

2022 Grant Application #1

Ray & Kay Eckstein Charitable Trust

REQUEST INFORMATION

Project Name*

Program or Project Name. If applying for general operating expenses, please name "General Operations YYYY".

Character Limit: 100

Total Request Amount*

Please indicate entire amount requested. If requesting payment over multiple years, amount should reflect the sum of all years. If this amount is different than the amount approved in the LOI, please provide a detailed explanation of the differential in the purpose box below.

Character Limit: 20

Purpose of the Request*

Provide a brief, descriptive narrative for the use of the funds. Please be as specific as possible.

Character Limit: 1000

Is this a funding request for a capital campaign, single year or multiple year?*

(A limited amount of funding is provided for single-year or multi-year, large capital requests that are designated for the acquisition, construction, renovation, or improvement of a property.)

Choices

Yes

No

If yes, please provide an explanation.

Example: \$20,000 per year for 3 years.

Character Limit: 250

What is the total budget for the program and/or project?*

If this is for general operating expenses, enter the total operating budget amount.

Character Limit: 20

What is the timeline for implementation?*

Character Limit: 200

Ongoing Program/Project

If this funding request will result in an ongoing program/project, describe plans and specific sources for future/long term funding.

Character Limit: 500

Geographic Areas Served (narrative)*

Please indicate who will benefit from this program/project. Helpful information may include the general population of the area and the projected number of individuals to be served.

Character Limit: 1000

Program/Project Funding*

Please list other anticipated funding for this program/project such as program income, grants, donors, etc. Typically, RKECT should NOT be the only funder from whom your organization is requesting funds.

Character Limit: 500

List other funders to whom this current proposal has been or will be submitted.*

Indicate amount requested and status of request (submitted, pending, funded, and/or declined). Please also specify the amount of the grant and date received.*

Character Limit: 500 / File Size Limit: 2 MB

Grant Opportunity*

Please indicate how you/your organization was made aware of the Ray & Kay Eckstein Charitable Trust and/or this grant opportunity.

Character Limit: 1000

ORGANIZATION INFORMATION

Organization's Fiscal Year Start Date*

Character Limit: 250

Organization's Fiscal Year End Date*

Character Limit: 250

Previous Recipient Information

Please provide detail of previous awards that you have received from RKECT.

Character Limit: 1500

Describe challenges and opportunities facing the organization in the next 3 to 5 years.*

Character Limit: 500

Briefly detail the organization's programs, activities, and accomplishments.*

Character Limit: 500

Please detail formal or informal relationships with other organizations.

(optional)

Character Limit: 500

Funding Sources (list)*

Please indicate the organization's sources of funding and the amounts for each.

Character Limit: 2000

Number of employees associated with the organization:*

Character Limit: 10

Number of volunteers associated with the organization:*

Character Limit: 10

Mission Statement*

Character Limit: 2000

Doing Business As

(if different than Legal Name)

Character Limit: 250

Year Founded*

Character Limit: 4

New Organization:

Has this organization previously applied with RKECT since 2016?

Choices

Yes

No

Are you a Catholic organization that is listed in the Official Catholic Directory?*

Choices

Yes

No

NEW ORGANIZATION INFORMATION

Provide the Organization's Legal Name*

(as shown on the IRS Letter of Determination)

Character Limit: 250

Tax Exempt Status*

Please indicate the organization's tax exempt status as noted on your IRS Determination Letter.

Character Limit: 100

Attach a copy of the IRS determination letter.*

(Please note that this is not the state sales and use tax exemption certificate. If there has been a name change, provide copies of the amended state certificate of incorporation and amended IRS Letter of Determination).

File Size Limit: 3 MB

Is the organization using a fiscal agent/sponsor?***Choices**

Yes

No

If yes, please provide name of agent or sponsor.

Character Limit: 200

CATHOLIC ORGANIZATIONS

Under what Diocese are you listed?

Character Limit: 150

Please provide page number and year of directory

(if your organization is listed in the Official Catholic Directory).

