USER GUIDE

Missouri
COMMON GRANT
APPLICATION
Version 2.0

Background

In 2012, representatives from the St. Louis grantmaking community came together with the Gateway Center for Giving to create a Missouri Common Grant Application (CGA) and related materials.

The CGA was designed to help make the grantmaking process simpler and more efficient for nonprofits while at the same time encouraging dialogue between funders and nonprofit organizations.

The goals for the creation of this application are:
- Designing a standard, yet customizable, Common Grant Application (CGA) for Missouri grant-makers.
- Allow Missouri grant-makers and grant seekers to work from a common set of questions that reinforce solid nonprofit practices.
- Save grant seekers time and effort by using a single form for many different applications.

Why the User Guide

The developers of the CGA created this User Guide to help organizations write more effective grant applications. The User Guide provides a greater understanding as to why each question is important to grant-makers and what grant-makers hope to learn about an organization from a particular question.

Each topic covered in the questions and attachments is an integral component of a well-run nonprofit. The User Guide elaborates on each topic with the intention of reinforcing the fundamentals of solid nonprofit practices. If you find a question particularly difficult to answer, then recognize that this is probably a topic that needs to be discussed by the organization's leadership (staff and board). The User Guide may provide helpful conversation starters for such discussions.

The User Guide is also intended to alleviate some fears that organizations may have. While the questions are uniform, grant-makers expect wide variation in the answers based on an organization's budget size, years in existence, location, and mission. Again, there is no one "right" answer.

It is not essential for a grant writer to reference the User Guide when completing the CGA. The CGA itself is designed to stand alone. However, for those new to grant-writing or for

anyone who is not clear about the intent of a question, the User Guide provides information that will hopefully alleviate confusion. It is also appropriate to contact a grant-maker directly if you have questions that are not answered on the grant-maker's website or in its grant guidelines.

User Guide Overview

The User Guide covers each question and attachment of the CGA. It can be read start to finish or referred to for clarification related to a specific component, question, or attachment.

The User Guide gives a brief explanation of why a question is being asked and provides additional insight into the intent of the question. The items specified in the text of the questions or attachments need to be addressed in your answers. The "Tips and Things to Consider" sections are suggestions, not necessarily requirements.

Considering the extreme diversity of the types of organizations completing the CGA, some of the items listed may or may not apply to your organization. The tips section is offered to help stimulate your thinking if you are unsure about what information would be relevant to convey in response to a specific question.

Tips for Writing Successful Proposals

- Communicate with funders if their grant guidelines let you know that it is okay. When in doubt, ask for clarification. Make sure you understand what's expected.

- Follow the directions. Answer the questions in the order listed, submit the number of copies grant-makers request, and include only the materials specified.

- Be clear, concise, and accurate. Make the case for your proposal in your own unique way, but include precise data. Avoid technical jargon.

- Emphasize what your organization will do. Spend more time describing your solution than the issue. Economize content and avoid repetition.

- Evaluation counts. Keep what you want to learn and evaluate in mind, as well the assessment tools you will use to evaluate your project (e.g., records, surveys, interviews, pre- and post-tests).

- Proofread carefully. Make sure numbers add up and typos are removed. Double check the funder's name.

- Seriously, proofread! If your proposal has been adapted for multiple funders, then make sure you omit other funders' names, as well as references to previous requests.

- Ensure that your request to each funder is based on their mission, vision, and funding interest. This Common Grant Application is NOT meant to be completed once and then sent to every grant-maker in the community.

Glossary of Terms

Activity/Tactics: Actual events or actions that take place as part of the project to achieve goals and objectives.

Capacity Building: Supporting projects that strengthen the development of an organization's core skills and capabilities, such as leadership, management, finance/fund-raising, programs, and evaluation, to build the organization's effectiveness and sustainability.

Collaboration: Organizations often submit joint proposals for funding to address common issues of organizational capacity and program outreach where they have similar outcomes to accomplish.

Cultural Competency: The process by which individuals and systems respond respectfully and effectively to people of all cultures, languages, classes, races, ethnic backgrounds, religions, spiritual traditions, immigration status, and other diversity factors in a manner that recognizes, affirms, and values the worth of individuals, families, and communities and protects and preserves the dignity of each.[1]

Diversity: Term that describes the presence of individuals from various backgrounds and/or with various identities. The term is often used to include aspects of race, ethnicity, gender, sexual orientation, class, and ability. [2]

Doing Business As (DBA): Name under which the business or operation is conducted and presented to the world but may not be the legal name.

Equity: The condition that would be achieved if the identities assigned to historically oppressed groups no longer acted as the most powerful predictor of how one fares, with the root causes of inequities eliminated. (Examples include the elimination of policies, practices, attitudes, and cultural messages that reinforce or fail to eliminate differential outcomes by group identity/background).[3]

Evaluation: The process of undertaking an analysis, at various degrees of formality, of the impact of a grant-funded project, usually communicated in the form of a report to the funder.

Fiscal Agent: A nonprofit, tax-exempt organization that acts as a sponsor for a project or group that may not have its own tax-exempt status. Grants or contributions are made to the fiscal agent who manages the funds.

General Operating Support: Grant funds to support the ongoing services, mission, or goals of an organization.

Goal: What is the desired result of the project in general terms? The broad, overarching purpose served by your project or service — for instance, "Our purpose [or goal] is to help women victimized by abuse recover their strength, stability, and self-esteem."

In-Kind Support: A contribution of equipment/materials, time, non-cash item, and/or services that the donor has placed a monetary value on.

Inclusion: The degree to which individuals with diverse perspectives and backgrounds can participate fully in the decision-making processes of an organization or group.[4]

Glossary of Terms

Letter of Intent (LOI): Also known as concept paper, white paper and pre-proposal, it is a brief, preliminary letter describing an organization and proposed grant request, usually sent prior to a full proposal.

Long-term Goal: Occurs after the funding period.

Marginalize: The process of making an individual, group, or class of people less important or relegated to a secondary position, which often leads to exclusion from meaningful participation in society.

Method(s): A procedure for accomplishing or approaching something. See Activity/Tactics.

Needs Statement: Presents the facts and evidence that support the need for the project and establishes that your organization understands the problems and therefore can reasonably address them. The information used to support the case can come from authorities in the field, as well as from your agency's own experience.

Operational Support: A grant given to cover an organization's day-to-day expenses such as salaries, utilities, office supplies, etc.

Outcome/: The changes in (or benefits achieved by) individuals or communities due to participation in project activities. Time-specific, measurable statements describing the results to be achieved and the way they will be achieved. This may include changes to participant's knowledge, skills, values, behavior, conditions, or status.

Output (Product): Direct product of project activities; immediate measures of what the project will do and/or has done in the past.

Program: An organized set of services designed to achieve specific outcomes for a specified population that will continue beyond the grant period.

Project: A planned undertaking or organized set of services designed to achieve specific outcomes that are time-limited. (Note: A successful project may become an ongoing program of the organization.)

Responsibility: Individual(s) responsible for the stated activity and measurements.

Short-term Goal: Occurs during the funding period.

