Proposal Investigation

Organization Name:

Purpose: This questionnaire helps the Betty and Davis Fitzgerald Foundation assess your grant request while giving you the opportunity to share more about your organization and the community you serve. Our site visit is a mutual learning experience, allowing us to better understand your work while providing space for your questions and insights. Please keep responses concise and clear—we will explore these topics further in our discussion. Thank you for your time—we look forward to meeting your team.

Grant Request Type:

Section I: Organizational Overview

Provide a summary of the organization's history.

Share a description of the organization's current programs, activities, number served annually, and recent accomplishments.

Strategic Plan:

Please upload a copy of your organization's most current strategic plan, if available. (If you do not have a strategic plan, please see the next question.)

If you do not have a strategic plan, please list your top 3 organizational (programmatic and/or operational) priorities. (Optional)

Have there been any major financial or organizational changes recently? What are your organization's greatest challenges and opportunities?

Section II: Community Engagement

What challenge, issue, or opportunity will be addressed by this project? Why is this issue important to the community served?

How does your organization collaborate with other groups, coalitions, or networks to advance its mission, and how do you engage the community in shaping your work?

Section III: Grant Request

What specific funding are you requesting, and how will it support your organization's goals? (For operating or capital requests, describe your agency's major goals.)

What key activities will be implemented to achieve these goals? (Include details such as scope, frequency, and duration of services.)

How will you track progress and define success? What measurable short-term and long-term outcomes do you expect?

Section IV: Organizational Infrastructure

How do your board, leadership, and staff reflect the demographics of the community you serve? How do you incorporate community perspectives into your work?

Who are the key members of your leadership team, and how many full-time and part-time staff does your organization have?

Section V: Financial Information

Please complete the fields below with your last fiscal year's financial information.

Fiscal Year

Revenue

Expenses

Surplus/Deficit

Operating Reserves (Unrestricted funds set aside for financial stability)

Endowment, if applicable (Restricted funds for long-term sustainability)

Required Attachments

Please upload the following with this proposal:

- *Most recent audit, if available (Optional - If unavailable, please include a note in the text box below.)*
- *Profit & Loss (P&L) statement from the last fiscal year (Required)*
- *Current operating/organizational budget (Required)*

Most recent audit:

To upload, click 'Choose File," select the file you wish to attach, then click 'Upload" to attach.

If you do not have an audit, please include an explanation below.

P&L statement from the last fiscal year:

To upload, click 'Choose File," select the file you wish to attach, then click 'Upload" to attach.

Current operating/organizational budget:

To upload, click 'Choose File," select the file you wish to attach, then click 'Upload" to attach.

What are your organization's primary funding sources? Please estimate the percentage of revenue from public funding (e.g., government grants, contracts, school districts), private philanthropy (e.g., foundation grants, corporate sponsorships, individual donations), and earned revenue (e.g., fees for services), if applicable.

Is there anything we haven't asked that you would like to share? (Optional)

Day of Logistics:

Please provide the name(s) and title(s) of those joining the site visit. We will do the same closer to the visit.

If in person, please provide any information we may need to find you (i.e., physical address, parking, contact number, etc.).