

Nonprofit Toolbelt Prep Doc

Thanks for visiting our Prep Doc page. We think you'll be glad you did!
We've made this page to help you organize the information
you'll want to provide for our online application.

Nonprofit Toolbelt Application

Organization Information

1. Tax ID (Employer Identification Number or EIN).

HELPFUL HINT: Your Tax ID number should be formatted as follows: 35-XXXXXXX. We need your Tax ID to verify your nonprofit status. Public schools and government entities do not need to complete this section.

2. Organization Name
3. Address
4. City
5. State
6. Zip
7. Phone number
8. Fax
9. Primary Contact

HELPFUL HINT: This is your organization's President, CEO, Executive Director, Superintendent, etc.

10. Primary Contact's email
11. Web Address
12. Annual Operating Budget
13. Sources of income
14. Percentage of total that each source makes up

Proposal Information

15. Primary Project Contact
16. Phone number
17. Email Project budget
18. Request amount
19. Project start date
20. Project end date

21. Describe the organizational challenge or opportunity that, if addressed, would have a clear positive impact on the gains you are able to achieve for the participants you serve.

HELPFUL HINT: Here are some sample answers to the question above:

- Staffing is our biggest challenge. Last year we had staff turnover at the rate of 25%. We believe that is too high for our organization because it brings with it too much confusion for the people we serve and too much retraining cost. We would like to work with an experienced consultant who can help us understand how to bring our rate of staff turnover down to about 10%.
- Organizational procedures are a problem for us. Our busy organization has simply outgrown the policies and procedures that worked well when we were smaller.
- The need for revenue development is looming for us. Our most successful fundraising event is losing steam and producing less revenue each year.

22. Describe the new capacity you propose to create in response to the challenge or opportunity that you defined above. Please be specific about what new capability will be in place. You may wish to focus on the question “What is the best way to invest in our organization to increase positive results for the people we serve? Or, how can we sustain our ability to help people gain positive changes in their lives?”

HELPFUL HINT: For the revenue development example above, you might answer Question 22 by stating: **Identify one or two new fundraising activities that the staff and board can fit into their workload.**

23. What other options have you considered for building this capacity?

24. Fully define the new or added results you will achieve once the new capacity is fully operational.

HELPFUL HINT: Continuing with the example above, you might want to answer Question 24 by saying: **“Increase fundraising event revenue by \$25,000 each year for the next three years.”**

When defining your results for the question above think in terms of reduced cost, increased revenue, or helping more people fully experience the benefits that your organization sets out to provide. An organization that works to keep teen parents in school might answer Question 24 by saying: **“90% of the 20 teen parents in our program ~~to~~ will earn their high school diplomas.”**

25. What, if any, important changes in organizational policy or staff behavior must take place for this new capacity to have its greatest impact?

26. Define the three or four most critical steps to achieving your capacity-building results.

HELPFUL HINT: This is not a request for a detailed work plan. We would like a brief description of the most critical steps in your capacity building efforts and what you need

to achieve at each step to be successful. We recommend that you use a brief bullet point format.

27. If the new capacity will lead to an overall increase in operating costs, (e.g. maintaining a new computer system, adding staff, increasing the number of program participants), how will you cover these costs in the future?