Strengths-based Practice/Perspective: Model of intervention that shifts the focus of work with clients and communities from power-over to power-with, from deficits to capacities, from expert-focused to the client-as-expert. Nonprofits using this lens recognize the communities/clients they serve as capable, resourceful, and gifted rather than defient.[5]

Technical Assistance: Operational or managerial assistance given to a nonprofit organization. It may include fundraising assistance, budgeting/financial planning, project planning, legal advice, marketing, or other aids to management. Assistance may be offered directly by a foundation or corporate staff member, or in the form of a grant to pay for the services of a consultant.

Timeline: When is the activity taking place and/or what is the duration?

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[1] National Association of Social Workers, *Standards and Indicators for Cultural Competence in Social Work Practice,* 2015.
[2] Baltimore Community Foundation*, DEI Definitions of Terms*. Drawn from Baltimore Racial Justice Action. 2014.
[3] Ibid.
[4] D5 Coalition*, State of the Work: Stories from the Movement to Advance Diversity, Equity, and Inclusion*, 2016.
[5] Hammond, Wayne. Resiliency Initiatives, *Principles of Strength-Based Practice*, 2010.

Table of Contents

*Note: Some of the content in this user guide has been modified to be relevant for St. Louis City Senior Fund applications. Go to the Senior Fund's **Grants** page for additional information on grant eligibility and applications.*

*In addition, this guide is primarily written for the Senior Fund's **Fund Defined Grant** applications. However, there are several sections that are relevant for **Applicant Defined Grant** applications that we strongly recommend reviewing.*

Frequently Asked Questions

1. **Is there a page or character limit for this application?**
   There is no set page or character limit for this application. We recommend that you answer each question as completely as possible. All fields in this application expand to fit whatever text you input into them.

2. **May I use bullets to answer the questions in this application?**
   If the question lends itself to using bullets, then feel free to use bullets.

3. **Do I need to submit a letter of inquiry before completing this application?**
   The St. Louis City Senior Fund does not accept letters of inquiry unless specifically requested for the funding opportunity.

4. **Can I use this form for capital campaign requests?**
   The St Louis City Senior Fund does not support capital campaign requests.

5. **Can I use this form for general operating requests?**
   The St Louis City Senior Fund does not support general operating requests.

6. **Can I use this form for special event requests?**
   The St Louis City Senior Fund does not support special event requests.

7. **Can I still call with questions about program and mission fit?**
   Many funders recommend that you reach out to them when you are applying to ensure program and mission fit before taking the time to submit your application. Go to the Senior Fund's Grants and Contact pages for information at stlseniorfund.org.

8. **Why are there questions about Diversity, Equity, and Inclusion (DEI) in the CGA?**
   The St. Louis City Senior Fund recognizes the importance of including DEI in grantmaking, as using a DEI lens informs the work of both grant-makers and nonprofits and offers a mechanism to address the profound disparities in opportunity that exist for marginalized groups. The inclusion of DEI-related language and questions throughout the

CGA and related materials is meant to: 1) provide a valuable perspective to grant-makers about their potential grantees' capacity to navigate DEI issues, and 2) encourage self-assessment and dialogue about DEI issues by both nonprofits and grant-makers.

9. **How do you define Diversity, Equity, and Inclusion (DEI)?**
   There are a variety of definitions for these terms. You can find the definitions we utilized in the User Guide's Glossary of Terms.

PART I. COVER SHEET

Tips & Things to Consider

- Be brief. Remember, this is a quick look at the organization. Detailed explanations should be reserved for the narrative portion of the application.

- Be sure that the information on these pages (budget figures, requested amount, etc.) matches any reference made later in the application.

- Update this section anytime you update the Narrative or Attachments to ensure that the information is consistent throughout the application.

- Regarding specific items on the Cover Sheet:

  o *Legal Name of Organization* - This should be the exact wording from the IRS 501(c)(3) letter.

  o *Doing Business As* - The name that the organization is widely known by, if different from the legal name.

  o *Main Contact for this Proposal* - If this is different from the CEO or Executive Director. This could be the development director, program director, or other person who should be contacted for further information or questions regarding the application.

  o *Board President* - In the case of potential staff changes at the organization it is important to also list the current Board President.

  o *Tax Exemption Status*

    ▪ If the organization applying is operating under the fiscal sponsorship of another organization, then provide the legal name of the fiscal agent. The Fiscal Agent/Fiscal Sponsor section outlines the information needed for the fiscal agent/fiscal sponsor. Everything else in the application should be completed with regard to the organization applying, not the fiscal agent.

    ▪ Examples of "Other than 501(c)(3)" include governmental entities and religious organizations.

  o *Type of Request* – For Fund Defined Grants: Indicate if the project for which you are requesting funding is for a program that is new to your organization, a program that is existing, (already in operation) and requires ongoing support at its current level, a program that is an existing program but you are requesting funding in order to expand or enhance it. For Applicant Defined Grants: Indicate if you are seeking

support for a pilot of a new program or innovation to an existing service, support for an existing program, or funding to improve capacity within your organization to deliver services.

   o *Financial Information* – For the organization's current budget, the information should cover the year in which the grant will be used. (Note: the date should be formatted mm/dd/yy).

   o *Geographic Area Served* - The zip codes in the City of St Louis that your organization current serves (you can indicate which zip codes will be served with your grant in the Narrative section). Be as accurate as possible within a short space.

   o *Executive Director Signature* - The signature should be that of the Executive Director or authorizing official on behalf of the organization.

PART II. NARRATIVE

SECTION A, QUESTION 1 - ORGANIZATION HISTORY

Discuss the founding and development of the organization, and the organization's current mission statement. Explain the original issue and/or opportunity the organization was founded to address and how that may have changed over time.

Rationale
By offering a solid description of when, why, how, and if relevant, by whom the organization was founded, as well as how the organization may have changed over time, you provide context for understanding an organization's current reality.

Tips & Things to Consider
- Founding: This is asking for a brief history of the organization's origins, not a detailed chronology of events. This is the place to convey the passion and commitment that led to the organization's creation. Even if the organization is well-known in the community, it is still necessary to provide the brief history that is asked for in this question.

- Development: If the organization has evolved over time in response to internal or external factors, then briefly describe here.

- The original issue and/or opportunity the organization was founded to address: This is the place to describe the need for the organization. This version of the CGA moves away from the language of a "needs statement" in favor of language that has a more positive orientation ("issue and/or opportunity," in place of "need"). However, it is still very important to explain what concern the organization was founded to address and – if it has changed – the concern that is currently being addressed.

- It is not necessary for organizations with long histories (more than 20 years) to cover all of the intervening years. Major milestones or significant changes in the organization's approach to its mission should be included only if such information will add to an understanding of current circumstances.

- If the organization has had a rocky past, then describe how those difficulties were overcome or are currently being addressed. Candor is appreciated and respected. If you have already described the situation in the cover letter, then do not repeat it in the organizational background.

SECTION A, QUESTION 2- ORGANIZATION DEMOGRAPHIC INFORMATION

Provide a brief description of the organization's current clients served. Include population and numbers served (unduplicated) in the last three fiscal years. In the last fiscal year provide information on the gender, race/ethnicity and zip code of clients served.

Rationale
By reading about the organization's demographics, the grant-maker will learn how many older adults the organization has served in the last three years.

