

The Collins Foundation

Grant Application Checklist

Please complete and include this checklist with your application. An incomplete grant application will cause delays in the Foundation's review of your request.

I. Cover letter

- Cover letter signed by the chief executive officer or board president, verifying the accuracy of the proposal and authorizing the request to the Foundation. Include the email address and phone number for the chief executive officer and primary contact person for the grant request.

II. Executive summary

- Executive summary (half page or less on a separate page) that includes a description of the project/program, the amount of the request, the period the grant will cover, the target population to be served, and proposed outcomes.

III. Proposal narrative

- Brief overview of the applicant organization and its mission and history.
- Description of the project/program, including:
 - amount of the request
 - starting date and timeline
 - need for the project/program
 - target population and the number of persons to be served
 - goals and proposed outcomes
 - proposed activities to meet the goals
 - how success will be measured

IV. Project/program budget

- Detailed project/program budget that groups revenue by source (e.g., earned income, contracts, foundation, government, corporate, individuals, in-kind) and expenses:
 - indicate whether the proposed project/program is an addition to, or included in, the agency's operating budget
 - if this is a request for one part of a larger endeavor, also include the larger project budget
 - for multi-year program grants, include a pro-forma budget for each year of the grant period, plus one year beyond

V. Current and projected contributed income

- An itemized list of major donors, corporations, foundations, public, and local sources being approached to fund the project/program. Individual donations may be grouped as one category. Please include:
 - amount of each request and its current status: planned (not yet submitted); pending (submitted and under review); or committed (pledged or in-hand)
 - anticipated decision dates of pending foundation requests and other key sources
 - total amount raised to date, including in-kind
 - amount left to raise
- Strategies to complete the fundraising.

VI. Sustainability

- Plans to sustain the project/program beyond the grant period, if appropriate.

VII. Attachments

- Board list
 - Name, place of employment and job title, and relevant community affiliations for each current member of the board.
- Current operating budget.
- Year-end financial statements from the **last full fiscal year**, including:
 - balance sheet (statement of financial position)
 - itemized revenue and expense report (profit & loss statement)

Note: If the financial statements show an operating deficit or significant surplus, provide an explanation.

- Audited financial statement for the most recent year available (if any), or most recent 990 IRS filing.
- Verification of nondiscrimination:
 - A copy of the applicant organization's nondiscrimination policy as it relates to governance, employment, volunteers, and services; or a description of the applicant organization's nondiscrimination practices, should a formal policy not exist.
 - Copies of relevant policy statements, including those requiring signatures, if the applicant organization requires adherence to specific religious beliefs or lifestyles.
- Verification of tax-exempt status:

A nonprofit organization must provide a copy of its most recent determination letter from the Internal Revenue Service stating that the applicant is exempt from federal taxation as defined by Section 501(c)3 of the Internal Revenue Code, and is a public charity (and not a private foundation) as defined by Section 509(a) of the Internal Revenue Code. Applicants with a different name from that shown in the IRS letter must provide satisfactory documentation explaining the discrepancy.

- Grant requests are considered only from nonprofit organizations/agencies that have current registration with the offices of the Oregon State Attorney General and the Secretary of State.
 - Nonprofit organizations demonstrating tax exempt status under a central organization must also provide a current certificate of membership.
 - Governmental and publicly funded applicants must provide appropriate documentation of their tax exempt status.
- For construction projects, include schematic drawings.
 - Optional: Letters of support from key partners; pictures; program materials.

Please send applications to: Cynthia G. Addams
Executive Vice President
The Collins Foundation
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Portland, OR 97201