

The Episcopal Diocese of Massachusetts

Green Improvement Grants:

A Creation Care Initiative

2016



From left: Church of the Good Shepherd, Acton, displays its energy savings from last year's boiler conversion; Bishop Cederholm blesses the new boilers at St. John's, Charlestown; the Creation Care team at St. John's, Gloucester reviews plans for their boiler conversion

The Episcopal Diocese of Massachusetts

138 Tremont Street

Boston, MA 02111

www.diomass.org/creation-care-initiative

617-482-5800

O LORD, how manifold are your works!
in wisdom you have made them all;
the earth is full of your creatures.

Yonder is the great and wide sea
with its living things too many to number,
creatures both small and great.

There move the ships,
and there is that Leviathan,
which you have made for the sport of it.

All of them look to you
to give them their food in due season.

You give it to them; they gather it;
you open your hand, and they are filled with good things.

You hide your face, and they are terrified;
you take away their breath,
and they die and return to their dust.

You send forth your Spirit, and they are created;
and so you renew the face of the earth.

Psalm 104:25–31

Book of Common Prayer, 1979

Creation Care: Green Grants Overview

The Creation Care Initiative of the Episcopal Diocese of Massachusetts exists to encourage, challenge, and support all the congregations of the diocese as they carry out their responsibility to care for God's creation. Within this Initiative, there are three separate programs: (1) Simple Acts Grants, of up to \$1,000, which support parish activities and programs that focus on the environment and conservation and are built on appreciation of and gratitude for blessings; (2) Green Improvement Grants, in amounts up to \$10,000, which assist congregations in funding their purchase of energy-saving equipment and supplies; and (3) Green Loans, a program structured similarly to Diocesan (Stokes) Loans that will provide lower-interest loans to enable congregations to make energy-efficient changes to their buildings. These three programs are supported by individual donations, congregational donations, and the Together Now comprehensive fundraising campaign. *This is the final year for Simple Acts and Green Improvement Grants*; Green Loans will continue to be available.

Green Improvement Grants

Some congregations are ready to take action to reduce their carbon footprints by upgrading their facilities. Green Improvement Grants involve a process designed to help these congregations identify and accomplish their projects. In this process, the congregation identifies a Creation Care Team, consisting of four or more parishioners, who will work with the vestry to lead the congregation through its project. It is vital that this work be carried out by a team, rather than by a single person – a team approach creates excitement and energy within a congregation that grows and expands, just as yeast enables bread to rise.

At least two members of each Creation Care Team attend a SHOW (Sustainable Houses of Worship) workshop conducted by representatives of Massachusetts Interfaith Power and Light. The workshops are designed to point out the common challenges to energy conservation that churches face, to propose various approaches to addressing these opportunities, to review project planning and funding practices, and to provide assistance in completing the grant application. The energy audit is an important piece of this work because it points out the focus areas for energy saving; so the Creation Care Team should, if possible, bring the results of their audit and their completed Utility Use and Cost Tracking Spreadsheet (or Portfolio Manager data) to the workshop.

Using the energy audits and workshop information, the Creation Care Team and congregational leadership set priorities for addressing the congregation's energy-saving opportunities and then create a plan for its Green Improvement projects. The congregation then completes and submits its grant application. Examples of Green Improvements are listed on page three. A summary of the steps in the Green Improvement Grant application process is included on page two.

Green Improvement Grants will provide support up to \$10,000. The grant committee will consider the planning and applicability of the project, as well as the projected environmental impact, in determining the amount of the grant. Congregations are encouraged, but not required, to match grants with local contributions to fund projects. The Green Loan program is available as a way to help finance higher-cost, high-return projects.

Requirements and Process

All diocesan grant and loan programs support healthy congregations that are prepared to undertake their proposed projects. Timely reporting and fiscal responsibility are indicators of both congregational health and effective leadership. A congregation unable to meet the reporting requirements may also be unprepared to undertake demands presented by additional, ambitious programs. Therefore, congregations must meet all of the compliance requirements listed in the application process.