Tips & Things to Consider
- By including information on the population served, you provide a clear sense of the current beneficiaries of the organization's projects and services. A description of the population served typically involves an explanation of the demographics of the population impacted by this grant. Be brief—only a limited amount of demographic information is needed.

- Numbers served offers a sense of scope and size of an organization. In describing numbers served, provide information on unduplicated individuals clients and not total units of service delivery.

- High or low numbers are not inherently good or bad. For example, an organization with one or two projects may be taking a very focused approach. In terms of numbers of individuals receiving services, serving 1,200 seniors vs. 15 seniors probably reflects a very different kind of project. It does not mean that one is more important or effective than the other.

SECTION B, QUESTION 3 – DIVERSITY, EQUITY, & INCLUSION: EFFORTS & AMBITIONS

Rationale
A growing number of grant-makers and nonprofits are embracing diversity, equity, and inclusion in their work. Grantmakers are seeking an understanding of their own and their potential grantees' capacity and/or hopes to effectively navigate diversity, equity, and inclusion (DEI) issues in a world of profound disparities in opportunity for marginalized groups.

Your answers will provide a valuable perspective on our grantees' capacity to address the issues of diversity, equity, and inclusion (DEI) and inform future investment in training and capacity-building.

Tips & Things to Consider
- Funders like to know if and how an organization is working to best incorporate a lens of diversity, equity, and inclusion (DEI) into their work.

- If your organization <u>does not</u> have any active efforts or initiatives that incorporate a DEI lens into its work, list any DEI goals your organization hopes to achieve in the future (e.g. developing a more diverse board of directors, conducting yearly cultural competency trainings with staff, active inclusion of diverse vendors, mechanisms for senior accountability for DEI performance, etc.).

  - Answers to this question should focus on the organization's overarching DEI practices. They can be supplemented with DEI practices related to the specific program for which funds are being sought.

- There are no "correct" answers, as every organization's work in the areas of diversity, equity, and inclusion (DEI) is different and can present opportunities to grow. It is up to each organization to identify what "diversity," "equity," and "inclusiveness" means to them within their organizational and community-based context.

  - If you need additional guidance about how an organization might define these terms, please see our Glossary of Terms on Page 5 of this User Guide.

- If you are having difficulty answering this question, we encourage you to start small. Consider whether your organization has a non-discrimination policy which outlines your organization's commitment to fair employment practices or a statement on diversity, equity, and/or inclusion, which summarizes your organization's values and stance on DEI.

Examples

- Focus on the organization's board of directors:

  - ABC Non-Profit, Inc. is committed to building an inclusive and diverse organization. The organization is led by a diverse board of directors, which consists of 50% African American individuals, 20% Hispanic/Latino, and 30% White/Caucasian. In addition to racial diversity, we strive to be inclusive of all sexual orientations and abilities, as our board has two self-identified gay individuals and another individual with a physical disability.

- Focus on the organization's cultural competency:

  - We provide materials to our clients in both Spanish and English, and ABC Non-Profit, Inc. covers translation costs into other languages upon request.

  - ABC Non-Profit, Inc. annually offers cultural competency training to board members, staff, and volunteers, and has implemented new employee orientation specific to issues of inclusiveness.

Additional Resources

The following resources have helpful suggestions for ways in which an organization can begin or further its commitment to DEI. Please contact the funder to which you are submitting this application if you have questions about their commitment to DEI and/or their DEI expectations for grantees.

- *Bridgespan Group—Five Ways to Build and Maintain Staff Diversity (2013)*

- *D5 Coalition—Policies, Practices, and Programs for Advancing Diversity, Equity & Inclusion (2013)*

- *The Denver Foundation—[Inclusiveness at Work: How to Build Inclusive Nonprofit Organizations](#) (2005)*

- *Gay & Lesbian Fund for Colorado—[Inclusive Workplace Toolkit](#) (2011)*

- *Green 2.0—[Beyond Diversity: A Roadmap to Building an Inclusive Organization](#) (2017)*

- *Lever—[A Step-by-Step Guide to Cultivating Diversity and Inclusion Part 1: 50+ Ideas](#) (2017)*

- *National Council of Nonprofits—[Nonprofits, You Are the Champions for Diversity, Inclusion and Equity](#) (2016)*

- *Stanford Social Innovation Review—[Five Ways to Build Diverse, Inclusive Leadership Teams](#) (2015)*

- *Third Sector New England—[Achieving Diversity in the Nonprofit Workplace: A Step-by-Step Guide](#) (2010)*

SECTION B, QUESTION 4 – DIVERSITY, EQUITY, & INCLUSION: DEMOGRAPHICS

Rationale
A growing number of nonprofits are embracing diversity, equity, and inclusion in their work. It is essential to have diverse perspectives and life experiences within a nonprofit's leadership team, as it encourages richer conversation and understanding, leads to greater innovation, and increases the likelihood of achieving impactful organizational and programmatic outcomes.

Tips & Things to Consider
- There is no wrong answer. Grantmakers are looking to hear your organization's story and how it has shaped your internal community.

- Recognizing the differences in history, mission, and culture among nonprofit organizations, it is the responsibility of each nonprofit to determine how to incorporate the voices of, and be accountable to, the communities/clients they serve.

- When answering this question, consider how your organization defines diversity within your community/clientele, and how you ensure that everyone is represented in your organization.

- When taking an inventory of the diversity/demographics present within your organization, it is best to avoid guessing or assuming how people would identify. Whenever possible, organizations should ask their staff, board, and volunteers how they choose to identify their race, sexual orientation, etc.

- If you are having difficulty answering this question, we encourage you to start small and consider your stakeholders, including partner agencies. Your organization might be a part of a regional coalition or rely upon focus groups or committees to gain the perspective of people representing various demographics, including the demographics of the community/clients your organization serves.

Examples

- *ABC Non-Profit, Inc. primarily serves low income, African American women and girls. Our organization mainly recruits female staff from local communities with an emphasis on priority neighborhoods. More than 20 women (ages 60-75) volunteer annually at our organization for pre-employment experience, the majority of who identify as African American/Black.*

- *ABC Non-Profit, Inc. provides quarterly practicum supervision to three, female, University of XYZ Master of Social Work graduate students.*

- *Our Board of Directors consists of five, White/Caucasian men, one White/Caucasian female, and two African American/Black females. The remaining two positions on the board of ABC Non-Profit, Inc. are reserved for a community advocate and elderly advocate, both of whom are required to be female members of the community. To remove barriers to participation, our board policies include provisions for accommodations for persons with disabilities, and for board members who claim daycare and travel expenses.*

SECTION C, QUESTIONS 5 & 6 – DESCRIPTION OF COMMUNITY/CLIENT NEEDS & STRENGTHS

Identify the community/client's needs that the project or program will address. This is the place to highlight an organization's understanding of the need it is addressing through this specific project. This section also provides an opportunity for an organization to acknowledge some of the key strengths, capacities, and assets of their clients/community in need and re-imagine the outcomes of their work using an aspirational, strengths-based perspective (see glossary for definition of strengths-based perspective).

Tips & Things to Consider

- This is where you demonstrate to the funder the importance of the issue you want to tackle, and it is an opportunity to demonstrate that your organization has expertise on the issue.

