



## CHECKLIST

We are excited to hear about your project and grant request. Let's get going.

The Circle of Dreams Foundation Grant Application consists of the following components, which should be submitted in the order listed below. This checklist is provided to help ensure a complete proposal. It does not need to be submitted with the proposal.

- Check specific Circle of Dreams Foundation guidelines and verify that there have not been any modifications to the application requirements.
- Comply with any unique application requirements.
- Section I: Cover Letter (one page)**  
Include the purpose of the grant request and a brief description of how the request fits with the Circle of Dreams Foundation mission and grantmaking priorities.
- Section II: Summary Sheet Form**  
Use the 2-page template provided.
- Section III: Narrative**
- Formatting:* Use 12-point font with 1-inch margins and include the **HEADING** provided for each question. It is not necessary to repeat the text of the questions.
- Page Limit:*  
General Operating Requests: 4-page limit; answer questions 1-3; 5(a), 5(b), 5(c); and 6-11.  
Program or Project Requests: 5-page limit; answer questions 1-4; 5(a), 5(b), 5(d); and 6-11.

### Narrative Questions

- 1. Organization Background
- 2. Goals and Mission
- 3. Current Programs
- 4. Program or Project Requests Only
- 5. Evaluation
- 6. Collaboration
- 7. Inclusiveness
- 8. Board/Governance
- 9. Volunteers
- 10. Planning
- 11. Optional



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**Section IV: Financial and Other Attachments**

If you omit any of the required attachments, provide an explanation as to why.

*Note: If you submit an incomplete proposal without explanation, your proposal can not be accepted.*

### Financial Attachments

- 1(a). Organization budget
- 1(b). Program or project budget, if applicable
- 2. Current (year-to-date) financial statements
- 3. Year-end financial statements, audit, and Sources of Income Table
- 4. Major contributors
- 5. In-kind contributions
- Explanation of items in financial attachments, if applicable

### Other Attachments

- 6. Board of directors list
- 7. Proof of IRS federal tax-exempt status, dated within the last five years
- 8. Anti-discrimination statement adopted by the board of directors
- 9. Key staff (including email and social media profiles)
- 10. Annual report, if available
- 11. Evaluation results (optional): Provide the organization's most recent evaluation results, relevant to this request.

### Additional Attachments for Organizations Using a Fiscal Agent/Fiscal Sponsor

*Circle of Dreams Foundation does not accept proposals from organizations using a fiscal agent/fiscal sponsor.*

**Thank you for your time and effort in completing this application.**



## SECTION I: COVER LETTER

**Purpose of Grant Request and a Brief Description of How Request Fits with Circle of Dreams Foundation Mission:**



## SECTION II: SUMMARY SHEET FORM

**Legal Name of Organization:**

**DBA (if applicable):**

**Mailing Address (and Physical Address if it is different and not confidential):**

**Phone:**

**Fax:**

**EIN:**

**Website:**

**Organization Email Address:**

**Name of CEO or Executive Director:**

**Phone:**

**Email:**

**Application Contact & Title (if not the CEO or Executive Director):**

**Phone:**

**Email:**

### Organization Information

**Year Founded:**

**Mission Statement:**



**Geographic Area Served** (specific to this proposal):

[Empty text box for Geographic Area Served]

**Tax Exemption Status:**

- 501(c)(3)
- Using a fiscal agent/fiscal sponsor

Name of fiscal agent/sponsor: [Empty text box]

- Other than 501(c)(3), describe:

[Empty text box for Other than 501(c)(3) description]

**Number of Employees: Full-time:** [Empty text box]

**Part-time:** [Empty text box]

**Grant Request Information**

**Type of Grant Requested** (select one):

**Amount of Request:** \$ [Empty text box]

- General Operating Support
- Program or Project Support  
Name of Program or Project: [Empty text box]
- Capital Request (Circle of Dreams Foundation does not accept Capital Requests)
- Other [Empty text box]

**Describe what the grant will be used for:**

[Empty text box for Describe what the grant will be used for]

**Financial Information**

**Organization's Current Budget for Fiscal Year Ending:** [Empty text box with slashes]

**Income:** [Empty text box] **Expenses:** [Empty text box] *Budget numbers should match the numbers presented in Attachments 1(a) & (b).*



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**AND, if other than a general operating request,**

**Program or Project Budget:**

**Dates: from:**

**to:**

**Income:**

**Expenses:**

By signing below, I certify that the information contained in this application is true and correct to the best of my knowledge.

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**CEO/Executive Director**

**Date**



## SECTION III NARRATIVE

For General Operating Requests answer questions 1-3; 5(a), 5(b), 5(c); and 6-11. There is a 4-page limit. For Program or Project Requests answer questions 1-4; 5(a), 5(b), 5(d); and 6-11. There is a 5-page limit.

Use 12-point font with 1-inch margins and include the **HEADING** provided for each question. It is not necessary to repeat the text of the questions.

