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diocese-oregon.org

Application for Grant, Loan, or Loan Guarantee from Board of Trustees

The Board of Trustees has authority over the invested funds of the Diocese. Some funds are in restricted accounts, limited to loans. Others are unrestricted and may be used for either grants or loans. The Trustees have a fiduciary obligation to conserve Diocesan funds. We therefore will make grants or loans only where we believe it is a sound investment for the Diocese as a whole. We appreciate your thoughtful answers and gathering of materials to allow us to make informed decisions on behalf of the Diocese.

Per Canon 3.6, upon receipt at the Diocesan Office, applications for funds for building, remodeling or additions of a permanent nature will be forwarded to the Commission on Church Architecture and Allied Arts. Applications for funds for program or redevelopment will be forwarded to the Mission and Ministry Committee of the Diocesan Council. That Committee or the Council as a whole may request additional information.

Date of request _____

Church making request

Name of Church _____ Location _____

Contact person:

Name _____

Address _____

Phone _____ Email _____

Is the church in compliance with Canon 5.2 (the DPA canon)? Yes No

(Note: DPA is what allows the Diocese to provide assistance to churches. The Board of Trustees will generally not make grants or loans to churches not in compliance. Application for reductions of DPA must be made to the Diocesan Council.)

For what purpose are you requesting funds? (Please describe briefly.)

How much money are you requesting? \$ _____ as a loan \$ _____ as a grant

Diocesan guarantee of third-party loan of: \$ _____

Please include the following information and documentation:

1. What is the anticipated overall cost of the project? \$ _____

2. Descriptions of this project. (These may be original to this application or may be, for example, parish newsletters or reports within Annual Reports. If it is a new building or remodel, include architectural drawings.)
Description enclosed labeled _____

3. Within the past five years, has the church created or updated a mission or vision statement, a long-range parish plan, a parish profile, or any similar document?
Yes No If "yes," please provide a copy.
Enclosed labeled _____ N/A

4. Year of last audit submitted: Year _____

5. A description of how this project fits with the Diocesan Mission Plan?
(A copy of the Diocesan Mission Plan is posted on the Diocesan website)
Enclosed labeled _____

6. The most recent three Annual Reports
Enclosed labeled _____

7. A current year-to-date financial statement (including balance sheet). Also enclose annual financial statements and balance sheets for each of the preceding three years if they are not already included in the Annual Reports.
Enclosed labeled _____

8. If this is a building project, a copy of the church's property tax statement showing assessed and market values.
Enclosed labeled _____ N/A

9. Does the church have an endowment fund?
Yes No If "yes," please attach a description of the fund, including any restrictions on its use.
Enclosed labeled _____

10. Does the church have any outstanding loans?
Yes No If "yes," list the lender's name, date of origination, date of maturity, unpaid balance, amount of original loan, and monthly payment amount and status.
Enclosed labeled _____

11. Has an energy audit been conducted and the results considered in the development of this project? (See Energy Trust of Oregon, or your local utility to arrange an audit.)
Yes No If yes, please attach the report.
Enclosed labeled _____ N/A

