

# MARGOES FOUNDATION

Please complete your proposal using our online grants management portal (instructions located on the foundation's website). This PDF is for informational purposes only.

## VENTURE PHILANTHROPY APPLICATION OVERVIEW INFORMATION

Project Title (*Limit 50 words*)

Project Summary (*Limit 250 words*)

Total Annual Organization Budget / Total Project Budget

Grant Geographic Service Area / Grant Age Group Served

## NARRATIVE QUESTIONS

1. The Organization - Define your organization's history, mission statement, purpose (i.e. what unmet need or gap are you addressing?), and key objectives/goals to be achieved in the next three years. (*Limit 600 words*)
2. Population served by program/project, including the total number of people served, ages, geographic location, demographics, and socio economic status. (*Limit 125 words*)
3. What's Different - Define how your program or service is unique or more innovative versus existing social impact initiatives tackling similar gap or unmet need related to college access, college completion, or career development. Why will your strategy or design be more successful? Beyond funding, what are the three biggest challenges to your organization's achieving success? (*Limit 600 words*)
4. The Team - Provide brief biographies of the Executive Director and other key leaders (management, staff, or Board of Directors). Also present a list of current funders and respective contribution levels, and how does the funding pipeline look for the next 12 months as relates to the number of funding organization and dollar levels?
5. Impact Metrics - Define how your organization measures its operating success and social impact. List key metrics or efficiency ratios and explain why they're used. For example, what impact metrics are (or will be) tracked quarterly and annually related to empowering the participants? Is it the number of individuals served, mentored by, enrolled in, or completing the program? Is it the number of participants reaching college, earning a summer internship, finishing college, securing a salaried job post-college, or other? (*Limit 600 words*)
6. Historical Model - Present financial summary year-to-date and past two years, if available (you may add as attachments).
  - Present Income Statement, Balance Sheet and Cash Flow Statement.
  - For the revenue roll-up, licensing revenue, foundation grants, corporate donations, and other should be shown as separate line items in reaching a total revenue figure.
  - Highlight or explain instances of major one-time benefits or costs, if applicable.

7. Forecast Model - Present a 3-year forecast of Income Statement only, explaining major changes to sources of revenue/funding or cost structure. For the revenue roll-up, licensing revenue, foundation grants, corporate donations, and other should be shown as separate line items in reaching a total revenue figure (you may add as attachment).
8. If your organization is selected for the Margoes Foundation VP Award, how will the new, multi-year funding be allocated or directed within the organization? *(Limit 600 words)*

**DOCUMENTS TO UPLOAD** *(Please note that all documents must be uploaded as PDFs)*

1. Historical Model financial attachment(s) **(required)**.
2. Forecast Model income statement attachment(s) **(required)**.
3. Additional relevant documents or materials **(if applicable)**.