**2025 Traditional Grant Requests - Cycle 2**

**Organization Summary**

**Organization Aliases**

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

**Area of Focus\***

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

* Arts & Culture
* Conservation & Parks
* Education
* Healthcare
* Historic Preservation & Heritage
* Libraries
* Miscellaneous
* Social Services
* Welfare of Animals
* Youth Services

**Mission Statement\***

Character Limit: 5,000

**Understanding Trends & Issues\***

How does the organization’s leadership learn about issues facing the field/clients, and then learn about solutions or model programs to address those issues?

Character Limit: 10000 (*suggested length: 1-2 paragraphs*)

**Community Served\***

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. If your organization is working to deliberately be more inclusive, please share with us how you are doing this.

Character Limit: 10000 (*suggested length: 2-3 paragraphs*)

**Number of Paid Full-Time Staff**

If applicable.

**Number of Paid Part-Time Staff**

If applicable.

**Number of Active Volunteers in Addition to Board Members**

If applicable.

**Has the organization operated as a 501(c)3 for at least three years?\***

* Yes
* No

**What year did the organization receive its 501(c)3 status?**

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

* Yes
* No

**Organization Has Been in Operation Under 3 YearsB**

**Please note that The Champlin Foundation prefers to focus support on those organizations 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.**

**Fiscal Sponsor InformationB**

**Please note that the Foundation rarely accepts applications from organizations or projects using a fiscal sponsor. If your organization does not have its own tax exemption, please read the** [**Fiscal Agent Policy**](https://champlinfoundation.org/what-we-fund/#funding-policies) **on** [**T**](https://champlinfoundation.org/house-of-worship-policy/)**he Champlin Foundation website before moving forward.**

**Fiscal Agent Name\***

**Fiscal Agent Tax ID\***

**Name of Fiscal Agent Contact Person\***

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

**Fiscal Agent IRS Determination Letter\***

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

File Size Limit: 1 MB

**Fiscal Agent Memo of Understanding\***

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 required because the fiscal agent will be bound by the terms and conditions of The Champlin Foundation’s standard grant agreement.

File Size Limit: 1 MB

**Board Summary**

**Number of Board Members\***

**Board Practices\***

Please share how often the board meets and what committees exist, if any. 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?

Character Limit: 10000 (*suggested length: 1-2 paragraphs*)

**Strategic Plan**

What are the dates covered by the organization’s most recent board-approved strategic plan?

**Board Giving Policy\***

Board members are essential to fundraising because it is their responsibility to ensure the organization has the resources (including funding) that it needs to operate. 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, talent, and event participation 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**

If any of your board do not make a monetary contribution, please help us understand why. Character Limit: 2500

**Financials**

**Do you currently have unspent funds from previous Champlin grants awarded prior to 2024?\***

* Yes
* No

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

**Year-End Actuals\***

Please upload the organization’s year-end actuals from its most recently completed **fiscal year**. This should include both a **Statement of Activity (Profit & Loss)** and a **Statement of Financial Position (Balance Sheet)**. General categories may be used and you do not need to go into line-by-line detail. Pre-audited statements are sufficient as we will ask you to upload audited financial statements separately. Municipal libraries should report only their financial reports, not the reports for the entire municipality. If you are a chapter to a national organization, please provide financials relevant to the RI work only.

**Current-Year Projected Budget\***

Please upload the organization’s board approved projected budget for its current **fiscal year** (income & expenses). Please do not include a report with every donor or expense itemized. General categories suffice. National organizations should provide only the RI operating budget.

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

This should align with the expense amount on the current year projected budget that was submitted above. If you are an in-state chapter to a national organization, please just indicate the budget for RI work only.

**Does this organization receive Federal support in 2024 or 2025?**

Check all that apply

* This organization receives funding directly from the Federal government
* This organization receives Federal pass-through funding from the State
* This organization receives Federal funding as a subcontractor
* This organization receives goods or supplies from a Federal department
* This organization does not receive any Federal support

**In FY 2024, what percentage of the organization’s budget came from Federal funds, whether directly, passed-through, or as a subcontractor?**

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

* Deficit
* Surplus
* Break Even

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

* Yes
* No

**What was your total debt 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 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

**IRS Form 990**

The IRS requires that tax exempt organizations gross receipts greater than $200,000 or assets greater than $500,000 file an annual Form 990. If an organization has less than $50,000 in gross receipts, it must submit a Form 990-N e-Postcard. If receipts are more than $50,000 but less than $200,000 and total assets less than $500,000, the tax-exempt organization can choose to file the Form 990-EZ, rather than the full Form 990. As public availability of current 990s has been greatly delayed, please upload the organization’s most recent 990 here. **Municipal Libraries may skip this question.**

**Is your organization required to have an audit?\***

A fiscal audit is mandated by the State for any organization that is required to register through DBR and has total receipts of $500,000. A single audit is mandated by the federal government for any organization that receives federal funds, whether directly or through the state, in the amount of $750,000 or more. If you are required to complete these audits, you must upload them below. Please note that a compilation is not an audit. Check all that apply.

* The State requires my organization to complete a fiscal audit
* The Federal government requires my organization to complete a single audit
* My organization is not required to complete an audit

**Audited Financials**

**Financial Notes**

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

**Unspent Funds DetailB**

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

**Unspent Funds Detail**

Explain the reason for any unspent funds from grants awarded prior to 2024 and indicate the plan for how and when the funds will be used. If the only unspent funds are from a grant awarded in 2024, you may skip this question.

Character Limit: 5000

**Project Information**

**Amount of Grant Request\***

Total grant amount you are requesting from The Champlin Foundation.