Completed applications should be emailed to greengrants@diomass.org or sent in the mail. The grant committee will review applications and award support. If your congregation's application is approved, 80%

of the funds will be available shortly after the award is announced, with the other 20% available in mid-December 2016, upon receipt of the program’s mid-year report.

The diocesan staff administers the program and welcomes the opportunity to work with potential applicants at all stages of the process. Please address questions and comments to Lauren Zook at lzook@diomass.org or [greengrants@diomass.org](mailto:green grants@diomass.org) or by phone at 617-482-4826, ext. 306.

Two Application Tracks

We offer two application tracks: an expedited early track for projects ready to launch that are interested in receiving a decision and funding earlier in the year; and a two-part application process, starting with a Letter of Intent, followed by feedback from the committee, with a final submission date on Earth Day.

	Expedited Track	Regular Track
Letter of Intent due	N/A	March 15
LoI feedback provided	N/A	March 28
Application due	March 15	April 22
Decisions Announced	April 22	Week of June 1

Five Steps for Obtaining a Green Improvement Grant

Step 1: The vestry votes to consider congregational participation in the Green Improvement program and appoints a Creation Care Team of at least four members to oversee the church’s project. One member is designated as the Creation Care Contact.

Step 2: If the congregation has not had an energy audit or Environmental Stewardship Assessment conducted in the past three years, the Creation Care Contact registers for one. Energy audits can be arranged through your utility company (free, and most appropriate for smaller projects such as upgrading to LEDs) and Environmental Stewardship Assessments through www.mipandl.org (sliding fee scale, and very comprehensive and suitable for larger projects). It takes time to schedule and have your energy audit done, so this should be done ASAP. Audits/ESAs must be no more than three years old.

Step 3: At least two members of the Creation Care Team attend a SHOW Workshop. Three SHOWs will be offered in the spring of 2016; dates and registration are available at www.diomass.org/creation-care-initiative. The SHOW will address project planning, including needs analysis and priority setting, as well as identifying approaches and resources available to churches. The Workshop will also cover other questions related to the completion of the Green Improvement Grant application, including an overview of the Green Loan program. The Creation Care Team is encouraged to complete the church’s Utility Use & Cost tracking spreadsheet (or use Portfolio Manager), to review the grant application form, and to have results of the energy audits of the church property available prior to attending the SHOW Workshop.

Step 4: The vestry ensures that the congregation is compliant with all of the following:

- Timely filing of the Parochial Report.
- Timely filing of the Annual Clergy Compensation Survey.
- The annual audit. Applicants applying for grant funds must have their congregation’s 2014 audit accepted and on record with the Treasurer’s Office to receive funds.
- Diocesan Assessment or Assessment Payment Plan.
- Stokes Loan payments or payment plan.

Step 5: In conjunction with the vestry and clergy, the Creation Care Team completes the application form and submits it to:

greengrants@diomass.org

Subject line: Creation Care Initiative: Green Improvement Grants

- or -

Creation Care Initiative: Green Improvement Grants

Attention: The Rev. Karen B. Montagno

Episcopal Diocese of Massachusetts

138 Tremont Street

Boston, MA 02111

Green Improvement Grants FAQ

What is the goal of the Creation Care: Green Improvement Grants?

The Creation Care Initiative exists to encourage, challenge, and support all the congregations of the diocese in environmental stewardship – reducing our diocese’s carbon footprint while saving the congregation green dollars. The program guides congregations in systematically identifying needs and prioritizing opportunities for conservation and assists congregations in selecting and purchasing energy-saving equipment and supplies. Another goal of the Green Improvement Grants program is education of the congregation and the wider community. A successful application addresses the ways the proposed project will foster greater awareness of the need for environmental stewardship not just at church, but also in the wider community at home, work, and school.

What programs qualify for Green Improvement Grants?