- 1. ORGANIZATION BACKGROUND.** Discuss the founding and development of the organization. Explain the original issue and/or opportunity the organization was founded to address and how that may have changed over time.
- 2. GOALS.** Describe the organization's current goals.
- 3. CURRENT PROGRAMS.** Provide a brief description of the organization's current programs. Include population and numbers served, as well as expected results. *If this request is for a specific program, describe the organization's **other** programs here. Describe the program for which you are seeking funding in Question 4.*
- 4. PROGRAM OR PROJECT REQUESTS ONLY.**
  - a) Provide a summary of the plan for the program or project request. Include the issue and/or opportunity addressed, goals and objectives, activities, and timeline.
  - b) Explain why the organization is approaching the issue and/or opportunity in this way.
- 5. EVALUATION.** *Respond to (a) AND (b), then respond to (c) OR (d) as relates to your specific request.*
  - a) Describe the organization's overall approach to evaluation.
  - b) Describe how the organization measures impact. If this is a program request, describe how impact is measured for the program that is the subject of this proposal.  
*Respond to (c) OR (d). This information captures results from the past:*
  - c) For general operating requests: Summarize key evaluation results or findings that demonstrate the organization's impact. Indicate the time frame for the results or findings.
  - d) For program or project requests: Summarize key evaluation results or findings that demonstrate the program or project impact. Indicate the time frame for the results or findings.
- 6. COLLABORATION.** Describe the organization's most significant interactions with other organizations and efforts. For program and project requests, address this question with respect to that program or project only.
- 7. INCLUSIVENESS.** Describe how the organization strives to be inclusive in its programs, staff, board, and volunteers, and describe the progress to date.
- 8. BOARD/GOVERNANCE.** Describe the role of the board of directors in advancing the mission of the organization. Include the key issues related to board effectiveness that are



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being addressed this year, the organization's policy regarding board terms, and the percentage of the board that contributes financially to the organization.

- 9. VOLUNTEERS.** Describe how the organization involves volunteers and unpaid personnel (other than the board of directors) within a typical 12-month time period. Include number of volunteers and hours (if tracked by the organization).
- 10. PLANNING.** Describe the challenges and opportunities facing the organization in the next three to five years. Additionally, describe how the organization engages in planning and describe the focus of any current planning efforts.
- 11. OPTIONAL.** If there is additional information that is vital to convey in this proposal, do so here. *(This must be contained within the four-page limit for general operating requests or the five-page limit for program and project requests.)*





## SECTION IV FINANCIAL AND OTHER ATTACHMENTS

*Label each attachment and provide in the order listed.*

### Financial Attachments

*Note: Provide explanations for items that may raise questions in any of the attached financial documents. The explanations can be written onto the documents themselves or included as an additional page.*

**1. BUDGETS.** Include revenues and expenses.

a) The organization’s operating budget for the current fiscal year. If available, also include the budget for the upcoming fiscal year.

*If the request is for a program or project, also include:*

b) Program or project budget for the program period.

**2. CURRENT (YEAR-TO-DATE) FINANCIAL STATEMENTS.** Include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income and Expense Statement) through the most recently completed operating month available (must be within the past three months). Provide the Statement of Activities in a budget-to-actual format if the organization uses that format.

**3. YEAR-END FINANCIAL STATEMENTS, AUDIT, AND SOURCES OF INCOME.**

Include the most recent fiscal year-end financial statements, audited if available. If the organization has an audit, but it is not available for the most recent fiscal year-end, also include the most recent audit.

**Sources of Income Table** Complete the table below for the organization as a whole, based on the most recently completed fiscal year. Categories may be modified to fit your organization’s funding sources.

Percentage	Funding Source
%	Government grants (federal, state, county, local)
%	Government contracts
%	Foundations
%	Business
%	Events (include event sponsorships)
%	Individual contributions
%	Fees/earned income
%	Workplace giving campaigns
%	In-kind contributions (optional)
%	Other
%	<b>TOTAL (must equal 100%.)</b>



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4. **MAJOR CONTRIBUTORS.** For the previous two fiscal years, list major contributors (foundations, businesses, government, individuals) with amounts. Do not include names of individual donors.
5. **IN-KIND CONTRIBUTIONS.** Summary of significant in-kind donations (donated goods and professional services) received by the organization for the last fiscal year.

### Other Attachments

6. **BOARD OF DIRECTORS LIST.** Include the following information for each board member:
  - Name and email
  - Position(s) on the board (officer and committee positions)
  - Occupation and name of employer and/or affiliation(s)
  - City or county of residence
  - Beginning of term and end date for each board member
7. **PROOF OF IRS FEDERAL TAX-EXEMPT STATUS,** also called a Letter of Determination. This letter must be dated within the last five years.
8. **ANTI-DISCRIMINATION STATEMENT** adopted by the board of directors.
9. **LIST OF NAMES, EMAILS, SOCIAL MEDIA, AND QUALIFICATIONS OF KEY STAFF,** including length of service with the organization. *Do not* include job descriptions or resumes.
10. **ANNUAL REPORT,** if available.
11. **EVALUATION RESULTS (optional):** Provide the organization's most recent evaluation results or findings, relevant to this request.

COMPLETED GRANT APPLICATIONS CAN BE EMAILED IN ONE ZIP FILE TO

[info@CircleOfDreams.org](mailto:info@CircleOfDreams.org)

or printed and mailed to

Circle of Dreams Foundation  
3401 Ponderosa Dr.  
Ridgway, CO 81432