What You Will Need to Apply
GENERAL OPERATING REQUEST

PLEASE NOTE: This document is intended to provide an overview of all potential information and documents needed to complete a grant application.

*You will be required to upload or attach documents to your application. These documents must already be saved on your computer before you can browse and upload them to your application. **Documents that are requested can be in Word, Excel or PDF format**.

A. Organization Information
- Legal name, address, phone number, fax number and web address
- Tax ID and filing year end
- Year established, staff size (calculate Full-Time Equivalent) and number of locations

B. Key Contacts
- Contact information for CEO/President/Executive Director, Finance/Accounting contact, and Application Primary contact (for any questions about the application)

C. Organization Background
- Mission statement
- One paragraph Organization description (no more than 4 sentences)
- Brief History of the Organization, including major or significant changes at organization since last application, if any/applicable (500 words or less)
- Overview of core programs and services, population served, and number of clients. Include past 3 years of relevant data where applicable.
- Three to four attributes that distinguish the organization (500 words or less)
- Relationship with other orgs providing similar programs or services (500 words or less)
- Information regarding previous grant requests to Robert B. Daugherty Foundation

D. Staff and Board
- Overview of management succession plan, if any (300 words or less)
- Documents needed to attach in this section*:
    - Organization Chart
    - Brief biographies of top three (3) management personnel
    - Board of Directors listing including name, employer and business title

E. Organization Governance
- Policy information relating to conflicts of interest, related party transactions, and accessing endowment principle
- Question pertaining to outstanding legal actions and contingent liabilities
- Documents needed to attach in this section*:
    - Policy regarding access to endowment principle, if any

F. Request Information
- Project Name, Request Amount, Frequency of Grant, Start Date & End Date of fiscal years for which funding will be utilized, and funding timing
- Total Project Budget Amount, Private Funding Goal, and Funds Secured Amount
- Board financial support of the organization including number of board and total dollars of support.
- Geographic area served
- Information regarding contact with Robert B. Daugherty Foundation pertaining to request, if any
- Documents needed to attach in this section*:

- o Budget including revenue and expenses covering the requested funding timeframe
- o Funding sources secured and potential funding sources (download from application for instructions)

G. Project Rationale
- Evaluation of Programs and Services including population served, number of clients, indicators of success, impact measurement, results reporting and use of data. (750 words or less)
- Past three (3) years of evaluation metrics previously outlined (400 words or less)
- Specific goals identified for funding timeframe and how plan to achieve (750 words or less)
- How will a grant help improve/deliver programs and services? (500 words or less)
- Challenges in community addressed (500 words or less)
- Additional staffing needs (500 words or less)
- Sustainability plan (500 words or less)

H. Organization Financial Information
- Description of current financial health of the organization
- Threats to short-term operations & primary long-term challenges
- Accounting firm(s) and/or internal resources that prepare financial and tax information
- IRS Filing Status
- Documents needed to attach in this section*:
    - o Current full-year Budget for the Statement of Activities (Income Statement).
    - o If prepared, current year Budget for the Statement of Financial Position (Balance Sheet) and Cash Flow Statement (or statement explaining cash forecasting procedures if Budgeted Cash Flow not prepared).
    - o Most recent Statement of Financial Position (Balance Sheet), Statement of Cash Flow (if prepared), and Statement of Activities (Income statement) comparing year-to-date Actual vs. Budget.
    - o Past two years **internal** financial statements (Balance Sheet, Income Statement and Cash Flow, if prepared) provided in a format to show line-by-line comparison of financial statement items per year
    - o The Top 10 Supporters spreadsheet (download from application for instructions)
    - o Most recent annual report, if any
    - o Most recently filed IRS Form 990
    - o Past two years audited financial statement reports (or statement with reason why audit not conducted)

J. Credit Line and Benefits
- Line of Credit details, if applicable
- Employee Benefits (Only required if funding request is equal to or greater than $500k)
- Executive Benefits Plan (Only required if funding request is equal to or greater than $500k)

Signature Page
- Electronic signature of submitter
- Documents needed to attach in this section* includes Statement signed by CEO/President/Executive Director or CFO verifying:
    - o Verification that CEO/President/Executive Director has reviewed and approved application for submission; and
    - o The organization's tax exempt status has not been revoked or changed.