Here are some examples of projects that are eligible for Green Improvement Grants and Loans, with more information available from <http://mipandl.org/ees.html>:

- Lighting projects: Installation of occupancy sensors, upgrade to LED lighting (note: installation of CFLs no longer qualifies for a Green Grant), conversion from T-12 to T-8 fluorescent tube fixtures and lamps, installation of LED exit signs
- Building envelope: energy-saving windows, interior storm windows, ceiling fans, adding insulation
- Heating and cooling: upgrade to high efficiency gas- or propane-fired boilers and furnaces, conversion from oil to gas systems, conversion from steam to hydronic, conversion to air source heat pumps or geothermal systems, addition of zones to current heating system
- Heating/cooling controls: Programmable thermostats, energy management systems, boiler reset controls
- Solar: Work needed prior to installation of solar panels, eg, re-shingling the roof, adding structural support
- Water: Conversion to EPA Water Sense-labeled faucets, toilets, etc; replacement of hot water heaters with on-demand hot water systems
- Appliances and electronic equipment: Replacement of major equipment (eg, refrigerators, copiers) with Energy Star-labeled equipment

What are the criteria for successful applications?

Applicants must complete the workshop, audit, and utility tracking requirements. Successful applications will be chosen based on their presentation of the cost-benefit analysis for their program. This will include describing the facility’s present needs, setting priorities for upgrades, and planning approaches to addressing identified needs. Financial and in-kind contributions from the congregation will be a consideration for

funding. Available rebates should be included in the final cost. Applications should include estimates of cost and energy reduction for the proposed project.

May a congregation apply for both kinds of Creation Care grants?

Congregations may apply for either a Simple Acts Grant or a Green Improvement Grant, or for both. However, a congregation may apply for funds only once for each type of grant in a given granting cycle.

What is expected from a funded congregation?

- Undertake the program described in its application or submit modifications for the Grant Committee's review and approval.
- Submit mid-year and year-end reports for the duration of the program, and a final report upon completion.
- Continue Utility Use and Cost reporting (annually) for four years following, as this enables analysis of benefits of actions by the congregation and the diocese.
- Provide information and reasonable assistance to fellow congregations undertaking similar programs.

Letter of Intent Format *(for regular track applicants only)*

Please e-mail to greengrants@diomass.org as Adobe Reader-compatible or Word-compatible attachment, or by post on standard 8½" x 11" paper:

A. Green Committee names and roles

- a. Please list the names and emails of your Creation Care Contact (this person will be the main liaison with the grant committee; may be lay or clergy) and all Creation Care/Green Committee members (you must have at least four).

B. SHOW attendance status

- a. Who on your committee has attended a Sustainable House of Worship (SHOW) workshop? You must have at least two members who have attended a SHOW (preferably in the past three years). Click [here](#) for upcoming dates and locations.

C. Environmental Stewardship Assessment (ESA) and/or Building Audit status

- a. Have you had an ESA and/or building audit conducted in the past three years? If so, please list the date (month and year) and organization that produced the audit.
 - i. If you have not yet had a building audit or ESA done or if it is more than three years old, please contact either Massachusetts Interfaith Power & Light (MIPL) to schedule an ESA or ESA "refresher" (for a fee) or contact your utility company to schedule a building audit (free).

D. Key "green" opportunities as identified by the ESA/building audit and/or by the committee/congregation

- a. What are some possible projects your committee is considering addressing over the next five years?

E. Likely focus for the Grant Application

- a. What project(s) do you anticipate submitting for funding?

- b. How much money do you anticipate requesting? (Green Improvement Grants award up to \$10,000.)
- c. How much money do you anticipate obtaining from other sources (rebates, capital campaign, etc.)?
- d. Do you anticipate also requesting a Green Loan? Note that this is a separate process; please contact Lauren Zook for more information about this.

Application Format

Application packet, e-mailed to greengrants@diomass.org as Adobe Reader-compatible or MSWord-compatible attachment, or by post on standard 8½" x 11" paper. The document must include:

- A. **Cover Page:** A single page with identification and contact information, in addition to a brief description of the project.

