



Applicant Checklist Capacity Building Grant

The application process can be time-intensive, requiring thoughtful responses and multiple supporting documents. To help streamline your experience, we have developed this checklist so you can gather and prepare all required materials in advance. By organizing these items ahead of time, you can complete your proposal more efficiently and avoid delays during submission.

Applicants should be prepared to provide the following information, documentation, and program/project context:

1. Basic Organization Information

- Legal organization name & DBA (if applicable)
- Address (city, state, zip)
- Website + main email
- Mission statement & brief history
- Social media links (if applicable)
- CEO/Executive Director contact info

2. Organizational Status

- 501(c)(3) determination letter
- OR
- Fiscal sponsor information, contact, and [agreement](#) (if applicable)

3. Financial Documents (Most Recent Required)

- IRS Form 990
- Year to date comparative financial statements
- Comparative prior year financial statements
- Audited or reviewed financial statement
- Current fiscal year budget
- Profit & Loss statement
- Balance sheet

4. Key Contacts

- Primary contact person (name, title, email, phone)
- Additional leadership contacts (if applicable)



5. Organizational & Demographic Information

- Total staff and leadership counts
- Racial demographic information (staff and board)
- Race Equity & Inclusion Phase 1 Training completion for board, executive & support staff

6. General Project / Program Information

- Purpose of funding request
- Type of capacity building (e.g., staffing, technology, strategy)
- Project title, start & end dates
- Strategic priority alignment
- Geographic Service area(s)
- Capacity building project history within the last three years (e.g., governance, staffing, partnerships, tech)

7. Strategy & Project Design Narrative Questions

- Brief project description including how funding will improve your organization
- Expected outcomes and learning
- Community partners involved / Roles and contributions of partners

8. Required Application Documents

- [Conflict of Interest Disclosure Form](#)
- Consultant proposal(s) including:
 - Scope of work
 - Timeline
 - Budget
 - Deliverables
- Supporting HR documents (if required):
 - Job description
 - Employee handbook
 - Policies
 - Reference letters

9. Budget & Request

- Organization's annual operating revenue
- Amount requested
- Total project/program cost
- Completed [budget form](#) upload

10. Final Review & Certification

Before submitting, confirm the following:

- All required fields completed
- All documents uploaded
- Certification boxes checked

11. After Submission (for awareness)

- Be prepared to schedule a learning conversation and answer follow-up questions
- Complete post-project assessments or progress and outcomes if funded



Tips for Applicants

- Upload **most recent financials only** (do not delete past uploads)
- Gather documents early to avoid delays
- Draft answers in a document first, then paste into the application
- Keep responses clear, concise, and impact-focused



Capacity Building Grant

LOGOUT

Welcome Page

Organization Information

Organizational Tax Status

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Project/Program Information

Budget

Certify Application

Organization Information

* indicates required field

* Organization Legal Name

DBA (if applicable)

* Address

* City

* State

* Zip/Postal Code

* Mission Statement and History

(4000 character maximum)

* Main Telephone

* Website Address

* Main Email Address

Organization Social Media Select all that apply. If not applicable, skip to next question.

- Instagram
- Facebook
- LinkedIn
- Twitter
- Youtube

Instagram e.g. "instagram.com/user"

Facebook e.g. "facebook.com/user"

LinkedIn e.g. "linkedin.com/user"

Twitter e.g. "twitter.com/user"

Youtube e.g. "youtube.com/@user"

* Do you have a single CEO/Executive Director or a Co-Directorship?

