



*the*  
**EPISCOPAL**  
**CHURCH** *in*  
WESTERN OREGON

## 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.)*

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*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

12. *If the project is a multi-phase one, break costs down by phase and include a description of contingencies.*

Enclosed  labeled \_\_\_\_\_ N/A

13. *What is the basis for the cost estimate? (bids, etc.)*

*(Three bids are required for any major project; if not submitted please explain why.)*

Enclosed  labeled \_\_\_\_\_

14. *Please describe the overall funding strategy for the project, e.g. existing funds, fund-raising campaign, donated time and expertise, etc.*

Enclosed  labeled \_\_\_\_\_

15. *Enclose a pro-forma budget for the next five years reflecting the anticipated effects of the proposed project. (If you are requesting a loan, the budget should include repayment.)*

Enclosed  labeled \_\_\_\_\_

16. *What other documents or information would be helpful in understanding this project and its context? (If the request is for program funding or redevelopment, you should include a detailed analysis of current and projected demographics of the wider community, other area churches and community organizations, and how the proposal will facilitate church growth in that context. You should also include an analysis of your church's demographics, life cycle, and leadership team and why you believe you are well positioned for growth.)*

List Additional documents enclosed:

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When you have completed this form, please return it and all included documentation and mail it to:

Episcopal Church in Western Oregon  
Board of Trustees  
PO Box 22310  
Milwaukie, OR 97269