**REQUEST WORKSHEET**

To accommodate grant seekers who prefer to prepare their submission outside of the portal, we have created a fillable worksheet to aid in the gathering of information. Since this worksheet cannot be submitted directly, the data must be transferred to the fields in the [grants portal](https://maclellan.net/portal). The portal order may be slightly different, but the questions are the same.

The portal is shared among several Maclellan Family Foundations. Though designed for the Maclellan Foundation, Inc., this worksheet is similar for use with the RL&KH Maclellan Foundation content as well.

GETTING STARTED

First for Maclellan Foundation, Inc., and RL&KH Maclellan applicants, we highly recommend visiting our webpage for grant seekers [here](https://maclellan.net/grantees). Then, review our instructions and tips below based on common questions. Please review this section carefully before proceeding, to save yourself time and trouble throughout the process.

**You cannot start a new request from within the portal but must click on the link sent by our team to start one.** As a reminder, a request invitation is to be used only one time and solely by your organization.

**Helpful tips and reminders**

1. Save often! You must save each tab before proceeding to the next.
2. Prepare your narrative content elsewhere and copy and paste it into the grants portal when it is complete. Doing this will allow you to check word counts and have a back-up in case your portal content does not save.
3. Follow the word count and response length prompts provided in the instructions on individual questions. It can be confusing when the box gives a character limit, while the instructions give a word count. When in doubt, follow the prompts in the instructions rather than looking to the field character limit for guidance.
4. Work through the request tab by tab. You will notice that tabs with asterisks\* don't apply to all organizations, rather only to organizations in a Fiscal Sponsorship or Parent/Subsidiary relationship.
5. Please add additional team members to an individual grant request using the “Team Members” tab, rather than sharing your username and login information.
6. Prepare your attachments in either Microsoft Word, Excel, or PDF formats only.

We would love your feedback on how we can improve the grants portal - if you have suggestions, please submit them [here](https://forms.office.com/Pages/ResponsePage.aspx?id=trhzt1Cj_kiaJMFxs-qL7fmivtLLOZ9KtQH4I0k575ZUMTBMNEVTTlpLRjAzWURVUFJaWDlUVTNWOC4u).

Before getting started on your request, choose the primary country where your project will take place. Please do not choose “Global.” It is for internal use only.

* Primary Country for Project: Country name

TEAM MEMBERS

If you would like other members of your organization to have access to this request, you may use the link below. Team members should be *members* of your organization or *grant writers* for your organization. We do not grant access to others outside of your organization (such as to members of a sponsored organization).

To request access for another team member, please provide the requested information [here](https://macfdn.us/teammember).

We will review your request and reach out to you shortly if we have any questions. If a new, approved team member does not have a username, we will reach out to them directly to create a new username.

ORGANIZATION DETAILS

*Please provide the requested information for your organization below.  
If you are a*[***fiscal******sponsor***](https://maclellan.net/support/fiscal-sponsorship)*, please provide us with your organization's information as the sponsor, unless otherwise noted. You will provide information about the organization you are sponsoring later.*

*If you are a*[***subsidiary***](https://maclellan.net/support/parents-subsidiaries)*, please provide us with the subsidiary's information, unless otherwise noted. You will provide information about the parent organization later.*

* Have you previously received funding from any Maclellan family foundation? Please select all that apply, or *No Previous Funding* if applicable.

*The current Maclellan family foundations are: Maclellan Foundation, Inc. (MFI); Robert L. and Kathrina H. Maclellan Foundation (RL&KHM); Hugh and Charlotte Maclellan Charitable Trust (HC Trust); and Christian Education Charitable Trust (CECT).*

* How long has your organization been in existence? Choose an item.
* Public Support Amount: Enter a number here.
  + *From your most recently filed 990 tax return, what is your public support amount for the past two years? This number should be listed as a percentage. This information can be found in Schedule A, Part II, Section C, Lines 14 and 15 OR Schedule A, Part III, Section C, Lines 15 and 16 of your return. If this information appears on your 990, fill in this section of the request. If this information does not appear on your 990, please enter N/A.*
* Organization Budget (current year’s operating expense budget in USD): Amount
  + *Enter your organization’s total annual expense budget for the current fiscal year.*
  + *If your organization is a fiscal sponsor, please enter YOUR organization’s projected total annual expense budget.*
  + *If your organization is a subsidiary, please enter YOUR organization’s projected total annual expense budget.*
  + *These numbers must match the numbers provided on the Three-Year Organization Budget attachment.*

FISCAL SPONSORSHIP\*

***\*This section is ONLY to be completed by organizations serving as a fiscal sponsor.***

*For definitions of “fiscal sponsorship” and to read more about requirements for fiscal sponsors, please visit our website* [*here*](https://maclellan.net/support/fiscal-sponsorship)*. If you have questions about your organization's role as a sponsor, please contact the individual that invited you to apply. The Maclellan Foundation does not make grants to Fiscal Agents serving only as financial conduits without accepting the responsibility of sponsorship.*

Are you a Fiscal Sponsor? *Is your organization (listed in the “Organization Name” field) serving as a fiscal sponsor for another organization who is not recognized in the U.S. as a 501(c)(3) public charity?* Yes or No?