* CEO/Executive Director or Director First Name

* Last Name

* Title

* Email

* Contact Number

Co-Director First Name

Co-Director Last Name

Co-Director Title


Co-Director Email

Co-Director Contact Number

Organization/Fiscal Sponsor Financials

****To ensure a comprehensive and accurate analysis, please upload the current year financials, while retaining any previously uploaded financial documents.****

* IRS Form 990 Upload most recent year, DO NOT delete previous submissions



Drag files anywhere in this area, or
[browse files](#)


Accepted files: .csv .doc .docx .eml .eps .heic
.ics .jpeg .jpg .mp3 .msg .numbers .pdf .png
.ppt .pptx .tif .tiff .txt .xls .xlsx .zip

Max size: 5.0 MB

Files (0)

No files uploaded

* Comparative prior year financial statements Upload most recent year, DO NOT delete previous submissions



Drag files anywhere in this area, or
[browse files](#)


Accepted files: .csv .doc .docx .eml .eps .heic
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Max size: 5.0 MB

Files (0)

No files uploaded

* Year to date comparative internal financial statements Upload current year, DO NOT delete previous submissions



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[browse files](#)

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Max size: 5.0 MB

Files (0)

No files uploaded

* Audited or Reviewed Financial Statement

Upload most recent year, DO NOT delete previous submissions



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Max size: 5.0 MB

Files (0)

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* Fiscal Year Budget

Upload current year, DO NOT delete previous submissions



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.ppt .pptx .tif .tiff .txt .xls .xlsx .zip

Max size: 9.6 MB


Files (0)

No files uploaded

* Profit and Loss Statement

The Profit and Loss Statement (also called an income statement) shows your organization's revenues, expenses, and net income over a specific period—helping us understand how your organization is performing financially.

Upload most recent year, DO NOT delete previous submissions



Drag files anywhere in this area, or
[browse files](#)

Accepted files: .csv .doc .docx .eml .eps .heic
.ics .jpeg .jpg .mp3 .msg .numbers .pdf .png
.ppt .pptx .tif .tiff .txt .xls .xlsx .zip

Max size: 5.0 MB


Files (0)

No files uploaded

* Balance Sheet

The Balance Sheet provides a snapshot of your organization's financial position at a specific point in time, showing assets, liabilities, and net assets.

Upload most recent year, DO NOT delete previous submissions



Drag files anywhere in this area, or
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Accepted files: .csv .doc .docx .eml .eps .heic
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.ppt .pptx .tif .tiff .txt .xls .xlsx .zip

Max size: 5.0 MB

Files (0)

No files uploaded

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Organizational Tax Status

* indicates required field

* Does your organization have a 501(c)3 exemption through the IRS?

We have a 501c3 exemption

IRS 501(c)3 Determination Letter


Drag files anywhere in this area, or [browse files](#)
Accepted files: .csv .doc .docx .eml .eps .heic .ics .jpeg .jpg .mp3 .msg .numbers .pdf .png .ppt .pptx .tif .tiff .txt .xls .xlsx .zip
Max size: 5.0 MB

Files (0)

No files uploaded

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Organizational Tax Status

* indicates required field

* Does your organization have a 501(c)3 exemption through the IRS?


We have a Fiscal Sponsor

Please note:

For all organizations applying with a fiscal sponsor, the fiscal sponsor's designated contact(s) must establish a CyberGrants account.

Fiscal Sponsor's Tax ID #

Fiscal Sponsor's IRS Letter of Determination


Drag files anywhere in this area, or [browse files](#)
Accepted files: .csv .doc .docx .eml .eps .heic .ics .jpeg .jpg .mp3 .msg .numbers .pdf .png .ppt .pptx .tif .tiff .txt .xls .xlsx .zip
Max size: 5.0 MB

Files (0)

No files uploaded

Fiscal Sponsor Organization Name

Fiscal Sponsor Contact First Name

Fiscal Sponsor Contact Last Name

Fiscal Sponsor Contact Role/Title

Fiscal Sponsor Email

Fiscal Sponsor Street Address


Fiscal Sponsor City

Fiscal Sponsor State

Fiscal Sponsor Zip Code

Fiscal Sponsor Form

Please complete and upload the [fiscal sponsor agreement](#)


Drag files anywhere in this area, or [browse files](#)

Accepted files: .csv .doc .docx .eml .eps .heic
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Max size: 20.0 MB

Files (0)

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Additional Fiscal Sponsor Documentation Please upload any additional fiscal sponsor letters or agreements that the organization has on file, if any.