Character Limit: 100

Attach a copy of your listing here.

File Size Limit: 1 MB

RESULTS AND EVALUATION

Impact Goals*

What is your organization aiming to accomplish with this grant? List three, specific, measurable short term goals.

Character Limit: 2000

What will be the long term impact of this project and/or program?*

How does it further advance the organization's mission?

Character Limit: 500

Impact Strategies*

What are your organization's strategies for making this happen?

Character Limit: 2000

Impact Indicators*

How will your organization know if you are making progress? For example, will the effectiveness of projects and/or programs be measured by intake sheets, checklists, surveys, questionnaires, etc.

Character Limit: 1500

Who will measure and track outcomes for this grant request?*

(i.e. staff, consultant, volunteers, etc.)

Character Limit: 200

Describe the involvement of the organization's clients in the evaluation process.

Character Limit: 500

How will leadership use the results of the evaluation?*

Character Limit: 500

FINANCIAL INFORMATION

Total Assets*

Enter Total Assets from most recent Fiscal Year End Balance Sheet.

Character Limit: 20

Total Liabilities*

Enter Total Liabilities from most recent Fiscal Year End Balance Sheet.

Character Limit: 20

Total Revenue*

Enter Total Revenue from most recent fiscal year end financials.

Character Limit: 20

Total Expenses*

Enter Total Expenses from most recent fiscal year end financials.

Character Limit: 20

Contributions Gifts and Grants*

Enter Total Contributions and Grants from most recent year end financials.

Character Limit: 20

Total Amount of Government Grants*

Enter Total Government Grants received in your most recent fiscal year. .

Character Limit: 20

Program Expenses*

Enter total amount of program expenses from most recent year end financials. [NOTE: Program Expenses plus Administrative Expenses plus Fundraising Expenses should equal Total Expenses.]

Character Limit: 20

Administration Expenses*

Enter Total Amount of Administration Expenses from most recent fiscal year end financials. [NOTE: Program Expenses plus Administrative Expenses plus Fundraising Expenses should equal Total Expenses.]

Character Limit: 20

Fundraising Expenses*

Enter Total Fundraising Expenses from the most recent fiscal year end financial statements. [NOTE: Program Expenses plus Administrative Expenses plus Fundraising Expenses should equal Total Expenses.]

Character Limit: 20

Total Operating Budget for Organization*

Enter the total operating budget amount for the organization.

Character Limit: 20

Provide a copy of the organization's operating budget for the current year.*

File Size Limit: 1 MB

Provide a project/program budget if appropriate for the request.

File Size Limit: 1 MB

Does your organization have an endowment?*

Choices

Yes

No

If yes, please provide the endowment size (market value as of the fiscal year-end).
(optional)

Provide Market Value and Date of Evaluation

Character Limit: 200

Does the organization file tax returns with the IRS?*

Choices

Yes

No

IRS 990

Tax Return*

Mark which tax return the organization is required to file.

Choices

IRS 990

IRS 990-EZ

IRS 990-N

Attach the most recent IRS 990 report.

(if applicable)

File Size Limit: 20 MB

Financial Statements*

Please include the most recent fiscal year end balance sheet and income statement.

Balance Sheet Upload

File Size Limit: 3 MB

Income Statement Upload

File Size Limit: 3 MB

RELIGIOUS ORGANIZATIONS NOT REQUIRED TO FILE TAX RETURNS

Financial Statements - RELIGIOUS ORGANIZATIONS

If your organization is exempt from filing an IRS 990, please provide year end financial statements from last **THREE** years (income statement and balance sheet minimum).

Please NOTE: If your organization's annual gross income is greater than \$500,000, AUDITED financial statements in their entirety must be submitted (this includes auditor's notes). If annual gross income is \$250,000 or greater, but less than \$500,000, financial statements that have been created or reviewed by a CPA are required. If you have audited financials regardless of gross income, please provide if you do not file IRS 990.

