



## **Questions to consider and summary of information you will need to provide in completing the 2017 North Shore Exchange Grant Application**

In addition to information already submitted with the Letter of Inquiry, below is a detailed summary of information you will be asked to supply on the Grant Application. A list of financial documents you must upload when submitting your Grant Application is also provided on the last page of this document. Please review the information below in detail before beginning your application.

### **ORGANIZATION QUESTIONS**

All contact information: Name, address, email, contact name, title, phone number, website, etc.

FEIN

501(c) 3 status

Year Founded

Provide mission statement, brief history of your organization and summary of the primary program in support of your mission.

### **GRANT QUESTIONS**

Specify type of NSE grant requesting and amount

Program name

Total number served by organization in 2016

Describe the program, project or purpose for which you are requesting the grant.

Describe the target population you expect to serve through this particular program or project.

Number served in program for which you are requesting the funding.

State need for services and/or project/program and provide evidence of that need and how the services will be implemented.

How will you measure the impact of the project or program on your served population?

Describe other funding sources for this project. If the project is collaborative, provide specifics and list all partners.

If support is insufficient to meet the budgeted expenses, indicate how the deficit will be met.

Describe plans for the project sustainability. What are the future funding plans?

Provide relevant program start and end dates along with any other significant project dates.

What additional information about your organization or program/project would you like to share with us?

### **ORGANIZATION FINANCIAL SUMMARY**

Complete provided fields with the following information for FY 2015, FY 2016, FY 2017

Total Organization Revenue:

Program Revenue

Contributions & Non-Government Grants

Government Grants

Government Contracts

Total Revenue Net of Program Revenue

Donations from Board of Directors

Revenues from Events

Total Revenues

Total Organization Expenses:

Program Expenses

Fundraising Expenses

Occupancy Expenses

Salary and Benefits Expenses

Administrative Expenses (include salary and benefit expenses)

Event Expenses

Net Organization Income:

Organization Budget: Revenues and Expenses for FY 2014, FY 2015 and FY 2016

Program/Project Budget: Revenues and Expenses for FY 2014, FY 2015 and FY 2016

Top 5 Organization Funding Sources and amounts for Current Year, Previous Year, and Past Previous Year.

Top 5 Organization Funding Sources Pending for Current Fiscal Year, amounts and dates of requested

Does your organization have an endowment? If so, what is its value? What percentage of the principle and/or earnings, go to general operations on an annual basis?

## **ORGANIZATION BACKGROUND AND ADMINISTRATIVE INFORMATION**

Provide the following personnel composition numbers: Total Staff, Full Time and Part Time, Senior Management, Volunteers and Board Members.

Do you conduct a review or evaluation of your Executive Director? If yes, how often is the review completed and what is the method of evaluation?

Describe the qualifications/bios of key staff.

Is there litigation pending or threatened against your organization or leadership?

Was a lawsuit settled in the past 5 years and if so how much was the settlement?

Does your organization carry a general liability and D& O insurance and how much coverage for each type?

### **PLEASE ATTACH COPIES OF THE FOLLOWING DOCUMENTS:**

#### **Exchange Grant:**

IRS charitable status determination letter

Most recent IRS 990 form and prior year

Most recent AG990 - IL and prior year

Most recent audited financial statement and prior year

Current fiscal year budget, actuals and projected year end as of 4/30/17

Most recent Annual Report

List of Board Members/Bios

#### **Invigorate Grant:**

IRS charitable status determination letter

Most recent IRS 990 form and prior 3 years

Most recent AG990 -IL and prior 3 years

Most recent audited financial statement and prior 3 years

Current fiscal year budget, actuals and projected year end as of 4/30/17

Most recent Annual Report

List of Board Members/Bios

