

Houston Endowment

Checklist for Applicants Completing a Full Application for Funding

Organizations completing a full application for funding from Houston Endowment will be asked to provide the following information as part of the application process. Please ensure you have the most current version of all of the information requested below.

CONTACT INFORMATION

- Name, title, phone number and email for the organization's executive leader
- Name, title, phone number and email for primary contact for the review of the request

SOURCES OF SUPPORT

- You will be asked to provide information about your organization's sources of support
- For all request types other than General Operating Support, you will additionally be asked to provide information about the sources of support for the project for which you are requesting funding

BOARD INFORMATION

To complete the board information section, you will need to have access to the following information:

- The number of times the board meets each year
- The average attendance at board meetings (report as an average percent in attendance)
- Whether or not the board members have term limits, and if so, what those limits are
- Whether or not a Board Conflict of Interest Policy exists for your organization
- The committee structure of the board (e.g., Executive, Audit, Finance, Development)
- Total cash amount the board contributed to the organization in the last fiscal year and percentage of the board who contributed

DOCUMENTS TO UPLOAD

Documents may be uploaded in their original form.

- A copy of your organization's most recently filed IRS Form 990 tax return
- A copy of your organization's most current audited financial statements
- A copy of unaudited financial statements for the most recently completed fiscal year

- A copy of your organization's operating budget for the current fiscal year
- For all applications except general operating support, a project-specific budget for each year of support requested
- A copy of your organization's current board of directors (with current position / organization affiliation, if available)

RESPONSES TO CORE APPLICATION QUESTIONS

You will be asked to complete certain questions based on the type of funding you seek, or based on the investment you selected when completing the pre-application. You will find the questions on the main Houston Endowment website, www.houstonendowment.org, in the For Applicants section, under Types of Investments. Click on each investment type to access the specific questions corresponding to that type of funding.