

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, 2024, (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 previous 2 fiscal years (FY25, FY24).
 - iii. Full agency budget for the upcoming fiscal year (FY26)
- 3. Any other information that you feel would be helpful in assisting the

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.

