



# Initial Information Request Summary

## BASIC ORGANIZATIONAL CRITERIA

NAME OF ORGANIZATION

ADDRESS

CONTACT PERSON CONTACT EMAIL

CONTACT PHONE NUMBER EIN NUMBER

### SECTION A

#### LEGAL/FINANCIAL STABILITY

- YES  NO
- Is the organization a 501c3, tax-exempt foundation?  
 • Please provide a copy of the IRS Tax-exempt Determination Letter
  - Has the organization filed their IRS Form 990s in a timely manner?  
 • Please provide the two most recent 990s
  - In what state is the organization incorporated? \_\_\_\_\_
  - In which state(s) does the organization have a solicitation license filed?  
 \_\_\_\_\_

#### REGARDING ORGANIZATIONAL POLICIES:

- YES  NO
- Does the organization have a Conflict of Interest Policy?  
 • If yes, please provide a copy
  - Does the organization have Directors & Officers Insurance?  
 • If yes, please provide a copy
  - Does the organization have a Gift Acceptance Policy?  
 • If yes, please provide a copy
  - 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
  - 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

**SECTION D**

**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?

\_\_\_\_\_

\_\_\_\_\_

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: [submissions@SperareMeliora.org](mailto:submissions@SperareMeliora.org)
2. Send printed files to:

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