- Don't assume the funder knows much about your subject area. Most grantmaking staff people are generalists.

- Why is this situation important? To whom did your organization talk, or what research did you do to learn about the issue and decide how to tackle it?

- Describe the situation in both factual and human-interest terms, if possible. Providing good data/statistics demonstrates that your organization is expert in the field. *Include citations for any statistics or research you reference.* If there are no good data on your issue, then consider doing your own research study, even if it is simple.

- Describe your issue in as local a context as possible. If you want to educate people in the City about an issue, then tell the funder about what is happening in the City — not in the United States as a whole unless national data would provide valuable context to the local information.

- Describe a problem that is about the same size as your solution. Don't draw a dark picture of nuclear war, suicide, or lethal air pollution if you are planning a modest neighborhood arts project for older adults.

- Don't describe the problem as the absence of your project. "We don't have enough beds in our abused women's emergency shelter" is not the problem. The problem is increased levels of domestic violence. More shelter beds are considered a solution.

- Don't use acronyms that haven't been clearly explained.

Example

Issue: There are documented known gang risk factors within the youth population of the City of St. Louis.

Gang risk factors are defined as neighborhood concentrations of documented gang presence and regular gang and youth violence. Contributing factors include high crime, poverty, and unemployment rates, and low education levels. Additional factors include a high percentage of school students who qualify as disadvantaged (Title I) and schools with poor daily attendance (below 80%).

As reported by the St. Louis Post-Dispatch in 2007, the St. Louis Metropolitan Police Department estimates 5,000 youth across the metropolitan area are members of a street gang. They are unusually hybridized, compared with Los Angeles or Chicago gang types, forming alliances evolved from local traditions, immigrant populations, and neighborhood divisions. According to a senior economist with the Federal Reserve Bank of St. Louis, the metropolitan area now has some of the nation's highest neighborhood concentrations of joblessness, low income, and lack of education.

Many young people living in communities with high crime, poverty, unemployment rates, and low education levels have high levels of resiliency, as seen through their abilities to survive past adversity and cope with emotional stressors. In addition, youth often have a close personal network of friends and family members who act as a self-organized support system that promotes engagement within a community via religious services, sporting groups, and/or local businesses.

If the strengths of the community our organization serves are mobilized, then a community with less gang activity within the youth population of the City of St. Louis would result. Instead of joining gangs, young people would find accessible, affordable, and inclusive opportunities to develop their leadership skills and boost self-esteem, which are goals of this project. In addition, youth would be able to safely participate in constructive leisure activities such as community sports and volunteering.

SECTION D, QUESTIONS 7-13 - *PROJECT INFORMATION*

This section provides the opportunity to present a thorough description of the specific project for which funding is being requested. Being able to answer all of the topics outlined in the questions demonstrates a well-conceived project that addresses a clearly defined issue(s). This section asks for the goals and objectives of the project for which funding is requested, as opposed to the organization's overall goals and objectives.

Rationale

Rather than provide an open-ended narrative format, we chose to break the narrative down into specific questions.

SECTION D, QUESTION 7 - PROJECT GOALS

Tips & Things to Consider
- Goals convey the general direction or overall purpose of the project for which funding is requested.

- Make sure that the goal says explicitly whom the project will impact. Make sure the goal describes the direction of the change that is expected (e.g., reduce, expand, increase, decrease). Be realistic.

- It is common to have several goals for a single project. If this is the case, group objectives beneath the appropriate goal.

- For expanded projects, differentiate between current and expanded activities.

Example
There are two major goals for the Gang Resistance Education and Training (GREAT) Project.
- *Goal #1 – To immunize students against delinquency, youth violence, and gang membership.*

- *Goal #2 – To provide life skills to students to help them avoid engaging in delinquent behavior and violence to solve problems*

SECTION D, QUESTION 8a-e – PEOPLE SERVED

Tips & Things to Consider
- Describe who will be served by this grant. Include the number, geographic area that the project will be implemented in, how many people you project to serve with the project.
- Describe how you will identify those who will benefit most from your program/project.
  - *Example:* We will screen potential clients with the Hughes et al. 3-Item Loneliness Scale to identify those who are at risk for being socially isolated and would benefit from our program.
- How do you plan to market the program in the community? How will you find the people that you will assess to benefit from the program?

SECTION D, QUESTION 9 – COLLABORATION

Describe the organization's most significant interactions with other organizations and efforts. For project requests, address this question with respect to that project only.

Rationale
The effectiveness of nonprofit organizations often depends on successful relationships with others in the community. Regardless of form – partnership, collaboration, cooperation, or coordination – these relationships, or strategic alliances, can serve a variety of purposes, including resource sharing, policy influence, and improved operational efficiency.

Tips & Things to Consider
- Do not create a simple list of key partners, as such a list does not convey very meaningful information. Instead, select the organization's most significant interactions

and explain the goals and/or outcomes of those relationships. Interactions run the gamut from simple awareness of other organizations to making referrals to other groups, attending networking meetings, sharing staff/volunteer trainings, strategic alliances, and formal partnerships/collaborations. Due to space limitations, describe the interactions that are most important to the organization in terms of helping it achieve its goals.

Examples

- Office Space – A small, furnished office cubicle with phone and internet services for the Project staff will be provided by ABC Non-Profit, Inc., plus parking and office supplies.

- Meeting/Event Space – Space and chairs for meetings and graduation events will be provided by the schools; space and set-up for the officer appreciation event will be provided by St. Louis Regional Arts Commission.

- Salary/Benefits – St. Louis Metropolitan Police Department will provide some funds towards salary and cover all fringe benefits.

- Travel – St. Louis Metropolitan Police Department will cover the costs of travel expenses associated with GREAT training in LaCrosse, WI. They will cover local mileage costs for officers participating in the School Component.

- Community Program – St. Louis Children's Hospital Safety Street program will provide trained police officers and educational materials for elementary school students, teaching them pedestrian safety, stranger danger, refusal skills for dealing with gangs, avoiding stray dogs, and bicycle safety.

- Community Program – Missouri National Guard will offer 14 scholarships to its six-day DEFY Summer Day Camp (Drug Education for Youth) for selected GREAT graduates residing in Weed and Seed Neighborhoods.

All agencies you plan to collaborate with must have a letter of support included with the application in Attachments.

SECTION D, QUESTION 10 – PROJECT STAFF (KEY PLAYERS)

Tips & Things to Consider

- Use this question to describe the roles of the various people associated with your project and the importance of each. Be sure to explain if staff is already in place or needs to be hired.

- Make sure to clarify how each role is essential to the success of the project and how each role clearly relates to operationalizing the methods you have described.

- *IMPORTANT:* What do you say about your key people? To start, make sure you include name, title, experience, and qualifications. Is this an existing position or a new position? This is a good place to use bullet points.

- The short descriptions of your personnel should let the funding agency know that you have excellent people who are committed to the project. The validity for what you are proposing is directly related to the people who will work with the project.

- If you will be using a Steering Committee (e.g. Advisory Committee, Governing Board, etc.) to assist in your project, then this is a good place to describe how it will be organized and who will be included.

