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INTRODUCTION

About Arizona Together for Impact

Arizona Together for Impact is a pilot initiative to encourage and support nonprofits to explore formal, long-term collaborations as a way to maximize impact.

We see formal collaboration as a relationship between one nonprofit and another nonprofit that:

- changes the way participating organizations do business for the long-term;
- has board involvement and endorsement; and
- preserves, expands or improves efficiency or services to constituents.

What We Provide

1. Encouragement for nonprofit leaders to explore a range of formal collaborations with other nonprofits or key strategic partners rooted in maximum impact with minimal overlap, including but not limited to:
   - back-office consolidation
   - long-term programmatic joint ventures
   - mergers

2. A repository of tools, research and best practices that arm nonprofits with why and how to formally collaborate;

3. Grant funding from $500 to $100,000 through the Impact Fund to pay for costs associated with exploring, designing and/or implementing a formal collaboration. Grants cover facilitator or consultant time and resources associated with feasibility assessment, planning, implementation and successful collaboration.

4. Arizona Together for Impact aims to stretch these grants by encouraging organizations to seek matching grants and pro-bono resources.

Types of Support

The Impact Fund’s grant types are designed to meet organizations where they are. Each funding request will be considered independently, as opposed to being part of a formal continuum from readiness assessment and feasibility to planning to implementation. It is anticipated that after conducting thorough exploratory work, some collaborative projects will not proceed to implementation based upon the exploration findings.
Eligibility

Applicants must be in pursuit of a formal collaboration, be that for initial discussion, exploration, or implementation support. The Impact Fund manages a competitive application process, and not all requests for funding will be awarded. For your proposed collaboration to be eligible for any of the grant types, at least one of the partnering organizations must:

1. Be a nonprofit based in and serving Arizona.
2. Meet financial criteria including: a complete annual financial report (audit, review, or internal compilation depending on the size of the organization) an annual tax return (990/990EZ), an active board of directors, a board-approved budget for the current year, and an IRS determination letter verifying nonprofit status. New initiatives or nonprofits must present equivalent financial documentation such as internal financial statements and a board-approved budget.

The Impact Fund Does Not Support

The Impact Fund does not consider any transaction involving only one organization (e.g., internal reorganization/repositioning), or any short-term activity (e.g., organizing a conference in partnership, a new program pilot, co-branding a one-time advocacy campaign).

The Impact Fund does not support program-level only collaborations that do not involve a fundamental shift in the organizations’ business models (e.g., a nonprofit providing afterschool programming is not eligible for a grant because it “works” with a school).

Criteria

The Impact Fund manages a competitive application process and not all requests for funding will be awarded. Applications will be reviewed based on the following criteria:

1. Meets the definition of formal collaboration and has potential to meaningfully preserve, expand or improve efficiency or services to constituents and/or improve financial health of the nonprofit(s) involved
2. Alignment of purpose among the partners
3. Demonstrated commitment to the success of the collaborative venture among the partners at ED/Board Chair level
4. The degree to which the funds can play a catalytic role in the process
5. Thoughtful pre-planning among partners as demonstrated in well-conceived responses, with clearly articulated costs, goals, timeline and benchmarks as appropriate
Additional Information

For administrative purposes, one contact person must be designated to steward the grant application process.

A single organization may submit multiple applications so long as each collaboration involves a unique partner. If two organizations have multiple collaborative ideas, the Impact Fund asks that the strongest idea be submitted for review.

The size of funding allocations for each grant type will be determined on a case-by-case basis depending on the complexity of the proposed collaboration. In most instances, grants will be awarded for 50% or less than the total dollar amount of estimated cost.

Arizona Together for Impact will maintain, share and look to grow an active list of technical assistance providers and consultants with demonstrated experience, but will not require you to use any given firm.

