

THE RETIREMENT RESEARCH FOUNDATION

Proposal Cover Sheet Organizational Capacity Building (OCB) Program Standard OCB Grant Proposal

Instructions: Please complete this cover sheet, print it, and attach it to your full proposal. If you have questions, feel free to contact us at 773-714-8080 or info@rrf.org. Thank you.

I. Organization Information:

Name of Organization:

Address:

City:

State:

Zip:

Phone:

Website Address:

Year Incorporated:

Fiscal Year Begins:

Employer ID Number (EIN):

Number of Full Time Equivalent Staff:

Number of Volunteers:

Mission:

Total number of clients served:

Total number of clients age 65 or older served:

Annual Budget of organization: \$

Percentage and dollar amount of annual budget for older adult programs: % \$

Describe any recent or expected leadership changes (e.g., new CEO, interim management):

Number of Board members:

Number of times/year Board meets:

Total contributed by Board in past fiscal year: \$

Number of Board members that contributed:

Organization has current Strategic Plan? Yes No Date completed:

Organization has current Fundraising Plan? Yes No Date completed:

Eligibility for OCB Program

Applicant is a nonprofit organization, and not a unit of government: Yes No

Located in one of the following Illinois counties: Cook DuPage Kane Kendall Lake McHenry

Overview of Financial Support

Percentage of support from the following sources:

Government Individuals Foundations/Corporations Fees Other (specify)

List the top three (non-governmental) financial contributions received in the past fiscal year:

Example: ABC Foundation \$25,000/one year 12/16/2013

II. Project Information:

Project Title:

Purpose:

Estimated Project Start Date:

Estimated Project End Date:

Total Project Cost: \$

Amount Requested of RRF: \$

Project Director Contact Information:

Name:

Title:

Organization:

Address:

City:

State:

Zip:

Phone:

Email:

Check here to be added to RRF email group

Check the organizational development area to which your project relates:

Board Development/Governance

Management Information System/Technology

Succession Planning

Marketing

Strategic or Business Planning

Financial Management

Program Evaluation

Restructuring, Merger, or Strategic Collaboration

Resource Development/Fundraising

Other, please specify

Signature of CEO

Date

Signature of Board President/Chair

Date

Name of CEO above (print)

Name of Board President above (print)

Title of CEO above

How did you find out about The Retirement Research Foundation (RRF)?

How did you find out about RRF's Organizational Capacity Building program (if different from above)?

III. Checklist for Proposal Completion:

Please indicate that the following items have been completed and included with the proposal. Aside from the audit, **all documents should be single-sided**. Please do not use a ring binder, folder, plastic sleeve, or any other binding or cover for your proposal and attachments.

Cover sheet

Original signatures on the previous page of this cover sheet

Separate two- to three-page executive summary

Project narrative

Line item budget

Budget narrative

Project timeline

Resume(s) for Project Director, other key project staff and consultants (if applicable)

Project bid from consultant(s) (if applicable)

List of current board members with affiliations

Minutes from last three Board Meetings

IRS letter documenting 501(c)(3) status or other evidence of federal non-profit status

Most recent financial audit (preferred) or IRS 990

Original and one copy of the cover sheet, proposal and attachments

If using a fiscal agent, please include the following items:

- A copy of the written agreement between the applicant and the organization serving as the fiscal agent.
The agreement should include a signature from the fiscal agent organization's CEO (or equivalent) and a signature from the applicant organization's CEO (or equivalent).
- 501(c)(3) documentation for the organization serving as the fiscal agent.
- The fiscal agent's most recent audited financial statement.
- Board of Directors list for the fiscal agent.