

The Diocese of Oregon, Trustees
11800 S.W. Military Lane
Portland, OR 97219-8436
(503) 636-5613 or (800) 452-2562

Checklist of Supporting Documentation (*as applicable*)
For a Grant or Loan or Cosigning Request to the Trustees

A. Please prepare statements for the following items concerning vision, focus, and health:

- ___ 1. Your vision or mission, goals, and strategy.
- ___ 2. How many active families are in your congregation? How many total families? Of total families, how many have become active within the last year? Average attendance?
- ___ 3. Please explain how the proposed project advances your mission and goals.
- ___ 4. How many pledges were made for each of the last three years? Percent not received?
- ___ 5. What was the total amount pledged to General Operations for each of the last three years?
- ___ 6. What was the average pledged for each of the last three years?
- ___ 7. Please describe the approval process for this project within the congregation.
- ___ 8. What are the history and the projected growth rate of membership and area population?
- ___ 9. Are new churches nearby or planned for the area? What is your relationship to them?

B. Please provide the following items concerning finance:

- ___ 1. A copy of the current year's and prior three years' budgets.
- ___ 2. Current and three prior years' Income and Expense financial statements.
- ___ 3. Current and three prior years' Statements of Financial Position (Balance Sheet.)
- ___ 4. For any outstanding loans, the lender's name, date of origination, date of maturity, unpaid balance, amount of original loan, and monthly payment amount and status.
- ___ 5. List current accounts payable, giving the vendor and the age of the outstanding amount.
- ___ 6. Evidence that the Diocesan Commission on Art and Architecture has been consulted regarding your project.
- ___ 7. A pro-forma Church budget for the next five years that includes repayment of any loans.
- ___ 8. A detailed spending plan by phase, including contingencies.

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Grant or Loan or Cosigning Request

Requestor (Church name, address, phone number, email):

Project contact person (name, address, phone number, email):

Please give or attach a concise statement of the purpose of the building or project (attach architectural plans):

Estimated building or project total cost: _____

Amount of request: _____

Request: ___ Grant or ___ Loan or ___ Diocese as a cosigner on a note

Amount of pledges toward the cost of the building or project: _____

Pledges payable by: _____ (date)

Cash in hand designated or restricted for the building or project: _____

Dean, Rector, Vicar, or Priest-in-charge: _____

Senior Warden: _____

Junior Warden: _____

Treasurer: _____

Clerk: _____