Application Deadlines

The Impact Fund accepts applications on a rolling basis.
How the Arizona Together for Impact Fund Makes Grants

Overview of Process

There are four steps in the Impact Fund Grants process:

1. Preliminary consultation (required)
2. Submit 1-page LOI (Note: only the LOI will be required for Seed Grants)
3. Receive invitation-only application and submit materials
4. Proposal compliance and review
5. Funding approval

Step One: Preliminary Consultation (required)

The Arizona Together for Impact Director is authorized to conduct a brief consultation with potential applicants to discuss the proposed collaboration concept and the status of deliberations to date. Note: All Preliminary Consultations will be held in complete confidence. Interested applicants may schedule a phone preliminary consultation online through the Arizona Together for Impact Website at azimpact.org.

Based upon this preliminary consultation, the Arizona Together for Impact Director will provide guidance on next steps, which may include further actions that must be taken by the organizations before a LOI can be submitted. A face-to-face meeting with key leaders from the potential partner organizations may be requested to better understand the proposed collaboration and/or to access the respective organizations’ level of commitment to the process.

The Arizona Together for Impact Director will provide guidance on the appropriate grant type for your collaboration to consider. If your collaboration is eligible, the Impact Fund Director will invite you to move forward with Step 2.

Organizations may be invited to submit an LOI for one of the three grant types (outlined below).

Types of Support: (Note: Arizona Together for Impact generally supports up to 50% of the costs through this grant initiative. Seed Grants will not require a match if they are less than $1,000.)

1. **Seed Grant: (Up to $2,000)** to help nonprofits learn about various partnership options, clarify what they want from (and can bring to) a collaboration, and examine their readiness to engage in a strategic restructuring exploration. The objective of Seed funding is to allow organizations to evaluate high-level feasibility of a collaboration and high-level initial analysis on fit, budgets, impact etc. by convening key parties and retaining outside experts as needed. Seed Grants may be used to pay for external facilitators and/or meeting expenses.

2. **Exploration Grant (Proposed Avg Grant of ~ $15,000)** to support one-time costs of facilitators and consultants. associated with activities to assess, negotiate, and design a formal implementation plan, timeline, and business model for the collaboration.
3. **Implementation Grant (Proposed Avg Grant of ~ $25,000)** to support one-time costs associated with an integration of two or more organizations. Funds may be used to pay for third-party costs of lawyers, accountants, consultants, other one-time costs necessary to complete the transaction. Pre-requisites for Implementation Grants include formal board approval, a formal implementation plan detailing scope, timeline, and business model, as well as an agreed upon set of metrics to measure the success of the collaboration.

**Step Two: Submit LOI**

A LOI is required for a grant to be considered. Following the preliminary consultation, the Impact Fund Director will invite eligible applicants to submit a one-page LOI, signed by Executive Director(s) and Board Chair(s) of the entities in the proposed collaboration, briefly describing what you hope to accomplish with the grant.

<table>
<thead>
<tr>
<th>Grant Type</th>
<th>Information to include in your one-page LOI</th>
</tr>
</thead>
</table>
| **Seed Grant (LOI serves as the grant application)** | 1. What is the motivating interest in a collaboration at this time? (~1000 characters)  
2. Have you already initiated or begun conversation with potential partners? If so, please describe. (~600 characters)  
3. What is the nature of the collaboration you are pursuing? (~600 characters)  
4. What outcomes does your organization(s) hope to achieve through the exploration of a permanent collaboration and what will be completed through a Seed Grant? (~1,000 characters)  
5. Which of the following statements best describes my organization’s financial situation:  
   - Stable and/or growing  
   - Stressed and stretched, but maintaining programs and services  
   - Vulnerable –cutting programs and concerned about sustainability  
6. Amount requested (30 characters)  
7. What is your organizations annual budget? (30 characters)  
8. Describe the proposed use of the funding. (350 characters)  
9. Project start and end dates |
4. Include the intended outcomes your organization hopes to achieve through the Planning Grant. (~1000 characters)

**What are the key issues you must address during this phase? What are the potential deliverables?**

| Implementation Grant | 1. Amount requested 
| 2. Describe the proposed use of the funding. (~350 characters) 
| 3. Briefly describe the proposed collaboration and what the potential partnering organizations could accomplish together that cannot be done individually. (~1,000 characters)  
|  a. How will it fundamentally change the way the two entities conduct business for the long-term? 
|  b. What might the potential impact of these changes be on the individuals/communities served? 
| 4. Include the intended outcomes your organization hopes to achieve through the Implementation Grant.  
|  a. **What are the key issues you must address during this phase? What are the potential deliverables?** (~1,000 characters)  
|  b. Note: LOIs for Exploration and Implementation Grants must also include a brief statement confirming that each board (i.e. not just the board chair) has formally approved the exploration or implementation for the proposed project. (~500 characters)  |

