

2017 Grant Application #1

Ray & Kay Eckstein Charitable Trust

GENERAL INFORMATION

Provide the Organization's Legal Name*

(as shown on the IRS Letter of Determination)

Character Limit: 250

Doing Business As

(if different than Legal Name)

Character Limit: 250

REQUEST INFORMATION

Project Name*

Name of Project.

Character Limit: 100

Total Request Amount*

Please indicate entire amount requested. If requesting payment over multiple years, amount should reflect the sum of all years.

Character Limit: 20

Purpose of the Request*

Provide a brief, descriptive narrative for the use of the funds. Please be as specific as possible.

Character Limit: 1000

Is this a multiple year funding request?*

(A limited amount of funding is provided for multi-year, large capital requests.)

Choices

Yes

No

If yes, please provide an explanation.

Example: \$20,000 per year for 3 years.

Character Limit: 250

What is the total budget for the program and/or project?*

Character Limit: 20

What is the timeline for implementation?*

Character Limit: 200

Geographic Areas Served (narrative)*

Please indicate who will benefit from this program/project. Helpful information may include the general population of the area and the projected number of individuals to be served.

Character Limit: 1000

Please list other anticipated funding for this current proposal:*

Character Limit: 500

List other funders to whom this current proposal has been or will be submitted.*

Indicate amount requested and status of request (submitted, pending, funded, and/or declined). Please also specify the amount of the grant and date received.*

Character Limit: 500 | File Size Limit: 2 MB

Grant Opportunity*

Please indicate how you/your organization was made aware of the Ray & Kay Eckstein Charitable Trust and/or this grant opportunity.

Character Limit: 1000

Continued
Below

ORGANIZATION INFORMATION

Year Founded*

Character Limit: 4

Mission Statement*

Character Limit: 2000

Organization's Fiscal Year Start Date*

Character Limit: 250

Organization's Fiscal Year End Date*

Character Limit: 250

Previous Applicant or Recipient

Has your organization ever applied or received funding from RKECT? If so, please provide detail.

Character Limit: 1500

Briefly detail the organization's programs, activities, and accomplishments.*

Character Limit: 500

Describe challenges and opportunities facing the organization in the next 3 to 5 years.*

Character Limit: 500

Please detail formal or informal relationships with other organizations.

(optional)

Character Limit: 500

Funding Sources (list)*

Please indicate the organization's sources of funding and the amounts for each.

Character Limit: 2000

Tax Exempt Status*

Please indicate the organization's tax exempt status as noted on your IRS Determination Letter.

Character Limit: 100

Is the organization using a fiscal agent/sponsor?*

Choices

Yes

No

If yes, please provide name of agent or sponsor.

Character Limit: 200

Attach a copy of the IRS determination letter.*

(Please note that this is not the state sales and use tax exemption certificate. If there has been a name change, provide copies of the amended state certificate of incorporation and amended IRS Letter of Determination).

File Size Limit: 1 MB

Number of employees associated with the organization:*

Character Limit: 10

Number of volunteers associated with the organization:*

Character Limit: 10

CATHOLIC ORGANIZATIONS

ONLY COMPLETE THIS SECTION IF THE ORGANIZATION IS A CATHOLIC CHARITY.

Are you a Catholic organization that is listed in the Official Catholic Directory?*

Choices

Yes

No

If yes, under what Diocese are you listed?

Character Limit: 150

Please provide page number and year of directory

(if your organization is listed in the Official Catholic Directory).

Character Limit: 100

Attach a copy of your listing here.

File Size Limit: 1 MB

RESULTS AND EVALUATION

Impact Goals*

What is your organization aiming to accomplish with this grant? List three, specific, measurable short term goals.

Character Limit: 2000

What will be the long term impact of this project and/or program?*

How does it further advance the organization's mission?

Character Limit: 500

Impact Strategies*

What are your organization's strategies for making this happen?

Character Limit: 2000

Impact Indicators*

How will your organization know if you are making progress? For example, will the effectiveness of projects and/or programs be measured by intake sheets, checklists, surveys, questionnaires, etc.

Character Limit: 1500

Who will measure and track outcomes for this grant request?*

(i.e. staff, consultant, volunteers, etc.)

Character Limit: 200

Describe the involvement of the organization's clients in the evaluation process.

Character Limit: 500

How will leadership use the results of the evaluation?*

Character Limit: 500

LEADERSHIP INFORMATION

Attach a list of board members and officers.*

(include names, profession, and years of service)

File Size Limit: 2 MB

Does the organization have board term limits?*

Choices

Yes

No

Board Term Limits

If yes, please describe term limits.

