

## COOPER FOUNDATION APPLICATION CHECKLIST

NOTE: Please follow the foundation guidelines to complete your application through the online grant application portal. The information from the LOI does not automatically carry over to the application form. Please use the checklist below to support and guide you in completing the application.

- You must provide your EIN tax ID number.
- You do not need to provide your IRS Exemption Letter or 990 tax form; both are uploaded automatically into the system from your EIN.

### *Notice to Grant Applicants about Confidentiality*

The Cooper Foundation understands the importance of confidentiality in grant applications, however, by submitting a grant application, you acknowledge and agree that information in your application may be shared with our staff, board, consultants, and other individuals as needed to properly evaluate applications. We assume no legal obligation to maintain strict confidentiality of the information contained in your application. If you require any information in your application to be kept confidential, please contact the Cooper Foundation President, to discuss before you submit your application. Grant applications will not be returned and all materials you provide us will be held and destroyed according to our document retention policy.

Rich Text for Form Questions: Allows users to format their response to questions using bullets, numbers, bolding, italicizing, and underlining. This allows a user to copy and paste text into a question from a Word document while retaining most formatting.

(\*=required)

- Project Name\*
- Amount Requested\*

### **Request Narrative**

- Request Description\* (character limit: 3,500)  
Begin this section by re-stating the amount requested and its use in one sentence. Describe your objectives, goals, and the need you will serve. Tell us what you want to do and why it is important.
- Who Will Benefit?\* (character limit: 2,500)  
State the number served and the population that will benefit from your proposal. Be specific in describing those who are expected to benefit, providing data that is used and/or generated by your organization.
- Funding\* (character limit: 2,500)  
State your funding goal and your plan to raise the funds needed. Tell us when this grant funding is needed.
- Outcomes\* (character limit: 2,500)  
State the specific outcomes you hope to achieve, the benchmarks that will indicate success, and how they will be measured. (Ex: increased attendance [outcome] of 10% [benchmark]).
- Financial information notes (optional)  
You may use this area to provide additional information about your project and operating budgets or financial reports, if necessary.

- Electronic Signature Agreement  
Entering data into the four fields is required; Authorized Signature – Name, Title, Date, Board President/Chair.

### **Required Supporting Documentation**

Attach the documents requested below that are available and applicable to this request. File Uploads: Please attach original (not scanned) PDF documents when possible. If attaching Word or Excel documents, please be sure that they are formatted to view/print completely on letter (8.5x11) or legal (8.5x14) pages.

- Project Budget (file size limit: 102.3 KiB)  
Upload your project budget, if applicable. (Requests for general operating support do not require a project budget. If the request is for a staff position, upload a budget for the position). Include sources and amounts of income and detailed expenses. Provide totals for both income and expense. Identify funding sources as confirmed, pending, or to be requested.
- Operating Budget (file size limit: 306.6 KiB)  
Upload your organizational operating budget, including income and expenses, for the current fiscal year.
- Operating Budget – next fiscal year (file size limit: 64.1 KiB)  
Upload the operating budget for the next fiscal year ONLY if funding is requested for that year.
- Balance Sheet (file size limit: 32.4 KiB)  
Upload the organization's most recent balance sheet.
- Income/Expense Statement (file size limit: 36.1 KiB)  
Upload your most recent Income/Expense (Profit/Loss) Statement including year-to-date information.
- Budget vs. Actual (file size limit: 210.4 KiB)  
Upload your most recent Budget vs. Actual report, if available.
- Audit or Year-End Financial Report (file size limit: 32.9 KiB)  
Upload the report for your most recent complete fiscal year. An Audit or Review of Financial Statements is preferred. A compilation or year-end balance sheet and income/expense statement will be accepted.
- Additional Financial Report – optional (file size limit: 42.5 KiB)
- Board of Directors and Staff (file size limit: 16.1 KiB)  
Upload a list of your board of directors including addresses, phone numbers, and affiliations, and names and titles of staff.
- Optional Documentation (file size limit: 96.1 KiB)  
Additional documentation, if necessary. A job description is required for requested staff positions.
- Optional Documentation (file size limit: 158.0 KiB)
- Optional Documentation