- Distinguish between new, expanded and existing positions.

- *NEW STAFF.* If the proposed project requires hiring new staff, indicate which positions and describe the organization's plan or timeline to ensure that staff are hired, trained, and ready to implement the program within the first quarter (July – September).

Example

The Project will employ two staff for part of their time, two police officers for part of their time, and 14 police officers for hourly overtime, and engage their supervisors.

- Project Director (10% of full time) – Responsible for hiring project staff, overseeing project development and operation, establishing and maintaining links with local government agencies, and budget. The Project Director will be Lisa Jones, Vice President of K-12 Services, ABC Non-Profit, Inc. (author of this proposal).

- Project Coordinator (40% of full time) – Responsible for developing project and implementing operations, enhancing links with local government agencies, reviewing invoices for budget, and routine communications. Responsible for collecting entry level data regarding students' risk factors and conducting periodic assessment of changes in their level of knowledge, comprehension, and application of that information. Also responsible for developing and implementing a system for periodic formative evaluation of the work of the police officers. Will be housed at ABC Non-Profit, Inc.

- Police Coordinator (20% of full time) and Assistant Police Coordinator (20% of full time) – Responsible for recruiting police officers, establishing and maintaining a working linkage with the schools, selecting officers for GREAT training, and scheduling officers for service delivery at the schools. The Police Coordinators will have a background in juvenile justice, crime suppression, gang culture, and police intelligence, surveillance, and operations. Will be housed at the St. Louis Metropolitan Police Department.

- Police Officers (hourly overtime at 3 hours per week for 26 weeks) – Responsible for delivering GREAT curriculum lessons to elementary and middle school students, in coordination with classroom teachers. Each officer will have a background as trained/certified in GREAT, familiarity with the neighborhood where assigned schools are located, and an interest in juvenile justice.

SECTION D, QUESTION 11 - LONG-TERM GOALS & STRATEGIC PLANNING

Rationale

Strong organizations are proactive in preparing for their future. Nonprofits should engage in sound planning to define a clear vision for the future with specific strategies for reaching established goals.

Tips & Things to Consider

- This question is asking for a broad overview of the organization's approach to planning for either the organization in general or this specific project.

- Report if the organization has developed or is currently working on any variety of plans, including, but not limited to a strategic plan, a long-range operational plan, a fund development plan, a succession plan for board and key staff, etc.
- Describe how the proposed project complements the organization's long-term goals.

SECTION D, QUESTION 12 -RESEARCH BEST PRACTICES

Tips & Things to Consider
- Evidence based approaches – Many grant-makers want to know that an organization's projects reflect best practices or utilize evidence-based approaches. If the organization is using a specific model or evidence-based approach, then provide that information.

- If the project is not based on a specific best-practice or model project, then explain why the organization chose to address the issue and/or opportunity in the way that it did. It may be appropriate to highlight the uniqueness of the organization's approach and, perhaps, why the approach appears promising.

- If the reason for the approach is based on evaluation results, then it may be appropriate to refer the reader to your response to the Evaluation section where you describe project results.

SECTION D, QUESTION 13 - TIMELINE

Rationale
A clear indication of the time frame for the project and the times when each aspect of the project will be implemented.

Tips & Things to Consider
- Timeline – Explain any key dates or chronology associated with the project by placing an X in which quarter(s) of the year you anticipate the activity taking place. This could include dates when enrollment is open; how many months out of the year the project is offered; the start and completion dates of a one-time project, a project design phase, or a pilot project, etc.

Example

Activities	Timeframe of When Will Occur in Year 1				Key Person(s) Responsible
	1st Qtr	*2nd Qtr*	*3rd Qtr*	*4th Qtr*	
(Month 1) • Advertise and interview project staff positions. • Meet with police department. • Meet with school administrators and community leaders.					Executive Director

Activities	Timeframe of When Will Occur in Year 1				Key Person(s) Responsible
(Month 2 & 3) • Hire and orient project staff. • Meetings with teachers and pre-trained police officers. • Select school classrooms for first ½ of first semester. • Finalize assignments of officers to school locations.	▓				Executive Director
• Host parent/community meetings at schools. • Collect baseline data on students. • Implement GREAT in classrooms. • Recruit/select/train additional police officers. • Assign officers to classrooms for remainder of academic year.		▓			Project staff; Evaluator
• Conclude implementing GREAT in classrooms. • Host parent/community GREAT graduations at schools. • Host police officer appreciation event. • Conduct regular formative evaluation. • Final summative evaluation at end of twelfth month.			▓	▓	Project staff; Evaluator

SECTION E, QUESTIONS 14-15 – MEASUREMENT & EVALUATION

Rationale

The strongest nonprofits evaluate their work, analyze and understand the results, and implement modifications to improve programming.

The Senior Fund has added a Logic Model as one of the required attachments to your application. See the Grants page for a logic model template.

Tips & Things to Consider

• Best practices in nonprofit operations encourage that organizations engage in some examination of their activities to help guide their work.

• Grantmakers realize that organizations in the startup phase (less than two years old) may not have a lot of outcome data to report.

- A complete answer to these questions requires you to provide information about your future plans for measuring impact, as well as reporting on previous evaluation results or findings.

- Describe the methods (e.g., client feedback, pre- and post-tests, focus groups, surveys, co-design evaluation tools, co-collecting data with community members, etc.) for measuring progress toward achieving established goals or desired outcomes and/or the names of specific tools that the organization uses to measure outcomes. Include what the organization is measuring, how often each tool is used, and, if appropriate, why a particular tool or method was selected.

- For project requests, limit the answer to how outcome is measured for that specific project.

- For startup organizations or new projects, describe how the organization is planning to measure outcomes.

- For existing project requests, summarize key evaluation results or findings that demonstrate the project's past results and indicate the time frame for the results or findings.

  - Do not be afraid to share disappointing results. The key is what the organization learns from experience and how it adjusts its practices in light of the results. Many nonprofits are addressing very complex social issues, and therefore, it is a real sign of strength to have uncovered a flaw in the organization's approach. Deliberately working to address those flaws can lead to improved outcomes in the future.

  - Summarize what the organization learned from its most recent evaluation results that best reflect the organization's overall impact. Be sure to include the timeframe the evaluation results cover. Include composite data (e.g., "Over the past 5 years, the graduation rate for our youth in mentoring relationships was 85%" or "Habitat enhancement and reintroduction of 10 river otter pairs yielded a net gain of 22 pups over the course of two years.").

- This section may include your organization's plan for disseminating and acting upon evaluation results. Describe how and with whom results are gathered, summarized and shared. Describe who is responsible for and how they go about using evaluation results to inform organizational decision-making, program improvements, and strategic decisions. Most funding agencies are interested in seeing how their financial support of your project will extend to other audiences. This may include newsletters, workshops, radio broadcasts, presentations, printed handouts, slide shows, training projects, etc. If you have an advisory group involved with your project, they can be very helpful in disseminating project information to other audiences.

