Cooper Foundation Funding Considerations

We review applications with two main areas of consideration:

1. The programs, services, and organization's work in the community
2. The organization's operations, governance, and capacity to fulfill its mission

Application reviews are supplemented by meetings and/or calls with applicants to discuss the organization, programs, and application materials. The following are typical considerations as we review applications, listed here to help as you are preparing your narrative and materials. Not all points will apply to all requests, and you may provide additional information not included here. Foundation staff is available to answer questions and provide assistance throughout the application process.

Programs and Services

- Impact of existing programs and services
- Detailed plans for new or expanded services
- Program design and incorporation of best practices
- Organization's expertise in the field

Objectives/Goals

- Goals identify desired results of programs and services
- Clearly identified objectives that are specific and measurable
- Activities that support those objectives and goals

Audience/clientele

- Number of people served by programs and services
- Direct and indirect beneficiaries of the work
- Demographic and other relevant information about participants
- How people are identified and reached by the organization
- Goals to increase or expand participants

Partnerships and affiliations

- Formal partners in program delivery
- Informal partners and collaborators
- The organization's participation in local, regional and national networks and affiliations

Staffing

- Detailed information on requests for existing, new, or expanding staff positions (including job description)
- Staff responsible for key initiatives and programs
- Information about volunteers and volunteer recruitment and management, if applicable

Funding

- The organization's plan to raise the funding necessary to support the work described in the request
- Other sources of funding for the project and/or organization
- Fundraising strategies
- Short and long-term plans for sustainability

Project budget

- Includes income and expenses for full project, including this grant request
- Income budget aligns with funding plan described in the application
- Budget line-items reflect scope of activities described in the application
- Complete and accurate
- Note for institutional applicants: Cooper Foundation funds may not be used for indirect costs (i.e. facilities & administrative costs) or costs outside the project budget.

Operating budget

- Includes all income and expense for the fiscal year
- Line-item expenses are listed
- Balanced budget – zero balance or net income for total budget
- A budgeted deficit should have accompanying notes explaining the plan to raise or access funds necessary to meet expenses
- Complete and accurate
- Note for institutional applicants: Cooper Foundation funds may not be used for indirect costs (i.e. facilities & administrative costs) or costs outside the operating budget.

Financial Reports

- Complete, accurate, and timely
- Time period on report is clearly stated and reconciles with other reports as necessary
- Format and presentation is appropriate for size and scope of the organization

Audit, Review of Financial Statements, or Year-End financial reports

- Third-party review (Audit, Review of Financial Statements, Compilation Report)
    - Level of review is appropriate to size and scope of the organization
- Year-end Balance Sheet (Statement of Financial Position) and Income/Expense (Profit/Loss; Statement of Activities)
    - Did the organization have an operating loss at year-end?

Board and Staff Leadership

- Board is 100% independent; CEO is not a voting member of the governing board
- Active, engaged, and diverse board
- Board's role in planning, fundraising, and oversight
- Leadership staff structure