

CANTERBURY UNITED METHODIST CHURCH
LUCILLE BEESON TRUST TEAM

Guidelines for Grant Applications
Updated 01/01/26

...to Canterbury United Methodist Church, Mountain Brook, Alabama, to apply to the relief of the needy elderly of Jefferson County, Alabama, including medical treatment...

Last Will and Testament of Lucille Stewart Beeson, January 8, 2001

BACKGROUND & MISSION

The legacy left to Canterbury United Methodist Church by Lucille Beeson is administered by the Lucille Beeson Team (the “Team”). The Team’s mission is “to enhance the quality of life of the needy elderly in Jefferson County.”

The Team defines “needy” as “being in want” which can arise from a lack of access to resources, poor health, or otherwise in need of relief. The Team has established no strict age requirement for qualification as “elderly”, but generally conforms to national standards such as AARP which regards elderly as 55 years or older.

The Team evaluates each grant request on its own merits; however, with limited funding available, there is a conscious attempt to address “Raw Edge Needs” and adhere to guidelines offered in **Matthew 25**...*For I was hungry and you gave me food. I was thirsty and you gave me drink. I was a stranger and you welcomed me. I was naked and you clothed me. I was sick and you visited me. I was in prison and you came to see me.*

Although Lucille Beeson vested in Canterbury United Methodist Church the responsibility of administering her bequest, grants will be evaluated on a non-sectarian basis, without discrimination based on race, religion, nationality, gender, handicap, age, or sexual orientation. Nevertheless, applications will be evaluated in light of the principles held by The United Methodist Church and those set out in Lucille Beeson’s will.

These guidelines are designed to inform prospective grant seekers how to apply for a grant.

DEADLINES

The Team will review submitted grants quarterly. The submission deadlines are: January 15; April 15; July 15 and October 15. All applications must be submitted by email, with all elements (as noted below) gathered into a single PDF, to lesliecarlisle@me.com no later than midnight of the applicable due date. Applications will NOT be accepted by hand delivery to the Canterbury United Methodist Church. The Team will endeavor to communicate its decisions on applications within 8 weeks of each quarterly deadline.

WHAT WE LOOK FOR

To make the greatest impact with the funds available, the Team prefers requests that address a critical community need in the following areas:

- healthcare
- housing
- basic necessities
- education/advocacy
- transportation

LIMITATIONS & RESTRICTIONS

The Team considers grant applications from agencies with the following criteria:

- nonprofit organizations only, that provide all of, or a significant portion of, their services in Jefferson County, Alabama for the needy elderly.
- tax-exempt status under Section 501(c)(3) of the Internal Revenue Code .
- must have received its Letter of Determination from the IRS and be able to provide a copy in their grant application.

No grants are made to or for:

- Political organizations or candidates for public office
- Lobbying
- Non-Profit organizations or foundations where grant proceeds may benefit a for profit company
- Capital Campaigns

Incomplete grant applications may not be considered.

An agency cannot submit a non-emergency grant request if it has been less than twelve months since the last Team grant was funded.

There is an \$85,000 annual cap on grant requests made by a nonprofit, qualifying organization.

WHAT TO INCLUDE IN YOUR APPLICATION

The Team has no specific application form. Proposals must be submitted in writing, scanned as a single PDF, and electronically mailed to lesliecarlisle@me.com. Please provide:

- Why funds are being requested, and how many persons will be affected
- If approved, how will the funds be used to enhance the quality of life of the needy elderly in Jefferson County
- How will the success of this effort be measured

Please email, as a single PDF, the following:

1. **A cover letter, one page only, signed by your Director and Board Chair, including:**
 - Name, address, phone, fax numbers and e-mail addresses of the organization
 - Name and title of the contact person if other than the director
 - Amount requested
 - An abstract or summary in one paragraph of the proposed project.
2. **The full proposal. In no more than four pages for Section 2, provide the following information:**

AGENCY BACKGROUND

- Its history including major programs or accomplishments, where applicable
- Any links with similar organizations
- Funding received by the agency, in the last 12 months, from Canterbury United Methodist Church. Also, any funding requests that may be currently pending with Canterbury United Methodist Church should be noted. If funding has been received, or is pending, what was the purpose?

THE PROJECT OR PROGRAM PROPOSED

- The total cost of the project or program and the amount requested
- Goals and objectives, including: what will change, for whom, by how much and when
- The activities that will be carried out to accomplish the objectives and how their success will be measured
- The qualifications of key personnel
- Any other organizations involved in this project and/or providing similar services in Jefferson County

PROJECT CONTINUATION

- If the project is ongoing, what plans are there to continue after the funding period?
- What plans are there for ongoing financial and community support to ensure the future of the project?

PROJECT EVALUATION

- Criteria for effectiveness
- The methods to be used to analyze results (measure progress)
- Who will assess the results
- Are leverage opportunities being used or explored

3. Financial Information

- A line item income and expense budget for the project, including in-kind and cash support.
- A list of other foundations or sources to which this proposal has been or will be submitted. Please indicate whether funds have been committed, declined or are pending from other sources.

- Organization's current annual operating budget AND an income & expense statement/balance sheet for the last fiscal year (audited financials if available). The financial information should reflect sources of support as well as expenses.

4. Additional Material

- A list of current Board of Directors including the primary professional and/or civic affiliation of each member.
- Names, titles and telephone numbers of three professionals familiar with the work of your organization.
- Copy of the organization's tax-exempt letter (Determination Letter) from the IRS.
- A description of insurance carried.
- A description of known staff members or laity of Canterbury United Methodist Church who hold leadership positions in the organization.

By getting your application in well before the deadline, you afford the Beeson Team the opportunity to provide feedback on your application. Therefore, if further detail is needed to enhance the informative quality of your application you will have time to provide that before the deadline.

Each request is reviewed before the Team meets. Your agency will be contacted should additional information be required and a site visit may be scheduled. During this same period, please advise us should circumstances arise which would change or affect any aspect of your request. If you have any questions, please contact Leslie Carlisle, Consultant to the Lucille Beeson Trust Team of Canterbury United Methodist Church, at 205-706-8828 or lesliecarlisle@me.com

ADDRESS APPLICATIONS TO:

Ms. Leslie Carlisle
 Attn: The Lucille Beeson Team/Canterbury United Methodist Church
lesliecarlisle@me.com

For questions, contact Leslie Carlisle:
 205-706-8828
lesliecarlisle@me.com