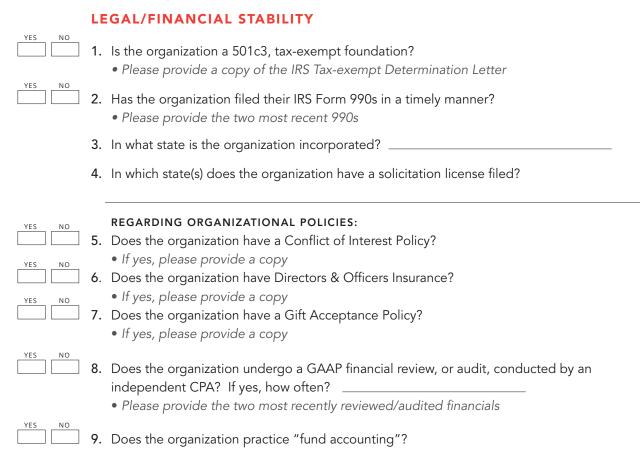


# Initial Information Request Summary

BASIC ORGANIZATIONAL CRITERIA

NAME OF ORGANIZATION		
ADDRESS		
CONTACT PERSON		CONTACT EMAIL
CONTACT PHONE NUMBER	EIN NUMBER	

#### SECTION A



# ADDITIONAL ORGANIZATIONAL INFORMATION:

- 10. Does the organization have more information on Administrative Costs?If yes, please provide most recent 2-year's financials
- 11. Does the organization have more information on Fundraising Costs?If yes, please provide most recent 2-year's reports
- 12. Does the organization have more information on Fundraising Efficiency?
  - If yes, please provide most recent 2-year's summary reports
- 13. Does the organization have more information on Primary Revenue Growth?
  - If yes, please provide reports
- 14. Does the organization have more information on Program Expense Growth?If yes, please provide reports
- 15. Does the organization have more information on Working Capital Ratio?
  - If yes, please provide reports
- 16. Does the organization have more information on Strength & Continuity of Leadership/Management?
  - If yes, please provide any reports

# SECTION B

NO

NO

### BOARD

- Does the Organization have a board roster?
   If yes, please provide
  - 2. How often does the board meet?\_
    - Please provide minutes from last 2 meetings
  - 3. Is there a succession plan for volunteers?
    - If yes, please provide
  - 4. Does the board evaluate their own performance?
    If yes, how? \_\_\_\_\_
  - 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? \_\_\_\_\_
- 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



- 5. Does the organization's strategic plan drive the operational plan?If yes, please provide explanation
- 6. Do staff undertake a process for goal setting and performance evaluation?If yes, please provide explanation

#### SECTION D

#### **BASIC PROGRAM CRITERIA** NO YES 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?

NO YES

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

YES NO	<b>GEOGRAPHIC AREAS: (WHY HERE, AND WHY NOW?)</b> 1. Does the organization have more information on Beneficiary Numbers?
YES NO	• If yes, please provide
	2. Does the organization have more information on Critical Assumptions?
YES NO	• If yes, please provide
	3. Does the organization have more information on Program Strategy & Timeline?
YES NO	• If yes, please provide
	4. Does the organization have more information on Program Services Coordination (i.e., Collaborative Partners)?
YES NO	• If yes, please provide
	5. Does the organization have more information on Transition or Exit Strategy?
YES NO	• If yes, please provide
	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?
VEC NO	
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.
- 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: <a href="mailto:SperareMeliora@gmail.com">SperareMeliora@gmail.com</a>
- 2. Send printed files to:

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