Initial Information Request Summary

BASIC ORGANIZATIONAL CRITERIA

WILLIAM H
MOFFAT JR
FOUNDATION

NAME OF ORGANIZATION

ADDRESS

CONTACT PERSON

CONTACT EMAIL

CONTACT PHONE NUMBER

EIN NUMBER

SECTION A

LEGAL/FINANCIAL STABILITY

YES   NO

1. Is the organization a 501c3, tax-exempt foundation?
   - *Please provide a copy of the IRS Tax-exempt Determination Letter*

YES   NO

2. Has the organization filed their IRS Form 990s in a timely manner?
   - *Please provide the two most recent 990s*

3. In what state is the organization incorporated? _____

4. In which state(s) does the organization have a solicitation license filed?

REGARDING ORGANIZATIONAL POLICIES:

YES   NO

5. Does the organization have a Conflict of Interest Policy?
   - *If yes, please provide a copy*

YES   NO

6. Does the organization have Directors & Officers Insurance?
   - *If yes, please provide a copy*

YES   NO

7. Does the organization have a Gift Acceptance Policy?
   - *If yes, please provide a copy*

YES   NO

8. Does the organization undergo a GAAP financial review, or audit, conducted by an independent CPA? If yes, how often? _____
   - *Please provide the two most recently reviewed/audited financials*

YES   NO

9. Does the organization practice "fund accounting"?

ADDITIONAL ORGANIZATIONAL INFORMATION:

YES ☐ NO ☐ 10. Does the organization have more information on Administrative Costs?
    • *If yes, please provide most recent 2-year's financials*

YES ☐ NO ☐ 11. Does the organization have more information on Fundraising Costs?
    • *If yes, please provide most recent 2-year's reports*

YES ☐ NO ☐ 12. Does the organization have more information on Fundraising Efficiency?
    • *If yes, please provide most recent 2-year's summary reports*

YES ☐ NO ☐ 13. Does the organization have more information on Primary Revenue Growth?
    • *If yes, please provide reports*

YES ☐ NO ☐ 14. Does the organization have more information on Program Expense Growth?
    • *If yes, please provide reports*

YES ☐ NO ☐ 15. Does the organization have more information on Working Capital Ratio?
    • *If yes, please provide reports*

YES ☐ NO ☐ 16. Does the organization have more information on Strength & Continuity of Leadership/Management?
    • *If yes, please provide any reports*

SECTION B

BOARD

YES ☐ NO ☐ 1. Does the Organization have a board roster?
    • *If yes, please provide*

YES ☐ NO ☐ 2. How often does the board meet?_____
    • *Please provide minutes from last 2 meetings*

YES ☐ NO ☐ 3. Is there a succession plan for volunteers?
    • *If yes, please provide*

YES ☐ NO ☐ 4. Does the board evaluate their own performance?
    • *If yes, how?* _____

YES ☐ NO ☐ 5. Is there an organizational strategic plan?
    • *If yes, please provide your plan*

SECTION C

STAFF

1. What are qualifications & experience of senior staff leader(s)?

_____

2. How long has that person been in the key leadership role? _____

YES ☐ NO ☐ 3. Is there a staff succession plan?
    • *If yes, please provide your plan*

4. How is the organization organized to deliver services?
    • *Please provide an organizational chart with explanation*

YES ☐ NO ☐ 5. Does the organization's strategic plan drive the operational plan?
    • *If yes, please provide explanation*

YES ☐ NO ☐ 6. Do staff undertake a process for goal setting and performance evaluation?
    • *If yes, please provide explanation*

BASIC PROGRAM CRITERIA

YES NO

1. Has the organization demonstrated a need for their activity?
   - *If yes, please provide*

2. What is the "problem" being addressed by the organization?

[ ]

3. What is the "cause" of the problem?

[ ]

YES NO

4. Does the organization understand and describe the population affected by the "problem"?
   - *If yes, please provide a credible source for this information*

5. Why is this program/organization critical to the solution?

[ ]

6. How does the organization intend to address the need/problem?

[ ]

SECTION E

GOAL

GEOGRAPHIC AREAS: (WHY HERE, AND WHY NOW?)

YES NO

1. Does the organization have more information on Beneficiary Numbers?
   - *If yes, please provide*

YES NO

2. Does the organization have more information on Critical Assumptions?
   - *If yes, please provide*

YES NO

3. Does the organization have more information on Program Strategy & Timeline?
   - *If yes, please provide*

YES NO

4. Does the organization have more information on Program Services Coordination (i.e., Collaborative Partners)?
   - *If yes, please provide*

YES NO

5. Does the organization have more information on Transition or Exit Strategy?
   - *If yes, please provide*

YES NO

6. Does the organization have more information on Cost/Budget?
   - *If yes, please provide*

REGARDING THE POTENTIAL FINANCIAL DONATION:

7. How would our dollars be specifically used?

[ ]

YES NO

8. Will our dollars be leveraged, or combined with other sources?

9. How will the organization become less dependent upon us for dollars in the future?

[ ]

YES NO

10. Does the organization measure results/outcomes/impact of their programs?
    How and what tool(s) is/are used? Please explain.

[ ]

- *Please provide either project/program evaluation plan, or the tool(s) that are used to evaluate impact*

YES NO
☐   ☐   11. Does the organization provide interim reports, as well as a comprehensive final report (i.e., stewardship reports)?
              • *If yes, please provide any and all of the past 2 year's final reports.*

YES NO
☐   ☐   12. Do you have a "human interest story" (accompanied by photo) describing the impact/success for an individual?
              • *If yes, please provide*

QUICK SUMMARY

What dollar amount is being requested?

_____   _____
MINIMUM AMOUNT   MAXIMUM AMOUNT

For what purpose will these monies serve?

[   ]

What is the impact of this contribution?

[   ]

_____   _____   _____
SIGNATURE   TITLE   DATE

APPLICATION SUBMITTAL

The William H. Moffat Jr. Foundation accepts grant applications by invitation only.

There are two grant cycles per year, with first cycle applications due **April 30th**, and those for second cycle due on or before **October 30th**.

Applicants can send their completed packets in two ways::

1. Send pdf files: SperareMeliora@gmail.com
2. Send printed files to:

    William H Moffat Jr Foundation
    160 West Huffaker Lane
    Reno, Nevada, 89511