

What You Will Need to Apply **PROGRAM/PROJECT**

PLEASE NOTE: This document is intended to provide an overview of all potential information and documents needed to complete a grant application.

*You will be required to upload or attach documents to your application. These documents must already be saved on your computer before you can browse and upload them to your application. Documents that are requested can be in Word, Excel or PDF format.

A. Organization Contact Information

- Legal name, address, phone number, fax number and web address
- Contact information for CEO/President/Executive Director, Finance/Accounting contact, and application submitter

B. Organization General Information

- Tax status, ID and filing year end
- Year established, staff size (FTE's) and number of locations
- Mission statement
- Comprehensive overview of the organization including but not limited to
 - Brief History
 - Focus
 - Programs
 - Audience Served
 - Geographic Reach
- Information regarding previous grants from Robert B. Daugherty Foundation
- Policy information relating to conflicts of interest, related party transactions, and accessing endowment principle
- Description of any outstanding legal actions
- Questions pertaining to:
 - Differentiating attributes
 - Short-term challenges
 - Long-term challenges and strategic plans ¹
 - Contingent liabilities ^{1 & 2}
 - Management Succession Plan ^{1 & 2}
- Documents needed to attach in this section*:
 - IRS tax determination letter
 - Organization Chart
 - Brief biographies of top three (3) management personnel
 - Board of Directors listing including name, employer and business title
 - Policy regarding access to endowment principle, if any

C. Organization Financial Information

- Current financial position, operating budget and Board Member operating support
- Accounting firm(s) that prepare financial information
- Line of Credit ^{1 & 2}
- Employee Benefits ^{1 & 2}
- Documents needed to attach in this section*:
 - Current year-to-date balance sheet and related actual vs. budget income statement**
 - Current year annual operating budget (for full year)**
 - Past two years **internal** financial statements**
 - Past two years audited financial statements
 - The Top 10 Supporters spreadsheet (please download from application for instructions)
 - Most recent annual report, if any

**All submitted financial statements, unless otherwise specifically requested, should be provided in the same reporting format used by the organization's management in the monthly and annual monitoring of the business. The financial statements should, at a minimum, include both a Balance Sheet and related Income Statement.

¹ Items required for grant requests over \$100,000

² Items required for grant requests over \$1,000,000

D. Program/Project Information

- Program/Project Name
- Request amount
- Frequency of Grant (one-time or multi-year)
 - If multi-year, number of years and amount per year for each year of grant request.
- Total Program/Project Budget
- Funds Available (cash and pledges raised to date)
- Type of Program/Project (select from list)
- Targeted geographic area
- Project start and end date and when funding is needed (mm/dd/yy)
- Information regarding contact with Robert B. Daugherty Foundation pertaining to request, if any
- Board Member financial support of Program/Project
- Make the Case for Support information pertaining to:
 - Narrative overview of project including history, scope, need, time-line (past, present, and future), impact on staff and budget, and how the program/project goals relates directly to organization mission
 - Description of program/project goals for funding period
 - Services and activities performed to accomplish stated goals
 - Additional staffing needs
 - Sustainability plan for after Robert B. Daugherty Foundation Funding would end
 - Overlapping efforts and/or collaborations with organizations in the community offering similar services and program/project
 - Importance to targeted area
 - Monitoring or program/project
- Documents needed to attach in this section:
 - Detailed, itemized program/project budget covering entire request period

F. Funding Sources

- List of all committed actual funding sources including:
 - Name
 - Amount
 - Status (secured-funded, pledged, in-kind, debt)
 - Matching or Challenge?
 - Has Organization previously received funding for this program/project from listed source
- List of identified potential funding sources including:
 - Name
 - Amount
 - Status (outstanding proposal or not yet contacted)
 - Date last contacted
 - Amount of financial support provided over last 5 years

Space is provided on the application to list 10 committed actual funding sources and 10 potential funding sources. If more sources are committed or identified, there is an option to attach a listing of additional committed and/or potential sources.*

Signature Page

- Statement signed by CEO/President/Executive Director or CFO verifying that the organization's tax exempt status has not been revoked*
- Electronic Signature of submitter

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