



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: Some grantmakers accept the CGA with minor modifications. Therefore, always check grantmakers' websites or guidelines prior to submitting a proposal in order to ensure compatibility with their requirements.

- Check specific grantmakers' guidelines and verify that they accept the CGA.
- Comply with all of their 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 and 5–11.
Program or Capital Requests: 5-page limit; answer all the questions.

Narrative Questions

- 1. Organization Background
- 2. Goals
- 3. Current Programs
- 4. Program and Capital 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 foundations will not accept an incomplete proposal, regardless of an explanation.

Financial Attachments

- 1(a). Organization budget
- 1(b). Program or capital 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 funder'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, & 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.

A User's Guide for the CGA is available at www.coloradocommongrantforms.org.



SUMMARY SHEET FORM

Legal Name of Organization: _____

DBA (if applicable): _____

Mailing Address, City, State, and Zip:

Phone: _____ **Fax:** _____ **EIN:** _____

Website: _____

Name of CEO or Executive Director: _____

Phone: _____ **Email:** _____

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

Phone: _____ **Email:** _____

Organization Information

Mission Statement:

Geographic Area Served (specific to this proposal):

Tax Exemption Status:

Year Founded: _____



- 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: _____

Grant Request Information

Type of Grant Requested (select one):

Amount of Request: \$ _____

- Program Support
- Capital Request
- Other _____

Describe what the grant will be used for:

Financial Information

Organization's Current Budget for Fiscal Year Ending: _____

Income: _____ Expenses: _____

AND, if other than a general operating request,

Program or Capital 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.

CEO/Executive Director

Date



NARRATIVE

General Operating Requests: 4-page limit; answer questions 1–3 and 5–11.

Program or Capital Requests: 5-page limit; answer all questions.

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, as well as expected results. *If this request is for a specific program, describe that program in Question 4; describe the organization's **other** programs here.*
- 4. PROGRAM AND CAPITAL REQUESTS ONLY.**
 - (a) Provide a summary of the plan for the program or capital 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. EVALUATION.**
 - (a) Describe the organization's overall approach to evaluation.
 - (b) 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.
Respond to (c) OR (d):
 - (c) For general operating or capital requests: Summarize key evaluation results or findings that demonstrate the organization's impact. Indicate the time frame for the results or findings.
 - (d) For program requests: Summarize key evaluation results or findings that demonstrate the program's impact. Indicate the time frame for the results or findings.
- 6. COLLABORATION.** Describe the organization's most significant interactions with other organizations and efforts. For program requests, address this question with respect to that program 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.
- 11. OPTIONAL.** If there is additional information that is vital to convey in this proposal, do so here. (This must be contained within the four-page limit for general operating requests or the five-page limit for program and capital requests.)



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 capital project, also include:

- (b) Program budget for the program period OR capital project budget.

2. Current (year-to-date) financial statements

Include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income and Expense Statement) through the most recently completed operating month available (must be within the past three months). Provide the Statement of Activities in a budget-to-actual format if the organization uses that format.

3. Year-end financial statements, audit, and Sources of Income Table

Include the most recent fiscal year-end financial statements, audited if available. If the organization has an audit, but it is not available for the most recent fiscal year-end, also include the most recent audit.

Sources of Income Table

Complete the table below for the organization as a whole, based on the most recently completed fiscal year. Categories may be modified.

| <u>Percentage</u> | <u>Funding Source</u> |
|-------------------|---|
| _____ % | Government grants (federal, state, county, local) |
| _____ % | Government contracts |
| _____ % | Foundations |
| _____ % | Business |
| _____ % | Events (include event sponsorships) |
| _____ % | Individual contributions |
| _____ % | Fees/earned income |
| _____ % | Workplace giving campaigns |
| _____ % | In-kind contributions (optional) |
| _____ % | Other _____ |
| _____ % | TOTAL (must equal 100%.) |



4. Major contributors

List major contributors (foundations, businesses, government, individuals) with amounts for the previous two years. Do not include names of individual donors.

5. In-kind contributions

Summary of significant in-kind donations (donated goods and professional services) received by the organization for the last fiscal year.

Other Attachments

6. Board of directors list. Include the following items for each board member:

- Position(s) on the board (officer and committee positions)
- Occupation and name of employer and/or affiliation(s)
- City or county of residence
- Term end date for each board member

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. List of names and qualifications of key staff, including length of service. *Do not include job descriptions or resumes.*

10. Annual report, if available.

11. Evaluation results (optional): Provide the organization's most recent evaluation results or findings, relevant to this request.

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