**Application for Loan/Grant from the Foundation**

This application with the supporting documentation referred to below is to be submitted as a complete package to the Foundation Liaison Person at the Diocesan Office at least two (2) weeks prior to the Foundation’s Screening and Review Committee Meeting as listed on the Diocesan Website.

Note that projects involving change to the “footprint” of buildings or significant structural repairs or alteration will also require review by, and approval from, the Property Committee of the Diocesan Board. Early contact with the Chair of the Property Committee is highly recommended prior to taking many of the steps that produce part of the documentation required for this application.

**Part I** [To be filled out on this form.]

1. Date of this application:
2. Descriptive Title of proposed project
3. Potential Loan Amount: Requested Grant:
4. Parish Name:

Phone: E-Mail: Web

1. Rector/Priest-in-Charge:

Phone: E-Mail:

1. Senior Warden:

Phone: E-Mail:

1. Junior Warden:

Phone: E-Mail:

1. Authorized Spokesperson for details of this Project:

Phone: E-Mail

**Parish Statistics** Please fill in each entry in the table below. (Most of this data can be found quickly in the Parish’s Annual Parochial Reports.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Ten Years Ago** | **Five Years Ago** | **Two Years Ago** | **Last Closed Year** | **This Year Estimate** | **Two - Three Years Out Estimate** |
| **Parish Membership** |  |  |  |  |  |  |
| **Parish Communicants** |  |  |  |  |  |  |
| **Parish Families** |  |  |  |  |  |  |
| **Average Sunday Attendance** |  |  |  |  |  |  |
| **Church School Registration** |  |  |  |  |  |  |
| **Average Church School Attendance** |  |  |  |  |  |  |
| **Confirmations/ Receptions** |  |  |  |  |  |  |
| **Number of Pledge Units** |  |  |  |  |  |  |
| **Average Pledge Amount** |  |  |  |  |  |  |
| **Total Annual Budget (nearest $1,000)** |  |  |  |  |  |  |
| **Total F. M. V. for all Parish Investments (nearest $1,000)** |  |  |  |  |  |  |

**Additional Parish Data:**

1. Are Diocesan Mandatory Assessment Payments up to Date?

1. What portion of your Diocesan Asking is being paid?
2. When was your last request for a Grant from the Foundation?
3. List initial date and current Balance of any open loans from the Foundation:
4. When was your last “Capital Campaign” type fund raising?

What was its Goal? What was the actual?

1. What percentage of annual parish income is spent on outreach to the local community in which most of your membership resides?
2. Are any Parish structures in an Historic district or Historic/Sacred site listing?

If so, indicate the correct designation(s):

**PART II** This section requires appropriate written documentation to describe the project and

why it is needed, specifically including responses to the following considerations:

1. A full description of the scope of the project.
2. For Repair/Replacement type work, a brief explanation detailing why this work became a distinct project rather than having been covered as a part of on-going operations.
3. An estimate of the overall cost of the complete project and details of the “expected source” of all the funds needed to complete the project and “plan B” for unrealized “expected sources”.
4. The projected time line for the total project; including planning, fund raising, bid negotiation, preparation work, any “dislocation” expenses, and any “follow-up” tasks. Include an indication of when any monies provided by the diocese would be spent.
5. What impact will this project have on the surrounding community?
6. Will the local community know that you are doing something significant?
7. How will the Parish be better able to carry out the strategic “marks of mission” of the diocese if the project is completed?
8. What would be the impact on both the community and the Parish if the project were not done?
9. What is the expected life span of this planned work?
10. Will any parts of this work improve the access to your facilities for those with disabilities?

**Notes concerning Loans:** The Foundation’s policies make loans available at the lowest practical interest rates and permit wide latitude to match the needs of each project. Once the Board has approved providing loan support to a parish, the terms of the loan are customized for every individual case by the Board Treasurer and the Parish Vestry. This provides for maximum advantage to the Parish: long-term source of funds with low payments; emergency availability of funds with no penalty for “immediate” payoff; using capital pledges for large payments and short terms; bridge loans to start work sooner while other funding accumulates; and other combinations.

**PART III** This is a check list of the documents of which a copy must be submitted as a part of the application.

1. Latest Parish Financial Audit report. (This must be for one of the last two calendar/fiscal years.)
2. Latest inspection report from the Parish’s Insurance Carrier. (This must be no more than 24 months old.)
3. Current Year’s Budget for both income and expense categories.
4. Latest closed year’s income/expense statement showing both budget and actual $$$.
5. If application is in the 3rd or 4th Quarter, the Treasurer’s report as of the 2nd Q.
6. The current Balance sheet no more than six months old. (If such is not regularly prepared, submit a listing, signed by the Treasurer, showing all Liabilities and all Accounts/Investments, including restricted/unrestricted designations.)
7. A signed statement from the Clerk of the Vestry documenting a Vestry motion that the Vestry is aware, and approves submission, of this application and designating the contact person listed above to speak for the project.
8. If possible, a few photos documenting the problems to be addressed by this project.
9. Copies of the estimates/quotations received from potential contractor(s) for the project. The normal expectation is submissions from three vendors. This is good stewardship even when the probable vendor is “pre-ordained” for clear reasons.
10. For any project that changes the “footprint” of the structures or property lines, the Property Committee of the Diocesan Board must review the project prior to any submission to the Screening and Review Committee of the Foundation and documentation of that review must be attached.

Please submit all the above documentation at one time in one package to:

Foundation of the Diocese of Central New York

c/o Diocesan Liaison to the Foundation

P.O. Box 3520

Syracuse, NY 13220