



# THE CHAMPLIN FOUNDATION

## SAMPLE Traditional Grant Application – Cycle 2

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Please be aware that this application is a sample document intended to give you a helpful idea of what to expect when the application opens on June 1<sup>st</sup>. Questions may be added or changed prior to that date.

### Organization Summary

#### Organization Name as Registered with the Secretary of State\*

Note that if a grant is awarded, this is the name that will appear on the check.

#### Organization Aliases

List any other names the organization is known by, including dbas and parent companies.

#### Mission Statement\* (Character Limit: 10,000)

#### Community Served\* (Character Limit: 5,000)

Help us understand the organization's impact – number of people served, neighborhoods/communities in which it operates, economic impact, its role in the community, etc.

#### Staying Current\* (Character Limit: 10,000)

How do you stay current on issues and trends to be in better service to clients and audiences?

#### Area of Focus\*

Note that this pertains to the organization's mission and not the specific request.

- ↳ Animal Welfare
- ↳ Arts & Culture
- ↳ Conservation & Parks
- ↳ Education
- ↳ Healthcare
- ↳ Historic Preservation
- ↳ Libraries
- ↳ Social Services
- ↳ Youth Services
- ↳ Miscellaneous

#### Number of Paid Full-Time Staff

If applicable.

#### Number of Paid Part-Time Staff

If applicable.



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**Has the organization been in operation for at least 3-years?\***

- Yes
- No

**Is your organization working with/through a fiscal sponsor?\***

- Yes
- No

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## Operations Under 3-Years

This question will only open if you answer 'No' to the question above.

Please note that The Champlin Foundation generally focuses support on those organizations or initiatives that have been in operation for 3-years or more. We recommend saving your application and contacting the office at 401-944-9200 to speak to a team member before going further.

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## Fiscal Sponsor Information

This question will only open if you answer that you are using a Fiscal Sponsor.

Please note that the Foundation infrequently accepts applications from organizations or projects using a fiscal sponsor. If your organization does not have its own exemption, please read the [Fiscal Sponsorship Policy](#) on The Champlin Foundation website before moving forward.

**Fiscal Sponsor Name\***

**Fiscal Sponsor Tax ID\***

**Name of Fiscal Sponsor Contact Person\***

**Telephone Number for Fiscal Sponsor Contact Person\***

**Fiscal Agent IRS Determination Letter\*** (File Size: 2MB)

Per the terms of the Fiscal Agent policy, please upload the fiscal agent's most current IRS Determination Letter here.

**Fiscal Agent Memo of Understanding\*** (File Size: 2MB)

Per the terms of the Fiscal Agent policy, please upload a signed Memo of Understanding outlining the agreement between the applicant and the fiscal agent. This is because the fiscal agent will be bound by the terms and conditions of the Champlin Foundation's standard grant agreement.



# THE CHAMPLIN FOUNDATION

## Board Summary

### Number of Board Members\*

#### Board Makeup\* (Character Limit: 10,000)

Briefly and generally tell us about the makeup of your board including the number of board members, how often it meets, committees, etc. Help us understand the diversity of the board (age/race/gender) and if the board includes representation from the people the organization serves. Feel free to tell us what diversity means for your organization and share what efforts your organization is making to include diverse voices on the board and staff. It is not necessary to include the names of individual board members.

#### Board Practices\* (Character Limit: 10,000)

Is there an intentional practice for the board to learn and improve its governance? How does the board educate itself about best practice in the field and trustee responsibilities? Does the board engage in learning retreats, undertake a self-assessment as to its performance, hear from guest speakers on occasion, and so forth?

#### Board Giving Policy\*

Because ensuring an organization has the financial resources it needs is a primary responsibility for any board member, do you have a stated policy that expects all board members to make a personal financial contribution, whether it is a defined amount or an amount that is meaningful to the member?

- Yes
- No

#### Board Contributions\*

Beyond contributing time and talent to the organization, what percentage of the board made monetary contributions in the last fiscal year? Please note that percentage is in decimal form so 100% should be represented as 1.00, 50% should be represented as 0.50, and so on.

