



MONTEREY PENINSULA FOUNDATION

Grant Application Compliance Checklist

Complete – Review Date:

Incomplete – Please submit the **unchecked** items below to grants@mpfca.org.

Organization:

Date:

Program:

Date of Last Grant:

Request Amount:

Grant Period:

General

A submitted Grant Application through online portal

Verified 501c3 tax-exempt status

A completed Grant Report from a previous grant, if applicable

Notes:

Organization

Mission Statement

Describe the organization’s history and major accomplishments.

Describe the organization’s current programs. How many constituents does the organization serve annually?

List the ten largest financial gifts (grants or gifts from individuals or organizations) that the organization received in the most recent fiscal year. Donors who have requested anonymity may be listed as Anonymous.

A detailed organization current annual budget (for the year reflected in the grant request), showing both income and expenses.

- Fiscal year ending date:

Board of Directors list including name, city of residence, and profession.

- Number:

Board Giving:

- Amount: \$

- Percentage: %

Notes:

Grant Request

Describe the community need that this program will address.

Summarize the program for which your organization is requesting funds.

Describe the constituency this program serves. (Be specific about demographics such as age, gender, ethnicity, and geographic locations.)

List up to three main goals of the program, including expected outcomes and activities for each goal. How will the organization collect information to measure the success of the program?

A detailed program budget showing income and expenses, and explaining how grant funds would be allocated for the year(s) reflected in this grant request. (Not required for operating support requests.)

- Period ending date:

List all grant requests for this program including: the funding source, the amount requested, and whether it is pending or approved.

List key staff (and their titles) associated with the program.

Notes:

Financial Information

Statement of Financial Position for the most recently completed fiscal year

- Fiscal year ending date:

Statement of Activities for the most recently completed fiscal year

- Fiscal year ending date:

Most Recently Submitted 990

- Period ending date:

Organizations requesting more than \$75,000 are required to submit a full financial audit. Organizations requesting more than \$25,000 are required to submit a financial review completed by a third party for the most recently completed fiscal year.

Notes:

Authorization

Signatures of a Board representative and an additional authorized representative

Notes: