

Agency:		Amount:
Purpose of Agency:		
Grant Report		
Grant Report	How does the results from the last grant report compare to this year's request?	
	Describe how challenges were addressed.	
	How is the program different?	
	How has the program been tweaked?	
Other Issues		
	Are there any lawsuits pending or being threatened? If so, can you tell me the nature of those suits?	
	Are you current on payroll, property, or other taxes?	
	Are there currently any open issues with the IRS?	
	Is there an oversight body (either governmental or not) that oversees your field? If so, what is your status with them? Can I see your most recent evaluation?	

Organizational History & Track Record		
History	Do you have any particular philosophy about how you do your work? How is it similar to or different from similar providers?	
	What are accomplishments are you most proud of in the past few years?	
	What are your major challenges and how are you addressing?	
Governance & Executive Leadership		
Role of the board	Describe your board & the role it plays in the organization.	
	How do the board and head of the agency work together? How are decisions made? Is it a rotating board?	
	What is the board's role in strategic planning? In fundraising? In financial oversight?	

Governance & Executive Leadership (cont)		
Structure of the board	How does the board make decisions? Tell me about your committee structure? How often does the board meet?	
	If there is an advisory board - what is their role?	
Comp of the board	Who is on the board? What do they bring to the organization?	
	How do you recruit and select your board members? Who is involved in the process?	
Fund Develop Planning & Oversight	Describe your fund development plan (i.e.: fundraising goals and plan for reaching them).	
	How is the board involved in fundraising?	
	What role do board members play in developing strategies to maintain or grow the organization's contributed income?	
	How do you monitor progress against your fundraising goals? What role does the board play in this process?	

Organizational Vision and Strategy		
Vision	What is your vision for the organization?	
Strategy formation	How do you set overall direction for the organization?	
	Do you have a current strategic plan? If not, how do you develop strategy?	
	Who is involved in the strategic planning and thinking? Do you involve clients in the process?	
	How do you incorporate current strategies into your work?	
External Environment	How does the organization keep abreast of the latest thinking in your field?	
	What are the top three challenges facing the organization or field in the next few years?	

Proposed Project: Planning, Outcomes, and Evaluation		
Project planning	How did you decide to embark on this project/program? What research do you rely upon for your proposed approach?	
	Describe the resources needed to accomplish your goals, and how you plan to obtain them.	
	If relevant, discuss the following: scalability or replicability of model; potential for broad impact; innovative approach	
Outcomes	What are the goals and outcomes identified for the project?	
	What was the process for developing the outcomes? How do you use lessons learned from previous years/projects?	
	Describe your organization's greatest strengths/challenges in terms of your capacity to achieve its intended outcomes.	
Evaluation	How do you evaluate your programs? What tools do you have in place?	
	How do you incorporate what you learn into your ongoing and future work?	
	What is the plan for evaluation for this project? What resources are allocated for evaluation in the project budget?	

Human Resources		
	How long have your key staff been with the agency? What do you believe are some of the reasons for longevity of staff?	
General staff & HR concerns	Are you able to offer professional development for the staff? What is the biggest challenge for you right now in terms of staffing?	
	Are you anticipating any personnel changes in the near future? What steps have you undergone to prepare for the transition?	
Project staff	How were staff members for the project chosen? Are you anticipating any changes in the near future?	
External Communications and Relationships		
Communications	Who do you consider your key audience? How do you communicate with those audiences?	
	How do you disseminate information about your work and/or share what you learn with others in the field?	
External Relations	What partnerships or collaborations are you involved in? What role do you play?	
	Who is your "competition"? How do you work with them?	

Financial Health		
Project Budget	Describe the project budget and how it supports the plan outlined in the proposal narrative.	
	How much of the project funding is committed? What will happen if you don't receive the anticipated funding from other sources?	
	How did you arrive at your budget estimates? (Any line items that need further explanation)?	
Financial Health		
Financial Systems & Reporting	Describe the financial expertise on your board. What role does the board play in financial oversight?	
	What is the process for providing the board with regular financial information?	

Operational Budget		
Organization al Budget	How do you develop your organizational budget? What is the role of the board in the process?	
	Has your organizational budget increased or decreased from last year? Why?	
	Do you receive United Way funding or other specific funding stream? What is your dependence on the stream? Do you see that as continuing?	
Financial Position & Trends	How would you describe the health and balance of your funding mix?	
	Are you current on lines of credit? Are there other issues regarding debt (mortgage or other)?	
	(If debts exceed available cash) what is your plan for debt reduction?	
	(If there was an operating loss) What are you going to do to avoid another loss this year?	
Other Notes		