#### Board Giving Exceptions (Character Limit: 2,500)

If any of your board do not make a monetary contribution, please help us understand why.

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## Financials

### RI Department of Business Regulation

Rhode Island State Statute 5-53.1 requires charitable organizations who solicit contributions in RI to register as a charitable organization with the RI Department of Business Regulation. If you are unsure if your organization must comply with this statute, please review these [instructions](#).



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## **Registration Approval Form** (File Size: 2MB)

If your organization must register with the RI Department of Business Regulation, please upload your organization's Notice of Charitable Organization Registration Approval form.

## **RI Department of Business Regulation Exemption**

If your organization is not required to register with the RI Department of Business Regulation, please tell us which exemption applies to your organization.

- ↳ Church or an organization controlled/affiliated with a church
- ↳ Do not raise or receive contributions > \$25,000
- ↳ Educational institution
- ↳ Foundation benefitting religious org, educational institution, nonprofit hospital, or public library
- ↳ Free, not-for-profit art museum
- ↳ Grange organization
- ↳ Historical society
- ↳ Land trust
- ↳ Nonprofit hospital
- ↳ Organization that solicits only from membership
- ↳ Public library

## **Are you current with your annual report filing with the Secretary of State?\***

- Yes
- No
- My organization is part of a municipality and is not required to file with the Secretary of State

## **Do you have any unspent funds from a Champlin grant awarded prior to 2020?\***

- Yes
- No

## **When does your current fiscal year end?\***

## **Organization Budget\*** (File Size: 8MB)

Please upload your organization's year-end actuals from last fiscal year as well as the projections from the current fiscal year (income & expenses). Budgets can include general categories and should not go into line-by-line detail. If you are a chapter to a national organization, please provide financials relevant to the RI work only.

## **What is the total dollar amount of your organization's budget for the current year?\***

If you are an in-state chapter to a national, please just indicate the budget for RI work only.



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**Do you anticipate ending the fiscal year with a deficit or a surplus?\***

- Deficit
- Surplus
- Break Even

**How many months of cash reserves do you have in hand?\***

**Does your organization have access to a line of credit?\***

- Yes
- No

**What was your organization's total debt (excluding Federal PPP funding) as of the close of the last fiscal year?\***

**Which of the following does your organization have?\***

Check all that apply.

- Endowment
- Board Designated Reserves
- General Reserves/Savings/Surplus
- None of the Above

**What was the total amount of these endowments/reserves/savings as of the close of the last fiscal year?\***

**Do you have an annual appeal or established fundraising program?\***

- Yes
- No

**Do you budget annually for capital expenses?\***

- Yes
- No

**Audited Financials** (File Size: 10MB)

The State mandates that any organization required to be registered through DBR and with total receipts of \$500,000 or more must undertake an annual audit. If your organization had receipts of \$500,000 more in the last two fiscal years, please upload your most recent audit and management letter. Please note that a compilation is not an audit.

**Financial Notes** (Character Limit: 2,500)

Optional. Please use this section if you have anything additional you would like us to know about the above financial information.



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## Unspent Funds Detail

This question will only open if you answered that you have unspent funds from grants awarded prior to 2020.

### What is the total balance of unspent funds from Champlin grants?\*

#### Unspent Funds Detail (Character Limit: 2,500)

Explain the reason for any unspent funds from grants awarded prior to 2020 and indicate the plan for how and when the funds will be used. If the only unspent funds are from a grant awarded in 2020, you may skip this question.

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## Project Information

### Amount of Grant Request\*

Total grant amount you are requesting from The Champlin Foundation.

