**Eligibility Quiz**

Out of respect for your time, we ask that you complete a brief eligibility quiz to help you determine if you meet the eligibility criteria before completing a First Stage Application.

Please answer the below questions about your organization and project. (Y/N)

1. Are you a non-profit with 501(c)(3) tax exempt status or a fiscally sponsored project?
2. Is this a capital project that includes one or more of the following: facilities or land acquisition; construction; renovation; repair; preservation; or equipment?
3. Does your capital project meet the relevant requirement below, based on your project type?

* **For new construction projects:** You own the land or have site control or are in the process of securing site control.
* **For building expansion or renovation projects:** You own the building or hold, or are in the process of securing, a long-term lease of at least 7 years.
* **For open space projects:** You own the land, have site control, or are in the process of securing site control.

1. Has the organization been in existence for a minimum of 5 consecutive years?
2. Is your project located in or significantly engaging residents in the following Boston neighborhoods: Dorchester, East Boston, Mattapan, Roxbury or the following cities: Brockton, Lynn, or Springfield?

**First Stage Application**

## **Applicant Overview**

\***Organization Name**

**\*Address**

*If the location of the capital project for which you are seeking funds is not the same as the organization’s address, please provide the address of the project.*

**\*Website**

**\*Year Founded**

**Tax ID (EIN #)**

*if you are using a fiscal sponsor, please leave this field blank and indicate your fiscal sponsor’s name in the next field.*

**Name of Fiscal Sponsor**

*(if applicable)*

**Fiscal Sponsor Agreement/MOU**

*(if applicable)* \*\*file upload\*\*

**\*Organizational Mission Statement**

## **Contacts**

\***Leader of Entity or Organization Spearheading the Project**

(E.g., Executive Director, CEO, Board Chair, Lead, etc.)

**\*Contact Person for this Application**

## **Capital Project Overview**

We suggest word counts for each narrative question below. We do not expect that you use all the space provided – we want to hear what you think is most important. We encourage bullet points and brief responses. Alternatively, if you need, you may exceed the word count.

1. **Top of Form**
   1. **\*Tell us about your organization and its role in your community. How do you fulfill your organization’s mission?**

*Please target up to 300 words.*

1. **\*Tell us about your capital project. What do you plan to do and why? Why is this project a priority for your community?** *Please target up to 300 words.*
2. **\*** **How would you categorize your capital project?***Select from following project types – choose as many as apply. See definitions below for reference:*

* Facilities and/or Land Acquisition (i.e. new purchase)
* New Construction (i.e. to build a new building or an addition to an existing building)
* Renovation (i.e. to significantly revamp an existing facility or outdoor space)
* Repair: (i.e. to maintenance or repair of a facility or outdoor space)
* Preservation (i.e. to maintain or repair existing historic structures)
* Equipment (i.e. major equipment as part of a larger capital project)

Facilities and/or Land Acquisition

Construction

Renovation

Repair

Preservation

Equipment

1. **\*What stage of execution is the project currently in (e.g., planning, construction, fundraising/financing, near completion, completed with additional fundraising, etc.)? Please provide a few sentences or bullets describing completed and upcoming milestones. What is the anticipated date for project completion?**
2. **Is there any time sensitivity regarding this project? If so, please describe in 1-2 sentences.**
3. **\*How has the local community been involved in planning the project?**

*Please target up to 300 words.*

*Please note we understand this question may be less relevant for facilities requests related to building maintenance and equipment (e.g., replacing a roof or HVAC system), in which case indicate “Not Applicable.”*

1. \***References**:

We are interested in understanding who can speak to the strength of your connections to place (where the capital project is planned) and its importance to the community (e.g., faith leader, neighborhood or civic organization leader, constituent, partner organization leader). We may contact these individuals at some point during our review. Please list 1-3 references with your application.

*Please use the space below to list the name, email and sentence about the contact’s role in the community and their connection to the organization and project.*

## **Financial Information**

**\*Organizational Budget Information**

*In the first section, please provide revenue and expenses for your current fiscal year (board approved projected budget) In the second section, please input the revenue and expenses for your most recently completed fiscal year (actuals).*

Our intent is to minimize burden on applicants by reviewing publicly available financial data to gain an initial understanding of an applicant's financial history. If we are unable to access your IRS filings from public sources, we may follow up to request specific documents.

* **Current fiscal year: Revenue and expense** (board approved budget) \*\*input numbers\*\*
* **Prior fiscal year: Revenue and expense** (actuals) \*\*input numbers\*\*

## **Capital Project Financials**

**\*Total Capital Project Budget** \*\*input number\*\*

**\*Capital Project Budget Attachment** \*\*file upload\*\*

Please upload the most recent capital project budget. It may be in the form of a high-level Sources and Uses document which outlines where the anticipated funding will come from (sources) and what the funding will purchase (uses). Please share the information in whatever format you currently have, or you may opt to use the sample budget template linked below.