**Project Name\***

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\***

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.** In the course of 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 there is a specific community that will be served or impacted by this undertaking, please be sure to reference that in your narrative. If you are requesting support for more than one project, pleas[e **click here**](http://champlinfoundation.org/wp-content/uploads/2020/12/Project-Description-2021.pdf) for instructions on how to format your project description. If requesting funds to supplement increased expenses of a previously awarded Champlin grant, please list this as a separate priority item. Please be sure to include information regarding how much of the previous project has been completed, and what additional funds you need to move forward. We would expect to see contractor/vendor quotes that can be compared to what was originally submitted with the first request.

Character Limit: 10000

**In what city or town will this project take place or the equipment be used?\***

Please note that you can only make one selection and it should be the physical location of where the project is or where the equipment will be housed. If you are requesting multiple projects for multiple sites, please indicate this by choosing the first option on the list.

**Type of Request\***

Check all that apply.

* 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 (only projects previously funded by a Champlin grant are eligible)
* Supplemental Funds for a Previously Awarded Grant

**Project Budget**

If you have a project budget, please upload it here. Please include expenses and anticipated income sources. Click [here](https://champlinfoundation.org/wp-content/uploads/2022/05/Sample-Project-Budgets.pdf) for a few sample budgets that might work for your project.

**Total Project Cost\***

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

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

* Yes
* No

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

**Additional Sources of Funding**

List all other sources of funding that have been secured or are being pursued for this project. Character Limit: 2500

**Project Timeline\***

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 by December 2025 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.

Character Limit: 2500

**Project Quotes and Estimates**

Combine and upload any quotes or estimates that help support your request. Because the Foundation looks to have funds spent within 12 months of receipt, we prefer to support "shovel-ready" projects and expect to see actual contractor/vendor estimates and bids. If quotes are not yet available, please send via email no later than September 30th. **Uploads can only accept one document so please combine multiple documents prior to uploading.**

**Does the project require any federal, state, or municipal permits, approvals, or inspections?**

* Yes
* No

**If yes, please explain where that permitting process currently stands.**

Character Limit: 1500

**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 own or lease your building/space?\***

* Own
* Lease

**Is there anything else regarding this project request that we should know?**

Optional.

**Additional Supporting Documents**

Optional. 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. **Uploads can only accept one document so please combine multiple documents prior to uploading.**

**Capital Campaign SummaryB**

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

**Campaign Progress to Date?\***

|  |  |
| --- | --- |
| **Amount Received and Expended** | $ |
| **Amount Received and In-Hand** | $ |
| **Outstanding Pledges** | $ |

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

* Yes
* No

**Historic Preservation & Heritage ApplicantsB**

**Public Programming and Accessibility\***

Please describe the types of programming the organization offers and who can participate. Please include information such as the organization’s hours of operation, the frequency of programming, outreach efforts to underserved communities, etc.

Character Limit: 10000 (*suggested length: 2-3 paragraphs*)

**Architectural Significance**

If the building is historic, please outline the architectural significance of the space.

Character Limit: 10000 (*suggested length: 2-3 paragraphs*)

**Preservation of History and Culture\***

Please describe how the organization preserves and promotes Rhode Island’s history, heritage, and culture. Help us understand how visitors are introduced to the entire history of the people who lived, worked, and perhaps died at your historic location, or contributed to the history that your organization focuses. Character Limit: 10000 (*suggested length: 2-3 paragraphs*)

**Education ApplicantsB**

**Education Level\***

Check all that apply.

* Middle School/Junior High School
* High School
* Higher Education
* Workforce Development
* Other

**Type of School\***

* Traditional Private/Independent
* 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. Percentages are to be given in decimal form so 100% is represented as 1.00, 75% is represented as 0.75 etc.

**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 is covered by tuition & fees vs. donation & grant revenue?**

Please answer this if you are a traditional private school or a parochial school. Percentages are to be given in decimal form so 100% is represented as 1.00, 75% is represented as 0.75 etc.

**Does the school receive Title I funding?**

* Yes
* No

**What percentage of your student body is receiving free or reduced lunch?**

Please answer this if you are a charter or other public school. Percentages are to be given in decimal form so 100% is represented as 1.00, 75% is represented as 0.75 etc.

**Requests for Real Estate AcquisitionB**

**Certified Appraisal**

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

File Size Limit: 5 MB

**Do you have a signed Purchase & Sale Agreement?\***

* Yes
* No

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

* Yes
* No

**Has an independent property inspection been performed to assess current conditions?\***

* Yes
* No

**Does the property require any state or municipal approvals or zoning changes prior to being put to its intended use?\***

* Yes
* No

**If applicable, explain the near-term improvements that will be needed at this property.**

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

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

* Yes
* No

**Have you projected out the 5-year carrying costs for this purchase and the revenue to cover them?\***

Please note that the Foundation expects applicants requesting funds for building acquisition to have developed a proforma budget with a realistic projection of the 5-year carrying costs.

* Yes
* No

**Do you have a facility/building committee?\***

* Yes
* No

**Debt Disclosure**

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

Character Limit: 1000

**Alignment with Strategic Planning**

Was this acquisition part of your most recent strategic plan? How long has the plan to acquire the real estate been in the works? Explain.

Character Limit: 1000

**Requests for Repairs/Upgrades/ImprovementsB**

**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

**Rental TermsB**

**REMINDER: The Foundation likes to see a 5-year lease with an automatic renewal option for any leasehold improvements it might fund.**

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

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

* Yes
* No

**Are the requested improvements the responsibility of the tenant under the lease?\***

* Yes
* No

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

* Yes
* No

**Requests for VehiclesB**

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

**How have you funded the purchase of vehicles in the past?**

Character Limit: 1500

**Usage and Storage\***

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.

Character Limit: 2500

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

* Yes
* No