



Applicant Checklist Community Investment 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. 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

3. Key Contacts

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

4. Organizational Status

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



5. Organizational & Demographic Information

- Total staff and leadership counts
- Racial demographic information (staff and board)
- Staff and board residency areas
- Race Equity & Inclusion Phase 1 Training completion for board, executive & support staff
- Current equity and inclusion practices (successes & challenges)

6. Program Design & Strategy Narrative Questions

- Type of request (General Operating or Programmatic Support)
- Geographic service area(s)
- Population served (residents, youth, etc.)
- Strategic priority alignment
- Key strategies to address community challenges (e.g., neighborhood revitalization, economic opportunity, education, leadership)
- Specific activities and approach
- Expected outcomes and learning
- Use of data and local context
- Community partners involved / Roles and contributions of partners

7. Supporting Documents

- Supporting data or organizational materials
- Optional uploads (letters, estimates, photos)

8. Budget & Request

- Organization's annual operating revenue
- Current Community Investment Grant status (if applicable)
- Amount requested
- Total project/program cost
- Grant period (1–3 years)
- Completed [budget form](#) upload
- Funding/resource development plan

9. Final Review & Certification

Before submitting, confirm the following:

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

10. After Submission (for awareness)

- Be prepared to schedule a learning conversation and answer follow-up questions
- Track 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 responses in a document first, then paste into the application
- Keep responses clear, concise, and community-focused



Community Investment Grant

LOGOUT

Welcome Page

Organization Information

Organizational Tax Status

Contact Information

Demographics

Program Information

Program 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

* Organization 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 .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

* Audited or Reviewed Financial Statement 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

* Year to date comparative internal financial statements

Upload current year, DO NOT delete previous submissions



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Max size: 5.0 MB

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No files uploaded

* Fiscal Year Budget

Upload current year, DO NOT delete previous submissions


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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
[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 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
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Certify Application

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
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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
[browse files](#)

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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


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

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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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Contact Information

* indicates required field

Create/Select at least one contact to be associated with 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 who choose not to identify a racial identity

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

* 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 who choose not to identify a racial identity

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

* 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

* Number of individuals that completed REI Phase 1 workshop Board Members

Executive Staff

Support Staff

0.00 Total

* How does your organization convey its commitment to race equity - the future condition where one's race identity has no influence on how one fares in society.
(4000 character maximum)

* How does your organization convey its commitment to inclusion - the art of creating an environment where one can feel welcomed, respected and valued to participate fully.
(4000 character maximum)

* Share any success and/or challenges your organization has encountered in race equity and inclusion journey.

(4000 character maximum)

* What would be helpful in your organization's race equity and inclusion journey?

(2000 character maximum)

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Strategic Priority: Community Revitalization

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Program Information

* indicates required field

* Type of Request **General Operating Support**

General Operating funds cover an organization's overall operational expenses and activities in support of the organization's day-to-day work. These costs are the expenses (staff salaries, utilities, maintenance and supplies) that are not directly tied to a specific program purpose.

Programmatic Support

Programmatic funds cover costs that are tied directly to the delivery of a particular project, service, or activity to achieve an outcome intended by the funding.

* 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

* Describe the population with whom you will do your work, be specific (residents, youth etc.)

(2000 character maximum)

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

Click [here](#) for full descriptions.

Community Revitalization

In the following section, the organization will complete the narrative questions for the selected focus areas.

- Stabilize low and moderate income neighborhoods
- Rehabilitate blighted, vacant residential properties
- Rehabilitate blighted, vacant commercial properties
- Safety/security
- Policy reform

What are your strategies to stabilize low and moderate income neighborhoods?

(2000 character maximum)

Referring to strategies that stabilize low and moderate income neighborhoods, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies to rehabilitate blighted, vacant residential properties?

(2000 character maximum)

Referring to strategies that rehabilitate blighted, vacant residential properties, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies to rehabilitate blighted, vacant commercial properties?

(2000 character maximum)

Referring to strategies that rehabilitate blighted, vacant commercial properties, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies for safety/security?

(2000 character maximum)

Referring to strategies that provide safety/security, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies for policy reform?

(2000 character maximum)

Referring to strategies for policy reform, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

* Referencing the challenge(s) you seek to address and/or the strategies you plan to employ, provide current and relevant data and statistics (with sources).

(4000 character maximum)

* In what ways does your organization use data to improve race equity and inclusion outcomes?

(2000 character maximum)

* Upload supporting data of your group/organization's work.



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: 10.0 MB

Files (0)

No files uploaded

OPTIONAL: Upload supporting documents, letters, estimates, or photos



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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* Summarize the role and contributions of key community partners in the planning, implementation and assessment of this program/project.

(2000 character maximum)

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Strategic Priority: Economic Opportunity

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Program Information

* indicates required field

* Type of Request

General Operating Support

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Programmatic Support

Programmatic funds cover costs that are tied directly to the delivery of a particular project, service, or activity to achieve an outcome intended by the funding.

* What area(s) does your organization serve?

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- 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

* Describe the population with whom you will do your work, be specific (residents, youth etc.)

(2000 character maximum)

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

Click [here](#) for full descriptions.

Economic Opportunity - upward economic mobility for residents in Warren and Youngstown neighborhoods ▼

Economic Opportunity

- Access to capital and investment
- Access to quality jobs, job training and job placement
- Asset building
- Eliminate barriers to accessing quality jobs
- Policy reform

In the following section, the organization will complete the narrative questions for the selected focus areas.