Character Limit: 250

How often do board of directors meet?*

Character Limit: 200

How often and who provides the performance evaluation for the organization's Executive Director?*

Character Limit: 500

Loans to Related Parties*

Has the organization provided a grant, loan, or other assistance to an officer, director, trustee, key employee, substantial contributor or an employee or family member of any of the aforementioned during the last 12 months?

Choices

- Yes
- No

Financial Statements*

Are year end financial statements prepared or reviewed by an independent accountant?

Choices

- Yes
- No

Organizational Minutes*

Does the organization document the meetings held or written actions during the year?

Choices

- Yes
- No

Conflict of Interest Policy*

Does the organization have a written conflict of interest policy?

Choices

- Yes
- No

Whistleblower Policy*

Does the organization have a written whistleblower policy?

Choices

- Yes
- No

Records Retention and Destruction Policy*

Does the organization have a written records retention and destruction policy?

Choices

- Yes
- No

FINANCIAL INFORMATION

Total Assets*

Enter Total Assets from most recent Fiscal Year End Balance Sheet.

Character Limit: 20

Total Liabilities*

Enter Total Liabilities from most recent Fiscal Year End Balance Sheet.

Character Limit: 20

Total Revenue*

Enter Total Revenue from most recent fiscal year end financials.

Character Limit: 20

Total Expenses*

Enter Total Expenses from most recent fiscal year end financials.

Character Limit: 20

Contributions Gifts and Grants*

Enter Total Contributions and Grants from most recent year end financials.

Character Limit: 20

Total Amount of Government Grants*

Enter Total Government Grants received in your most recent fiscal year. .

Character Limit: 20

Program Expenses*

Enter total amount of program expenses from most recent year end financials.

Character Limit: 20

Administration Expenses*

Enter Total Amount of Administration Expenses from most recent fiscal year end financials.

Character Limit: 20

Fundraising Expenses*

Enter Total Fundraising Expenses from the most recent fiscal year end financial statements.

Character Limit: 20

Total Operating Budget for Organization*

Enter the total operating budget for the organization.

Character Limit: 20

Provide a copy of the organization's operating budget for the current year.*

File Size Limit: 2 MB

Provide the last fiscal year end income statement and balance sheet.*

If you are an organization that does not file an IRS 990, please provide year end financial statements from last three years.

File Size Limit: 3 MB

Provide a project/program budget.*

(if appropriate for the request)

File Size Limit: 1 MB

Attach the most recent IRS 990 report.

(if applicable)

File Size Limit: 2 MB

IRS Form 1023-EZ*

Do you file a 1023-EZ?

Choices

Yes

No

Does your organization have an endowment?*

Choices

Yes

No

If yes, please provide the endowment size (market value as of the fiscal year-end).

(optional)

Provide Market Value and Date of Evaluation

Character Limit: 200

Ongoing Program/Project

If this funding request will result in an ongoing program/project, describe plans and specific sources for future/long term funding.

Character Limit: 500

CAPITAL REQUESTS

Capital Campaign requests are designed for the acquisition, construction, renovation, or improvement of a property or depreciable equipment. **If applying for capital campaign support, the charity MUST answer the additional questions below.** Otherwise, skip this section of questions.

Ongoing Operational Expenses

Discuss the need, feasibility, and cost of the capital campaign, and its implications for the organization's ongoing operational expenses.

Character Limit: 500

Support Received to Date

Specify the support received to date and the number of prospects approached and/or identified.

Character Limit: 500

Identify potential naming opportunities and attach any documents related to them.

Character Limit: 500 | File Size Limit: 1 MB

Leadership Team

Explain how the organization's leadership team (board members, campaign committee members, and/or organizational officers) is financially participating in the campaign including the percentage participating.

Character Limit: 500

Describe plans for funding the ongoing maintenance of the new capital project.

Character Limit: 500

Describe financing that might be undertaken in addition to raising funds from the public.

Character Limit: 500

Please indicate the current phase of the campaign.

Also indicate the date the campaign began and when it expected to conclude.

Character Limit: 500

Specify if purchase agreements or purchase options are signed or needed.

Specify whether regulatory approvals (i.e. certificate of need, zoning, historic preservation, environmental impact) are in place or are imminent.

Character Limit: 500

OPTIONAL UPLOADS

Optional Upload #1

Attach any additional documentation that you feel is pertinent to the request in the space provided below.

File Size Limit: 4 MB

Optional Upload #2

Attach any additional documentation that you feel is pertinent to the request in the space provided below.

File Size Limit: 3 MB

Optional Upload #3

Attach any additional documentation that you feel is pertinent to the request in the space provided below.

File Size Limit: 3 MB