If organization is less than three years old, please provide statements since inception.

Applications that do not include ALL requested information will be marked incomplete and not processed until the appropriate information is received.

Year #1 - Financials

File Size Limit: 5 MB

Year #2 - Financials

File Size Limit: 5 MB

Year #3 - Financials

File Size Limit: 5 MB

IRS 990-EZ/IRS 990-N

Financial Statements - IRS 990-EZ or IRS 990-N*

Please provide year end financial statements from last **THREE** years (income statement and balance sheet minimum).

Organizations who are less than three years old need to provide since inception.

Applications that do not include ALL requested information will be marked incomplete and not processed until the appropriate information is received.

Year #1 - Financials

Character Limit: 250 | File Size Limit: 5 MB

Year #2 Financials*

File Size Limit: 5 MB

Year #3 Financials*

File Size Limit: 5 MB

LEADERSHIP INFORMATION

Attach a list of board members and officers.*

(include names, profession, and years of service)

File Size Limit: 2 MB

Does the organization have board term limits?*

Choices

Yes

No

Board Term Limits

If yes, please describe term limits.

Character Limit: 250

How often do board of directors meet?*

Character Limit: 200

How often and who provides the performance evaluation for the organization's Executive Director?*

Character Limit: 500

GOVERNANCE

Financial Statements*

Are year end financial statements prepared or reviewed by an independent accountant?

Choices

Yes

No

Loans to Related Parties*

Has the organization provided a grant, loan, or other assistance to an officer, director, trustee, key employee, substantial contributor or an employee or family member of any of the aforementioned during the last 12 months?

Choices

Yes

No

Organizational Minutes*

Does the organization document the meetings held or written actions during the year?

Choices

Yes

No

Form 990

If your organization files an IRS Form 990 or IRS Form 990-EZ, did the organization provide a complete copy to all members of the organization's governing body prior to filing the IRS 990 or IRS 990-EZ?

Choices

Yes

No

Not Applicable

Conflict of Interest Policy*

Does the organization have a written conflict of interest policy?

Choices

Yes

No

Whistleblower Policy*

Does the organization have a written whistleblower policy?

Choices

Yes

No

Records Retention and Destruction Policy*

Does the organization have a written records retention and destruction policy?

Choices

Yes

No

OPTIONAL UPLOADS

Optional Text Box

Character Limit: 500

Optional Text Box

Character Limit: 10000

Optional Upload #1

Attach any additional documentation that you feel is pertinent to the request in the space provided below.

File Size Limit: 4 MB

Optional Upload #2

Attach any additional documentation that you feel is pertinent to the request in the space provided below.

File Size Limit: 3 MB

Optional Upload #3

Attach any additional documentation that you feel is pertinent to the request in the space provided below.

File Size Limit: 3 MB

CAPITAL REQUESTS

Capital Campaign requests are designed for the acquisition, construction, renovation, or improvement of a property or depreciable equipment. **If applying for capital campaign support, the charity MUST answer the additional questions below.**

Please indicate the current phase of the campaign.

Also indicate the date the campaign began and when it expected to conclude.

Character Limit: 500

Describe financing that might be undertaken in addition to raising funds from the public.

Character Limit: 500

Identify potential naming opportunities and attach any documents related to them.

Character Limit: 500 | File Size Limit: 1 MB

Ongoing Operational Expenses

Discuss the need, feasibility, and cost of the capital campaign, and its implications for the organization's ongoing operational expenses.

Character Limit: 500

Describe plans for funding the ongoing maintenance of the new capital project.

Character Limit: 500

Leadership Team

Explain how the organization's leadership team (board members, campaign committee members, and/or organizational officers) is financially participating in the campaign including the percentage participating.

Character Limit: 500

Specify if purchase agreements or purchase options are signed or needed.

Specify whether regulatory approvals (i.e. certificate of need, zoning, historic preservation, environmental impact) are in place or are imminent.

Character Limit: 500