

NEW PROPOSAL SUMMARY QUESTIONS

1. Mission Statement of Organization (max 200 words)
2. Project/Program Title
3. Purpose of Grant
4. Request Amount
5. Total Project/Program Budget
6. Total Annual Organization Budget
7. Fiscal Year End (month, year)
8. Project/Program Start Date
9. Project/Program End Date

PROGRAM QUESTIONS

1. What is the need or problem that your organization addresses? Who will benefit from your efforts? How? (Max 400 words)
2. Describe the proposed program or need for funding. How many participants will it serve? (Max 400 words)
3. How does this grant request fit into your strategic plan? (Max 200 words)
4. List specific program goals, measurable objectives and expected outcomes. How will you measure your success? (Max 400 words)
5. Who will be responsible for the management of this grant? What are his/her qualifications? (Max 100 words)
6. How will volunteers be used to accomplish your objectives? Do you have a director of volunteer services on your staff? (Max 100 words)
7. Are you collaborating with any other organizations on this program? (Max 100 words)

FUNDING FOR THE PROJECT

1. What are your plans for ongoing sources of support? (Max 50 words)

FUNDING FOR THE ORGANIZATION

1. What are the sources of the funding you receive? (Please provide a breakdown: i.e., donations, state grants, federal grants, individuals, etc.) (Max 50 words)
2. Please supply list of the principal donors (both individuals and foundations) who are currently supporting your agency. (Max 100 words)
3. What percentage of your board members makes a financial contribution to the organization and what was the aggregate amount contributed by the board during the most recently completed fiscal year? (Max 50 words)
4. Do you have current debt and what plan do you have to reduce and/or retire the debt? (Max 50 words)

OTHER

1. Is your organization involved in any lawsuits? If so, please explain the basis of the litigation and its anticipated course. (Max 50 words)

DOCUMENTS TO UPLOAD

1. Year-to-date balance sheet and income statement
2. Most recent complete-year financials (audited, if available)
3. Current year operating budget
4. Current list of Board of Directors
5. Program Budget – *See form below*
6. Visual Material (reports, pictures, videos , etc.) This is optional. If none exist, please do not make a special production for this application

PROGRAM INFORMATION			
Organization Name:		Program Budget:	\$
Program Name:		Amount Requested:	\$

Please list each itemized program/project expenses related to your request below and provide a total.
If you have any questions regarding filling out this form, please contact the foundation's grants manager at rbrookhouse@pfs-llc.net.

ITEMIZED PROGRAM EXPENSES <i>(please add additional sheets if necessary)</i>	
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
Total Costs (A)	\$

Please provide a timeline for the anticipated expenditures of the requested grant funds.

FUNDS CURRENTLY COMMITTED FOR PROGRAM	
Government	\$
Corporations	\$
Foundations	\$
Individuals	\$
Trustees/Directors	\$
Other (Earned income, special events, membership, subscriptions, etc.)	\$
Total Funds Available (B)	\$
Balance Required (A minus B)	\$

Please tell us what other sources of potential major gifts you are approaching for this program:

NAME	TYPE (foundation, corporation, individual)	AMOUNT REQUESTED
		\$
		\$
		\$
		\$
		\$

If you are not approaching other sources of major gifts, please explain:

GRANT REPORT QUESTIONS

1. What were the specific objectives of the funded project/program? (400 words)
2. Did you reach your objectives? If not, why not, and how do you think the project/program could be strengthened in the future? Would you change the objectives, if so, how and why? Have there been any unexpected impacts? (400 words)
3. Can you give us data, even anecdotal or observational, that demonstrates the impact of your project/program? How was the data collected? (400 words)
4. How did this project/program affect your organization as a whole? Are there organizational issues that need to be addressed in order to continue and/or improve? What are those, and how do you plan to address them? Or, are there organizational strengths that made implementation easier or more successful than you anticipated? (400 words)
5. Do you think that this grant was instrumental in any way in your getting other funding? (100 words)

And, if applicable,

6. Do you have a plan for the ongoing financial sustainability for this project or program? (200 words)
(While the Foundation is willing to fund for more than one year, we do not want the program jeopardized by the fact that the agency is relying too heavily on the Winifred Johnson Clive Foundation as a source of support.)

DOCUMENTS TO UPLOAD

A financial statement for the program (or if not a program, then for the organization) that shows how the funds were spent.

PROGRAM INFORMATION	
Organization Name:	
Program Name:	
Program Budget:	\$
Amount Granted:	\$
Amount Spent:	\$

ITEMIZED PROGRAM EXPENSES <i>(please add additional rows if necessary)</i>			
Item Description	Amount Budgeted	Amount Spent	Foundation Funds Spent
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Total Amount Spent		\$	\$

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NARRATIVE QUESTIONS

1. If you are requesting funds for the same program you received funding for in the prior year, please describe your new goals and objectives. If, as a result of what you have learned from the previous year, you want to change your program, be sure to describe the changes you plan to make. (max 400 words)
2. Describe any changes that may have occurred with your organization's management or overall health. (max 200 words)
3. Has your 501(c)(3) status has changed in any way since your previous application. If so, please provide the new document from the IRS. (max 100 words)

DOCUMENTS TO UPLOAD

1. Statement of income and expenses for the agency's most recently completed fiscal year
2. Current list of Board of Directors
3. Program Budget - See *form below*

GRANT REPORT QUESTIONS

1. Please give a brief description of the project/program for which funding was awarded. (400 words)
2. What were the specific measurable objectives of the funded project/program? (400 words)
3. What progress has been made towards meeting these objectives? (e.g. How many people have been served?) (400 words)
4. Have there been/do you foresee any obstacles in meeting the objectives? (400 words)
5. Have there been any significant changes in the organization or program since application? (400 words)
6. Please provide any additional information relevant to this report. (200 words)

DOCUMENTS TO UPLOAD

A financial statement for the program (or if not a program, then for the organization) that shows how the funds were spent.

PROGRAM INFORMATION	
Organization Name:	
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Amount Granted:	\$
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ITEMIZED PROGRAM EXPENSES <i>(please add additional rows if necessary)</i>			
Item Description	Amount Budgeted	Amount Spent	Foundation Funds Spent
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Total Amount Spent		\$	\$