

Community Planning & Allocations Application

Submission Materials Checklist

One needed per Agency:

- ☐ 1. Current list of Board of Directors with email addresses and indication if they are a current financial contributor to your organization. Note: There is no need to indicate at what level the member contributes
- ☐ 2. Financial:
 - ☐ a. Audited financial statement for the period ending June 30, 2022, or June 30, 2023 (or equivalent end-of-year date as established by the applicant agency's fiscal calendar).
 - ☐ b. IRS Determination Letter.
 - ☐ c. Most recent monthly financial statements, including a current statement of financial position and statement of activities. The P&A committee is particularly interested in seeing what the applicant agency regularly reports to its Board of Directors.
 - d. Budget forms (provided in Excel format), which include:
 - ☐ i. Description of major anticipated budget changes for ongoing programs.
 - ☐ ii. Detailed full agency budget actuals for the current and previous fiscal years (FY24, FY23).
 - ☐ iii. Proposed full agency budget for the upcoming fiscal year (FY25) (with information regarding agency Board or Executive Committee approval, if applicable).
- ☐ 3. Any other information that you feel would be helpful in assisting the Federation in understanding the financial condition of your agency.

One for Each Program:

- ☐ 1. Proposed Program Budget

Suggested Documents:

- ☐ 1. If your agency has a board-adopted strategic plan, please include it with the application.
- ☐ 2. If your agency has a board adopted security plan, please include it with the application.

