



(NOTE: Do not use this package if submitting a building-related application. Instead, please use the "Building Project Application Package for Applicants Seeking a Loan and/or a Grant".)

The **Program Application Package** includes the following documents:

- This cover page (page 1);
- **Criteria for Awarding Loans and Grants** (page 2);
- **Checklist for Applicants for a Loan and/or a Grant** (pages 3-4);
- **Application for a Loan and/or a Grant for a Program** (pages 5-8).

Before completing the application form, please make sure that you have all of the documents listed above, and that you have read them carefully. If any of these pages is missing, please contact the Anglican Foundation office, or download the entire application package from www.anglicanfoundation.org.

Before mailing your application, please ensure that you have included all of the items listed on the **Checklist for Applicants for a Loan and/or a Grant**. The Board of Directors of the Foundation will not consider an application that does not contain answers to all questions or which does not include all supporting documents, including a financial statement for the previous year and a budget for the project.

★ NEW (July 2008) ★

Applicants are now required to submit only one (1) printed copy of the completed application package and supporting information. Please mail your application to the address listed below. Please note that applications submitted by fax or email (as a scanned attachment) must be followed up with a mailed application package.

Send your completed application package to:

The Anglican Foundation of Canada
80 Hayden Street
Toronto, ON M4Y 3G2

Fax: (416) 924-8672

Email: foundation@anglicanfoundation.org

If you have any questions about the application package or process, please contact the Foundation office by telephone at (416) 924-9192 (ext. 322, 253, or 234), or by one of the means listed above.



CRITERIA FOR AWARDING LOANS AND GRANTS

1. Types of projects: The Anglican Foundation of Canada is a separately incorporated body whose purpose is to give financial and other aid to any part of the Anglican Church in Canada where there is an urgent need for assistance. The Directors are particularly interested in supporting new and imaginative projects that might have difficulty in finding financial help. The Foundation provides assistance through low-interest loans and/or grants to projects of Anglican churches and organizations within Canada. These include: certain types of building projects, ministries for the future, education, ecumenical projects, areas of research, “seed” and “risk” projects, and creative arts as related especially to worship and liturgy.

2. Applicant responsibilities prior to submission: The Board of Directors prefers to receive applications after **every effort** has been made by the applicant to put together a complete financial package, raising as much support locally as possible. The request of the applicant should therefore be for the balance needed (within reason).

3. Not more than half: The policy of the Board is to fund not more than 50% of any program or project. The applicant is expected to have a minimum of 50% of funding in place prior to submission of an application. **The Board will not consider any application without 50% of funding in place.**

4. Time-sensitive: Funding is awarded, and must be claimed, in the 12-month period following the approval of the application.

5. Independence of loans and grants: The awarding of a loan does not guarantee the awarding of a grant for the same project, and vice versa.

6. Role of the Diocese or Governing Body: The Board considers a Diocese or Governing Body of an Anglican Theological College approving an application to be a ‘partner’ with the applicant and with the Foundation. Our understanding is that, prior to submission of an application, The Diocese or Governing Body has:

- examined the project and the ability of the applicant to effectively manage the financial responsibilities of the project;
- approved the project and considered giving financial assistance to it;
- given permission to submit an application to the Foundation (if deemed essential);
- guaranteed repayment if a loan is awarded by the Foundation.

7. Letters of support: Two letters of support are required with each application. The first is a letter of support from the **Diocesan Bishop**, sharing his or her knowledge of the background of the project, and clarifying why the project is important to the life and mission of the diocese. The second is a letter from a representative of the **Diocesan Council**; this letter must include the date of the meeting at which the application was reviewed and approved, as well as the actual wording of the motion that approved the application’s submission to the Anglican Foundation of Canada.

8. Maximum disbursements: The maximum loan award has been set at \$100,000. All loans depend upon both the total cost of the project and the perceived ability of the applicant to effectively manage the financial responsibilities of the project. The maximum grant award has been set at \$15,000. **No loan or grant higher than these figures will be awarded.**

9. Limitations on disbursements: No loan or grant will be awarded:

- To an individual;
- For the purchase of, or repairs to, church organs or other musical instruments;
- For the installation of stained glass windows;
- For operating budgets, bridge financing, salaries or travel expenses.

An application for a project that has already been completed will normally not be considered.

10. Deadlines for submission: The Board of Directors meets three times per calendar year and applications **must** be received by the deadline date set before each meeting. The dates of the meetings and the deadline dates may be obtained from the Foundation Office or the website (www.anglicanfoundation.org).

