

GOVERNING DOCUMENT

The Donald K. Evans Memorial Theological Scholarship Fund Ohio-Meadville District Unitarian Universalist Association

“DONALD KING EVANS . . . always holding important positions in organized educational work, effective preacher and keen student of man’s thought and affairs, competent as an administrator and wise and winning in dealing with human relations; withal a minister of religion with the understanding of the comprehensive scope of his work today and an adequate sense thus of personal responsibility.”

--Citation from the presentation of the honorary D.D. degree, St. Lawrence University.

History of the Fund

Founded in 1963 at the formation of the Ohio-Meadville District, The Donald K. Evans Memorial Scholarship Fund honors the memory of Dr. Donald K. Evans

Dr. Evans died suddenly as he recorded the vote which created the District. Dr. Evans had been Superintendent of the Universalist Church of Ohio since 1946 and it was intended that he would become the first District Executive for the newly formed District.

Dr. Evans served churches in Vermont, New York and Illinois before coming to Ohio. The District archives contain additional information regarding Don Evans’ career. It is fitting that the Ohio Meadville District Theological Scholarship Fund carries his name and honors the memory of one so dedicated to the Unitarian Universalist Association.

Starting with funds from the Universalist Church of Ohio, the fund grew substantially with the allocation of \$5,000 in memory of Dr. Evans and \$3,000 from the Association of Universalist Women of Ohio when the Unitarian Universalist Women of the Ohio-Meadville District was founded. When this group disbanded, their funds were given to the Evans Fund as well.

Scholarship grants from the Evans Fund have been awarded to students at these institutions:

Meadville/Lomard Theological School
Starr King School for the Ministry
Harvard Divinity School
Methodist Theological School
John Carroll University

More than 30 students have benefited from the Evans Fund, including District Field Service Consultant Carol Brody, now retired.

Purpose of the Fund

The Donald K. Evans Memorial Theological Scholarship Fund provides financial support to women and men who wish to study to become Unitarian Universalist ministers.

Operation of the Fund

The Board of Trustees of the Ohio-Meadville District (the “Board of Trustees”) shall have final authority over the operation of the Donald K. Evans Memorial Theological Scholarship Fund (“the Evans Fund”). Ordinarily, however, the Board of Trustees shall delegate responsibility for operation of the Evans Fund to the duly elected Officers of the Ohio-Meadville District Chapter of the Unitarian Universalist Ministers Association (the “Officers of the District Chapter of the UUMA”). Annually, the Officers of the District Chapter of the UUMA shall submit a written report to the Board of Trustees. This report shall include at least the following information: (1) the maximum amount of money available to be awarded as scholarship grants; (2) the names of all theological students to whom scholarship grants were awarded together with the amount of each scholarship grant.

The Treasurer of the Ohio-Meadville District shall be responsible for investing the principal of the Evans Fund. The principal of the Evans Fund shall be invested separately from all other funds. All proceeds from investment of the Evans Fund shall be retained by the Evans Fund and shall be reinvested as part of the principal of the Evans Fund. Annually, the Treasurer of the Ohio-Meadville District shall provide a written report to the Board of Trustees and to the Officers of the District Chapter of the UUMA. This report shall include at least the following information: (1) the market value of the Evans Fund as of the final day of the fiscal year of the Ohio-Meadville District; (2) all contributions to the Evans Fund; and (3) all disbursements from the Evans Fund.

The Officers of the District Chapter of the UUMA shall have the authority to award grants to individuals who are enrolled in accredited theological schools in preparation for professional service as Unitarian Universalist ministers, as specified in the following paragraphs.

Each year, the Officers of the District Chapter of the UUMA shall determine the maximum amount of money available for scholarship grants. This determination shall be according to the following formula: The maximum amount of money available for scholarship grants in any fiscal year shall be equal to 3.5% of the average of the year-end market value of the Evans Fund for the three preceding fiscal years. (See the Appendix for an example.)

At least once each year, the Officers of the District Chapter of the UUMA shall communicate with all congregations in the Ohio-Meadville District (1) to remind them of the existence, purpose, and procedures of the Evans Fund, and (2) to ask congregational

leaders to encourage theological students who are members of their congregations to apply for scholarship grants.

Each year, the Officers of the District Chapter of the UUMA shall review scholarship grant applications for the Evans Fund and decide which students are eligible to receive scholarship grants and how large the scholarship grants will be. (For example, one method would be to establish a customary grant amount, anticipating that the number of students requesting scholarship grants in any year will usually be small and will not change drastically from year to year. Another method would be simply to divide the available funds equally among all eligible students in any year.) The Officers of the District Chapter may choose to set a maximum scholarship grant amount. (For example, the maximum grant amount might be \$1,500 per year per student.) The Officers of the District Chapter of the UUMA may award scholarship grants of different amounts to students with differing degrees of demonstrated financial need. The Officers of the District Chapter of the UUMA may set a deadline for scholarship grant applications. (For example, the deadline might be April 1 for the following academic year.) The Officers of the District Chapter shall prepare a grant application form and shall determine what information will be requested on the scholarship grant application form. This grant application form shall be easily available through at least one standard District communication channel. (For example, the application form might be available through the District web site.) Eligibility requirements for scholarship grants from the Evans Fund shall include at least the following: (1) a grant recipient must be enrolled in (or accepted at) an accredited theological school; (2) a grant recipient must be preparing for professional service as a Unitarian Universalist minister; and (3) a grant recipient must be a member or former member of a congregation within the Ohio-Meadville District. The Officers of the District Chapter of the UUMA may set additional eligibility requirements, except that (1) a grant recipient need not attend a theological school within the geographical area served by the Ohio-Meadville District, and (2) grants shall not be withheld on the basis of age, race, gender, sexual orientation, physical ability, color, national origin, or ethnic identity.

