

Common Grant Application & Report

Standard forms for requesting and reporting on grants
from Greater Washington funders

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Cover sheet, report narrative, attachments

Forms published by the Washington Regional Association of Grantmakers (revised 2012).

Before applying, confirm with each funder that it accepts these forms and whether it requires a newer version.

Common Grant Application

Formatting Notes

- Proposals should be typed in 12-point font (Times New Roman or similar) with one-inch margins on all sides
- Pages should be numbered
- Proposals should not be placed in binders or folders; one staple or paper clip in the upper-left hand corner is sufficient

SECTION ONE: Executive Summary (1 page, single-spaced)

1. Application date
2. Organization name and contact information (full address, including mailing address if different, telephone number, and website)
3. Federal tax-exempt number
4. If not a 501(c)(3) nonprofit, provide fiscal agent's contact information and federal tax-exempt number
5. Name, title, telephone number, and email address of CEO or executive director
6. Name, title, telephone number, and email address of contact person for this proposal (if different)
7. Dollar amount of this funding request
8. Total current organizational budget (all requests)
9. Total project budget (project support requests only)
10. Organization's fiscal year (beginning date and end date)
11. Period this funding request will cover
12. Purpose of this funding request, including brief description of the population and number of individuals served, and geographic area(s) that will benefit (as applicable)
13. Signature of executive director or other authorizing official

SECTION TWO: Narrative

ORGANIZATIONAL INFORMATION: All requests must complete this section. If applying for general support, this section should be no more than five (5) pages double-spaced. If applying for project, capital campaign, or capacity building support, this section should be no more than four (4) pages double-spaced.

1. Briefly describe your organization's history, mission, and goals.
2. Briefly describe the role of your organization's board of directors, including how your board carries out its responsibilities for financial and programmatic oversight and fundraising.
3. Briefly describe current activities, recent accomplishments, and future plans.
4. Briefly describe how the population you serve is involved in the work of your organization.

5. Briefly describe your most significant collaborations and partnerships with other entities in your field or geographic area.
6. **General support, capital campaign, and capacity building requests only:** What results are you committed to achieving during the grant period? What is the timeline for accomplishing these results? What evidence will prove your success?

PROJECT INFORMATION: Complete only if applying for project support. For capital campaign and capacity building requests, please see appendices I and II. This section should be no more than four (4) pages double-spaced.

1. What problem or need does your project address?
2. What is your proposed solution to this problem or need?
3. What is the plan for implementation of this project?
4. Is this a new project? If yes, how was the project approach developed? If not, what have you accomplished so far?
5. Are there additional partners who you are working with for this project (who were not listed in the previous section)? If so, who are they and what are their roles?
6. What results are you committed to achieving during the grant period? What is the timeline for accomplishing these results? What evidence will prove your success?

SECTION THREE: Financials

Please include the following information, regardless of the size of the request. You may submit this information in the format most convenient to you. Footnotes may be used to explain budget items.

Special note for arts and cultural organizations: Some funders now require applicants to submit organizational and financial data to the DC Cultural Data Project (www.dcculturaldata.org), which generates reports for funders. Be sure to check with the funder you are applying to in order to determine whether this is required.

FOR ALL REQUESTS

Financial statements:

- a. For previous fiscal year: organizational budget v. actual, including revenue and expense categories listed below
- b. For current fiscal year:
 - i. Organizational budget v. actual, including revenue and expense categories listed below
 - ii. Organization's year-to-date Statement of Financial Position (Balance Sheet)
 - iii. Organization's year-to-date Statement of Activities (Income Statement)
- c. For next fiscal year: Organization's projected/proposed/draft budget for the next fiscal year, only if this application is being made during the last quarter of the organization's fiscal year

FOR PROJECT, CAPACITY BUILDING, AND CAPITAL CAMPAIGN REQUESTS PLEASE ALSO INCLUDE THE FOLLOWING:

Financial statements:

- a. For previous fiscal year: project budget v. actual, including revenue and expense categories listed below

- b. For current fiscal year: project budget v. actual, including revenue and expense categories listed below
- c. For next fiscal year: project projected/proposed/draft budget for the next fiscal year, only if this application is being made during the last quarter of the organization's fiscal year

Revenue Categories: Please use the categories listed below when developing the financial statements requested above. Not all categories may be applicable to your organization or request.

In addition, please list specific amounts requested from foundations, corporations, and other funding sources, as well as the status of those requests (pending or committed).

Be sure to include all revenue sources, committed and pending. For pending requests, please indicate the date you expect notification. This additional information can be submitted separately from the financial statements.

- 1. Grants/Contracts:
 - a. Local/State/Federal Governments (please list source(s))
 - b. Foundations
 - c. Corporations
 - d. United Way/Combined Federal Campaign and other federated campaigns
 - e. Individual Donors
 - f. Other (specify)
- 2. Earned Revenue:
 - a. Events
 - b. Publications and Products
 - c. Fees
 - d. Other (specify)
- 3. Membership Income
- 4. In-Kind Support (donated goods, services, equipment, non-cash items, volunteer hours)
- 5. Other (specify)
- 6. Total Revenue

Expense categories: Include the total amount for each category relevant to your organization. Skip categories where you have no expenses. For project support requests, please show two columns – one listing the total expense and one listing the specific costs requested in this grant proposal.

