



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

\* = REQUIRED FIELD

**GENERAL INFORMATION:**

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

**FINANCIAL OVERVIEW:** Please provide the following information:

FROM IRS FORM 990 @ FYE:		FROM CURRENT ANNUAL BUDGET @ FYE: 2019	
<b>*Total Annual Expenses</b>	\$ _____	<b>*Total Annual Expenses</b>	\$ _____
<b>*Direct Program Expenses</b>	_____ %	<b>*Direct Program Expenses</b>	_____ %
<b>*Total Assets</b>	\$ _____	<b>*Total Assets</b>	\$ _____
<b>*Total Revenues</b>	\$ _____	<b>*Total Revenues</b>	\$ _____
<b>Fees for Service (Earned Income)</b>	_____ %	<b>Fees for Service (Earned Income)</b>	_____ %
<b>Grants-Gov't, Corporate, Private</b>	_____ %	<b>Grants-Gov't, Corporate, Private</b>	_____ %
<b>Investment/Dividend Income</b>	_____ %	<b>Investment/Dividend Income</b>	_____ %
<b>Individual Donors</b>	_____ %	<b>Individual Donors</b>	_____ %
<b>Other-(explain source types)</b>	_____ %	<b>Other-(explain source types)</b>	_____ %
<div style="border: 1px solid black; height: 20px; width: 100%;"></div>		<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	
<b>Total Revenues</b>	_____ <b>100 %</b>	<b>Total Revenues</b>	_____ <b>100 %</b>
<b>*Do you have an endowment?</b>	\$ _____	<b>* Do you have operating reserves?</b>	\$ _____

**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](mailto:debbie@rsffoundation.org)

**THE PATRIOTS CONNECTION**  
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