Example
To evaluate client outcomes, ABC Counseling uses the following measures:
- Parental Stress Index – a standardized tool that measures parental stress in three domains: difficult child behavior, parent child interaction, and parental distress.
- North Carolina Family Assessment Scale – a standardized assessment to identify risk and protective factors

- Protective Factors Checklist – an internally-developed checklist completed by therapists as they observe changes in parent and child behavior and relationships. Informed by the evidence-based Protective Factors.
- Incidents of child abuse and neglect – at case closure, therapists report on whether or not, to their knowledge, the family has been involved in a substantiated case of child abuse and neglect

Evaluation data are collected by therapists at the completion of the assessment process (by the end of the 4th session) and then again at case closure. The data is entered into ABC Counseling's database where it is reviewed quarterly by the Program Manager.

In 2015, our program achieved the following outcomes:
- 94% of parents who completed the program demonstrated a reduction in stress, as measured by reductions in their score on the Parental Stress Index.
- 92% of families who completed the program showed an increase in at least one protective factor (knowledge of child development, parental resilience, social connections, concrete needs, and child social/emotional competence), as measured by the North Carolina Family Assessment Scale.
- 99% of families remained safe and free of any substantiated instance of child abuse or neglect.

Every quarter, the Program Manager reviews the Protective Factors Checklists for each family to ensure that each family is making progress. Also quarterly, the Program Manager reviews the pre/post test data for any family who was discharged in that quarter. If outcomes are falling short of goals, the Program Manager looks more closely at the data to identify trends or changes that could explain the shortfall. The results are reviewed in quarterly staff meetings.

SECTION F, QUESTION 16 - BUDGET NARRATIVE

Rationale
The budget narrative justification serves two purposes: it explains how the costs were estimated and it justifies the need for each budget item.

Tips & Things to Consider
- Be sure to provide details for what is included in the line labeled "other" on the line item budget section.
- Often times, percentages will be used in the budget narrative justification. If you are assuming that your project expenses will be x% of your total organization budget expenses, you would explain that in the budget narrative.
- Funders like to know what % of an FTE the project involves.

Additional Information for Senior Fund Grants
- You MUST include a description for each line item in your budget spreadsheet, including a description of how you calculated expenses. You only need to include this for the amounts you are requesting Senior Fund grant support.

- For project staff listed in Salary and Benefits:

- o Make sure to describe their roles on the project, how much time they will devote to the project portion funded by the Senior Fund, if their role is new or expanded compared to the previous year and why, and total costs of salary and benefits for each project staff member.

- o If you need to hire any new staff, indicate which positions, reason(s) why, and your plan and timeline for ensuring new team members are hired, trained, and ready to carry out project tasks within the first quarter of the fiscal year.

Examples

SALARY & BENEFITS

Terry Smith, Director of Program Services (full-time, 20% FTE for SF grant), will continue to serve as the project manager in Year 2 and will oversee the entire project, including day to day supervision of project staff and contractors. Additionally, they will do XYZ for the project. Their fringe benefit rate is 28%. We have factored in a 2.1% cost of living adjustment for their salary from the previous year. Terry Smith's salary and benefits = $XX,XXX.
[Info on additional project team staff members]

Total Salary & Benefits = $XX,XXX

CONTRACTS

Class Instructors – We contract with several instructors who facilitate classes at our sites; these are contractors we have worked with previously. Specifically, we are contracting with….to implement…. Expense: $50/hour * 3 instructors * 30 hours = $4500

Total Contracts = $4,500

TRAVEL

On average, our volunteers travel 40 miles per month for home visits and monthly trainings and our staff travel 35 miles per month for check-ins and other client-related tasks. Our mileage rate is $.58 per mile. Volunteer mileage = 10 volunteers * 40 miles/month * 12 months * $.58 = $696. Staff mileage = 2 staff * 35 miles/month * 12 months * $.58 = $487

Total Travel = $1,183

MARKETING

Newspaper Ad [name of newspaper] for one week, 3 times in year, to promote XYZ., $700 * 3 = $2,100
Facebook Boosts for XYZ for 4 days on six occasions, $60/boost * 6 times = $360
Banners for XYZ to be used at …., $110/banner * 6 banners = $660

Total Marketing = $3,120

PART III- REQUIRED ATTACHMENTS

ATTACHMENT 1 - IRS Letter of Determination

- A determination letter is the most important legal document your organization possesses. The IRS sends you this letter after you have successfully applied for the recognition of your organization's tax-exempt status. In this document the IRS indicates under which section of the Internal Revenue Code your organization is qualified.

- The determination letter is the only official document and proof that your organization is recognized as a tax-exempt organization. A state-issued tax-exempt letter is not the same thing.

ATTACHMENT 2 – Current Board of Directors

Rationale
The detailed list of current board of directors' members makes clear the composition of the board. Their professional affiliations provide information on the various skill sets represented on the board. Their ZIP code of residence reflects the residential geographic distribution of your board.

Tips & Things to Consider
- Contact information for the board of directors is not required.

- The information should include name, title on board (if applicable), name of employer, job title, and ZIP code of residence.

- Board members influence the way an organization approaches its mission, how it views and interacts with the community/clients it serves, how money is spent, what initiatives are given priority, and how success is defined and measured.[1] These decisions are best made by a leadership team with diverse careers, perspectives, and backgrounds.
  - A board member's ZIP code of residence <u>may</u> indicate diversity of lived experience, including their access to resources, their cultural environment, their social-economic-status (SES), and other demographics.

Example
> *Marcia Lopez, Board President*
> *ABC Law Firm, Partner*
> *ZIP Code of Residence: 63105*
>
> *Joseph Smith, Secretary*
> *Community Volunteer*
> *ZIP Code of Residence: 63135*

ATTACHMENT 3 – Letter(s) of Support *(if applicable)*

Tips & Things to Consider
- Funding agencies would like to know that others feel strongly enough about your project that they are willing to write a letter in support of the project. Talk through with the potential letter writers the sort of focus that you think will be important for their letter. (Try to draw on the reputation of the letter writing group).

- Do not get pushed into writing the letters on behalf of agencies - they will all sound alike and will probably defeat your purpose of using them.

- The letters must be substantive. If not, then do not use them!

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[1] Moyers, Rick. *A Stronger Case for Board Diversity*. Nonprofit Leadership Blog, 2017.

- Have the letters addressed directly to the funding agency. (Do not use a general "To Whom It May Concern" letter - it makes it appear that you are applying to many different potential funding agencies and are using the same letter for each. This may really be the case, so make sure you personalize each letter to the specific potential funding agency).

ATTACHMENT 4 – Memorandum of Understanding *(if applicable)*

Tips & Things to Consider

- A Memorandum of Understanding/Agreement (MOU/MOA) is a written agreement, usually simpler and less formal than a legal contract, which outlines an arrangement between parties.[2]

- A MOU describes an intended common line of action among two or more parties. It is often used in cases where parties either do not imply a legal commitment or in situations where the parties cannot create a legally enforceable agreement.

- An MOU doesn't need to include complicated legal conditions, exclusions, indemnifications, etc.
    - If two entities are collaborating on a project, the purpose of an MOU might be to indicate goodwill on the part of both parties, or to help them keep track of the items upon which they have agreed. The agreement may help to clarify the relationship between both organizations, and to make clear responsibilities of each party.[3]

ATTACHMENT 5 - FINANCIALS

Part 1 - Project Budget (must use Excel template)
- Please note that you can add in extra rows to the template as needed.
- Not every line item will be applicable. If not applicable, then leave it blank.
- The project budget must be explained in the budget narrative in your application.
    - If your request is for general operating support, then the project budget is your organization budget.

