



**QUESTIONNAIRE FOR ORGANIZATIONS SERVING MILITARY SERVICE MEMBERS,
WOUNDED WARRIORS, VETERANS AND THEIR FAMILIES**

* = REQUIRED FIELD

GENERAL INFORMATION:

*Organization Name:	
*Date Founded:	*Tax ID:
*What geographic areas do you serve?	
*Address:	*Phone/Fax:
*Website:	
*CEO or Executive Director/Email/Phone (direct):	Contact person, if different/Email/Phone:
*What is the primary purpose of your organization? 325 character limit	
*Please state your Mission: 325 character limit	
*What % of your business is focused on the military?	* Approximate # military served annually?

FINANCIAL OVERVIEW: Please provide the following information:

FROM IRS FORM 990 @ FYE:		FROM CURRENT ANNUAL BUDGET @ FYE: 2018	
*Total Annual Expenses	\$ _____	*Total Annual Expenses	\$ _____
*Direct Program Expenses	_____ %	*Direct Program Expenses	_____ %
*Total Assets	\$ _____	*Total Assets	\$ _____
*Total Revenues	\$ _____	*Total Revenues	\$ _____
Fees for Service (Earned Income)	_____ %	Fees for Service (Earned Income)	_____ %
Grants-Gov't, Corporate, Private	_____ %	Grants-Gov't, Corporate, Private	_____ %
Investment/Dividend Income	_____ %	Investment/Dividend Income	_____ %
Individual Donors	_____ %	Individual Donors	_____ %
Other-(explain source types)	_____ %	Other-(explain source types)	_____ %
Total Revenues	_____ 100 %	Total Revenues	_____ 100 %
*Do you have an endowment?	\$ _____	* Do you have operating reserves?	\$ _____

TRANSPARENCY/ACCOUNTABILITY/GOVERNANCE:

Is the following information posted on your organization's website?		
	Yes/No	If YES, Please provide the URL for the following:
*Form 990		
*Audited Financials		
*Board Members Listed		
*Key Staff Listed		
*Donor Privacy Policy		

Tell us about your organization's governance:

*What percentage of your Board supports your organization with annual donations?	%	*Do you have a written Conflict of Interest Policy?		*Do you have a Whistleblower Policy?	
*Do you have any paid staff members serving on the Board of Directors? If yes, please explain.					
*Are any Directors or staff military veterans?					

MEASURING EFFECTIVENESS: *Briefly, describe your organization's effectiveness and impact; including any major accomplishments (include links to your website, if helpful). *500 character limit*

*What protocols are in place to measure and evaluate outcomes? *500 character limit*

*How do you use evaluation as part of a broader effort to affect progress, and/or strategic direction? *500 character limit*

***CAPACITY:** Which programs, consultants, or resources have you accessed in the last 3-5 years for capacity building training? e.g. Fieldstone, Nonprofit Management Solutions, USD, SCORE, AFP, etc. *500 character limit*

OTHER: Is there anything else that you would like us to be aware of that will help us better understand and evaluate your organization's work? *500 character limit*

THE PATRIOTS CONNECTION at RANCHO SANTA FE FOUNDATION appreciates the opportunity to learn about your organization. If you have any questions, contact Debbie Anderson at (858) 756-0358. Please email your completed questionnaire to debbie@rsffoundation.org

THE PATRIOTS CONNECTION
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