant to be considered.

\_\_\_\_ 1. Your church is a United Methodist church located in the state of Indiana.

\_\_\_\_ 2. Your church's key leaders have been trained in the Vital Merger model by a Church Development staff. Date held:\_\_\_\_\_

\_\_\_\_ 3. The new merger has not yet happened.

\_\_\_\_ 4. The merged church will have a new name meet in a new location.

\_\_\_\_ 5. The pastor being appointed to lead the new merged church a) was not already the pastor of one of the merging churches and b) has completed the Indiana Conference Church Leadership Academy.

\_\_\_\_ 6. Thanks to the United Methodist Churches of the Indiana Conference tithing their incomes to the conference, this grant is available. In like manner, these churches agree to faithfully support the conference with its tithes and offerings as well.

\_\_\_\_ 7. Your churches agree to hire a coach who is approved by the Director of Church Development who will meet (by phone is okay) at least monthly with the project's leader/s for at least 12 months.

\_\_\_\_ 8. The progress report in Appendix E will be submitted to the Senior Associate Director of Church Development by the stated deadlines. Note: Grant payment will be delayed one month for every month the report is submitted late.

## E. Signatures

The signatures below indicate the support of this plan and approval of the benchmarks by which the project will be measured. Electronic signatures are acceptable.

A. District Superintendent\_\_\_\_\_ Date\_\_\_\_\_

B. District Board of Church Location and Building chair\_\_\_\_\_ Date\_\_\_\_\_

C. Churches board chairs\_\_\_\_\_ Date\_\_\_\_\_

\_\_\_\_\_ Date\_\_\_\_\_

\_\_\_\_\_ Date\_\_\_\_\_

D. Churches pastors\_\_\_\_\_ Date\_\_\_\_\_

\_\_\_\_\_ Date\_\_\_\_\_

F. Project's coach\_\_\_\_\_ Date\_\_\_\_\_

Or, in lieu of signature, attach a letter indicating approval.

G. Church Development representative\_\_\_\_\_ Date\_\_\_\_\_

H. Cabinet member (indicating the Cabinet's review)\_\_\_\_\_ Date\_\_\_\_\_

## Appendix A: Project Benchmarks

***What's a benchmark?*** A benchmark is a goal that is specific, measurable, and is projected to be accomplished by a specific date. The benchmarks will serve as a way to measure the progress of the project. Continued payout of a grant will depend upon how well the benchmarks are being met. Every three months, they will be evaluated by the Church Development Team.

***Benchmarks should include—but not be limited to—the following:***

1. Completion of vital merger strategic plan.
2. Development of new church structure and budget.
3. Recruitment, election, and training of new leadership.
4. Sale of original sites, selection of new site and facility design.
5. The expansion of key ministries in preparation for the move (e.g. welcoming system, new member assimilation system, discipling system, marketing outreach effort).
6. The ongoing recruitment and training of leaders for the above efforts.  
Coordinator/Helper Matrix is moving to completion.
7. Monthly meet with coach (at least the first twelve months).
8. Monthly report these progress reports to the conference.

***Some “red flags” which could stop funding...***

1. The momentum stalls or stagnates.
2. The implementation plan keeps changing (e.g. the target group, strategy used, etc.).
3. Coaching meetings aren't taking place at least monthly.
4. Monthly reports aren't being provided to the conference.
5. There is a change in pastoral leadership.
6. The project leader experiences a serious crises (e.g. a divorce) or is involved in unethical/sinful behavior.



## **Appendix B: Coaching Alliance Agreement Between Client & Coach**

*Sample agreement.*

### Parties

Client: \_\_\_\_\_ District: \_\_\_\_\_

Coach: \_\_\_\_\_

### ***Coaching sessions***

The client and coach are agreeing to meet together for up to 2 hours one time per month for at least 12 months. At the end of those 12 months, both the client and coach will determine whether or not to continue the coaching relationship.

The client and coach will notify each other if either party needs to cancel a particular session by giving each other 24 hours notice if at all possible.

If, at any time, either the coach or client feels it is time to complete the relationship or agreement, they may bring the topic to the next coaching session. The relationship will then be completed following that session. If the client and/or coach feels that they are not a good match, they can request the Indiana Conference Director for Church Development for a new coach.

The client understands that coaching is designed to ultimately help their congregation successfully create a new church in order to more effectively make disciples of Jesus Christ. The coaching sessions will help the client create and implement goals to that end. The coach cannot guarantee that any specific results will be achieved. It is the coach's intention to honor the agenda the client brings, to help the client move forward but not to lead or direct.

### ***Professional limitations***

The client understands that coaching is NOT professional, legal or financial advice and will seek appropriate professionals before taking action in these areas. At times, the client may ask their coach for help on a specific issue. In those cases, the coach will help direct them to an appropriate expert if it is outside the coach's area of expertise.