Note: The following description of Project Budget line items has been modified to align with the Senior Fund's guidelines.

EXPENSES
Expenses are reported in two columns, one for outlining your total project/program expenses and the second for outlining the specific amount you are seeking to be covered by the St. Louis City Senior Fund. Below are descriptions of each line item for reference.

Note: The Senior Fund Board has recently approved guidelines for indirect expenses. See Item 13 below for a description of how to calculate your administrative/indirect expenses.

---

[2] Colorado Nonprofit Association, Collaboration Toolkit: Creating an MOU, 2013.

[3] Work Group for Community Health and Development. *Community Tool Box, Chapter 9: Section 9: Understanding and Writing Contracts and Memoranda of Agreement*, 2016.

1. *SALARY & BENEFITS*

   Include the expenses for all the people who will work <u>directly</u> on the project. <u>Break out the employee detail in your budget narrative</u>. Don't forget to add payroll taxes (FICA, Medicare, unemployment, and workers' compensation) and fringe benefits such as health insurance. You can include a portion of these costs equal to the portion of the person's time dedicated to the project.

2. *CONTRACT SERVICES (consulting, professional)*

   Non-employees that are contracted to do work related to the project. Whenever grant funds are used to pay a third party (individual or organization) outside of the organization, these costs should be included in the grant budget under this category.

3. *OCCUPANCY (rent, space fees)*

   You should only use this line item if you have specific space costs related to your program (i.e., space rental fees for exercise program). General occupancy expenses incurred by your organization for staff should be included in your Administrative/Indirect Expense line item.

4. *INSURANCE*
   Costs related to ensuring this project that are above and beyond the regular insurance costs for the organization. Only use this line item if you have project specific insurance needs (i.e., you are adding to your current insurance just for this project). Expenses of general organizational insurance needs (e.g., your liability insurance), should be accounted for in the Administrative/Indirect Expense line item.

5. *TRAVEL*
   Local travel related to the project for staff or clients. Be specific in your budget narrative as to how you arrived at the amount requested.

6. *EQUIPMENT*
   Nonexpendable, tangible property. Typically thought of as items that are more costly and durable. When there is a need to rent or buy equipment for use on the project, provide information on the type of equipment to be rented/bought, the purpose or use on the project, the length of time needed, and the rental/purchase rate**.**

7. *SUPPLIES*

   Typically thought of as items that are less costly and get used up. In an office setting a computer would be equipment and a pencil or paper would be supplies.

8. *PRINTING, COPYING, & POSTAGE*

   Photocopying, printing, mailings, postage, and express mail charges that are directly related to the project.

9. *EVALUATION*
   Costs that are directly related to the project. May include hiring external evaluators or incentives for program participants to respond to surveys. If staff are responsible for evaluation, include their time for evaluation in Salary and Benefits.

10. *MARKETING*
    Costs related to the marketing, advertising, and the promotion of your project. Might

include additional website costs that are above typical website costs related to your everyday business.

11. *MEETING EXPENSES*

Costs of holding meetings are included in this category. Some examples are the rental of facilities and equipment for a meeting or honorariums/fees for trainers/guest speakers. Details of costs for meetings should be broken out and provided in the budget narrative. Conference and meeting expenses are not supported for individual Senior Fund grants unless meeting expenses are specifically for project participants.

12. *OTHER DIRECT EXPENSES*

Other direct expenses are non-labor direct expenses associated with a project that do not fall within the categories listed above. Include a label in the spreadsheet for each Other direct expense you include in your project budget and describe how you arrived at the requested amount in your budget narrative.

13. *ADMINISTRATION/INDIRECT EXPENSES (NEW Guidelines)*
Indirect expenses represent the project's share of overhead expenses (rent, phone, utilities, etc.) and administrative costs. These are expenses incurred by the applicant organization because of program or service implementation but that are not easily identifiable with a specific project. Examples include executive oversight, accounting, grants management, legal expenses, utilities, insurance, and facility maintenance.

Applicants are allowed indirect expenses of <u>up to</u> 12% of the direct expenses of the project.

EXAMPLE	
Salary & Benefits	$15,450
Travel	$1,200
Supplies	$500
Marketing	$3,000
Total Direct Expenses	*$20,150*
Indirect Expense (Total Direct Expense * 12%)	$2,418
Total Amount Requested	**$22,658**

If you are requesting support for indirect expenses, list the amount in the Administrative/Indirect Expense line item of your project budget spreadsheet. In your budget narrative, specify the percent of your direct expenses you are requesting to account for administrative expenses and briefly describe how you determine the percentage of indirect costs for your organization.

Note: If your project includes contracts, subtract those from your direct expenses before determining your indirect expense amount. Each subcontractor may include indirect costs, but only on their portion of direct costs.

PROJECT REVENUES

Include information on the other sources you will be using to fund your project or program. Total revenues should equal the amount listed in the Total Project Expenses column. List your Senior Fund grant renewal amount in the Pending column.

Please specify whether the Contributions, Gifts, Grants, & Earned Revenue are committed or pending. Committed means there is a firm agreement with the funding source to give a contribution (even if you have not received a check). Pending means that a request has been made but not yet agreed to or granted. If any pending amount significantly affects your ability to implement your project, explain this in the budget narrative justification.

1. *LOCAL GOVERNMENT, STATE GOVERNMENT, FEDERAL GOVERNMENT*
    Group together each type of government revenues (related to your project) and then break out the detail as necessary in the project budget justification.

2. *INDIVIDUALS*
    Group together all individual donations and then describe as necessary in the project budget justification.

3. *FOUNDATION*
    Group together foundation grants less than $1,000. Break out foundation grants greater than $1,000. Add rows as needed.

4. *CORPORATION*
    Group together corporate grants less than $1,000. Break out corporate grants greater than $1,000. Add rows as needed.

5. *FEDERATION*
    Group together federated grants less than $1,000. Break out federated grants greater than $1,000. Add rows as needed.

6. *OTHER*
    Other grants not covered by the above listed categories.

7. *MEMBERSHIP INCOME*
    Revenues expected to be received from membership dues as related to this project. Explain how your dues work in the budget justification narrative.

8. *PROJECT SERVICE FEES*
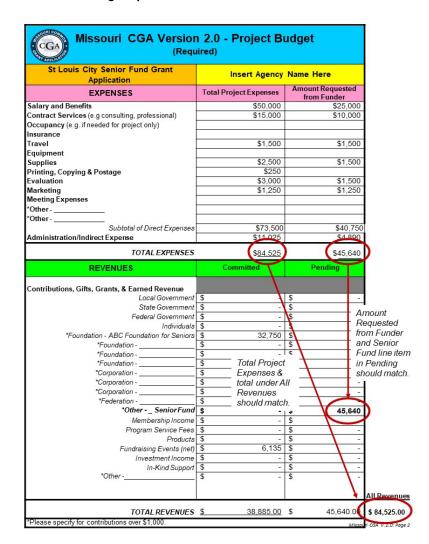   Revenues expected to be received from project participation.