What are your strategies to provide access to capital and investment?

(2000 character maximum)

Referring to strategies to provide access capital and investment, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies to access quality jobs, job training, and job placement?

(2000 character maximum)

Referring to strategies to access quality jobs, job training, and job placement, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies for asset building?

(2000 character maximum)

Referring to strategies for asset building, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies that eliminate barriers to accessing quality jobs?

(2000 character maximum)

Referring to strategies that eliminate barriers to accessing quality jobs, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies for policy reform?

(2000 character maximum)

Referring to strategies for policy reform, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

* Referencing the challenge(s) you seek to address and/or the strategies you plan to employ, provide current and relevant data and statistics (with sources).

View the local conditions reports for Warren and Youngstown in our [Resource Library](#).

(4000 character maximum)

* In what ways does your organization use data to improve race equity and inclusion outcomes?

(2000 character maximum)

* Upload supporting data of your group/organization's work.



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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Max size: 20.0 MB

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* Summarize the role and contributions of key community partners in the planning, implementation and assessment of this program/project.

(2000 character maximum)

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Strategic Priority: Educational Opportunity

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Program Information

* indicates required field

* Type of Request **General Operating Support**

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- Ohio Statewide
- Other

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

* Describe the population with whom you will do your work, be specific (residents, youth etc.)

(2000 character maximum)

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

Click [here](#) for full descriptions.

Educational Opportunity - school and career readiness for Warren and Youngstown City School students ▼

Educational Opportunity

- Access to quality programs/services grades PK-12
- Access to quality programs/services targeting grades 6-12
- Attainment of skills to qualify for and succeed in postsecondary pathways
- Connections among providers and agencies serving students and families
- Policy reform

In the following section, the organization will complete the narrative questions for the selected focus areas.

What are your strategies to provide quality programs/services for grades PK-12?

(2000 character maximum)

Referring to strategies to provide quality programs/services for grades PK-12, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies to provide quality programs/services for grades 6-12?

(2000 character maximum)

Referring to strategies to provide quality programs/services for grades 6-12, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies that work toward the attainment of skills to succeed in postsecondary pathways?

(2000 character maximum)

Referring to strategies toward attainment of skills to qualify for and succeed in postsecondary pathways, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies to create connections among providers and agencies serving students and families?

(2000 character maximum)

Referring to strategies to create connections among providers and agencies serving students and families, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies for policy reform?

(2000 character maximum)

Referring to strategies for policy reform, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

* Referencing the challenge(s) you seek to address and/or the strategies you plan to employ, provide current and relevant data and statistics (with sources).

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(4000 character maximum)

* In what ways does your organization use data to improve race equity and inclusion outcomes?

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* Upload supporting data of your group/organization's work.



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Files (0)

No files uploaded

* Summarize the role and contributions of key community partners in the planning, implementation and assessment of this program/project.

(2000 character maximum)

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Strategic Priority: Public and Civic Sector Leadership

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- 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

* Describe the population with whom you will do your work, be specific (residents, youth etc.)

(2000 character maximum)

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

Click [here](#) for full descriptions.

Public and Civic Sector Leadership

- Achievement of excellence in operations, governance, strategy and leadership
- Improved quality of leadership among staff, members of boards, councils, commissions and committees
- Neighborhood organizing
- Policy reform

In the following section, the organization will complete the narrative questions for the selected focus areas.

What are your strategies that lead to the achievement of excellence in operations, governance, strategy and leadership?

(2000 character maximum)

Referring to strategies that lead to the achievement of excellence in operations, governance, strategy and leadership, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies that lead to improved quality of leadership among staff, members of boards, councils, commissions and committees?

(2000 character maximum)

Referring to strategies that lead to improved quality of leadership among staff, members of boards, councils, commissions and committees, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies for neighborhood organizing?

(2000 character maximum)

Referring to strategies for neighborhood organizing, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

What are your strategies for policy reform?

(2000 character maximum)

Referring to strategies for policy reform, describe the outcomes and learning you expect to occur as a result of your project/program.

(4000 character maximum)

* Referencing the challenge(s) you seek to address and/or the strategies you plan to employ, provide current and relevant data and statistics (with sources).

View the local conditions reports for Warren and Youngstown in our [Resource Library](#).

(4000 character maximum)

* In what ways does your organization use data to improve race equity and inclusion outcomes?

(2000 character maximum)

* Upload supporting data of your group/organization's work.



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: 10.0 MB

Files (0)

No files uploaded

OPTIONAL: Upload supporting documents, letters, estimates, or photos



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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

Max size: 20.0 MB

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* Summarize the role and contributions of key community partners in the planning, implementation and assessment of this program/project.

(2000 character maximum)

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Program Budget

* indicates required field

* What is your organization's annual operating revenue?

* Do you have an active Community Investment grant?


Unspent Funds to date

* Amount of Request Enter the amount you are requesting for this project/program.

* What is the total cost of this project/program?

* What is the period in which you expect to complete the grant activities and expend funds?

* 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

Max size: 5.0 MB

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* Describe your funding/development/resource plans in support of your work.

(4000 character maximum)

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Welcome Page

Organization Information

Organizational Tax Status

Contact Information

Demographics

Program Information

Program Budget

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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