This LOI can be submitted directly via a link to the web portal sent by the Director of Arizona Together for Impact. Agencies may then set up a login in order to complete the LOI process. The Governance Committee of the Impact Fund will determine as a group whether your collaboration is eligible to move to Step 3, and you will be notified either way.

If you have already submitted a LOI for a previous grant for the same collaboration, the Arizona Together for Impact Fund Director may inform you that a new letter is not necessary.

All applicants must submit Stewardship information for all organizations involved in the collaboration at the time they submit their LOI.
**Step Three: Receive invitation-only application and submit application materials**

The Impact Fund accepts applications on an ongoing basis. Generally, requests will receive a response within 60 days. However, proposal review can be expedited upon request if the nature of the request is time-sensitive.

Please refer to the following applications for the respective required materials. Note while the Stewardship Information is required for all grant types, the items on the Documentation Checklist are required for all grant types except Seed Grants.

1. Exploration Grant Application
2. Implementation Grant Application

Grant funding decisions are approved by the Governance Committee and awarded through the Arizona Community Foundation.

**Step Four: Proposal Compliance and Review**

The Proposal Compliance Review Form is the tool the Arizona Together for Impact Director will use to ensure proposal compliance. If a proposal receives a “no” to any of the unshaded questions, it will be removed from the process and the applying organization will be notified via email.

Once passing the compliance review, all application materials will be reviewed the Arizona Together for Impact Director and a funding recommendation will be made. When comparing programs applying for funding, the Impact Fund will refer to our established set of criteria and working definition of meaningful collaboration. Occasionally the Arizona Together for Impact Director may request additional information and/or ask clarifying questions prior to reaching a funding decision.

**Step Five: Funding Approval**

The Governance Committee will review and approve all funding requests for each application and promptly notify the primary contact.

Best efforts will be made to notify applicants as soon as possible following the Governance Committee meetings. Similarly, if applicants are time-sensitive in nature, the Impact Fund will make every effort to notify applicants of the funding decision as soon as possible after receipt of a complete application package.
Stewardship Information Required for all Applications

[OUTLINED BELOW FOR YOUR REFERENCE. INVITATION-ONLY APPLICATIONS ARE RECEIVED AND SUBMITTED THROUGH AN ONLINE PORTAL]

Primary contact for this grant
First and Last Name:
Organization:
Title:
Phone:
Email:

Organization #1 Information
Legal name of the organization:
Doing business as (if applicable):
Mailing address:
Organization website:
EIN:
Mission statement:

Primary Mission Area:
- Arts, Culture and Humanities
- Community Capacity
- Education and Literacy
- Environment
- Animal Welfare
- Science, Technology and Social Sciences
- Health Care
- Mental Health and Crises Intervention
- Aging and Elderly Populations
- Housing and Shelter
- Crime and Legal Related
- General Human Services
- Public Safety and Disaster Preparedness and Relief
- Food, Agriculture and Nutrition
- Children, Youth and Families
- Other (100 characters)

What is the primary geographic area(s) where you serve your mission: (check all that apply)
- Northern Arizona
- Central Arizona
- Southern Arizona
- Eastern Arizona
- Statewide

*Diversity, Equity, & Inclusion: Arizona Together for Impact supports organizations in communities representing the geography and demography of Arizona. You may opt the ‘Prefer Not To Answer’ selection in the following questions. Arizona Together for Impact respects your privacy and in no way uses the information gather to negatively impact your ability to receive grant funding.
Please indicate if the following communities are represented in your organization's primary service population:

- LatinX
- African American
- Native American
- LGBTQ
- Young Arizonans (0-35 years)
- None of the Above
- Prefer Not to Answer

Briefly describe the constituents or clients to whom you primarily target your services: (~700 characters)

Will these funds be used to provide services across the state? (~100 characters)