Drag files anywhere in this area, or
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Accepted files: .csv .doc .docx .eml .eps .heic
.ics .jpeg .jpg .mp3 .msg .numbers .pdf .png
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Max size: 5.0 MB

Files (0)

No files uploaded

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Organizational Tax Status


* indicates required field

* Does your organization have a 501(c)3 exemption through the IRS?

We have an approved Group Exemption ▼

Central Organization Name


Central Organization's IRS Letter of Determination


Drag files anywhere in this area, or [browse files](#)
Accepted files: .csv .doc .docx .eml .eps .heic .ics .jpeg .jpg .mp3 .msg .numbers .pdf .png .ppt .pptx .tif .tiff .txt .xls .xlsx .zip
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Group Exemption Letter


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Contact Info

* indicates required field

Create/Select at least one contact who is responsible for the completion and submission of the grant application.

- Match: Check the box to associate this individual with this application.
Name:
Telephone #:
E-mail Address:
Contact Type: Development Staff
- Match: Check the box to associate this individual with this application.
Name:
Telephone #:
E-mail Address:
Contact Type: Administrative Staff
- Match: Check the box to associate this individual with this application.
Name:
Telephone #:
E-mail Address:
Contact Type: Executive Leadership
- Match: Check the box to associate this individual with this application.
Name:
Telephone #:
E-mail Address:
Contact Type: Administrative Staff

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Create New Contact

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* indicates required field

Create/Select at least one contact that is responsible for the development, implementation and evaluation of this request.

* Contact Type Please pick the contact type that best describes your role.

* First Name

* Last Name

* Title

* Email Address

* Contact Number

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Demographics

* indicates required field

The Raymond John Wean Foundation is committed to ensuring accountability to Black, Hispanic and Latinx-led organizations and communities of color. Information requested in the following section is used for the purpose of completing an accurate leadership landscape of the Valley and determining equitable distribution of resources.

* Total number of staff

* Total number staff in Executive positions

- * Please select all racial identities represented in your executive staff
- African-American/Black
 - American Indian/Indigenous People
 - Asian or Pacific-Islander
 - Hispanic or Latinx
 - White/Caucasian
 - There are staff members with racial identities not listed here or choose to self identify
 - There are staff members who choose not to identify a racial identity

Total number of executive staff who identify as African American/Black

Total number of executive staff who identify as American Indian/Indigenous People

Total number of executive staff who identify as Asian or Pacific Islander

Total number of executive staff who identify as Hispanic or Latinx

Total number of executive staff who identify as White/Caucasian

Total number of executive staff members with racial identities not listed here or choose to self identify

Total number of executive staff who choose not to identify a racial identity

* Total number of Board or Leadership Body members

- * Please select all racial identities represented in your Board or Leadership Body
- African-American/Black
 - American Indian/Indigenous People
 - Asian or Pacific-Islander
 - Hispanic or Latinx
 - White/Caucasian
 - There are members with racial identities not listed here or choose to self identify
 - There are members who choose not to identify a racial identity

Total number of board members who identify as African American/Black

Total number of board members who identify as American Indian/Indigenous People

Total number of board members who identify as Asian or Pacific Islander

Total number of board members who identify as Hispanic or Latinx

Total number of board members who identify as White/Caucasian

Total number of board members with racial identities not listed here or choose to self identify

Total number of board members who choose not to identify a racial identity

* Board member residence location Identify the number of board members that reside in designated areas.

Warren

Youngstown

Other

0.00 Total

* Executive staff residence location Identify the number of executive staff that reside in designated areas.

Warren

Youngstown

Other

0.00 Total

* Support staff residence location Identify the number of support staff that reside in designated areas.

Warren

Youngstown

Other

0.00 Total

* How is a commitment to race equity and inclusion conveyed in your organization? The Foundation defines *race equity* and *inclusion* as:
Race Equity: the future condition where one's race identity has no influence on how one fares in society.

Inclusion: the art of creating an environment where one can feel welcomed, respected and valued to participate fully.