Please include:

* Sources: List of funders and prospective funders (private and public) for the capital project. For all sources of funding, please indicate if committed or pending. Please also include debt financing if applicable.
* Uses: All relevant costs (i.e., "soft costs" for planning consultants and "hard costs” for labor and materials, property acquisition, and other costs, such as contingency or a facilities reserve fund).

[TEMPLATE](Klarman%20Sources%20and%20Uses%20template%20stage%201.xlsx)

**Second Stage Application**

## **Community connection and impact**

* 1. **\*Please describe the constituencies and communities to whom your organization matters most and why. How do you listen and adapt based on your community?** *Please target up to 300 words*
  2. **\*What are two to three organizational accomplishments that illustrate your impact on your community over the last five years?** *Please target up to 300 words*
  3. **Please share information about your board members**

*Please choose one of the following options:*

* *list your board members, with role and relevant affiliations, in the text box below, or*
* *include a URL to your website that lists your board members, with role and relevant affiliations, or*
* *upload a document that lists your board members, with role and relevant affiliations*

## **The capital project**

* 1. **Capital Project Description**

*Hover below and click 'Use This Response' to add the description of your capital project from your first stage application. Please update if anything has changed.*

* 1. **\*Project Timeline**

*Please include your timeline in the textbox below or upload a complete timeline for the project, identifying key milestones (for example, these may include pre-development planning, fundraising and financing, design, site acquisition, permitting, construction, and occupancy).*

* 1. **\*Who comprises the team overseeing the project?**

*Please include names, titles, project roles, and relevant background.*

* 1. **\*What challenges have you faced or do you anticipate facing in executing the project and how are you addressing them?** *Please target up to 300 words.*
  2. **\*What is your understanding of how the project will impact your organization’s revenues, costs, and staffing needs?** *Please target up to 300 words.*
  3. **\*Are there capacities, skills, or competencies that your staff, leadership, or board members need to build in order to complete this capital project and to ensure the organization’s long-term success?** *Please target up to 300 words.*

*As part of the Community Capital Fund, KFF may provide support for technical assistance. We are open and eager for your candid response to help us understand the range of assistance that may be beneficial to applicants to the Community Capital Fund.*

## **Capital Project Financials**

\***Total Capital Project Budget** \*\*input numbers\*\*

**\*Capital Project Budget Attachment**

*Please upload the most recent capital project budget. Given the fluid nature of capital projects, we expect the budget may look different than in the First Stage Application.*

We are interested in what the project will cost (e.g. “uses”) and where the funds will come from (e.g. “sources”).

The budget should include all sources and uses as follows:

* + Sources: List of funders and prospective funders (private and public) for capital project. For all sources of funding, please indicate if committed or pending. Please also include debt financing if applicable.
* Uses All relevant costs (i.e., "soft costs" for planning consultants and "hard costs” for labor and materials, property acquisition, and other costs, such as contingency or a facilities reserve fund.)

Please share your budget in whatever format you currently use, or you may opt to use the sample budget template linked below.

[TEMPLATE](Klarman%20Sources%20and%20Uses%20template%20stage%202.xlsx)

## **Financial Overview**

We want to understand your finances. We would like to see what tools you use to manage your financial position, for example the most recent documents shared with your board. Please don’t create something specific for this application.

*Please note that we may request additional data following our review of the information submitted.*

**Current Year**

* \***Organization board approved operating budget for the current year**
* **\*Balance sheet** *statement of financial position*
* **\*Year-to-date Income Statement/Statement of Activities** *budget to actuals (including revenue and expenses)*
* **Other financial documents you shared with your board**

**\*Historical**

* **Audited financial statements for the three most recent fiscal years**. *If you do not have audited financial statements, please provide internal financial statements (income statements and balance sheets) for the three most recent fiscal years. These should be the year end statements reviewed by the board or advisory/steering committee.*
* **Income Statement/Statement of Activities** *budget to actuals (including revenue and expenses) for the most recently completed fiscal year.*

## **Optional Attachments**

*You are welcome, but NOT required to upload the following additional documents should you have them readily available. Please do not create anything new.*

OPTIONAL: **A narrative related to your financial health or financial results that may be helpful context when we are reviewing your financial information**

OPTIONAL: **Any existing documents describing the capital project and its importance to your organization and community**

OPTIONAL: **Strategic plan**

OPTIONAL: **List of Capital Campaign Committee members**

OPTIONAL: **Bios of key staff and project leadersfor the capital project**

*Updated 11/30/23*