- 1. Salaries (total salary budget, number of positions, and whether full- or part-time)
- 2. Payroll Taxes
- 3. Fringe Benefits
- 4. Consultants and Professional Fees (itemize type(s) of consultant(s) and fees)
- 5. Travel
- 6. Equipment
- 7. Supplies
- 8. Printing and Copying
- 9. Telephone and Fax
- 10. Postage and Delivery
- 11. Rent and Utilities
- 12. Maintenance
- 13. Technology (if budgeted separately, specify hardware/software capital spending, maintenance, and/or training)
- 14. Evaluation

15. In-kind expenses
16. Other (specify)
17. Total Expenses

SECTION FOUR: Attachments

1. A copy of your (or your fiscal agent's, if applicable) current IRS tax-exempt determination letter. If tax-exempt status is pending, provide an explanation of application status
2. Most recent audit or form 990 (or that of your fiscal agent, if applicable)
3. A one-page organizational chart
4. Short biographies of staff and volunteers essential to the success of this request
5. List of board members with terms, occupations, and places of employment
6. Current, dated Memoranda of Understanding or Memoranda of Agreement with other organizations for collaborative or cooperative activities, as appropriate
- 7. For capital campaign requests only: List of members of the capital campaign/leadership committee**
- 8. For capacity building requests only: Current strategic plan**

APPENDIX I: Capital Campaign Requests

Capital campaign requests are designated for the acquisition, construction, renovation, or improvement of a property. If applying for capital campaign support, provide the information requested below, in addition to the organizational information requested in Section Two. This section should be no more than four (4) pages double-spaced. Include information on the following, as applicable to your organization's request.

1. Discuss the need, feasibility, and cost of the capital campaign, and its implications for the organization's ongoing operational expenses.
2. Specify contributions in hand, as well as those that are pending or prospective.
3. Specify loans, including amounts and terms.
4. Include the financial participation in the campaign of the board and the capital/leadership campaign committee (percent participating and total contributed).
5. Specify whether purchase agreements or purchase options are signed or imminent. Specify also whether regulatory approvals (e.g., Certificate of Need, zoning, historic preservation, environmental impact) are in place or are imminent.
6. Indicate if timing is a factor, i.e., if a "window of opportunity" exists that would affect the success of the campaign.

APPENDIX II: Capacity Building Requests

If applying for capacity building support, provide the information requested below, in addition to the organizational information requested in Section Two. This section should be no more than four (4) pages double-spaced.

1. Please provide a brief overview of the strengths and major challenges facing your organization at this time.
2. Please describe the specific capacity issue or need to be addressed with this request.
 - a. How was the issue identified? Include information about how the board and other key stakeholders were involved in identifying the issue or need.
 - b. Is your organization currently working on this issue? If so, where are you in the process? Have you worked to address this issue previously? If so, what were the outcomes of these efforts? Please identify

any current, past, and potential funders of this capacity building project, the amounts you have received or requested, and the status of the request.

3. Please describe the project plan.
 - a. Describe specific tasks and activities and timeline.
 - b. Identify key staff or board members who will be involved in the project. Briefly describe what skills and experiences they will bring to the project.
 - c. Are there specific consultants or groups that the organization will partner with to address the identified capacity issue? What was the process and criteria for selection? If your project includes software, equipment, or other products, please describe the process and criteria for selection.
4. Please describe key outcomes.
 - a. List at least three specific, measurable short-term outcomes.
 - b. What will be the long-term impact of this project? How will the project strengthen your organization, enable you to deliver programs or services more effectively, and better achieve the organization's mission? How does it further the goals in your strategic plan?

Common Grant Report

Formatting Notes

- Reports should be typed in 12-point font (Times New Roman or similar) with one-inch margins on all sides
- Pages should be numbered
- Reports should not be placed in binders or folders; one staple or paper clip in the upper-left hand corner is sufficient

Cover Sheet

1. Report date
2. Organization name and contact information (full address, including mailing address if different, telephone number, and website)
3. Federal tax-exempt number
4. If not a 501(c)(3) nonprofit, provide fiscal agent's contact information and federal tax-exempt number
5. Name, title, telephone number, and email address of CEO or executive director
6. Name, title, telephone number, and email address of contact person for this report (if different)
7. Dollar amount of this grant
8. Funding period of this grant
9. Period that this report covers, if different
10. Signature of executive director or other authorizing official

Report Narrative (maximum of four (4) pages double-spaced)

1. What progress have you made toward achieving the results you described in your proposal during this period? What evidence do you have to demonstrate your success? If you did not achieve your intended results, why not?
2. What do you consider to be the greatest strength(s) of your work? What do you consider to be the most important concern(s) – apart from finances – currently facing your organization (or project, if you received project support)?
3. Have there been any significant changes in your organization or the project since the grant was awarded (i.e., executive leadership, staff, facilities, location)?
4. As applicable, describe any plans for moving forward. What, if anything, will you do differently?
5. What are the organization's two (2) most significant financial challenges and how are you planning to address them?

(See page 2 for attachments)

Attachments

For general support grants:

1. Organization budget as submitted in the original proposal and actuals for this period. Explain any significant variances
2. List the organization's largest funding sources during this period

For project support grants:

1. Organization and project budgets as submitted in the original proposal and actuals for this period. Explain any significant variances
2. List other funding sources and amounts received for this project during this period