In any given fiscal year, the total amount of money awarded as scholarship grants from the Evans Fund shall not exceed the money available, as determined by the Officers of the Chapter of the UUMA in accord with the formula specified above. Scholarship grants from the Evans Fund are not loans and do need not to be paid back. A student may receive scholarship grants from the Evans Fund for up to three years. Scholarship grants from the Evans Fund may be used for books, tuition, supplies, travel, and other educational expenses. Scholarship grant checks are issued directly to the student.

The Officers of the Chapter of the UUMA shall encourage individuals and congregations to contribute to Evans Fund. This encouragement may take the following forms: (1) asking all members of the Ohio-Meadville District Chapter of the Unitarian Universalist Ministers Association as well as all other ministers serving congregations within the Ohio-Meadville District to encourage the congregations which with they are affiliated to contribute to the Evans Fund; (2) requesting that offerings in support of the Evans Fund be taken at events sponsored by the Ohio-Meadville District, including Summer Institute,

Winter Institute, and District Assembly; (3) requesting that offerings in support of the Evans Fund be taken at ordinations and installations taking place in congregations within the Ohio-Meadville District; (4) preparing a brochure about the Evans Fund which could be distributed through congregations and through District events; (5) writing an article about the Evans Fund for publication in the District newsletter; and (6) asking individuals who have received scholarship grants from the Evans Fund in the past to consider making contributions to the Evans Fund once they have become financially stable, even if they are serving congregations outside the Ohio-Meadville District. Contributions to the Evans Fund are tax-deductible.

The Officers of the Chapter of the UUMA may delegate their responsibility for operation of the Evans Fund to a Donald K. Evans Memorial Scholarship Fund Committee (the "Scholarship Fund Committee"), which shall consist of no less than three and no more than six members of the Ohio-Meadville District Chapter of the Unitarian Universalist Ministers Association who shall be appointed for three-year terms by the Officers of the Chapter of the UUMA. In this case, (1) the Scholarship Fund Committee would then report to the Board of Trustees, including the information specified above, and (2) the Treasurer of the Ohio-Meadville District would then report to the Scholarship Fund Committee and the Board of Trustees, including the information specified above.

Appendix

Example 1: On June 30, 2006, an endowment fund was worth \$120,000. On June 30, 2005, it was worth \$100,000. On June 30, 2004, it was worth \$110,000. The average value of the endowment over those three years was \$110,000. Multiplying this average value by the payout percentage of 3.5%, one would draw out \$3,850 in the year 2007.

Example 2: Now suppose the same endowment fund was worth \$140,000 on June 30, 2007. Then the new three-year average (for 2005, 2006, and 2007) would be \$120,000. Once again using a payout percentage of 3.5%, one would draw out \$4,200 in 2007.

This method offers two benefits: First, it effectively takes into account total return on an endowment, including capital appreciation as well as dividends and interest. Second, it makes the flow of available money more predictable even when the year-to-year value of the endowment fluctuates.

APPLICATION FORM

The Donald K. Evans Memorial Theological Scholarship Fund
Ohio-Meadville District, Unitarian Universalist Association

Part 1. Your Contact Information

Name _____

Mailing Address _____

Telephone _____

Email _____

Part 2. Your History with the Evans Fund

Have you previously applied to the Evans Fund? If so, when? _____

Part 3. Your Theological School Information

Name of School _____

Mailing Address _____

Main Telephone _____

Name of Dean of Students _____

Part 4. Your Connection with Ohio-Meadville District

Home Congregation _____

Are You a Member of This Congregation? _____

How Long Have You Been a Member? _____

Comments _____

Part 5. Your Personal Statement

Please explain in a few paragraphs: (a) your sense of ministerial calling or your reasons for becoming a minister; (b) your aspirations or hopes for your career as a Unitarian Universalist minister; (c) your plans for the remainder of your theological education (internship plans, anticipated date of graduation, anticipated date of meeting with the Ministerial Fellowship Committee, etc.); (d) any information about your personal situation or history that you would like to share; and (e) some indication of financial need.

The application deadline is April 1 for the following academic year. Please send your completed application to:

Chapter President
Ohio-Meadville District Chapter of the Unitarian Universalist Ministers Association
c/o Ohio-Meadville District Office
PO Box 157
St. Clairsville, OH 43950

Alternatively, you may send your application by email to office@ohiomeadville.org.