Will these funds be used to provide services to specific counties? (~200 characters)

Briefly describe the services/activities/programs you provide: (~700 characters)

Number of full-time employees:
Number of part-time employees:
CEO, President or Executive Director name:
CEO, President or Executive Director phone:
CEO, President or Executive Director email:
Board Chair name:
Board Chair phone:
Board Chair email:

3 For all Grants, each partnership will designate a lead organization and contact person to steward the process from an administrative perspective.
Organization #2 Information (If the second organization is not a 501c3, please complete this section as applicable)

Legal name of the organization:
Doing business as (if applicable):
Mailing address:
Organization website:
EIN:
Mission statement:
Primary Mission Area:
  • Arts, Culture and Humanities
  • Community Capacity
  • Education and Literacy
  • Environment
  • Animal Welfare
  • Science, Technology and Social Sciences
  • Health Care
  • Mental Health and Crises Intervention
  • Aging and Elderly Populations
  • Housing and Shelter
  • Crime and Legal Related
  • General Human Services
  • Public Safety and Disaster Preparedness and Relief
  • Food, Agriculture and Nutrition
  • Children, Youth and Families
  • Other (100 characters)

What is the primary geographic area(s) where you serve your mission: (check all that apply)
  • Northern Arizona
  • Central Arizona
  • Southern Arizona
  • Eastern Arizona
  • Statewide

*Diversity, Equity, & Inclusion: Arizona Together for Impact supports organizations in communities representing the geography and demography of Arizona. You may opt the ‘Prefer Not To Answer’ selection in the following questions. Arizona Together for Impact respects your privacy and in no way uses the information gather to negatively impact your ability to receive grant funding.*
Please indicate if the following communities are represented in your organization’s primary service population:

- LatinX
- African American
- Native American
- LGBTQ
- Young Arizonans (0-35 years)
- None of the Above
- Prefer Not to Answer

Briefly describe the constituents or clients to whom you primarily target your services: (700 characters)
Will these funds be used to provide services across the state? (100 characters)
Will these funds be used to provide services to specific counties? (200 characters)
Briefly describe the services/activities/programs you provide: (700 characters)
Number of full-time employees:
Number of part-time employees:
CEO, President or Executive Director name:
CEO, President or Executive Director email:
Board Chair name:
Board Chair phone:
Board Chair email:
Organization #3 Information (This part is not applicable if a third organization is not applying. If the third organization is not a 501c3, please complete this the section as applicable)

Legal name of the organization:
Doing business as (if applicable):
Mailing address:
Organization website:
EIN:
Mission statement:
Primary Mission Area:
• Arts, Culture and Humanities
• Community Capacity
• Education and Literacy
• Environment
• Animal Welfare
• Science, Technology and Social Sciences
• Health Care
• Mental Health and Crises Intervention
• Aging and Elderly Populations
• Housing and Shelter
• Crime and Legal Related
• General Human Services
• Public Safety and Disaster Preparedness and Relief
• Food, Agriculture and Nutrition
• Children, Youth and Families
• Other (100 characters)

What is the primary geographic area(s) where you serve your mission: (check all that apply)
• Northern Arizona
• Central Arizona
• Southern Arizona
• Eastern Arizona
• Statewide

*Diversity, Equity, & Inclusion: Arizona Together for Impact supports organizations in communities representing the geography and demography of Arizona. You may opt the ‘Prefer Not To Answer’ selection in the following questions. Arizona Together for Impact respects your privacy and in no way uses the information gather to negatively impact your ability to receive grant funding.

Please indicate if the following communities are represented in your organization's primary service population:
• Latina
• African American
• Native American
• LGBTQ
• Young Arizonans (0-35 years)
• None of the Above
• Prefer Not to Answer

Briefly describe the constituents or clients to whom you primarily target your services: (700 characters)

Will these funds be used to provide services across the state? (100 characters)
Will these funds be used to provide services to specific counties? (200 characters)
Briefly describe the services/activities/programs you provide: (700 characters)
Number of full-time employees:
Number of part-time employees:
CEO, President or Executive Director name:
CEO, President or Executive Director email:
Board Chair name:
Board Chair phone:
Board Chair email:
Documentation Required for all Exploration and Implementation Grants

Please submit these documents online for EACH collaborating organization that is a 501c3 nonprofit: (Note: Seed Grants will only require items 1 & 4)

☐ 1. **Financial Statements** - Most recent financial statements (Audit, Review or internally compiled, depending on organization size.)

