Planning for Your Grant Application

Getting Started Checklist

- ☐ Familiarize yourself with Champlin funding policies, noticing what the Foundation will and will not fund. Review past grants and annual reports.

- ☐ Determine whether your organization is eligible. If you have questions, contact the office at 401-944-9200.

- ☐ If you are eligible, request access to the online portal by contacting Heather Fraser by email or phone at 401-944-9200 x115.

- ☐ Prepare the documents you will be asked to upload. Upload fields in this application are as follows:

    From All Applicants

    - ☐ Statement of Activity (Profit & Loss) for last fiscal year
    - ☐ Statement of Financial Position (Balance Sheet) for last fiscal year
    - ☐ Current Year Projected Budget (Income & Expenses)
    - ☐ Most Recent IRS Form 990 (excluding municipal libraries)
    - ☐ Project Budget
    - ☐ Contractor/Vendor Quotes and Estimates

    From Select Applicants

    - ☐ Fiscal Agent Memo of Understanding (applicants using fiscal agents only)
    - ☐ Notice of Charitable Organization Registration Approval (if applicable)
    - ☐ Audited Financials (if applicable)
    - ☐ Certified Appraisal (for real estate acquisition requests only)

- ☐ Prepare your application. While the system does allow you to save your application to access at a later time, some applicants prefer to prepare their entire application in Word *before* accessing the portal. For this reason, you can use the below Word template or download one any time from our website or from the log on page of the online portal.

- ☐ Collaborate with colleagues. If you know that you want other team members to have access to the application and/or reports, use the collaborate feature in the upper right-hand corner of the application to invite them to do so. Just keep in mind that whoever hits the Apply button at the start is automatically the primary contact of the application and all communication will go to them.

- ☐ Ask questions! If you have questions about the application, about the Foundation's policies, or about your project—please don't hesitate to reach out. We are here to help.

Frequently Asked Questions

I have never received funding from Champlin before. Any advice?
First-time awards are typically $25,000 or less, and the Foundation rarely awards first-time grants higher than $50,000. If you have never received funding before, we recommend you speak to us in advance of an application. You can contact Heather Fraser and she will put you in contact with the correct person.

I can't access my organization in the portal. Should I create a new record?
No, please don't create a new record as you might be adding a duplicate. If you need credentials or help logging in, please contact Heather Fraser.

Why can't I edit other users on my organization's record?
Individual users have permission to edit their organization information and their personal contact information. When you see additional active contacts on your organization's record, you will notice that you are unable to edit them. This is because each of these contacts is a user in the system for the organization and only they can update their contact information. If you notice a user that has changed their contact information or that no longer works for the organization, simply contact Heather Fraser to update the record on your behalf. Please note that inactive contacts will remain on the organization's record but will not have access to the portal.

Can I view the application before deciding if I want to apply?
Yes! In fact, we hope that you will read through the application, our grant-making guidelines, and our funding policies prior to opening an application. You can preview the application by clicking on the **Preview** button underneath the application you will be using. You can also find a PDF of the questions you can expect to see on The Champlin Foundation website.

Note: If you want to print the questions, simply click on the **Question List** icon in the upper right hand corner.

What does "character count" mean?
Character counts in the Foundant system include letters, numbers, spaces, and special characters. If you are working in Word, you can check the character count by selecting *Review* and then *Word Count*. Be sure to follow the **character count with spaces** totals and not the word count totals.

Should I use the character count as a guide for how much to write?
Please don't feel overwhelmed by high character counts. Much of the feedback we received was to *increase* these character counts across the board. We allow for higher character counts but please do not feel compelled to fill each space. We have added suggested paragraph parameters to help guide you but we understand and appreciate that every organization and applicant is different.

Can I upload multiple documents into one question?
Unfortunately, no. Each upload field only allows for one document, so multiple documents must be combined prior to uploading. You can do this with a scanner, with a fax machine, or with certain Adobe licenses. If you are having trouble, simply send your documents to Heather Fraser with directions on where you need them uploaded.

I have additional photos/diagrams/documents to include. Where can I upload them?
Based on user feedback, we added an additional upload field in the Project section of the application where you can share photos, diagrams, plans, etc. You can also send documents to Heather Fraser along with a brief description of what they are, and she will add them for you. Please only send documents that enhance your application. Upload options and file sizes are limited to ensure that the system can operate smoothly.

My document exceeds the allowable size parameters for uploads. What do I do?

If you find that your file is too large, please email it to Heather Fraser who will add it to your application. Please include a description of your file so we know what it is in reference to.

Can I print and/or save the application when I am finished?

Yes! At any time prior to or after submission, you can click on the **Application Packet** button in the top right-hand corner of your screen. This will give you a full PDF of the application with answers as well as any documents you have attached. The PDF can be saved and/or printed.

I work with a few organizations. Can I submit applications for more than one organization?

You can! This is a new feature that rolled out in 2024. If you'd like to apply on behalf of multiple organizations, please contact Heather Fraser.