CHECKLIST FOR APPLICANTS FOR A LOAN AND/OR A GRANT

BEFORE SUBMITTING AN APPLICATION

- ❑ **Contact your Diocese and/or the Anglican Foundation to confirm that your region's annual application quotas have not already been reached.** Please note that only three applications from each Diocese, Province and General Synod will receive consideration in any calendar year. A maximum of two applications per diocese will be considered at any single meeting. One application from each theological college may be submitted each year.
- ❑ **Present an outline of the project to the Diocesan Property Committee (or other relevant committee) for its consideration.** It is hoped that this committee will recommend your project to the Diocesan Council.
- ❑ **Obtain Episcopal and Diocesan endorsement for the project.** Both the **Diocesan Bishop** and the **Diocesan Council** must endorse the application, in writing. (See "**Include both letters of endorsement**" in the section "**Preparing and submitting an application**," below.)
- ❑ **Seek Diocesan financial assistance.** The Board expects applicants to request financial assistance from the Diocese prior to submitting their application, and to report on the result of that request in part 5 of the application.
- ❑ **Secure at least 50% of the project's funding.** The applicant is expected to have a minimum of 50% of funding in place prior to submission of an application. Details of this funding must be reported in part 4 of the application.
- ❑ **Verify the application submission deadline.** All applications must arrive in the Foundation office no later than the deadline date set by the Board of Directors. Applications submitted after the deadline date will be deferred to the next meeting of the Board.

PREPARING AND SUBMITTING AN APPLICATION

- ❑ **Use the designated form.** All applications must be submitted on the most recent version of the application form, available from the Anglican Foundation office, or from our website (www.anglicanfoundation.org). Please ensure that you have answered all questions completely, and that you have secured all of the necessary signatures requested on the final page of the application form.
- ❑ **Supply all required supporting material.** All applications should be supported by brochures, budgets, and any other material which can enable the Directors to assess the merits of the application, including full details of diocesan, governmental, community and ecumenical financial support for the project. **See parts 2 and 3 of the application form for a more thorough list of materials required.** Please note: "*budgets*" include expected **expenditures** AND expected **sources of income**.
- ❑ **Include both letters of endorsement.** Each application must include:
 - **a letter from the Diocesan Bishop**, detailing the project and providing reasons why the project should be supported by the Anglican Foundation of Canada;
 - **a letter from the Diocesan Council**, which includes the date at which the application was reviewed and approved, as well as the actual wording of the motion to approve the application for submission to the Anglican Foundation of Canada.

Any application without BOTH letters will be automatically disqualified from consideration.
- ❑ **Submit only one copy.** One (1) copy (printed double-sided) of each application and all supporting material must be supplied at the expense of the applicant.



CHECKLIST FOR APPLICANTS FOR A LOAN AND/OR A GRANT

AFTER SUBMITTING AN APPLICATION: FREQUENTLY ASKED QUESTIONS

- ❑ **“Will the Foundation confirm receipt of our application?”** The Anglican Foundation will send a letter confirming receipt of an application as soon as possible upon the application’s arrival in our office. If you would also like to receive confirmation of receipt via email, please clearly state this in your application package.
- ❑ **“How long will we have to wait to find out if the application was approved?”** You should receive word regarding your application’s status (approved, declined, or deferred) within two weeks following the meeting at which the Board of Directors considered your application.
- ❑ **“Our application has been deferred. Now what do we do?”** An application is deferred for one of two reasons:
 - The Anglican Foundation may not have received the application before the deadline; in this case, the application will automatically be deferred until the next scheduled meeting of the Board of Directors, and you need do nothing.
 - Further information may be required before the Board of Directors can make a decision. In this event, the office of the Foundation will contact you to request the required information.
- ❑ **“Can we resubmit our declined application for future consideration?”** No. Once the Board of Directors has considered and declined an application, the application cannot be reactivated.
- ❑ **“Our grant application was approved. When can we expect to receive the funds?”** For grants, payment is included with the letter announcing the approval of the application, unless a loan was also awarded. In this case, the grant amount is awarded when the loan is awarded (see below).
- ❑ **“Our loan application was approved. Will we receive the funds right away?”** If your loan application is approved, we will include a repayment schedule and the form ***Undertaking for Repayment of a Loan*** with the letter announcing the application’s success. Once we receive your completed copy of the form of undertaking and post-dated cheques for the first twelve (12) payments, we will disburse the funds. If a grant was also approved, it will be disbursed with the loan in a single cheque.
- ❑ **“How often do we need to make a loan repayment?”** All new loans are repayable in equal monthly instalments, plus interest (calculated at the current rate set by the Board of Directors). A **Schedule of Repayment** will be provided. All payments are due on the 25th day of each month; the first instalment comes due on the 25th day of the month following the disbursement of the funds.
- ❑ **“Can we make lump-sum payments against our loan?”** Repayments are amortized over a period of up to 30 years to match the budget of the borrower. Lump-sum payments may be made at any time without notice or penalty.

