



## CAPITAL APPLICATION SAMPLE QUESTIONS

The Anne and Henry Zarrow Foundation is committed to fairly evaluating each proposal submitted. To meet the due diligence required we might also ask for additional information not contained within the application. Below is a list of sample questions for a capital project application with the Foundation. Grantees should be prepared to submit answers to each of these questions through our online portal at the time of application. For general questions about our application process, please email [grants@zarrow.org](mailto:grants@zarrow.org).

### 1. Organization Overview & Contact

- a. Organization
  - i. TAX ID, Legal Name / DBA
  - ii. Mailing Address, Phone, Email
- b. Executive Director or CEO
  - i. Name, Title, Email, Phone, Position Tenure (years)
- c. Primary Contact for the Grant Request
  - i. Name, Title, Email, Phone

### 2. Grant Request

- a. Request Amount (\$), Requested Grant Terms (in months)
- b. Capital Project Type – Renovation, Expansion, New Construction
- c. Project Title (Brief, one sentence)
- d. Project Description - Describe the scope of the proposed facility renovation, expansion or new construction. If building at a new location, include the site details (e.g., address, square footage).
- e. Program areas and population served

### 3. Request Details

- a. Is the capital project part of a larger fundraising campaign (i.e. with endowment or general operating)?
- b. Grant Request is what percentage of the total facility project cost?
- c. What is the total cost of the facility project (i.e., capital, FFE, site, soft costs, etc.)?
- d. Total Campaign Goal?
- e. Has a site been identified? If so, please describe - Physical address (if different from the organization's current location), cost of the site, acreage, and lot/parcel size as separate from the square footage of the project
- f. Does your organization own the site free and clear? If not, please describe the debt encumbrance or acquisition plan.
- g. Has an architect been engaged?
- h. Describe the planning activities completed to date, and when they were done. Please include the internal staff and any outside consultants or experts involved.
- i. Please check all planning elements that have been completed: Space Programming, Conceptual Rendering, Early Schematics, Final Schematics, Building Elevations, Design Development, Construction Documents
- j. What is the anticipated impact of this capital project on your organization, and/or the case for the proposed project?
- k. How were project costs determined?
- l. Will current services be interrupted by the project? If so, what is your continuation plan?
- m. Anticipated construction start date and completion date.

### 4. Organization – Program Details

- a. Number of Full-Time Employees, Part-time employees, Volunteers

- b. Does your organization have the following paid staff positions – Marketing, Fundraising, Accounting, Event Coordination, Finance
- c. Geographic area served, number of unduplicated clients served, number of clients under 300% poverty level
- d. Commitments of Faith
  - i. Does your organization require board members or staff to make commitments of faith?
  - ii. Does your organization require religious or faith practice as a component for the participation of clients, staff, or board?
  - iii. Does your organization adheres to an Equal Employment Opportunity statement that includes non-discrimination regardless of age, gender, race, ethnicity, sexual orientation, disability, national origin, political affiliation, or religious belief.
- e. Organization mission statement
- f. Describe your organization's core programs and services.
- g. Describe the demographics of those benefitting from your organization's services (i.e. age, gender, race, ethnicity, income, etc.).
- h. What are your organization's core strengths?
- i. Enter your current strategic plan start date and end date, if available.
- j. Describe your organization's measurable outcomes and accomplishments this last year.
- k. List any Organizational Accreditations or National Affiliations

**5. Organization – Finances & Fundraising**

- a. Annual Budget
- b. Does your organization have at least a 3-month reserve?
- c. Average Reserve Amount (Past 3 years)
- d. Has your organization been operating in the black for the past three consecutive years?
- e. Total amount of debt your organization carries, if any.
- f. Current endowment market value with the unrestricted percentage of endowment
- g. For the past year, list the percentages of revenue from the following sources: Government, Earned Income, Fees, Earned Interest, Private Support (including Events), In-Kind Donation
- h. What percentage of the governing board contributed financially in the last fiscal year, and what was the total amount contributed?
- i. Briefly describe the facilities you presently lease or own and current square footage used.

**6. Capital Campaign Details**

- a. Organization has conducted a general or capital campaign in the past five years.
- b. If so, please list the beginning and ending dates of the campaign, as well as the goal and the results.
- c. Organization is currently conducting a capital campaign.
- d. If so, provide the following details: Goal Amount, Amount Raised To Date, Request as Percentage of Campaign, Start Date, Expected End Date
- e. Has a Feasibility Study has been conducted?
- f. Is work on the capital campaign being completed with outside counsel?
- g. What are the major project components of the campaign, and the goal amounts associated with each? (i.e., capital projects, maintenance fund, endowment, expenses, site acquisition, etc.)

**7. Attachments: Please upload either PDF, Excel, or Word documents.**

- a. Last Year's Actuals vs. Budget
- b. Detailed Capital Project Budget for Construction
- c. Detailed List of all Capital Campaign components with dollar amounts (e.g., buildings, operating, etc.)
- d. Board of Directors (please include their occupation and their place of employment)
- e. Organizations' Most Recent 990 and Most Recent Complete Audit
- f. List of Major Donors Committed to the Capital Campaign
- g. List of Prospective Donors to the Capital Campaign
- h. Rendering, Site Plan and/or Floor Plan (if available)