



Applicant Checklist Incubator Associate Application

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
- Current year financial statements
- Prior year financial statements
- Audited or reviewed financial statement
- Current fiscal year budget
- Profit & Loss statement
- Balance sheet

3. Organizational Status

- 501(c)(3) determination letter
- Central organization information (if applicable)
- Group exemption letter (if applicable)

4. Key Contacts

- Primary contact (name, title, email, phone)
- Additional leadership contacts (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
- Geographic service area(s)
- Current equity and inclusion practices (successes & challenges)

6. Organizational Capacity & Readiness (Incubator Participation)

- Value alignment (e.g., collaboration, equity, inclusion)
- Strategic priority alignment
- How your organization will use incubator space
- Desired length of participation (e.g., 1–2 years)
- Budget for space/utilization
- Organizational development needs and support areas (e.g., fundraising, HR, governance, program evaluation)

7. Final Review & Certification

Before submitting, confirm the following:

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

8. After Submission (for awareness)

- Be prepared to schedule a learning conversation and answer follow-up questions
- Be ready to discuss organizational needs and goals



Tips for Applicants

- Upload **most recent financials** only (do not delete past uploads)
- Gather documents early to avoid delays
- Prepare responses in a document first, then paste into the application
- Keep responses clear, concise, and honest about needs and capacity
- Use this as an opportunity to reflect on your organization's growth



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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 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

* Fiscal Year Budget Upload current year, DO NOT delete previous submissions



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.ics .jpeg .jpg .mp3 .msg .numbers .pdf .png
.ppt .pptx .tif .tiff .txt .xls .xlsx .zip

Max size: 9.6 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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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
Max size: 5.0 MB

Files (0)

No files uploaded

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* 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
Max size: 5.0 MB

Files (0)

No files uploaded

Group Exemption 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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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 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
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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* indicates required field

Value Alignment

With which of our values does this organization's work align?

- Collaboration
- Community Investment
- Inclusion
- Learning
- Race Equity
- Resident Engagement
- Social Equity

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

Community Revitalization - resourced physical landscape of Warren and Youngstown neighborhoods

Community Revitalization

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

What area(s) does your organization serve?

- 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

Space Utilization

* What will be the organization's primary use of the space?

[Text input field]

(4000 character maximum)

* What is the desired length of time to utilize the space?

[Dropdown menu]



Strategic Priority: Economic Opportunity

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* indicates required field

Value Alignment

- With which of our values does this organization's work align?
- Collaboration
 - Community Investment
 - Inclusion
 - Learning
 - Race Equity
 - Resident Engagement
 - Social Equity

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

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

What area(s) does your organization serve?

- 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

Space Utilization

* What will be the organization's primary use of the space?

(4000 character maximum)

* What is the desired length of time to utilize the space?



Strategic Priority: Educational Opportunity

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* indicates required field

Value Alignment

- With which of our values does this organization's work align?
- Collaboration
 - Community Investment
 - Inclusion
 - Learning
 - Race Equity
 - Resident Engagement
 - Social Equity

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

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

What area(s) does your organization serve?

- 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

Space Utilization

* What will be the organization's primary use of the space?

(4000 character maximum)

* What is the desired length of time to utilize the space?



Strategic Priority: Public and Civic Sector Leadership

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* indicates required field

Value Alignment

- With which of our values does this organization's work align?
- Collaboration
 - Community Investment
 - Inclusion
 - Learning
 - Race Equity
 - Resident Engagement
 - Social Equity

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

- 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

- What area(s) does your organization serve?
- 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

Space Utilization

* What will be the organization's primary use of the space?

(4000 character maximum)

* What is the desired length of time to utilize the space?

* What is your organization's budget allocation for leasing office space?

Capacity Building Readiness

When considering leadership, strategy and impact, how closely does this statement represent your organization:

A sustainable organization that produces change and impact.

* What type of training and development opportunities would be helpful in support of your organization's operations?

- Advocacy and public policy
- Donor relations and stewardship
- Finance and budgeting
- Fundraising and development
- Grant writing
- Human Resources and development
- Nonprofit governance and board development
- Program and evaluation and impact assessment
- Volunteer management and engagement

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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 group's leadership for submission. I certify

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