Please include all of the following information on the cover page of your application:

- 1. The name of the program for which you seek funding. Please identify as Application for Green Improvement Grant.
- 2. The name of the congregation sponsoring the program.
- 3. The Creation Care Contact for the congregation. (Please include postal and e-mail addresses, plus daytime and evening phone numbers.)
- 4. The clergy, senior or junior wardens, and members of the Creation Care team. (Please include e-mail addresses and phone numbers.)
- 5. The amount requested for the current grant cycle, as well as total project cost.
- 6. A one- or two-paragraph summary of the program.
- 7. Either dated signatures of the clergy and lay leader or e-mails from each acknowledging congregational participation in the proposed project.

- B. **Two-Page Program Overview:** The application must include a two-page narrative of the program that addresses the following:

- 1. Goals: Describe the goals of the program. What specific needs will the program address?
- 2. Description:
 - a. Describe the specific ways you hope the program will fill the stated needs, transform participants, and serve your community.
 - b. Describe the specific activities involved in the program. Include who will implement them and how they will be funded.
 - c. Estimate the number of members of the congregation who will participate in the program.
 - d. Briefly describe the congregation's long-term commitment to sustainability, the environment, and conservation.
 - e. Describe the studies, data gathering, and selection process you have undertaken related to the program. Include significant lessons learned from these activities.
- 3. Evaluation: Describe how you plan to evaluate the success of the program, including but not limited to saving in energy costs. How will information be collected?
- 4. Support:
 - a. State the financial resources needed to complete this phase of your improvement program.
 - b. Describe fund-raising and matching funds efforts.
 - c. Describe the non-financial assistance necessary to conduct the program for one year.
 - d. Describe how your program will be affected if your Green Grant request is only partially funded.

- C. **Program Budget:** Applications must include a description of your program's financial story in the context of your congregation's budgets. Please follow the format of the Program Budget template (page 7). For the budget of your program, include all other grants, gifts, or contributions to be applied to the proposed program. List all other income and expenses related to the proposed program. Identify all in-kind services available for the program. List all available rebates (identified and obtained through your energy company and/or manufacturer) or provide a narrative explaining the research process and confirming that none are available.
- a. **Green Loans:** If you are applying for a Green Loan, please contact Lauren Zook (lzook@diomass.org or 617.482.4826 x306) to discuss your ideas and obtain an application. There is a separate process to apply for and receive a Green Loan, and obtaining one does not guarantee obtaining the other.
- D. **Checklists:** Applications must include all three checklists – Checklist A (page 8), Checklist B (page 9), and Checklist C (page 9) – for each congregation that will participate in the proposed program.
- E. **Supporting Documents:** Copies of the following information must be included with the application:
1. Certificates of attendance at a SHOW workshop for at least two Team members.
 2. Copy of your energy audit or Environmental Stewardship Assessment (ESA). If your energy audit or ESA is more than three years old and/or you have made any significant changes to the building since its last energy audit, please have your ESA updated by MIPL, or include a recent energy audit available free from your utility company.
 3. Utility use and cost spreadsheets, showing three years of past utility information. A template for this is available from www.MIPandL.org and is included in the DVD handed out at the SHOWs. You may also use Portfolio Manager to record your data.
 4. Income and expense reports for 2014 and 2015, including operating and non-operating accounts.
 5. The congregation's balance sheet for the fiscal year ending December 31, 2015.
 6. The congregation's 2016 budget.

Program Budget Template

(also available as an Excel document from www.diomass.org/grants-loans/creation-care-initiative)

Income	Creation Care Initiative Green Improvement Grant	
	Other secured grants*	
	Diocesan Green Loan <i>(please note status of application)</i>	
	Rebates from utility company and/or manufacturer	
	Other pending grants*	
	Fee for service	
	Fundraising	
	Congregation's contribution from annual budget	
	Congregation's contribution from bequests	
	Other income for program	
	In-kind contributions	
	TOTAL PROGRAM INCOME	
Expenses	Personnel	
	Telephone & utilities	
	Training	
	Insurance	
	Printing/duplicating	
	Supplies	
	Materials	
	Transportation	
	Rent	
	Other expenses	
		TOTAL PROGRAM EXPENSES

*Please identify each grantor, amount, and restrictions on secured grants. In the case of pending grants, please identify the potential grantor, amount requested, and approximate granting date. Please use additional pages if necessary.

