



## Conservation Policy Proposal Requirements

If we invite your organization to submit a proposal, you will receive an email with a link to apply via our grantee portal. The following information is required to complete a Conservation Policy application.

This is not an application form, but may be used to collect information that will be entered in an online form. Please note: Some items call for a form field entry while others must be uploaded as a separate document.



Indicates online form field entry



Indicates document upload



### Organizational Data

- Current number of paid full time staff
- Current Number of paid part time staff
- Approximate number of volunteers who support and help advance your conservation agenda
- Number of individuals that have contributed financially within the past twelve months (including members)
- Number of individuals who have made a gift of at least \$250 within the past twelve months (including members)
- Number of foundations that have provided support for your current (or most recent) fiscal year
- Please indicate which fundraising/membership development tools your organization uses (you may select more than one): special events, direct mail, annual giving, monthly giving, planned giving, other (specify)
- Explanatory comments regarding your organizational data (optional).



### Funding Details

- Project Title
- Amount Requested
- Total Project Expense Budget (if applicable)
- 12-month Organizational Expense Budget
- Fiscal Year End Month
- Other Funding Sources: Please name top foundations or other major funding sources (do not include amounts, separate multiple sources with commas).



## Request Narrative

(Required) Upload a narrative document to provide us with a complete picture of your organization and the work it proposes to undertake with the support of Brainerd funding. The proposal narrative should describe your goals and planned activities. Please provide an outline of short-term objectives, describing how they can be reached during the grant period and how they fit into a longer-term strategy.



## What we want to know about your work

In addition to the narrative provided above, we are particularly interested in the topics addressed in the following bullets. Your answers will be entered in an online form, so it's easiest to prepare them prior to logging on to the grantee portal so they may be copied and pasted into the application form. Please keep your answers to a brief paragraph and you may skip any that do not apply.

- In a paragraph, please very briefly summarize your organization's goals and activities to be supported by this grant. (required)
- Please briefly summarize how your organization collaborates with other conservation-minded groups to achieve its goals.
- Briefly identify the decision-makers or target audiences you are trying to reach. How do you increase your credibility and influence with these parties?
- Briefly describe how you plan to help public officials or decision-makers become stronger supporters (or champions) for your organization's goals.
- Please summarize how you will engage a broader set of community-based stakeholders.
- Does your organization have a plan for its communications and engagement work? If yes, please briefly describe your communications and engagement plan or attach it.
- We are interested in understanding your organization's key capacity needs, so that we may explore additional ways to support your work. What do you see as your most pressing capacity needs at this time? For example, does your organization have a budget for staff and board trainings? Does it have a succession plan? Is your technology infrastructure up-to-date, including your Web site and database? Are there any gaps in your communications strategy?
- How would you like the Brainerd Foundation to evaluate your success at end of the grant term?



## Organization Strategy

Upload relevant documents that describe your program (e.g., organizational strategic plan, theory of change, etc.).



## Officers, Board, and Staff

- Upload a list of the officers and board members of the organization.

- Upload the qualifications of those staff that will bear primary responsibility for the proposed work. For project support requests, ideally this will include the percentage of each staff person's time anticipated to be devoted to the proposed project.



## Budgets

- Upload the annual operating budget for the organization showing anticipated revenue and expense for the current fiscal year. (Please itemize your sources of revenue.)
- Upload the detailed budget for the project (for project support only) showing anticipated revenue and expense for the current fiscal year. (Please itemize your sources of revenue and provide a separate column for the proposed use of Brainerd Foundation funds.)
- If applying near the end of your fiscal year, upload a draft organizational operating budget for the next fiscal year, if available.
- If applying near the end of your fiscal year, upload a draft project budget for the next fiscal year with a separate column for the proposed use of Brainerd Foundation funds, if available. (project support only)



## Financial statements

- Upload a year-to-date statement of revenue and expense for the organization.
- Upload the most recent balance sheet for the organization.
- For project support grants only, upload a year-to-date financial statement for the project (if available).
- Upload the prior fiscal year statement of revenue and expense for the organization.
- Upload the most recent end-of-fiscal-year balance sheet for the organization.
- For project support grants only, upload the most recent end-of-fiscal-year financial statement for the project (if available).



## & Audit or Equivalent

If you represent a fiscally-sponsored organization or a local or regional office of a larger parent organization that holds charitable status, please skip to the last bullet in this section.

- Does your organization have a budgeted revenue of \$500,000 US or greater? If Yes: Does your organization have a recent annual financial review or audit? If Yes: Please upload it.
- If applicable: Does your fiscal sponsor or parent organization have a budgeted revenue of \$500,000 US or greater? If No: Please upload the most recent 12-month statement of revenue and expense and the most recent 12-month balance sheet for that organization. If Yes: Does your fiscal sponsor or parent organization have a recent annual financial review or audited financial statements with accompanying notes and auditor's opinion? If Yes: Please upload it. If No: Please provide the most recent 12-month statement of revenue and expense and the most recent 12-month balance sheet for that organization.



## **Additional Materials**

- Include additional materials only if they are essential for the foundation to understand the program.