9. *PRODUCTS*
    What people give you in exchange for the service or product your project generates. Not all projects generate income, but many do. A play generates ticket income and maybe concession income. An education project may have income from publication sales or tuition.

10. *FUNDRAISING EVENTS (NET)*
Revenue expected to be received related to this project for fundraising event. Please subtract out the cost of the event.

11. *INVESTMENT INCOME*
Income coming from interest payments, dividends, capital gains collected upon the sale of a security or other assets, and any other profit that is made through an investment vehicle of any kind.

12. *IN-KIND SUPPORT*
Gifts of goods or services instead of cash. They can include donated space, materials or time. If you list in-kind contributions as income, then you must also show the corresponding expenses. If someone gives you something at a major discount, show the whole expense and then list the portion being donated under in-kind contributions. This might include volunteer involvement (e.g., a volunteer offered their marketing services and it would have cost $xxx amount if you would have had to purchase those services).

EXAMPLE Budget Spreadsheet

Part 2 - Income Statement

Internally prepared income statement (also known as budget) for current fiscal year (may use organizational budget spreadsheet in the budget template Excel file).

Part 3 - Audited Financial Statements OR 990's & Internally Prepared Financial Statements

NOTE – Financial statements are to be prepared according to Generally Accepted Accounting Procedures (GAAP).

1. Complete copy of organization's externally audited/reviewed/compiled financial statements for the last fiscal year which includes two (2) years of financial information. Note: Some funders will only accept audited statements. Please check with individual funder.

OR

2. Organization's most recently filed Form 990 plus internally prepared financial statements for the past two (2) years. Must include:

a. Form 990
The IRS Form 990 is titled "Return of Organization Exempt from Income Tax." It is submitted by tax-exempt organizations and non-profit organizations (except congregations) to provide the Internal Revenue Service with annual financial information. A short version, Form 990-EZ, may be used by organizations with gross receipts of between $25,000 and $500,000 and total assets of less than $2.5 million. (Organizations and congregations with gross receipts of under $25,000 in a year are not required to file a form 990). Another variant, Form 990-PF, is available for private foundation organizations.

b. Statement of Activities (income statement)
Also known as profit and loss statement (P&L), statement of financial performance, earnings statement, operating statement, or statement of operations. It indicates how the revenue is transformed into the net income (the result after all revenues and expenses have been accounted for, also known as the "bottom   line"). It displays the revenues recognized for a specific period, and the cost and expenses charged against these revenues, including write-offs (e.g., depreciation and amortization of various assets) and taxes. The purpose of the income statement is to show whether the nonprofit made or lost money during the period being reported. It represents a period of time. This contrasts with the balance sheet, which represents a single moment in time. It is important to specify whether it is accrual (preferred) or cash accounting. Some funders require accrual.

c. Statement of Financial Position (balance sheet)
A summary of the financial balances of your nonprofit. Assets and liabilities and fund balances are listed as   of a specific date, such as the end of its financial year. A balance sheet is often described as a "snapshot of a nonprofit's financial condition." It applies to a single point in time of a business' calendar year.

d. Statement of Cash Flow
Shows how changes in balance sheet accounts and income affects cash and cash equivalents, and breaks the analysis down to operating, investing, and financing activities. Essentially, the cash flow statement is concerned with the flow of cash in and cash out of the nonprofit. The statement captures both the current operating results and the accompanying changes in the balance sheet. As an analytical tool, the statement of cash flow is useful in determining the short-term viability of a nonprofit, particularly its ability to pay bills.

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Common Grant Application Version 2.0 Committee (2017 Revisions)

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Clare Brewka, *Gateway Center for Giving*

Cynthia Crim, *Commerce Bank*

Kathy Doellefeld-Clancy, *Joseph H. & Florence A. Roblee Foundation*

Diane Drollinger, *Network for Strong Communities*

Deb Dubin, *Gateway Center for Giving*

Wendy Jaffe, *Trio Foundation of St. Louis*

Samantha Sherrod, *United Way of Greater St. Louis*

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Commerce Bank

Missouri Foundation for Health

Spire

Trio Foundation of St. Louis

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Jan Jacobs Brown, *Being Individually Genuine, Inc. (BIG)*

Amy Lottes, *The Little Bit Foundation*

Becky Moss, *Parents as Teachers*

Jim Schallom, *Sherwood Forest*

Lisa Thorp, *St. Louis Public Library, Grants & Foundation Center*

The following resources and reports were used to help with developing the Common Grant Application V.2.0.

Colorado Common Grant Application & User Guide. 2010.

Associated Grant Makers, *Common Proposal Form*. 2016.

Baltimore Community Foundation, *Grant Application—Education*. 2014.

Baltimore Community Foundation, *DEI Definitions of Terms.* Drawn from Baltimore Racial Justice Action Definitions.

The Denver Foundation, *Grants Guidelines*. 2016.

The Chinook Fund, *Funding Guidelines & Grant Application*. 2016.

D5 Coalition, *State of the Work: Stories from the Movement to Advance Diversity, Equity, and Inclusion*. 2016.

Common Grant Application Version 1.0 Committee (2012)

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Kay Dusenbery, *Daughters of Charity Foundation of St. Louis*

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Ann Julian, *Our Little Haven*

Katherine Kornfield, *Missouri Botanical Gardens*

Donna Luker, *Lutheran Foundation of St. Louis*

Rob Massa, *Sherwood Forest Camp*

Miriam Mayham, *St. Joachim & Ann Care Services*

Karin McElwain-West, *Aim High St. Louis*

Bill McRoberts, *Near Southside Employment Coalition (NSEC)*

Jim Moore, *Community Action Agency of St. Louis County, Inc.*

Mary Neal, *Writing Works*

Michele Oesch, *Saint Louis University*

Marissa Paine, *The Haven of Grace*

Colleen Peters, *St. Francis Xavier Outreach Ministry*

Regina Przetak, *ALIVE*

Liz Reeves, *St. Louis Public Library Foundation*

Heather Rich, *Saint Louis University*

Phyllis Schneider, *United Services*

Ana Schultz, *Sisters of Divine Providence*

Muriel Smith, *Delta Gamma Center for Children with Visual Impairments*

Ann Sutter, *Spirit of St. Louis Women's Fund*

Barry Trautman, *ARCHS*

Julie Turner, *Lindenwood University*

Ohala Ward, *Near Southside Employment Coalition (NSEC)*

David Warren, *Metro Theater Company*

Kevin Kriesel, *Hoyleton Youth and Family Services*

Gil Weyhaupt, *Room at the Inn*

The following resources and reports were used to help compile the information found in the CGA Version 1.0 User Guide:

- Barbara Davis for the Minnesota Council on Foundations, *Writing a Successful Grant Proposal*. 2005.
  Colorado *Common Grant Forms*.
- S. Joseph Levine, Ph.D. for Michigan State University. *Guide for Writing a Funding Proposal*. 2011.
- Foundation Center- *Proposal Writing Short Course*.
- Ohio Grantmakers Forum (dba Philanthropy Ohio).
- University of Arizona Foundation- *Helpful Grantseeking Links*.
- University of Arizona- *Grants Glossary*.