Proposal Investigation

Organization Name:

Purpose: Please complete the brief questionnaire below to help us prepare for your site visit. This is a mutual learning opportunity—your responses will give us a deeper understanding of your organization and grant request, and the visit will offer you a chance to learn more about the Foundation and ask questions. Please keep answers concise, as we'll explore these topics further during the visit. We appreciate your time and look forward to connecting with your team.

Grant Request Type:

Section I: Organizational Overview

1. Briefly describe your organization's mission and the communities you serve.

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.)

2. If your organization is working without a formal plan, briefly share your top three organizational priorities. (Optional)

3. What are your major programs and services? Include activities, numbers served annually, and recent accomplishments.

4. Who are your organization's key partners or collaborators to advance its mission?

5. Share any organizational changes, events, or shifts that have defined your work this year. How has your organization adapted?

Section II: Grant Request and Intended Outcomes

6. What is the purpose of this funding request, and how will it support your organization's current goals or priorities?

7. What core issues or opportunities is this funding intended to address, and why is this work important now?

8. Who will be directly served or engaged through this funding, and in what numbers?

9. What outcomes has your organization already achieved, or is currently working toward, that this funding will support? How do you understand whether your efforts are making a difference?

10. What is the total cost of this effort, and what funding has already been secured? (For general operating support, include your annual fundraising goal and progress to date.)

Section III: Organizational Leadership

11. How does your organization's key leadership (staff, board, or founders) reflect the communities you serve — in terms of lived experience, identities, and expertise?

12. How are the people or communities you serve involved in setting priorities or shaping programs?

13. Please share demographic breakdowns for staff and board, if available. How many full-time and part-time staff are currently on your team?

Section IV: Financial Information

14. Please complete the chart with your last fiscal year's financial information.

Fiscal Year (e.g., June 30, 2024)

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.

15. Please estimate your revenue sources as percentages (e.g., 60% foundation grants, 20% government, 20% earned revenue).

16. 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.).