Cooper Foundation Application Instructions

Updated: 6/5/2024

Before starting:

- **Refer to the *Cooper Foundation Funding Considerations* document to guide you in preparing your Application**. This is especially recommended for first-time applicants. This document lists various aspects that we consider when reviewing grant applications.

- **Collaborator Button**: You may invite others via email to work on the Application Form. It is located at the top, right hand corner of the form.

- **Support:** Cooper staff is available at any step of the grant process. Contact us via phone: 402-476-7571 or email: victoria.grasso@cooperfoundation.org or tram.kieu@cooperfoundation.org.

Application Process:

- Organizations complete the Application Form, which includes a Request Description, Supplemental Materials, and Required Documents and Governance Questions.

- **Q&A Meeting (Zoom/Phone Call/Site Visit):** We will schedule a time for a visit with you to review the Application Form, learn more about the request and your organization, ask questions, and provide more information about our grant application process.

- You will have the opportunity to provide supplemental information or make changes to the application as necessary.

- Cooper staff will also review Candid/Guidestar profiles, 990 information (you do not need to upload your 990), and your website. It is very helpful to keep your information up-to-date.

- After the staff review, application materials are sent to the Cooper Foundation board of trustees, which makes all grant decisions.

- Applicants are notified within one week of the decision date.

- Character limits include spaces and punctuation.

Application Form:

- **Request Description**: This is the main narrative section of the application. It should include information about the need for grant funds, a description of your program, project, and/or organization, information about the people and beneficiaries served, and measurable goals.
    - Character Limit – 7,500
    - Begin this section by re-stating the amount requested and explaining its use.
    - Describe your program(s), goals and anticipated outcomes.
    - Provide information about **who is served** and **how many are served** by the program and/or organization. Provide data and demographics that are used and/or generated by your organization.

    - You do not need to use the full character count when a more concise response is sufficient.
    - You are welcome to copy/paste from other sources, including grant applications or reports created for other funders.

- **Funding:** Describe your plans to raise the funds needed.
    - Character Limit – 3,000
    - Describe your plans to raise the funds needed now and in the future, if applicable.
    - What resources have been confirmed, unconfirmed, or pending.
    - Tell us when this grant funding is needed.

- **Supplemental Documents:** Upload documentation that provides additional information to support the Request Description. We encourage you to use existing documentation available to you.
    - Share up to 6 documents that support the request and explain your projects/programs and/or organization.
    - A non-exhaustive list of potential supplemental materials is below, and you may also provide URL links to website, videos, and images.
    - Each upload field has an accompanying text area. Character Limit – 1,000.
    - You do not need to fill text area or provide uploads for each field.
        - **Job Description**: This is REQUIRED for requests for staff positions
        - **Program List/Program Descriptions**
        - **Report(s)**: Internally or externally shared (Examples: reports already created for other funders/grant applications)
        - **Data collected by your organization** (Examples: Dashboards, surveys, survey results, etc.)
        - **Strategic Plans or Organizational Strategic Documents** (Examples: Strategic planning documents, DEIA-related plans, succession plans, etc.)
        - **Organizational Charts**: This can be board, staff or other persons related to the organization or project (Examples: Consultants, advisory board list, contracted staff, etc.)
        - **Articles related to your organization or project** (Examples: News or magazine articles)
        - **Newsletter(s)/Annual Report(s)**

- **Required Documents & Governance Questions:**

  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.

  Financial Reports – not all organizations will have all reports. Provide the reports that are available and applicable to the request. Contact Cooper Foundation staff with any questions.

    - **Project Budget**
        - Upload your project budget, if applicable.
        - Requests for general operating support do not require a project budget.
        - 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.
        - If the request is for a staff position, upload a budget for the position.
    - **Total Budget:** enter the total operating budget for the current fiscal year
    - **Operating Budget**
        - Upload your organizational operating budget, including income and expenses, for the current fiscal year.
    - **Operating Budget - next fiscal year**
        - Upload the operating budget for the next fiscal year ONLY if funding is requested for that year.
    - **Balance Sheet**
        - Upload the organization's most recent balance sheet (statement of financial position).
    - **Income/Expense Statement**
        - Upload your most recent income/expense statement (profit & loss or statement of

activities), including year-to-date information.

- **Budget vs. Actual**
  - Upload your most recent Budget vs. Actual report, if available.
- **Audit or Year-End Financial Report**: Upload the report for your most recent complete fiscal year. Provide the highest level of financial review available, choosing one from the following list:
  1. Audit
  2. Review of Financial Statements
  3. Compilation Report
  4. Year-end balance sheet (statement of financial position) and income/expense statement (profit & loss or statement of activities).
- **Financial Reports - Frequency**
  - How often does the board review financial reports?
- **Financial Information notes (optional)**
  - You may use this area to provide additional information about your project and operating budgets or financial reports, if necessary.

- **Internal Control: Does the organization have, and follow, a written internal control policy?**
  - (An internal control policy describes the procedures that the organization follows, as well as who is responsible, for financial transactions, accounting, and reporting to prevent misuse and misappropriation of assets and ensure that all financial functions are properly authorized, appropriated, executed and recorded. It should provide adequate separation of duties for financial functions, and oversight from senior staff and the board.)
  - If you answered no, please contact Victoria Grasso at victoria.grasso@cooperfoundation.org.

- **Is the governing board fully independent?**
  - Board members are considered independent if they are not compensated as an officer or other employee of the organization; did not receive compensation in excess of $10,000 during the organization's tax year; were not involved in financial transactions with the organization or with a related organization, nor was a family member involved in a financial transaction with the organization or with a related organization.
  - If you answered no, please provide an explanation about your Board's structure. List names and titles.

- **Are any staff members or board members related by family or marriage to another staff member or a board member?**
  - If you answered yes, please provide further details about the relationship(s) between any staff and/or any board members. List names and titles. Describe any supervisory roles.

- **Board of Directors List***
  - Upload a list of your board of directors including addresses, phone numbers, and professional affiliations.

- **Staff List - Can be combined with Board List**
  - Upload a list of your staff including names and titles.

- **Number of Staff**
  - Full-time/part-time/volunteers
  - Text area: Additional Information About Staff (Optional) Character Limit – 1,000

- **Electronic Signature Agreement**
  - By submitting your name, title, and the date you are confirming your authorization to submit this application.
  - Name/Title/Date

- **Board President or Chair Contact Information**
  - Provide the contact information for your Board President or Chair. This information is needed for post-award purposes.
  - Name/Title/Email/Phone

- **Designated Financial Contact**
  - Enter the information of the person who will provide bank information and complete tasks related to the grant payment(s). This information is needed for post-award purposes.
  - Name/Title/Email/Phone

- **Bill.com**
  - If this request is awarded, does your organization have a Bill.com profile we can utilize for payment(s)? (Yes/No)

- **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 Victoria Grasso, 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.

  Add tram.kieu@cooperfoundation and administrator@grantinterface.com to ensure that you do not miss any important updates throughout the grant process. When you submit this form you should immediately receive a confirmation email. If you do not, check your spam folder. Thank you.