☐ 2. **Management Letter (If Applicable)** – If the most recent audit had a management letter (also known as internal control deficiency letter) with it, please submit a copy of that management letter and your service provider’s formal response. (A management letter is a detailed letter from the auditor that is usually addressed to the board of directors or the audit committee. It presents weaknesses identified during the audit and offers recommendations to address them.)

☐ 3. **Tax Return** - Most recent IRS Form 990 or 990EZ.

**NOTE:** You MUST SUBMIT an IRS Form 990/990EZ unless your organization is a church or other house of worship, and thus not required by the IRS to file a return. This exemption DOES NOT apply to general faith-based nonprofit service organizations.


☐ 5. **Budget** - Most current board-approved operating budget with comparison to previous year.

☐ 6. **Board Roster** – Most current roster of your Board of Directors indicating those who are officers, members of the Executive Committee and all standing committees. If applicable, note which board members will be involved in the Collaboration Exploration or Implementation.

☐ 7. **Disclosures (If Applicable)** –Please list any major changes and/or circumstances, fraud, litigation, investigation or other related occurrences since your most recent audit that would affect the financial health of your organization. If there are not any disclosures, please indicate such when completing form online.
Exploration Grant Application

[OUTLINED BELOW FOR YOUR REFERENCE. INVITATION-ONLY APPLICATIONS ARE RECEIVED AND SUBMITTED THROUGH AN ONLINE PORTAL]

1. How much are you requesting from the Together for Impact Fund for a collaboration Exploration Grant?

<table>
<thead>
<tr>
<th>Budget Amounts</th>
<th>Amount Requested from Together for Impact Fund</th>
<th>Total Exploration Phase Expenses</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Amounts</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please list other sources of support for this project (funding or in-kind). (~300 characters)

2. Briefly describe the collaboration you are looking to explore. (~500 characters)

3. Describe the reason(s) both organizations are considering collaboration and what prompted each organization to consider a collaboration at this time. (~1,000 characters)

Examples of reasons for considering collaboration may include:

- potential departure of one or more senior leaders,
- advancement of a shared goal,
- competition for funding donors and/or clientele,
- difficulty funding necessary technological initiatives,
- difficulty in meeting external standards/requirements imposed on our organization,
- financial problems/pressures within one or more of the partnering organizations,
- funder initiated/mandated the collaboration,
- high/increasing costs,
- parent organization request,
- response to a community need, and/or
- response to a funding opportunity

4. Briefly describe the potential benefits of this collaboration. How might the collaboration meaningfully change how the organizations involved will operate? What might the potential impact of these changes be on the individuals/communities served? (~1,000 characters)

5. What are the projected beginning and end dates of this project? (~300 characters)

Submit these documents online:

☐ 1. Feasibility Phase Budget and Narrative – Line-item budget and narrative describing the technical assistance support that is being requested. Narrative portion should identify name, cost, and timing for each technical assistance provider.
Implementation Grant Application

[OUTLINED BELOW FOR YOUR REFERENCE. INVITATION-ONLY APPLICATIONS ARE RECEIVED AND SUBMITTED THROUGH AN ONLINE PORTAL]

1. How much are you requesting from the Impact Fund for your collaboration implementation phase? Reminder: Implementation grants fund one-time costs necessary to execute a formal collaboration between two or more organizations. This type of grant does not support expenses for program operations.