The coach promises confidentiality to the extent permitted by law unless the client directs the coach otherwise in writing. The coaching relationship is not considered "privileged" under the law such as one would have with a lawyer, therapist, spouse or religious counselor. In this agreement, the client's district superintendent and the conference's Director for Church Development (or their designated staff) are considered to be part of this coaching alliance; thus, the client and coach agree to open communication with them. In order for any additional parties—such as an intern coach who's observing sessions—to be added to this alliance, both the client and coach must approve.

### ***Remuneration***

The client agrees to pay their coach \$ \_\_\_\_\_ per month. Payments are to be made prior to the coaching session. If payment isn't made, the session will be postponed until after the payment is made.

Special coaching sessions that extend beyond the two-hour limit (e.g. a Saturday-morning session or an all-day retreat) and long distance calls will require additional remuneration. Terms for this will be negotiated in advance between the coach and the client.

***Signatures***

I have read, understood and agree to the above coaching alliance.

Church pastor: \_\_\_\_\_ Date \_\_\_\_\_

Church Ad.Board/Council Chair: \_\_\_\_\_ Date \_\_\_\_\_

Coach: \_\_\_\_\_ Date \_\_\_\_\_

Coach's contact information:

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone number/s: \_\_\_\_\_

## Appendix C: Coordinator/Worker Matrix

*This is only an example. Customize the matrix to fit your project's context and need.*

	Coordinators		Apprentice Coordinators		Workers	
	Filled	Needed	Filled	Needed	Filled	Needed
<b>Small groups</b>						
<b>Marketing/outreach</b>						
<b>Hospitality/assimilation</b>						
<b>Finances/organization</b>						
<b>Worship-planning</b>						
<b>Worship-music</b>						
<b>Ministry-children</b>						
<b>Ministry-youth</b>						
<b>Missions/service</b>						
<b>TOTALS</b>						

**LIST NAMES ON REVERSE SIDE.**

*Each category above would then have its own grid like the example below; line headings would be changed to fit the category.*

### Small Groups

	Group 1		Group 2		Group 3	
	Filled	Needed	Filled	Needed	Filled	Needed
<b>Leader/facilitator</b>						
<b>Apprentice leader</b>						
<b>Hospitality/member care</b>						
<b>Host/room set up</b>						
<b>Worship/devotions</b>						
<b>Childcare</b>						
<b>Outreach/service</b>						
<b>TOTALS</b>						

**LIST NAMES ON REVERSE SIDE.**

*Each line above might have a coordinator, apprentice coordinator, and worker/s for that responsibility. You total the number of each of these categories and place them in the grid above in the "Small groups" line.*

## **Appendix D: Racial Equality Action Plan (REAP)**

### ***What is a R.E.A.P.?***

A Racial Equality Action Plan is a plan outlining how a congregation will live out God's and the Indiana Conference's vision of an inclusive church.

### ***Who must submit a R.E.A.P.?***

All churches seeking Church Development grants of more than \$5,000 must submit along with their grant applications a Racial Equality Action Plan for their congregation.

### ***How does a church develop a R.E.A.P.?***

A church should have its leaders consider how the church can practice inclusiveness and promote racial equality throughout all that it does--for example, its welcoming and inviting of newcomers, ministry to the community, its worship and discipling groups, purchasing, communicating, selection of personnel, and the addressing of institutional racism.

### ***What should such a plan include?***

A church's Racial Equality Action Plan should include the following: a) a description of the church's vision for practicing inclusiveness and promoting racial equality, b) a description of its present reality and where the gaps between its vision and reality are, and c) a plan--that includes measurable goals--that describes how the church will close this gap over the next five years.

### ***Where does a church go for guidance and assistance?***

Attached is an example of a local church's R.E.A.P. For more guidance and information about, contact the Indiana Conference's Commission on Religion and Race.

## Selma United Methodist Church Racial Equality Action Plan

### ***Our Mission Statement:***

A great commitment to the great commission and the great commandment will grow a great church. Our major focus is to be purpose-driven in all that we do. We remain faithful to God's mission ...

### ***Our Definition of Ministry:***

- Values people regardless of age, gender, ethnic origin, or socioeconomic status;
- Values godly standards-the force behind a church must be biblical principles, not programs, personalities, or gimmicks-
- Values teaching and living "love for one another" (John 13:31-35);
- Values discipleship, which produces healthy spiritual habits.

"God wants all men to be saved and to come to a knowledge of the truth." 1 Tim. 2:4  
NIV

Our path will be the direct result of being a church filled with persons who reject emulating the cultural confines of racism, ageism, classism, and thrive on personal and corporate worship & prayer, informed by a growing hunger for God's word, and insatiable desire to be relationally faithful to ALL those God brings through our doors, as well as seeking those we have not yet reached for Christ.