If you answered “Yes,” the Sponsored Organization’s information should be entered here:

* Name of the Sponsored Organization:
* Alternate Name of the Sponsored Org.:
* Sponsored Organization’s Website:
* Sponsored Organization Primary Contact:
* Sponsored Organization Contact Email:
* Sponsored Org Annual Expense Budget:
  + *List the sponsored organization's projected annual expense budget for the current fiscal year in USD.*
  + *These numbers must match the numbers provided on the Three-Year Sponsored Organization Budget attachment.*
* Have you previously provided us with your sponsorship agreement? Yes or No?
* If you have previously supplied us with your agreement, please select all options that apply:
  + *The terms in our previously supplied sponsorship agreement have not changed.*
  + *The dates in our previously supplied sponsorship agreement are still effective.*
* **Sponsorship Agreement – ATTACHMENT (PDF formats only)**

*Please upload the most recent* [*sponsorship agreement*](https://maclellan.net/support/fiscal-sponsorship-agreement)*. Please make sure this agreement is current and signed by both parties. If you have previously provided us with a copy of your sponsorship agreement and if the terms of that agreement have not changed and if the dates of that agreement remain in effect, then an additional copy of the agreement is not required.*

A typical agreement includes the following and should be signed by executive staff from both the fiscal sponsor and the sponsored organization:

* + A statement that the sponsored organization’s project is compatible or consistent with the sponsoring organization’s mission or purpose.
  + A statement that the sponsor retains full discretion and control over the use of such funds and may redirect funds if necessary to a different beneficiary to accomplish the purpose of the program if the sponsored organization cannot.
  + A statement that the sponsoring organization is responsible for complying with the terms of the grant, and that they will provide oversight on the project and use of funds, to assure the funds are used for the designated charitable purposes.
  + An explanation or detailing of fees charged by the fiscal sponsor organization.
  + A clear definition of the structure and role of the sponsored organization’s board of directors (if any), project advisory group (if any), and staff members.
  + Clearly defined “effective dates” for the agreement.

PARENT ORGANIZATION\*

***\*This section is to be completed ONLY by organizations that are a part of a parent/subsidiary type relationship.*** *For definitions of a "parent organization" or "subsidiary organization," and to read more about requirements, please click* [*here*](https://maclellan.net/support/parents-subsidiaries)*. If your organization is not a subsidiary, please proceed to the next tab.*

* Are you a Subsidiary? *Check the box below if your organization is applying as a subsidiary under a parent organization's IRS determination letter?* Yes or No?
* Name of Parent Organization:
* Alternate Name of Parent Organization:
* Parent Organization Street:
* Parent Organization City:
* Parent Organization State:
* Parent Organization Zip:
* Parent Organization Country:
* Parent Organization’s Website:
* Parent Organization's Primary Contact:
* Parent Organization's Contact’s Email:
* Parent Organization’s Contact’s Phone:
* Parent Organization’s Annual Expense Budget:
  + *List the parent organization's projected annual expense budget for the current fiscal year in USD.*
  + *These numbers must match the numbers provided on the Three-Year Parent Budget attachment.*
* **Parent Certification Letter – ATTACHMENT (MS Word or Adobe PDF formats only)**

*If applying as a subsidiary, we must have a certification letter from your parent organization, on the parent's letterhead, and signed by an Executive Officer of the organization. To view or download a sample parent certification letter, please click* [*here*](https://maclellan.net/support/parents-subsidiaries)*.*

The letter must include the following:

* + a description of the relationship between the parent and subsidiary organizations;
  + authorization giving the subsidiary organization permission to apply;
  + permission for the Maclellan Family Foundations to correspond directly with the subsidiary in response to the application;
  + instructions on where to mail any grant payments (if any). NOTE: Upon approval, all checks would be made out to the parent organization unless directed otherwise. No correspondence will be sent outside the United States;
  + certification that the parent organization is a public charity and not a private foundation;
  + commitment that the parent organization will notify the Maclellan Family Foundations if any changes take place with respect to its relationship with the subsidiary organization.

