



## OPERATING AND PROGRAM APPLICATION SAMPLE QUESTIONS

The Anne and Henry Zarrow Foundation is committed to evaluating each proposal submitted fairly. We might also ask for additional information not contained within the application to meet the due diligence required. Below is a list of sample questions for general operating and program applications with the Foundation. Grantees should be prepared to submit answers to each question 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, Tax Registration Date, Date Founded, 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 Duration
- b. Project Title (Brief, one sentence)
- c. Project Description (Maximum: 300 Words)
  - i. If you are applying for operating support, you may skip this question.

### 3. Organization | Background

- a. Mission Statement (Maximum: 60 words)
- b. Number of Full-Time Employees, Part-time employees, Volunteers
- c. Organization Type, Geographic area served, number of unduplicated clients served, number of clients under 300% poverty level
- d. Dates of current strategic plan
- e. 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 adhere 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.
- f. Does your organization have operational policies and procedures to ensure the protection of individuals served (*e.g. screening procedures for employees/volunteers, policies limiting one-on-one situations between adults and children, etc.*)?

- g. List any current organizational accreditations or national affiliations
- h. Do your board demographics reflect the clients served by your organization? If not, please explain.

**4. Organization | Program Details**

- a. Describe your organization's core programs and services.
- b. Describe any major changes in the organization or program this last year. (*e.g., change in mission, leadership change, loss of major funding, significant board or staff turnover, change in location, or expanded/downsized/eliminated programming.*)
- c. Describe the demographics of those benefitting from your organization's services. (*e.g., age, race/ethnicity, gender, income, etc.*)
- d. How do you collaborate with other organizations in the community to maximize impact?
- e. List the partnerships where you have a written partnership agreement.
- f. Describe your organization's accomplishments and/or measurable outcomes this last year.

**5. Organization | Finances & Fundraising**

- a. Describe your organization's annual operating budget, key drivers of income and revenue, and any significant variances from the past year.
- b. Last Year Total Operating Expenses (\$), Last Year Total Operating Revenue (\$), Current Unrestricted Cash on Hand (\$), Total amount of debt your organization carries, if any (\$)
- c. Current Endowment Market Value (\$) and What percentage of endowment can be used for general operating expenses?
- d. For the past year, list the percentages of revenue from the following sources, which should total 100 (%): Private Support, Government, Earned Income - Sales, Earned Income – Service Fees, Investment/Endowment, In-kind Donation
- e. What percentage of the governing board contributed financially in the last fiscal year and what was the total amount of that board financial support?

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

- a. Last Year's Actuals vs. Budget (*Income vs. Expenses for your most recent completed fiscal year or twelve-month budget cycle*)
- b. Current Year Organization Budget (*Income vs. Expenses*)
- c. Proposed Program or Project Budget, if applicable
- d. Board of Directors (*Please include occupation and place of employment*)
- e. Last Year's Major Donors with Donation Amounts
- f. Organization's Most Recent 990
- g. Most Recent Audited Financial Statements and/or Fiscal-Year-Ending Financial Statements