Checklist A

Required for all applicants

Please indicate which of these your congregation has done during the past year or 18 months. These 20 practices often contribute to long-term congregational vitality. (Note: It is not necessary to complete all of these to receive funding.)

	√	Name of Congregation:	Location:
1		Conducted a Mutual Ministry Review of/by vestry and clergy	
2		Conducted vestry goal-setting	
3		Conducted vestry review of progress on goals previously set	
4		Created or revised a parish mission or vision statement	
5		Created or updated a long-range parish plan	
6		Obtained or studied a demographic profile of your ministry area (such as a Percept profile)	
7		Obtained an independent audit of your books	
8		Graphed and tracked your average Sunday attendance over at least the last 10 years	
9		Created or revised a comprehensive parish profile (the kind produced in a clergy search or a major strategic planning process)	
10		Undertook a building audit (the kind offered by the Diocesan Property Committee)	
11		Undertook an energy audit (the kind offered by a local energy company or by Massachusetts Interfaith Power and Light)	
12		Conducted a face-to-face stewardship canvass of your parish households	
13		Developed a planned giving program	
14		Held a special vestry day or weekend retreat focused on team-building, planning, or spiritual growth	
15		Sent staff or parishioners for Anti-Racism training	
16		Sent staff or parishioners for Safe Church Training (online or group training)	
17		Completed a Safe Church policy	
18		Participated in an intentional partner relationship with another congregation	
19		Used a consultant (diocesan consultant or other) to help you address an opportunity or challenge	
20		Applied for a grant (from diocesan funds or elsewhere) to help your congregation start or expand a ministry	

Checklist B

Required for all applicants

Complete applications must contain satisfactory explanations of circumstances related to all questions answered in the negative.

Please note: No funds will be distributed to congregations that are delinquent in Parochial Report filing, Clergy Compensation Worksheet filing, Diocesan Loan payments or payment plan, Annual Audit, or Assessment payment (or Assessment Payment Plan compliance).

	Yes / No	Name of Congregation:	Location:
1		Is the congregation current with its filing of the Annual Parochial Report? (The 2015 Parochial Report is due in March 2016.) <i>Required to obtain grant funds.</i>	
2		Is the congregation current with its submission of the Annual Clergy Compensation Survey? <i>Required to obtain grant funds.</i>	
3		Is the congregation current with its filing of the Annual Audit? (Congregations must submit completed audits to the Office of the Treasurer by September of the following year. Applicants filing for grant funds after 9/1/15 must have their congregation's 2014 audit <u>accepted and on record with the Treasurer's Office</u> to receive funds.) <i>Required to obtain grant funds.</i>	
4		Is the congregation current with its Annual Assessment or Assessment Payment Plan? <i>Required to obtain grant funds.</i>	
5		Are all clergy compensated at or above the diocesan minimum? <i>Encouraged.</i>	
6		If applicant is awarded a grant, does the congregation commit to providing mid-year and year-end reports for the duration of the funded program, as well as a final report at the end of the program? <i>Required to obtain grant funds.</i>	
7		If applicant is awarded a grant, does the congregation commit to providing annual Utility Use and Cost reports for four years following? <i>Required to obtain grant funds.</i>	

Checklist C

Required for all applicants

	√	Name of Congregation:	Location:
1		Your congregation has identified a Creation Care Contact person and a Creation Care Team of at least four members of your congregation. Please include with your application the Team list with an e-mail address for each member.	
2		At least two members of your Creation Care Team have attended a Sustainable Houses of Worship (SHOW) Workshop. Please include with your application copies of your certificates of participation.	
3		Your congregation has had an energy audit of the church building and other public buildings used by your congregation in the past three years. Please include a copy of the audit with your application.	
4		Your congregation is tracking at least three years of Utility Use & Cost necessary for tracking the reduction of your carbon footprint. Please include your congregation's UU&C spreadsheets with your application OR copies of your Portfolio Manager data.	