- Racial Equity Institute Phase One (two-day) workshop
- Diversity or race equity and inclusion training
- Explicit values or policies related to racial equity and inclusion
- Actively engaged in reading and learning
- Diverse staffing
- Other

Other (please specify)

* Number of individuals that completed Board Members

Executive Staff

Support Staff

0.00 Total

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Capacity Building Fund

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* indicates required field

Nonprofit Capacity Building Readiness

Nonprofit Capacity Building Readiness refers to a nonprofit organization's current state of preparedness to engage in capacity building activities.

Some points to consider, the organization has:

- Assessed capacity building opportunities.
- Committed to implementing strategies to enhance its effectiveness and sustainability to achieve its mission.
- Engaged employees in the change.
- Identified resources and support systems to implement the change.
- Affirmed the changes support its strategic priorities.
- Committed to making the change successful.

* Purpose of this funding request

Project/Program Title

* Provide a brief description of this effort.

(2300 character maximum)

Project/Program Start Date

Project/Program End Date

* What area(s) does your organization serve?

Disclaimer: Recognizing that definitions of areas may vary by organization consider:

- Warren
- Youngstown
- Mahoning County (more than one city within Mahoning County)
- Trumbull County (more than one city within Trumbull County)
- Mahoning Valley (at least 2 of the following counties: Columbiana, Mahoning, Mercer, Trumbull)
- Northeast Ohio (beyond the four counties within the Mahoning Valley and within the state of Ohio)
- Ohio Statewide
- Other

Other: please specify what area(s) your organization serves

* With which of our Strategic Priorities does your work/this request most align?

Click [here](#) for full descriptions.

Type of capacity building you are seeking.



- Capacity Building Options:**
- Automation
 - Collaborations and Partnerships
 - Communication Strategy
 - Equitable Compensation
 - Evaluation
 - Funding Development
 - Governance
 - Hiring
 - Merger
 - Program Development
 - Race Equity and Inclusion
 - Staff Development
 - Strategic Planning
 - Technology Infrastructure
 - Other

What are your strategies to address the challenge(s) identified?

(2000 character maximum)

Referring to strategies that address the identified challenge(s), describe the outcomes and learning you expect to occur as a result of this effort.

(4000 character maximum)

* Identify key staff, board members, consultants and technical assistance providers involved in this effort.

Include: name, title, organization and summary of major responsibilities.

(4000 character maximum)

* Identify any key external community partners who will contribute to this effort.

Include: name, title, organization and summary of major responsibilities.

(4000 character maximum)

Consultant Project/Program Proposal

A good consulting proposal includes:

1. A summary of your organization's challenges.
2. A detailed plan for solving those challenges.
3. A list of expected results or deliverables.
4. A description of the project/program team's qualifications and experience.
5. Activities that align with the project/program and your budget.
6. Clear specifications in terms of quality and time.

Please upload the proposal(s) for the project/program.



Drag files anywhere in this area, or [browse files](#)

Accepted files: .csv .doc .docx .eml .eps .heic .ics .jpeg .jpg .mp3 .msg .numbers .pdf .png .ppt .pptx .tif .tiff .txt .xls .xlsx .zip

Max size: 17.9 MB

Files (0)

No files uploaded

Conflict of Interest and Disclosure Form

Please complete and upload the [conflict of interest and disclosure form](#).



Drag files anywhere in this area, or [browse files](#)

Accepted files: .csv .doc .docx .eml .eps .heic .ics .jpeg .jpg .mp3 .msg .numbers .pdf .png .ppt .pptx .tif .tiff .txt .xls .xlsx .zip

Max size: 5.0 MB

Files (0)

No files uploaded

Select the types of capacity building projects that your organization has participated in within the past three years? (Select all that apply)

- Automation – invest in automation to reduce the time spent on manual/repetitive/tedious tasks
- Collaborations and Partnerships – build on existing capacities/foster connections/share learning

