

OPERATING SUPPORT APPLICATION CHECKLIST

This document is intended to provide an overview of all potential information and documents needed to complete a grant application.

A. Organization Contact Information

- Organization legal name, address, phone and fax numbers, population of city, website address
- Head of Organization & contact information (including number of years in position) & Application Contact information

B. Organization General Information

- Tax ID number and tax status
- Organization type, year organization was established, number of locations
- Number of full-time and part-time staff, number of volunteers
- Brief biography and summary of qualifications of Executive Director/CEO of organization
- Board member list (Excel fill-in form provided) and board's role in your organization

Organization Details

- Mission statement, brief history
- Challenges your organization is trying to address, national or local statistics and context that supports the issue(s) and why it matters, and why your organization is best-positioned to do this work
- Community(ies) and population(s) you serve, including number of clients or community members served, and core programs and services provided by your organization
- Other organizations in your community that do similar work and how you work together
- Most significant collaborations and partnerships with other organizations within your community and how they increase your impact
- Data and evaluation results you collect and monitor to improve upon the effectiveness of your organization and how your organization has implemented improvements based upon this data
- Your organization's biggest internal strengths and weaknesses, and what you are doing to build on your strengths and address your weaknesses
- Your organization's greatest external opportunities and biggest threats, and what you are doing to take advantage of your opportunities and minimize or avoid potential threats
- Short-term and long-term goals and priorities of organization
- Major changes within your organization over the past five years

C. Organization Financial Information

- Financial overview of your organization (source of operating funds, earned/contributed revenue, operating reserves, endowment and spending policy, debt)
- Any changes in funding and expenses that will improve or pose risks to your financial health and how you will address any changes
- Fiscal year end of organization
- Annual operating budget, YTD balance sheet, related actual vs. budget income statement
- Audited/reviewed financial statements (summary of your financial oversight and monitoring process if no audit or review is performed)

D. Request Details

- How many years of operating support you are requesting
- Project title and description of request
- Impact Area (refer to our website to view these areas: http://www.peterkiewitfoundation.org/impact_areas)
- How a general operating support grant will help advance your goals and improve your organizational capacity

E. Operating Budget and Funding

- 3-Year detailed operating budget
- Funding request summary including total operating budget, grant amount requested, funds available, and balance needed (Excel fill-in form provided)
- List of current and potential donors (Excel fill-in form provided)

Attachments

You will be required to upload or attach documents to your application. These documents must already be saved on your computer before you can browse and upload them to your application. Acceptable attachment formats: Word, Excel, or PDF.

- Board member list (Excel fill-in form)
- Current fiscal year organization financials (operating budget, YTD balance sheet, related actual vs. budget income statements)
- Audited/reviewed financial statements (if applicable)
- 3-year detailed operating budget
- Funding request summary worksheet (Excel fill-in form)
- List of current and potential donors (Excel fill-in form)