PROJECT DETAILS

* Have you completed all your outstanding requirements, such as post-grant reports on previous grants? This may include an interim report if your project is not complete, or your post-grant report is not yet due. Choose an item.
  + *If you choose “No,” please do not submit this application until all outstanding requirements have been fulfilled. If you have any questions regarding your outstanding requirements, please get in touch with your contact at the Foundation to discuss your options.*
* Are you requesting general operating or project-based support? Choose an item.
  + *Project-based support is designated for a specific project and grantors may place stipulations on how grant funds can be used. General operating support funds are used at the grantee's discretion and cover the general operations of an organization including overhead. In general, the Maclellan Foundation, Inc. gives project-based support.*
* Project Title: Project Title
* Start Date: 1/1/2023
  + *Enter the date your project began or is scheduled to begin. If you are requesting general operating support, please provide the date your fiscal year starts.*
* End Date: 12/31/2023
  + *Enter the date you plan to complete your project. If you are requesting general operating support, please provide the date your fiscal year ends.*

PROJECT PLAN

**Executive Summary**

Please provide an executive summary of no more than 600 words that describes your request in a narrative format. The questions below follow the “NISO” framework. **For more information on the NISO framework, please read** [**this whitepaper**](https://maclellan.net/support/niso)**.** Please answer the following questions in a narrative form:

* What need or opportunity are you seeking to meet?
* What is your idea to address this need?
* What is your strategy to implement this idea?
* What does your organization require to complete this request?
* With whom will you collaborate or partner on this request, and how will you collaborate? \*Note: Please describe what the partnership will look like practically. Please do not simply list your partners.
* What are your long-term goals, and what lasting impact do you hope to see?

**Please answer these questions as a narrative so we can understand how your request is connected to your organization’s theory of change.** Please do not number the questions individually. You must answer all questions.

Type your Executive Summary here.

**Strategy**

In the Executive Summary section, we asked what need or opportunity you are seeking to address and for a brief description of your project plan. Please use this section to provide greater detail on the request and how it fits within your organization’s mission and goals. (Please limit to approximately 300-500 words.)

Type your Strategy here.

**Maclellan Bridge Strategy**

Please describe how your organization or grant request fits into the Maclellan Bridge Strategy. For more information on the Bridge Strategy, please watch [this video](https://vimeo.com/697003389). **Please limit your summary to approximately 300-500 words.**

*\*Grant seekers from Chattanooga do not need to answer this question.*

Type your answer here.

PROJECT FUNDING

*Please provide details about your plans for funding this project. If you are serving as fiscal sponsor for a project, answer the questions in this section for the sponsored organization only.*

* Amount Requested: Amount in USD
* Project Budget: Amount in USD
* How much of the project funding has been raised to date? Choose an item.
* From how many donors (excluding Maclellan) have you received funds for this project? Click or tap here to enter text.
* How much of the funding has been raised locally where this project will be implemented? Choose an item.
* Breakdown, by percentage, of how you anticipate this project being funded. (Answers should add up to 100%.)
  + Private Foundations: Click or tap here to enter text.
  + Individuals or Businesses: Click or tap here to enter text.
  + Churches or Nonprofits: Click or tap here to enter text.
  + Governmental Sources: Click or tap here to enter text.
  + Self-Generated Revenue: Click or tap here to enter text.
* In 300-500 words or less, please answer the following questions in a narrative format:
  + How does your organization currently raise funds, and from where?
  + How does your organization raise funds within your region/country?
  + What is your organization’s plan for long-term sustainability?

Type your answer here.

OBJECTIVES

*Before adding your objectives, we ask that you review our tutorial* [*here*](https://maclellan.net/support/how-do-i-create-measurable-grantee-objectives)*.*

*Provide distinct and measurable objectives for your project. An objective is a proposed target your project hopes to accomplish, and that you will be able to track and measure. If awarded a grant, you will report upon each objective at the culmination of your project. List each objective separately.*

* *You may submit a* ***maximum of 5 objectives****.*
* *Each objective will be listed as a* ***range*** *with a high target and low target.*
* *If your objective is not suitable as a range, enter the same number for the low and high target (example: 1 event would be listed at low target:1; high target:1).*

**CREATE YOUR OWN OBJECTIVES:**

|  |  |  |  |
| --- | --- | --- | --- |
| **NAME**  *(Title for this objective)* | **SUMMARY**  *(Brief summary of the objective)* | **LOW TARGET**  *(Proposed low number)* | **HIGH TARGET**  *(Proposed high number)* |
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PRAYER

