

# *Online Funding Inquiry Instructions and Notes*

## **INTRODUCTION**

- Please note the John Templeton Foundation (Foundation) issues grants to support *projects*. A project has a specific start and end date. Generally, projects submitted to the Foundation may have a term of no more than 3 years.
- Please review the Foundation's [grantmaking calendar](#) for key dates regarding our review of Online Funding Inquiries (OFIs).
- Answer questions as thoroughly and specifically as possible. An asterisk (\*) next to a question signals that a response to that question is mandatory.
- Please direct questions to [programofficer@templeton.org](mailto:programofficer@templeton.org).

## **CYCLE & AREA**

Cycle: The Foundation accepts new funding inquiries (OFIs) at any time of the year. However, the Foundation reviews OFIs at specific times of the year depending upon the size of the request. Please review the [grantmaking calendar](#) on our website to select the cycle that best aligns with your request.

Area: Please select the [Funding Areas](#) or [Strategic Priority](#) that best aligns with your proposed project. If you believe your project closely aligns with more than one area, or if you are unsure about the best fit for your idea, we recommend selecting the "Unsure" area. By selecting Unsure your OFI will be triaged by our team and routed to the internal department best suited to conduct our review.

## **PROJECT DESCRIPTION: WHAT DO YOU PROPOSE TO DO?**

1. The Project Title should clearly, concisely, and in non-technical terms convey the essence of your proposed project.
2. The Executive Summary is your opportunity to describe what you plan to do, why it is worth doing, and what impact the project will have, if it is successful. The Executive Summary should be written in such a manner that it would be

comprehensible to a typical reader of the *New York Times* or *London Times*—someone who is intellectually engaged, but not necessarily a specialist in your area of expertise.

A good Executive Summary will answer—in brief—all the following questions:

- a) What specific questions will the project help to answer?
- b) What activities will you carry out to answer those questions?
- c) Why is this project needed?
- d) What concrete deliverables will you produce by the end of the project?
- e) What impact will your project have?

You do not need to include information about the project team, organization, request amount, or project duration in your Executive Summary.

3. The Project Description is the longest and most important field in the OFI.

Please provide a specific, concise, and detailed description of the activities you plan to carry out with the funds that you are requesting.

If the description of your project requires the use of special characters, graphs, figures, or formatting, you may upload a document in the space provided and type in the phrase “See attached document” to refer staff to your uploaded file.

4. The Statement of Significance should describe the current conditions in the field(s) relevant to the project, identify the problems that the project will address, and articulate the specific opportunity that your project presents.
5. The Outputs (sometimes called “deliverables”) are important events and work products that your Project activities (described in #3 above) will generate and which are necessary in order for you to make progress towards your proposed Outcomes (#6 below). Please provide a list of the outputs you intend to produce.
6. The Outcomes (sometimes called goals, results, or impacts) are the specific and identifiable changes that you expect your Outputs will bring about (or contribute to bringing about) within 5 years of your project’s end date. These should describe what the success of your project would look like. Please provide a list of the outcomes you expect to come about as a result of your outputs.
7. The Capacity for Success should explain why your team and/or organization is positioned to be successful in this project.

8. Please explain how your proposed project would advance the philanthropic vision of Sir John Templeton and aligns with his Donor Intent. (To learn more about the Foundation's Funding Areas please visit our [Funding Areas](#) page.)
9. To the best of your knowledge is the work of the proposed project similar to, or does it further expand the work of, an active or closed grant you (or your organization) received from the John Templeton Foundation, the Templeton World Charity Foundation, or the Templeton Religion Trust? Please select "Yes" or "No." If yes, please explain in the text box: (a) how such proposed project is similar to, builds upon, furthers, or expands the work of an active or closed grant, and (b) provide the following specific information for the active or closed grant in question: Project Title, Grant ID#, Grant Amount, end date of the Grant and a very brief synopsis of the project activities.
10. The Proposed Project Start Date will likely depend upon a number of variables. For the Foundation, the timing of our review process is a major consideration in determining when projects can start. Your Proposed Project Start Date should be at least 6 weeks after the end of the relevant funding cycle (i.e., the applicant notification date). Please review to the Foundation's [grantmaking calendar](#) prior to submitting your OFI.
11. The maximum permissible duration of your project will depend on the type of organization receiving the grant (if funded). For most organizations that are recognized as public charities in the United States, the Proposed Project End Date must be no more than 36 months beyond the Proposed Project Start Date. For all other organizations and grants to individuals, the Proposed Project End Date should not be more than 33 months beyond the Proposed Project Start Date.

