

PETER KIEWIT FOUNDATION

Application Checklist – General Operating Funding

This checklist is intended to provide a list of all information and documents needed to complete a general operating 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). We're looking for 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 Operating Budget
 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. Request Title *(Complete this sentence: To provide XX years of operating support for ORGANIZATION/ENTITY.)*
2. What are your top priorities in the next three years and why? *(250 words)*
3. Tell us about your most significant collaborations/partnerships and how they help you advance your mission and priorities. Please also include how you engage stakeholders and clients as partners. *(250 words)*
4. Tell us about how your work impacts the populations and communities you serve. Feel free to share anecdotes or stories (we'll be asking you about data in the next question). *(250 words)*
5. How do you know your efforts are effective? Please share information and data that demonstrates the scale and impact of your work. It's fine to share outputs (e.g. # of trainings provided, # of people served), but we also want you to share data about your impact on the community and the people you serve (e.g. % of clients who became employed, # of youth who graduated college on time) *(500 words)*
6. Do you have any other specific needs at this time that, if met, would help you be more sustainable and successful? (e.g. professional development or coaching, technical assistance, specific equipment or IT, something else?) *(150 words)*
7. Beyond what you've already shared in this application, is there anything else we should know about your organization and why you are well-positioned to do this work? *(250 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
- Three-year operating budget
- YTD balance sheet
- Budget v. actuals income statement
- Most recent strategic plan
- Executive Director/CEO/President resume
- Donor information worksheet
- Anything else that will help PKF better understand your organization