### Project Name\* (Character Limit: 250)

A brief title for your project, such as:

- Vehicle Purchase
- Emergency Room Renovations
- HVAC System
- New Roof and Exterior Painting
- Purchase of Network Server

### Project Description (Character Limit: 10,000)

Please provide a concise description of the items/projects for which you are requesting support for. If more than one, **list in order of priority for funding.** While describing the project please let us know why you are undertaking this project now, how the project fits in with your current priorities, and how potential funding from The Champlin Foundation would be used. If you are requesting support for more than one project, please [click here](#) for instructions on how to format your project description.

### In what county will this project take place/equipment be used?\*

- Bristol County
- Kent County
- Newport County
- Providence County
- Washington County
- Statewide
- Outside of Rhode Island



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## Type of Request\*

Check all that apply. Please visit [The Champlin Foundation](#) for a complete understanding of what projects we fund.

- Building - New Construction or Additions
- Building - Repairs
- Building - Upgrades
- Property Improvements (ex: parking lots, fencing, landscaping)
- Equipment - Mechanical (ex: HVAC units, ventilation systems, water tanks)
- Equipment - Technological (ex: computers, platform development, building security systems)
- Equipment - Vehicles
- Equipment - Other
- Real Estate Acquisition
- Debt Reduction (preferably on a project previously funded by The Champlin Foundation)
- Other

**If you answered 'other' above, please explain.** (Character Limit: 250)

## Are you requesting 100% of the cost from Champlin?\*

- Yes
- No

## Total Project Cost\*

All anticipated costs related to the project for which you are applying.

## Project Budget (File Size: 2MB)

If you have a project budget, please upload it here. Please include expenses and anticipated income sources.

## How much have you raised for this project to date?\*

## Additional Sources of Funding (Character Limit: 2,500)

List all other sources of funding that have been secured or are being pursued for this project.

## Project Timeline\* (Character Limit: 2,500)

If successful in obtaining this grant, explain what the projected timeline is in which the funds will be spent, understanding that ACH deposits will be made in December 2021 and Champlin hopes all grant funds will be expended within 12-months of the deposit. If Champlin funds are going towards one element of a larger project, also outline the timeline for the entire project.



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## **Project Quotes and Estimates** (File Size: 10 MB)

Combine and upload any quotes or estimates that help support your request. The Foundation prefers to support "shovel-ready" work, so we expect to see actual contractor/vendor estimates and bids. Though architects' quotes are helpful, we hope to see actual contractor estimates whenever possible. If quotes are not yet available, please send via email no later than September 15th. **Uploads can only accept one document so please combine multiple documents prior to uploading.**

## **Will any Federal, State or Municipal permits/approvals be required?\***

- Yes
- No

**If yes, explain where that permitting process currently stands.** (Character Limit: 1,500)

## **Is the Board contributing to the cost of this specific project/purchase?\***

- Yes
- No

## **Is this project part of a larger capital campaign?\***

- Yes
- No

## **Do you anticipate that a Champlin grant would serve as a formal match for other funding?\***

- Yes
- No

**Is there anything else about this request that we should know?** (Character Limit: 2,500)  
Optional.

## **Additional Supporting Documents** (File Size: 10MB)

Please feel free to use this field to combine and upload additional documents that may help support your proposal. These can include photos, diagrams, renderings, etc. Please only include those documents that you feel strengthen your application. If you need additional documents added to your file that will not fit here or elsewhere in the application, please email them to Heather Fraser at [hfraser@champlinfoundation.org](mailto:hfraser@champlinfoundation.org). **Uploads can only accept one document so please combine multiple documents prior to uploading.**





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## Capital Campaign Summary

This question will only open if you answered that this project is a part of a capital campaign.

**What is the overall campaign goal?\***

**How much of that overall goal has been raised to date – in hand?\***

**How much of that overall goal has been raised to date – in pledges?\***

**Is there a stand-alone capital campaign committee/leadership on the Board?\***

- Yes
- No

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## Education

This question will only open if your Area of Focus is Education.

**Education Level\***

Check all that apply.

- Middle School/Junior High School
- High School
- Higher Education
- Workforce Education Other

**Type of School\***

- Traditional Private/Independent
- Public Charter
- Parochial
- Higher Education
- Other/Not a School

**What percentage of your student body is receiving tuition assistance?**

Please answer this if you are a traditional private school or a parochial school.

