



PETER KIEWIT
FOUNDATION

Application Checklist – Capital Funding

This checklist is intended to provide a list of all information and documents needed to complete a capital funding grant application.

Organization Information

Legal Name, DBA (doing business as), EIN, Tax Status Type, Address, Phone, Website, Fiscal Year End Date

Fiscal Sponsor Information, if applicable

Fiscal Sponsor Name, EIN, Address, Phone, Website, Fiscal Year End Date, Contact Name & Title

Contact Information

- Organization primary contact information (name, title, phone, email)
- Proposal primary contact information (if different than above)

Organization Details

1. What is your mission?
2. What issue are you working to address? Include data and statistics that illustrate the need. (500 words)
3. Tell us about your programs/services, how they support your mission, and how they address the need described above. (500 words)
4. Tell us about the people and populations you serve. Please include demographics and data/statistics. (150 words)
5. Tell us about any major changes you've experienced in the last three years (e.g. a new executive director, a major new source of funding, a new program). (250 words)
6. Where do you provide services?
 - a. Omaha/Council Bluffs MSA
 - b. Lincoln
 - c. Greater Nebraska
 - d. Southwest Iowa
7. What is the primary county where services are provided?
8. Staff Composition
 - a. Number of full-time staff
 - b. Number of part-time staff
 - c. Number of executive staff
 - d. Number of volunteers

Financial Information

1. Please give us a breakdown of your sources of operating revenue (e.g. 30% government funding, 30% grants, 10% individual donors, 30% earned income). Provide an overview, not specific funders.

2. What percent of your revenue is earned (vs. contributed through grants or donors)?
3. What is your current operating reserve balance?
4. How much cash do you currently have on hand?
5. Do you have an endowment? If so, what is the balance and spending policy? *(150 words)*
6. Do you have debt? If so, to whom and how much is owed?
7. Please tell us about any major changes you are anticipating in your revenue streams or expenses. *(250 words)*

Funding Request Summary:

Total Project Cost
 Funding Available
 Balance Needed
 Requested Amount

If you are requesting multiple years of support, please break down your requested amount by year. (example: Year 1: January 1, 2020 – December 31, 2020; \$20,000)

Project Details

1. Project Title *(Complete this sentence: To provide capital support for WHAT YOU'RE GOING TO FIX/BUILD/BUY.)*
2. Please identify what type of project this is (check all that apply):
 - New construction
 - Renovation
 - Purchasing items
 - Land acquisition
3. Please describe your capital project—what are you building, fixing, and/or buying? *(500 words)*
4. How does this project improve your ability to deliver your programs and services, and/or improve your operations? *(500 words)*
5. How will you know that this project has had its intended impact? Please share data that could be tracked to demonstrate the impact of this project in the years following its completion. It's fine to share outputs (e.g. # of trainings provided, # of people served), but we also want you to share data about the project's impact on the community and the people you serve (e.g. % of clients who became employed, # of youth who graduated college on time) *(250 words)*
6. How has the community and/or the people you serve been involved in identifying the need for the project and providing input into the project design and implementation? *(150 words)*
7. Will debt financing be used for this capital project? If so, provide source, amount, interest rate, loan term, and repayment plans. *(250 words)*
8. How will this project impact your operational costs? If this increases your expenses, how will you cover the additional costs? *(250 words)*
9. If your request is for renovation or construction, how do you plan on covering ongoing maintenance for your new facility? *(150 words)*
10. List key partners and consultants who are working with you on this project (e.g. architects, engineering firms, owner's representative, campaign manager, etc.). *(250 words)*
11. If your request is for renovation, construction, or land acquisition, who owns the site? Will you hold sole ownership in the future? If there are plans to transfer ownership to another organization, please share details about your plans. *(250 words)*

12. If your request is for renovation or construction, what is the size of the facility, both in gross sq. ft. and finished sq. ft.? Please separate out new construction and renovation and identify the square footage for each (if doing both). *(50 words)*
13. What is the cost of construction or renovation per square foot? Please separate out new construction and renovation and identify the cost per square footage for each (if doing both). *(50 words)*
14. What is the current target date for project completion?
15. Other than what you've already shared in this application, is there anything else we should know about this project and why you are well-positioned to complete it? *(250 words)*
16. Outside of this project, do you have any other specific needs at this time that would help you be more sustainable and successful? (e.g. professional development or coaching, technical assistance, specific equipment or IT, something else?) *(150 words)*

Attachments

- Board member list
- Most recent audit or reviewed financial statements
 - Check here if you are a new organization or do not yet have these
- Operating budget
- YTD balance sheet
- Budget v. actuals income statement
- Most recent strategic plan
- Executive Director/CEO/President resume
- Three-year proforma operating budget
- Detailed project/purchase budget
- Donor information worksheet
- Relevant attachments (floor plans, front elevation, building footprint, etc.)
- Anything else that would help PKF better understand your project