## PERSONNEL

12. The Primary Contact is the person who will manage all communications with the Foundation regarding the funding request. As the originator of this OFI you are the Primary Contact. The information displayed below was retrieved from your user profile. To change the Primary Contact on this funding request and transfer it to another portal account, please email portal support at [support@templeton.org](mailto:support@templeton.org).

13. The Project Leader, sometimes known as the Principal Investigator, is the person who will take the overall leadership role in the project. The Project Leader may also be the Primary Contact for this funding request. If the Project Leader differs from the Primary Contact please provide the required information on the Project Leader, including an upload of the Project Leader's CV/resume.
14. The Project Co-Leader, sometimes known as the Co-Investigator, works alongside the Project Leader in providing leadership in the project. The Project Co-Leader may also be the Primary Contact for this funding request, or there may be no Project Co-Leader associated with this request. If relevant please provide the required information on the Project Co-Leader, including an upload of the Project Co-Leader CV/resume.
15. If the Project Leader or Co-Leader is related to the Foundation as described in Question 15 in the OFI, please email [programofficer@templeton.org](mailto:programofficer@templeton.org) to seek further advice before submitting your inquiry. The criteria for answering "Yes" to this question is if the Project Leader or Co-Leader (or their spouse or family) presently serve as a Trustee, Officer, or staff member of the Foundation. If the Project Leader or Co-Leader has served on the John Templeton Foundation Board of Advisors, or is related to someone who has served or is serving on this advisory board, the question should be answered "No".
16. For each additional personnel that has already committed to your proposed project, please provide their full name, disciplinary and organizational affiliation. Additional personnel may include additional Project Co-Leaders, consultants, post-doctoral researchers, presenters, speakers, panelists, or other roles as are required by your project.
17. Please describe how you or any members of your team came to learn about the Foundation. Have you previously applied for or received funding from the Foundation? Have you participated in any events sponsored by the Foundation, or discussed your project idea with a member of our staff?

## ORGANIZATION

18. Please select the country where the organization seeking funding for this project is located.
19. If you are seeking funding in your individual capacity (i.e. you will sign the grant agreement and the funds will be paid to you in your name), and not through an

organization such as a university, school, other non-profit or for-profit company, please answer "Yes."

20. Please provide the full name of the college or university. Do not use abbreviations.

- a. Provide the specific department or center within a college or university, any alternative names for your organization if it is known by another name more commonly, has a commonly used abbreviation, or requires translation into English.
- b. If the organization's answer to this question is "Yes", please email [programofficer@templeton.org](mailto:programofficer@templeton.org) as requests from such organizations have restrictions.

### Overview of Expenditure Responsibility

The Internal Revenue Service (IRS) requires private foundations to exercise a special procedure called "Expenditure Responsibility" ("ER") over grants to organizations which are:

- For Profit, or
- Not classified as a Public Charity in the United States, or
- A newly formed Public Charity with a limited budget or history.

If your Organization is classified as any of the above and your request for funding is approved, you will be required to operate under ER. **If your Organization is NOT classified as above, the content below does not apply to your Organization.**

ER requires the John Templeton Foundation (JTF) to assume full legal responsibility under the US tax laws for ensuring that the grant is used for its intended charitable purpose. If approved for funding, and under these tax rules, you would be required to provide JTF with Expenditure Responsibility Reports for the duration of the grant; including the reporting of capital expenditures purchased with grant funds. This overview is to provide examples of capital expenditures and provide guidance if invited to submit a Full Proposal.

### What is a Capital Expenditure?

In general, capital expenditures include items with an individual value equal to or greater than \$5,000 USD (or foreign currency equivalent), which have a "useful life" of more than one year. Useful life is defined as the amount of time an asset is expected to be functional and fit-for-purpose. Below are a few **examples** of common capital expenditures:

## Equipment

1. Vehicles
2. Office equipment
3. Computer equipment
4. Research/Lab equipment
5. Equipment purchased separately that are used in aggregate to perform a business function (e.g. Individual pieces of lab equipment that are dependent upon each other for scientific experimentation).

