

## **CHECKLIST**

The grant application consists of the following components, which should be submitted in the order listed below. This checklist is provided to help ensure a complete proposal. It does not need to be submitted with the proposal.

- Section I: Cover Letter (one page)**  
Include the purpose of the grant request and a brief description of how the request fits with the foundation's mission and grantmaking priorities.
- Section II: Summary Sheet Form**  
Use the 2-page template provided.
- Section III: Narrative**  
*Formatting:* Use 12-point font with 1-inch margins and include the **HEADING** provided for each question. It is not necessary to repeat the text of the questions.  
*Page Limit:* Please limit the narrative section of your proposal to no more than 5 pages.

### **Section IV: Attachments**

If you omit any of the required attachments, provide an explanation as to why.

#### Financial Attachments

- 1(a). Organization budget
- 1(b). Program or project budget, if applicable
- 2. In-kind contributions

**Thank you for your time and effort in completing this application.**

## SUMMARY SHEET FORM

**Legal Name of Organization:**

**DBA (if applicable):**

**Mailing Address (and physical address if it is different):**

**Phone:**

**Fax:**

**EIN:**

**Website:**

**Organization Email Address:**

**Name of CEO or Executive Director:**

**Phone:**

**Email:**

**Application Contact & Title (if *not* the CEO or Executive Director):**

**Phone:**

**Email:**

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### Organization Information

**Year Founded:**

**Mission Statement:**

**Geographic Area Served (specific to this proposal):**

**Tax Exemption Status:**

- 501(c) (3)
- Using a fiscal agent/fiscal sponsor

Name of fiscal agent/sponsor:

- Other than 501(c) (3), describe:

**Number of Employees: Full-time:**

**Part-time:**

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**Grant Request Information**

**Which Fund/Community Foundation are you requesting a grant from:**

**Type of Grant Requested** (select one):

- General Operating Support
- Program or Project Support

**Amount of Request:**

\$

**Name of Program or Project:**

**Summarize what the grant will be used for: (500 character limit)**

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**Financial Information** Budget numbers should match the numbers presented in Attachments 1(a) & (b).

**Organization's Current Budget for Fiscal Year Ending:**

**Income:**

**Expenses:**

**AND, if other than a general operating request,**

**Program or Project Budget:**

**Dates: from:**

**to:**

**Income:**

**Expenses:**

By signing below, I certify that the information contained in this application is true and correct to the best of my knowledge.

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CEO/Executive Director

Date

## NARRATIVE

*For General Operating Requests, there is a 4-page limit. For Program or Project Requests, there is a 5-page limit. Use 12-point font with 1-inch margins and include the **HEADING** provided for each question. It is not necessary to repeat the text of the questions.*

- 1. ORGANIZATION BACKGROUND.** Discuss the founding and development of the organization. Explain the original issue and/or opportunity the organization was founded to address and how that may have changed over time.
- 2. GOALS.** Describe the organization's current goals.
- 3. CURRENT PROGRAMS.** Provide a brief description of the organization's current programs. Include population and numbers served. *If this request is for a specific program, describe the organization's **other** programs here. Describe the program for which you are seeking funding in Question 4.*
- 4. PROGRAM OR PROJECT REQUESTS ONLY.**
  - a) Provide a summary of the plan for the program or project request. Include the issue and/or opportunity addressed, goals and objectives, activities, and timeline.
  - b) Explain why the organization is approaching the issue and/or opportunity in this way.
- 5. IMPACT ON THE COMMUNITY.** Describe how the organization measures impact. If this is a program request, describe how impact is measured for the program that is the subject of this proposal.
- 6. COLLABORATION.** Describe the organization's most significant interactions with other organizations and efforts. For program and project requests, address this question with respect to that program or project only.
- 7. INCLUSIVENESS.** Describe how the organization strives to be inclusive in its programs, staff, board, and volunteers, and describe the progress to date.
- 8. BOARD/GOVERNANCE.** Describe the role of the board of directors in advancing the mission of the organization. Include the key issues related to board effectiveness that are being addressed this year, the organization's policy regarding board terms, and the percentage of the board that contributes financially to the organization.
- 9. VOLUNTEERS.** Describe how the organization involves volunteers and unpaid personnel (other than the board of directors) within a typical 12-month time period. Include number of volunteers and hours (if tracked by the organization).
- 10. PLANNING.** Describe the challenges and opportunities facing the organization in the next three to five years. Additionally, describe how the organization engages in planning and describe the focus of any current planning efforts.

## ATTACHMENTS

*Label each attachment and provide in the order listed.*

### Financial Attachments

*Note: Provide explanations for items that may raise questions in any of the attached financial documents. The explanations can be written onto the documents themselves or included as an additional page.*

1. **BUDGETS.** Include revenues and expenses.
  - a) The organization's operating budget for the current fiscal year. If available, also include the budget for the upcoming fiscal year.

*If the request is for a program or project, also include:*

  - b) Program or project budget for the program period.
2. **IN-KIND CONTRIBUTIONS.** Summary of significant in-kind donations (donated goods and professional services) received by the organization for the last fiscal year.