



CAPITAL 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.

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. Request | Background

- a. Request Amount (\$), Requested Grant Duration
- b. Project Title (Brief, one sentence)
- c. Anticipated Project/Construction Start and End Date
- d. Project Description (Maximum: 300 Words). *Please briefly describe the project, the case for the proposed project, and the anticipated impact of this capital project on your organization.*
- e. Geographical Area Served by Capital Project
- f. How will core services continue during construction?
- g. If your organization has conducted a capital campaign in the past ten years, please provide a brief description and the results of the project. (1-3 paragraphs)

3. Request | Project & Campaign Details

- a. Total Overall Campaign Goal
- b. What is the total cost of the facility project? (*e.g., capital, FFE, Site, Soft Costs, etc.*)
- c. This grant request is what percentage of the total facility goal?
- d. Total Amount Raised To Date
- e. How were project costs determined?
- f. Briefly describe the facilities you presently lease or own. *Please include the total square footage and current square footage utilized.*

- g. Has a new site been identified? *If so, please describe. Include physical address (if different from organization's current location), cost of site, acreage, lot/parcel size as separate from the square footage of the project.*
- h. Does your organization own the new site free and clear? If not, please describe the debt encumbrance or acquisition plan.
- i. Please list any outside consultants or professional services engaged in this project to date, including firm name, date of hire, and purpose for hire (*e.g., Architect, Construction Manager/General Contractor, Owners Rep/Project Management, Fundraising Consultant, Legal*)
- j. Please list the planning activities completed to date and the date of completion. (*e.g., Feasibility Study, Space Programming, Conceptual Rendering, Early Schematics, Final Schematics, Building Elevations, Design Development, Construction Documents, Permitting*)

4. Organization | Background *(These questions should be answered for your overall organizational operations and not specific to the capital project or campaign. If you have submitted a general operating or program application to The Anne and Henry Zarrow Foundation in the last 12 months, you may skip this section.)*

- 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.

5. Organization | Program Details *(These questions should be answered for your overall organizational operations and not specific to the capital project or campaign. If you have submitted a general operating or program application to The Anne and Henry Zarrow Foundation in the last 12 months, you may skip this section.)*

- 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.

6. Organization | Finances & Fundraising (See the Attachments Tab for a full list of financial documents requested in addition to the answers below. These questions should be answered for your overall organizational operations and not specific to the capital project or campaign. For all fields requesting percentages, please include only a number 0-100. The field will not recognize symbols, such as %. If you have submitted a general operating or program application to The Anne and Henry Zarrow Foundation in the last 12 months, you may skip this section.)

- 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?

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

- a. **Please upload the following documents related to your overall organization and operations:**
 - i. Last Year's Actuals vs. Budget (Income vs. Expenses for your most recent completed fiscal year or twelve-month budget cycle)
 - ii. Organization's Most Recent 990
 - iii. Most Recent Audited Financial Statements and/or Fiscal-Year-Ending Financial Statements
 - iv. Board of Directors (Please include occupation and place of employment)
 - v. Last Year's Major Donors with Donation Amounts
- b. **Please upload the following documents related to your capital project:**
 - i. Detailed Budget for Overall Campaign
 - ii. Detailed Project Budget for Construction (if separate from the overall campaign budget above)
 - iii. List of Major Donors to the Capital Project including both current pledges and cash received.
 - iv. Any relevant project documents like renderings, site plans, floor plans, etc.