Our worship style is conducive to multi-cultural ethnicity as evidenced through musical selections and flow of worship. We consistently present opportunities to our congregation to go out into the community and volunteer in a variety of settings to share their faith, love and hope they have in Jesus Christ.

### ***Present Realities:***

Selma, Indiana is a small, rural Midwestern town that is 99% Caucasian. We have our work cut out for us. To say this is a challenge is an understatement!

### ***Bridging the gap between vision and realities:***

- Support of mission priority of approximately 25% of outreach dollars have focused specifically on regions of the world where ethnic divisions have been most drastically demoralizing, i.e. India and the caste system.
- Participation with Covenant Partners ministry to reach culturally under-reached population, historically via leadership and financial support.
- Financial support of the City-Wide Church, which values and works with a diverse community.
- Programmatic support for Madison & Buley Centers that serve the underprivileged of Muncie's south-central inner city.
- For past three years have implemented a Christmas project in which we provided food to the dependents of the incarcerated, a population that was 99% African American.

- Participation of senior leadership over the past year has been highly invested in Annual Conference agenda to develop and redevelop ethnic churches and ethnic church opportunities, via Committee on Church Development.
- Financial and relational support of Great Commission Ministries based in Orlando targeting a highly diverse university population.
- Developed a sister-church relationship with New Hope Church of mostly African Americans in Anderson, Indiana.
- Took a 5-member team on a missionary trip to India.
- Participate yearly in Habitat for Humanity through volunteers and/or their donations.
- Hosted a community event with nationally known vocalist Alicia Williamson and invited a culturally diverse population.
- Financial and volunteer support of Blood and Fire Ministries in the inner city.

***Goals and Strategies:***

We will continue to strive to move forward and outward in our areas of ministry. We have a need to share and develop beyond our own station to connect with those who are unreached so that we may share the truth of Jesus Christ. Knowledge truly does replace fear of the unknown and a lack of understanding. By the end of 2007, we will strive to meet these goals:

- Be proactive in recruiting for this positions and purposefully seek and encourage minority candidates to apply for attached positions. Incorporate monies into the 2003 budget and yearly after that for programming, educating, and bringing culturally diverse populations into our Christian community.
- Develop a Racial Equality Action Team to create ways to effectively connect with diverse people groups, both in and out of the Christian community, to form relationships, reach the unreached, and to proactively seek opportunities to team together for the overall mission.
- Actively pursue and develop a "sister relationship" with a church(es) in Muncie whose congregation is highly diverse for the purpose of assisting them in meeting a need, i.e. assisting in programming, funding for a project, teaching, mentoring, encouragement, volunteering our help in any way we can, reaching out through our preschool by offering scholarships to minority children whose parents can't afford to send them, etc.

## Appendix E:

## Indiana Conference Church Development

### Monthly Grant Project Report Form

For all churches receiving Church Development grants of over \$5,000.

**Submit this form by January 15, April 15, July 15, and October 15<sup>th</sup> for the prior three month period to Rev. Steve Clouse.**

Mail to: Indiana Conference of The United Methodist Church, 301 Pennsylvania Parkway, Suite 300, Indianapolis, IN 46280. Or email to: [steve.clouse@inumc.org](mailto:steve.clouse@inumc.org). **Electronic submission preferred.**

- This report will help both your church and the Church Development Team keep apprised of your project's progress. Failure to submit this report will delay your church's grant payment one month for every month it is late.
- You are the only person from your church receiving this form, so please pass it on if you're not the responsible person.
- Please return the form by the above deadlines for the prior three-month period. Thanks, and God's blessings!

Name of church: \_\_\_\_\_ City: \_\_\_\_\_

This report is for the month of: \_\_\_\_\_ (month) \_\_\_\_\_ (year)

Person completing this form: \_\_\_\_\_ Date: \_\_\_\_\_

#### 1. GOALS ACCOMPLISHED FOR PAST MONTH IN ORDER TO ACCOMPLISH BENCHMARKS:

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#### 2. NEXT MONTH'S GOALS:

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#### 2. COORDINATORS/HELPERS. Attach your project's Coordinator/Helper Matrix and highlight those names added this month.

3. WORSHIP ATTENDANCE. Provide the following (if applicable):

\_\_\_\_\_ Weekly worship service's average for the month. Average to date: \_\_\_\_\_

Benchmark measure: \_\_\_\_\_ (the average weekly worship attendance of your service's first ten weeks, removing the highest and lowest figures)

4. COACHING. Did you meet this month with your coach (via phone okay): \_\_\_\_\_

5. MONTHLY REPORT. Did you return this form to the Direct of Church Development within 15 days of the end of the month for which you're reporting? \_\_\_\_\_

6. How might we pray for your project this coming month?

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*You can provide any additional information on a separate page.*