**What is the average amount of tuition assistance provided per pupil receiving tuition assistance?**

Please answer this if you are a traditional private school or a parochial school.

**What percentage of the operating budget for the school is covered by tuition and fees versus revenue from donations and grants?**



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## Historic Preservation Requests

This question will only open if your Area of Focus is Historic Preservation.

**Describe the public usage/public benefit of this building and its historical and/or architectural significance.\*** (Character Limit: 10,000)

**Has your organization contemplated how it will integrate the stories and history of racially diverse peoples as part of its historic preservation mission? If so, tell us how.\*** (Character Limit: 5,000)

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## Real Estate Acquisition Requests

This question will only open if your Type of Request includes Real Estate Acquisition.

**Certified Appraisal** (File Size: 5MB)

Upload the certified appraisal of this building/property, if applicable.

**Do you have a signed Purchase & Sale agreement or other binding agreement with the seller?\***

- Yes
- No

**If you are financing any of the purchase, do you have a loan approved from the lender?\***

- Yes
- No

**Has an independent assessment of the property been performed to assess current conditions?\***

- Yes
- No

**Does the property require any state or municipal approvals prior to being put in service?\***

- Yes
- No

**If applicable, explain the near-term improvements that will be needed at this property.** (Character Limit: 1,000)

Include any available information on estimated costs and how the organization plans to fund the improvements.



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## Will you have a facilities maintenance fund?\*

- Yes
- No

## Have you projected out the 5-year carrying costs for this purchase?\*

- Yes
- No

## Do you have a facility/building committee of the board?\*

- Yes
- No

## Debt Disclosure (Character Limit: 1,000)

Are you incurring debt and, if so, how much? What is the debt capacity your board has approved?

## Alignment with Strategic Planning (Character Limit: 1,000)

Does this acquisition align with your board approved strategic planning and how long has the plan to acquire the real estate been in the works? Explain.

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## Repairs/Upgrades/Improvements Requests

This question will only open if your Type of Request includes Repairs/Upgrades/Improvements.

REMINDER: Please be sure to provide at least one contractor's estimate in the [Project Section](#) of this application.

## Has an inspector/government entity cited the organization for deficiencies related to this request?\*

- Yes
- No

If you answered 'yes' to the question above, please explain. (Character Limit 500)

## If funded, would this repair/upgrade comprehensively address the need?\*

- Yes
- No

## Do you own or lease your building/space?\*

- Own
- Lease



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## Rental Terms

This question will only open if you answered that you lease your space.

**REMINDER:** The Foundation prefers to see a 5-year lease with an automatic renewal option.

**What is your current lease term?\***

**Does the lease provide for an automatic renewal term?\***

- Yes
- No

**Are the proposed improvement costs your responsibility and not those of the landlord?\***

- Yes
- No

**Do the proposed improvements require landlord permission under the terms of the lease?\***

- Yes
- No

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## Vehicle Requests

This question will only open if your Type of Requests includes Equipment - Vehicles.

**REMINDER:** Please be sure to provide a dealer quote in the [Project Section](#) of this application.

**Is this a replacement vehicle or an addition to the vehicles you already own?\***

- Replacement
- Addition
- This would be my organization's first vehicle

**If it is a replacement, please explain why it needs to be replaced.** (Character Limit: 1,500)

**If it is an addition, how many other vehicles does your organization currently own?**

**How have you funded the purchase of vehicles in the past?** (Character Limit: 1,500)

**Usage and Storage\*** (Character Limit: 2,500)

Describe how this vehicle will be used, where it will be stored, who will be the primary driver(s), and what special licenses they need to have, if any.



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**Are there regulatory requirements related to your transporting people and, if so, what are they?\*** (Character Limit: 500)

**Have you projected out the 3-year carrying costs for this vehicle?\***

- Yes
- No

SAMPLE