

## Grant Application Checklist

Below is a list of the documents commonly required with most grant applications. Each organization is different and there may be additional requirements depending on the foundation; however, those can be addressed on an individual basis. Keeping an updated electronic copy of each of these documents makes the grant application process much easier.

1. Organization Employer Identification Number (EIN)
  - Each entity has an EIN number. If you are not sure, contact the diocesan business office.
2. Detailed organization budget
  - Include the current year and the upcoming year's budget, if available.
3. Detailed budget for the project or grant request
  - If the program or project is part of the operating budget, like tuition assistance, then the previous budget information is acceptable.
  - If the project is separate from the annual operating budget or is a project within the budget, such as capital expenditures, then a detailed budget of the project is requested.
4. Audited financials or Agreed Upon Procedures
  - Full audits are preferred and/or required by some organizations, especially since religious organizations do not file an IRS Form 990.
5. School board members, Organization Advisory Board and/or Finance Council
  - Include names, titles or affiliations and addresses of current members
6. Group Ruling Determination Letter (most recent year) and your entry in *The Official Catholic Directory* handbook.
  - Scan in the page (with page number visible) that identifies you as part of the Catholic Diocese.
  - The current Group Ruling Determination letter can be found on the USCCB website, search "group ruling".
7. List of previous grants received from the organization for which you are applying
  - Date grant was awarded, amount received and purpose or project funded
  - Date follow-up paperwork was filed (if required)
8. Requests received and pending for the project for which you are seeking funding
  - Name of organization, date grant was applied for or awarded, amount applied for or received and purpose or project funded
9. Demographics of population served (updated regularly)
  - Ethnicity and socio-economic data is the most useful, especially if you serve a primarily moderate to lower income area.
  - Please explain how this is measured. For example, 60% of students qualify for free and reduced meals or 40% of the families live below the poverty line (\$24,250 for a family or household of four).
10. History, mission and vision of the organization
  - Keep the history short and focus on how the history relates to the current needs i.e. the school was established in 1965 and like all older facilities is in need of renovation.
11. Project description or purpose for request
  - Give details and focus on the impact of the project