*We would like to know more about your organization's prayer efforts, as well as give you an opportunity to share a prayer request. Please answer the questions in this section for your organization unless you are serving as a fiscal sponsor. If you are serving as fiscal sponsor for a project, answer the questions in this section for the sponsored organization only.*

* Choose the phrase that best describes your organization's prayer efforts regarding this project. Prayer is important, but we do not have a prayer strategy for this project.
* If you are working on a plan to better integrate prayer, or if you have a clearly defined prayer strategy, please describe your prayer strategy below. If you do not have a prayer strategy for this project, you may move to the next section.

Click or tap here to enter text.

* Our staff would like to pray for your organization or project. Please enter your prayer request below (no personal or monetary requests please):

Click or tap here to enter text.

BOARD OF DIRECTORS

*Choose the statement(s) that best answer the questions below regarding your governing board.  
If you are serving as fiscal sponsor for a project, answer the questions in this section for the sponsored organization only.*

* Does your organization have a board of directors? Yes or No?
* If your organization does NOT have a board of directors, please explain why your organization is lacking a board in the text box below, then proceed to the next section. If your organization does have a board of directors, leave the text box below blank, then proceed to the remaining questions in this section.

Click or tap here to enter text.

* How are the frequency and function of your board meetings best described?

Choose an item.

* How does your board exercise financial oversight?

Choose an item.

* How does your governing board address the need for organizational planning?

Choose an item.

* How is your board involved in fundraising?

Choose an item.

* At what level does the board support your organization by giving?

Choose an item.

* **Board of Directors – ATTACHMENT**

Please provide a list of your board of directors, including their names, position on the board, occupation, and donation amount to the organization in the last fiscal year. If your policy does not allow for disclosure of donation amounts, please list the aggregate giving of board members, as well as the number of the board members that give. Click [here](https://maclellan.net/support/request-attachments) for a sample template.

*\*Fiscal sponsors, please provide the sponsored organization's board information.*

ATTACHMENTS

*Please provide the requested attachments for your organization below. We have provided templates and further details* [*here*](https://maclellan.net/support/request-attachments)*.*

* **IRS Letter**

Please upload your organization's current IRS Determination Letter.

* **Top Ten Donors (PDF Formats Only)**

Please provide a list of your top ten donors from the **previous fiscal year**, including donor names, giving amount, and donor type. If your policy does not permit disclosing donor names, please list donors anonymously along with the giving amounts and donor type.

* + *Fiscal sponsors, please provide the sponsored organization's donor information.*
* **Project Budget (PDF Formats Only)**

Please upload a **one-page** project budget that includes amounts for project related income and expenses. Indicate on the budget statement where you would like grant funds to be applied, if awarded. If the budget is in a currency other than USD, a column must be provided to show USD equivalents.

* + *If you are requesting a general operating grant rather than a project-based grant, please upload a one-page general operating budget for your current fiscal year.*
* **Three-Year Organization Budget**

Please provide a three-year organization budget with the following requirements, and **please make sure this figure agrees with the previously provided organization expense budget figure:**

* + Include past 2 years of actuals and 1 year of current projections.
  + Include expenses and income.
  + If your organization uses a different currency, you must include a column to show USD equivalents.
  + One page document.

*Fiscal sponsors, please provide your organization's donor information, as the sponsoring organization. The sponsored organization's budget is provided below.*

* **Sponsored Organization or Parent Organization Three-Year Budget\***

*\*This attachment is only required for Fiscal Sponsors or Parent Organizations.*

* + *Fiscal Sponsors: Please provide a three-year organization budget for the SPONSORED organization.*
  + *Subsidiaries: Please provide a three-year organization budget for the PARENT organization.*
  + Include both income and expenses with two years of actuals and one year of projections for the current fiscal year. If the organization uses a different currency, you must include a column to show USD equivalents.
  + **Please make sure this figure agrees with the previously provided organization expense budget figure.**

REVIEW

*Congratulations! You have reached the end of the request worksheet. Now, login to the grants portal to submit your information tab by tab.*

*After completing the tabs, you will have the opportunity to review and edit your content before submitting. Once you submit you will no longer be able to edit your request unless reopened by a staff member. Once you are ready to submit, you may also print a copy of the request for your records.*

*If you have any final questions, we invite you to check out our* [*web page for grantees*](https://maclellan.net/grantees) *or contact us directly.*