PRESENTED AT

Nonprofit Organizations Workshop

January 16, 2019
Austin, TX

Back to Basics: Grantmakers & Grantseekers
Supporting Documentation

Exhibit A – Grant Application Example
Exhibit B – Grant Agreement Example

Julie Lerudis, CPA – Finance & Grants Director
Boettcher Foundation; Denver, CO

Terry Quinn – Chief Development Officer
The Texas Tribute; Austin, TX

Permission given by Community Resource Center to share Colorado Common Grant Application. (01.03.2019)

CHECKLIST

The Colorado Common Grant Application (CGA) 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.

Note: If your proposal is for a building project or land acquisition, check the Common Grant Forms website to see if the grantmaker accepts the CGA for Capital Campaigns or contact the grantmaker directly if they are not listed on the website.

☐ Check specific grantmakers' guidelines and verify that they accept the CGA and determine whether or not they have made modifications to their application requirements.

☐ Comply with any unique application requirements.

☐ **Section I: Cover Letter (one page)**
Include the purpose of the grant request and a brief description of how the request fits with the grantmaker'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:*
General Operating Requests: 4-page limit; answer questions 1-3; 5(a), 5(b), 5(c); and 6-11.
Program or Project Requests: 5-page limit; answer questions 1-4; 5(a), 5(b), 5(d); and 6-11.

<u>Narrative Questions</u>

☐ 1. Organization Background
☐ 2. Goals
☐ 3. Current Programs
☐ 4. Program or Project Requests Only
☐ 5. Evaluation
☐ 6. Collaboration
☐ 7. Inclusiveness
☐ 8. Board/Governance
☐ 9. Volunteers
☐ 10. Planning

☐   11. Optional

☐   **Section IV: Attachments**
If you omit any of the required attachments, provide an explanation as to why.
Note: Some grantmakers will not accept an incomplete proposal, regardless of an explanation.

Financial Attachments

☐   1(a). Organization budget
☐   1(b). Program or project budget, if applicable
☐   2. Current (year-to-date) financial statements
☐   3. Year-end financial statements, audit, and Sources of Income Table
☐   4. Major contributors
☐   5. In-kind contributions
☐   Explanation of items in financial attachments, if applicable

Other Attachments

☐   6. Board of directors list
☐   7. Proof of IRS federal tax-exempt status, dated within the last five years
☐   8. Anti-discrimination statement adopted by the board of directors
☐   9. Key staff
☐   10. Annual report, if available
☐   11. Evaluation results (optional): Provide the organization's most recent evaluation results, relevant to this request.

Additional Attachments for Organizations Using a Fiscal Agent/Fiscal Sponsor

Note: Many grantmakers do not accept proposals from organizations using a fiscal agent/fiscal sponsor. Therefore, be sure to check each grantmaker's guidelines prior to submitting a proposal.

☐   1. The memorandum of understanding or the contract between the organization and the fiscal agent/fiscal sponsor.
☐   2. Financial attachments 1(a), 2, and 3 for the fiscal agent/fiscal sponsor.
☐   3. Proof of IRS federal tax-exempt status for the fiscal agent/fiscal sponsor, dated within the last five years.
☐   4. Board of directors list for the fiscal agent/fiscal sponsor.

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

Title search: Back to Basics: Grantmakers & Grantseekers Supporting Documentation

Also available as part of the eCourse
[2019 Nonprofit Organizations Back to Basics eConference](#)

First appeared as part of the conference materials for the
2019 Nonprofit Organizations Back to Basics Workshop session
"2A: Back to Basics: Grantmaking and Grantseeking"