- Communication Strategy - use communications to educate the public/share perceptions/foster outcomes
- Equitable Compensation - promote pay equity practices/support organizational sustainability
- Evaluation - improve impact measurement/assess the quality, impact of programs to make decisions
- Fund Development - increase sustainability through training
- Governance - strengthen recruiting and training/improve decision-making processes/update policies
- Hiring - recruit and retain staff, volunteers, or residents with relevant knowledge and expertise
- Merger - consolidate resources to drive long-term growth/achieve greater impact
- Program Development - refine existing programs or pilot new initiatives
- Race Equity and Inclusion - understand racism/develop a person's capacity through a vetted vendor
- Staff Development - provide development opportunities for staff, volunteers, or residents
- Strategic Planning - define strategy or direction and make decisions on allocating resources
- Technology Infrastructure - offer technical assistance to users, including adoption of new tools
- Other

Other (please specify)

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Strategic Partner Fellowship

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Project/Program Information

* indicates required field

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- Engaged employees in the change.
- Identified resources and support systems to implement the change.
- Affirmed the changes support its strategic priorities.
- Committed to making the change successful.

* Purpose of this funding request

Project/Program Title

* Provide a brief description of this effort.

(2300 character maximum)

* What area(s) does your organization serve? Disclaimer: Recognizing that definitions of areas may vary by organization consider:

- Warren
- Youngstown
- Mahoning County (more than one city within Mahoning County)
- Trumbull County (more than one city within Trumbull County)
- Mahoning Valley (at least 2 of the following counties: Columbiana, Mahoning, Mercer, Trumbull)
- Northeast Ohio (beyond the four counties within the Mahoning Valley and within the state of Ohio)
- Ohio Statewide
- Other

Other: please specify what area(s) your organization serves

* With which of our Strategic Priorities does your work/this request most align? Click [here](#) for full descriptions.

Type of capacity building you are seeking.

→ Capacity Building Options:
Hiring
Staff Development

What are your strategies to address the challenge(s) identified?

(2000 character maximum)

Referring to strategies that address the identified challenge(s), describe the outcomes and learning you expect to occur as a result of this effort.

(4000 character maximum)

* Identify key staff, board members, consultants and technical assistance providers involved in this effort.

Include: name, title, organization and summary of major responsibilities.

(4000 character maximum)

* Identify any key external community partners who will contribute to this effort.


Include: name, title, organization and summary of major responsibilities.

(4000 character maximum)

Please upload the following items:

1. Job description
2. Employee handbook
3. Benefits Policies
4. Personnel Policies
5. Three Reference letters (Including colleague, Supervisor/Manager - Current & Immediate Past, and Direct Report if applicable)

Please upload each file one at a time



Drag files anywhere in this area, or
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Accepted files: .csv .doc .docx .eml .eps .heic .ics .jpeg .jpg .mp3 .msg .numbers .pdf .png .ppt .pptx .tif .tiff .txt .xls .xlsx .zip

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- Evaluation – improve impact measurement/assess the quality, impact of programs to make decisions
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- Staff Development – provide development opportunities for staff, volunteers, or residents

- Strategic Planning – define strategy or direction and make decisions on allocating resources
- Technology Infrastructure – offer technical assistance to users, including adoption of new tools
- Other

Other (please specify)

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Budget

* indicates required field

* What is your organization's annual operating revenue?


Two Year Grant Cycle **Nonprofit Leadership Fellowship requests should be submitted as a two year grant cycle.**

* Amount of Request Enter the amount you are requesting for this effort.

1. Capacity Building funding requests not to exceed \$25,000.
2. Nonprofit Leadership Fellowship requests not to exceed \$101,500 over two years.

* What is the total cost of this effort?

* Budget form Download and complete the [budget form](#)



Drag files anywhere in this area, or [browse files](#)

Accepted files: .csv .doc .docx .eml .eps .heic .ics .jpeg .jpg .mp3 .msg .numbers .pdf .png .ppt .pptx .tif .tiff .txt .xls .xlsx .zip

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Certify Application

Certify Application

* indicates required field

* Check this box to certify that the information you have provided is true and accurate. I certify

* Check this box to certify that this application has been approved by the CEO or Executive Director for submission. I certify

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