**APPLICATION FOR A LOAN AND/OR A GRANT
FOR A PROGRAM
ANGLICAN FOUNDATION OF CANADA**

(Do not use this form for a building related application)

PART 1 - THE APPLICANT

This Application Form is for a Parish, Diocese, Ecclesiastical Province, National Church or Anglican Theological College.

(Please circle one of the above)

Name of Programme or Project: _____

Applicant Name: _____

* (Church, Diocese, Province, National Church or College)

Address and Postal Code _____

* If church is part of a larger parish, name of parish: _____

Clergy-in-charge: _____
(Print Name)

Contact Person: _____
(Print Name)

Telephone: (Day) _____ (Night) _____ (Fax) _____

E-mail address: _____

Diocese: (if this is a church application) _____

Charitable Business Number (B.N.): _____

Are you currently a member of the Anglican Foundation of Canada? Yes _____ No _____

PART 2 - THE PROJECT (PROGRAM)

Briefly describe the project (program)

On separate pages give a full description of the program being undertaken or proposed. Give details of how the program fits in any long-term plans for the parish, diocese, province or national church. If a parish, please also outline any additional information about the church, its history, finances, statistics, etc. which might be helpful to the Anglican Foundation Board of Directors in their consideration of the application.

What is the **TOTAL COST** of the project (program)? \$ _____

What is the date that the grant or loan will be needed? _____

PART 3 - FINANCIAL INFORMATION

The application **MUST** be accompanied by:

- 1. Complete financial statements for the last full year including a balance sheet (assets and liabilities) and full details of revenue and expenses.**
- 2. If available, an interim financial statement for the current year (Operating Statement).**
- 3. A complete statement of any fund dedicated to the project.**
- 4. The Budget of the Project, Operating Statement and Balance Sheet are to be submitted on a separate sheet. Copies of all quotes are not to be included.**

PART 4 - FUNDING OF THE PROJECT

The Total Funding shown below must be at least 50% of the estimated total cost of the project (program) before the Foundation will consider making either a loan or a grant.

Cash already raised locally.....\$ _____

Money pledged locally but not yet received.....\$ _____

Loans available locally.....\$ _____

Diocesan, government or other funds committed.....\$ _____

Value of Volunteer Labour and Donated Material.....\$ _____

TOTAL FUNDING (available and committed).....\$ _____

PART 5 - ASSISTANCE REQUESTED FROM THE FOUNDATION

Are you applying for a Grant?.....(Yes/No) If yes, for what amount? \$ _____

Are you applying for a Loan?(Yes/No) If yes, for what amount? \$ _____

Over how many years do you propose the loan be repaid? _____ years.

TOTAL of loan and grant being applied for.....\$ _____

Have you asked the Diocese to provide funds for the project? _____
(Yes/No)

If Yes, for how much? \$ _____ Amount given: \$ _____

If Funds received from the Diocese is it a Loan or a Grant? _____

If a Loan provide all details: _____

If you have not asked the Diocese to provide funds, why not? _____

PART 6 - STATISTICAL INFORMATION

How many congregations or points are there in the church (or mission) making application? _____

About what year was the church (or mission) established? _____

How many families are on the church or congregational roll of the applicant? _____

How many individuals are on the church or congregational roll of the applicant? _____

What is the total number of persons who look to the church of the applicant for ministry? _____

How many identifiable givers are there? _____

Date of last Stewardship Visitation Campaign, nature and results: _____

PART 7 – ADDITIONAL INFORMATION

What was the total amount raised for all purposes in the last full year? \$ _____

How much was paid toward diocesan apportionment or assessment in that year? \$ _____

What grants did you receive in that year? From the diocese \$ _____

From General Synod \$ _____ From other sources? \$ _____

If the church or mission owes a balance on any outstanding loans, please give details: _____