<table>
<thead>
<tr>
<th>Budget Amounts</th>
<th>Amount Requested from</th>
<th>Total Planning Phase Expenses</th>
<th>Percent</th>
</tr>
</thead>
</table>

Please list other sources of support for this project (funding or in-kind). (~300 characters)

2. Briefly describe the collaboration you are looking to explore. (~500 characters)

3. Describe the reason(s) both organizations are considering a collaboration and what prompted participating organizations to consider a collaboration at this time. (~1,000 characters)

Examples of reasons for considering collaboration may include:

- potential departure of one or more senior leaders,
- advancement of a shared goal,
- competition for funding donors and/or clientele,
- difficulty funding necessary technological initiatives,
- difficulty in meeting external standards/requirements imposed on our organization,
- financial problems/pressures within one or more of the partnering organizations,
- funder initiated/mandated the collaboration,
- high/increasing costs,
- parent organization request,
- response to a community need, and/or
- response to a funding opportunity

4. Discuss the potential benefits of the collaboration. How might the collaboration meaningfully change how the organizations involved will operate? What can you accomplish together that you cannot do separately? What might the potential impact of these changes be on the individuals/communities served. (~2,000 characters)

5. Discuss potential challenges of the collaboration. What are the key issues you must address together? (e.g., governance, culture, programming, staffing) (~1,000 characters)

6. What are the essential questions that must be answered before each organization can make the decision to implement a formal collaboration? To the extent possible, identify the sequence by which you need to answer these questions (e.g., what questions must you answer first before deciding whether to proceed further in the exploration?) (~2,000 characters)
7. How will you measure successful completion of the Planning Phase? Consider what success would look like even if your organizations elect not to proceed with implementing the proposed collaboration. (~1,000 characters)

8. What are the projected beginning and end dates of this project? (300 characters)

Submit these documents online:

1. **Implementation Phase Budget and Narrative** – Line-item budget and narrative describing the technical assistance support that is being requested. Narrative portion should identify name, cost and timing for each technical assistance provider. If requesting more than $10,000 for any single technical assistance provider, attach copy of proposal.

2. **Readiness Assessment Results (if applicable)**

3. **Additional work to date (if applicable)** – Share description and/or summaries of collaboration feasibility work completed to date.
# PROPOSAL COMPLIANCE STAFF REVIEW FORM – FOR INTERNAL USE ONLY

<table>
<thead>
<tr>
<th>Agency Name:</th>
<th>Staff:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Requested (type and amount):</td>
<td>Date Completed:</td>
</tr>
</tbody>
</table>

## Geographic Service Area

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>1. Based in and/or serving the Northern, Central or Southern Arizona community.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Comments:</th>
</tr>
</thead>
</table>

## Financial Statement

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>1. Did the agency submit an independent audit, review or internally compiled financial package?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>2. Was the year-end covered within 18 months of review date?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Document Included?</th>
<th>3. Is there a management/internal control letter included?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>4. If there is a management letter included, is it absent of any material weaknesses and/or significant deficiencies?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>5. If there is a management letter included, was it absent of a “going concern”?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>6. If there is a management letter included, was it absent of an adverse opinion and/or a disclaimer opinion?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>7. Does the independent accountants report indicate that the agency complies with all GAAP (generally accepted accounting principles)?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>8. Is the independent accountants report an “unqualified” opinion?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>9. Liquidity: Does the agency have 20 days of cash or more?</th>
</tr>
</thead>
</table>

## 990

<table>
<thead>
<tr>
<th>YES/NO</th>
<th>1. Did the agency submit a 990 or 990EZ?</th>
</tr>
</thead>
</table>

*If not available, please provide equivalent financial information such as a board-approved budget along with an explanation.*
### IRS Determination Letter

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Did the agency submit an IRS determination letter showing a nonprofit status?</td>
<td>Yes/No</td>
</tr>
</tbody>
</table>

Comments:

### Operating Budget

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Did the agency submit an annual operating budget, with comparison to previous year?</td>
<td>Yes/No</td>
</tr>
</tbody>
</table>

Comments:

### Board Governance

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Did the agency submit a current Board roster, indicating officers and membership on the Executive committee and on all standing committees?</td>
<td>Yes/No</td>
</tr>
</tbody>
</table>

Comments:

### Disclosures

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is the agency absent of any disclosures that would negatively impact current financial health?</td>
<td>Yes/No</td>
</tr>
</tbody>
</table>

Comments:

### Agency Score

An agency will receive a “fail” if any areas (other than shaded areas) are checked “no”. 

Pass/Fail