

Trust Authority Grant Documentation Requirements

The Trust's documentation requirements are designed to provide a clear picture of each applicant's financial stability, governance, and program readiness while minimizing unnecessary administrative burden.

These items will be used to evaluate your grant request and will be included with the grant record. Please note that the Alaska Mental Health Trust Authority is a State of Alaska agency and is subject to the Alaska Public Records Act. More information about the Alaska Public Records act can be located here: <https://www.law.alaska.gov/doclibrary/APRA.html>

Financial Documentation Requirements:

To assess the financial health and operational capacity of all grant applicants, the Trust requires the following information to be included with each grant application requesting **\$25,000 or more:**

- Current financial statement, including:
 - Balance Sheet
 - Income (Profit & Loss) Statement
 - Cash Flow Statement
- If your organization's fiscal year has recently ended and the financial statements are not yet finalized, please provide draft or internally prepared versions, certified as correct by the appropriate staff member.
- Copy of most recently filed IRS Form 990 (**Non-Profit Organizations Only**)
- A copy of your organization's most recent financial audit. If your organization has not had a financial audit, please provide a statement clarifying that.
- Include a brief description and status of any current or pending legal matters involving your organization that would impact the project the Trust is requested to fund.

Organizational Documentation Requirements

To have a better picture of the organizational structure and programmatic capacity of your organization, the Trust is now requiring the following with grant applications requesting **\$25,000 or more:**

- Organizational chart clearly showing leadership and reporting relationships. Please indicate whether the listed individuals are employees or contractors.
- Resumes for key program staff (two pages or less per individual) who will perform Trust grant activities, or whose positions are funded by the Trust.
- A list of current board members including titles and email addresses.
- If available, provide a copy of your organization's current strategic plan or equivalent planning document.