## Website

1. Application and Infrastructure Development – examples include acquiring or developing hardware and software needs to operate the website, obtaining the domain name, developing or acquiring the software for website operations, database and applications, purchasing the hardware, installing and testing the hardware/software.
2. Graphics Development – examples include the overall design of the web pages (design, layout, color, images).

## Software

1. Software Development – software to integrate a database with a website.
2. Computer, smart phone or tablet applications.
3. Databases, including the front-end user-interface and/or the back-end systems.

## What Is Not a Capital Expenditure?

Equipment, the creation of a website, or software expenditures of less than \$5,000 USD or foreign currency equivalent are not capital. In addition, expenditures for equipment, websites, and software with a useful life of less than one year are not capital. Expenditures that are not considered capital also include:

1. Aggregate costs of individual pieces of equipment used independently e.g. 3 laptop computers costing \$2,000/per, totaling \$6,000 USD or foreign currency equivalent.
2. Costs to lease items from a third party.
3. Website costs related to planning, content development, and operating.

## JTF Limits on Project Duration

Please note that JTF has its own internal project duration maximum of 33 months for

ER grants. This may limit our ability to provide funding for capital expenditures with a useful life of greater than 3 years.

Capital expenditures with a useful life exceeding 5 years, such as office furniture, may NOT be purchased with JTF grant funds. Buildings and significant building improvements, may NOT be purchased with JTF grant funds.

If invited to submit a Full Proposal, additional details will be provided.

## BUDGET

21. The Foundation awards and pays grants in sixteen (16) different currencies: the US Dollar (USD), Australian Dollar (AUD), Canadian Dollar (CAD), Swiss Francs (CHF), Danish Krone (DKK), Eurozone Euro (EUR), British Pound (GBP), Hong Kong Dollar (HKD), Israeli Shekel (ILS), Japanese Yen (JPY), Mexican Peso (MXN), New Zealand Dollar (NZD), Swedish Krona (SEK), Singapore Dollar (SGD), Turkish Lira (TRY), and South African Rand (ZAR).
22. How much funding are you requesting from the Foundation? The Foundation will approve an added component for overhead/indirect costs within the budget, which is no more than (fifteen) 15% and welcomes proposals that request a lower percentage. Round to the nearest whole currency unit and use numbers only.
23. The Total Project Amount may be equal to or greater than the Request Amount. With many of the requests received and funded by the Foundation, the Total Project Amount is equal to the Request Amount, because the applicant is requesting the Foundation to support all of the project costs. However, the Foundation favors projects in which a proportion of the required funding has been secured from other sources. The Total Project Amount is the sum of: (a) the Request Amount and (b) funding secured or requested specifically for this project (defined in the specific activities described in your [Project Description](#)) from other sources. See the note on #24 for more information concerning what qualifies as Additional Funding. Round to the nearest whole currency unit and use numbers only.
24. The purpose of the Budget Narrative at this early stage helps the Foundation determine if the estimated project expenses are reasonable and necessary for the proposed project. In narrative or bullet-point format, please provide a broad overview of your proposed project expenses including anticipated amounts and major categories of expenditures; [see above](#) for additional

information on expenditures.

Additionally, please list the supplementary sources of funding for your project. The Foundation favors projects that have secured, or plan to secure, Additional Funding from other sources. For each potential source, list the amount of funding that you have secured or are requesting, and the status of your request. To determine whether a source of support constitutes Additional Funding, please consider:

- Additional Funding can include funds from other philanthropic organizations, in-kind support from the employers of project personnel, or donated time of project members.
- Additional Funding does not include costs for equipment not solely used for the proposed project (e.g., an fMRI scanner) or costs for activities associated with but not specifically part of the proposed project (e.g., a larger conference that precedes a proposed workshop). Finally, please note that support for activities that will occur before or after the project should not be counted as Additional Funding.

## **REVIEW AND SUBMIT**

This page provides applicants with the opportunity to review the contents of your funding inquiry, download a copy of the current form, and identify any missing fields or fields that exceed the character limits.

If all required fields are complete and within the character limits, applicants will be able to submit their OFI to the Foundation. Once submitted the record will become read only and you will not be able to make any edits to your submission.