

## LETTER OF INQUIRY

### **TAB – Organization Information**

#### Mission:

1. What is your organization’s mission, and how does it align with [Weingart Foundation’s commitment](#) to advance social and economic equity in under-resourced communities?

#### What you do:

2. How do your core work and programs/services aim to reduce barriers, increase opportunity, or meet essential needs of disadvantaged individuals and communities?
3. In addition to your core work and programs/services, do you engage in any of the following strategies to advance your mission? Check all that apply.
  - Address a critical need for a historically marginalized population or community;
  - Build cross-sector coalitions, networks and/or movements to advance positive change and build public will for greater equity;
  - Promote youth and grassroots leadership development and civic engagement for individuals from under-resourced communities and those historically under-represented;
  - Engage in system or policy change aimed at addressing the root causes of inequity through community organizing (of those directly impacted) or advocacy;
  - Promote local leadership and leaders of color;
  - Engage in multi-racial organizing and coalition building;
  - Implement strategies to improve community capacity and advance sustainable economic growth for low-income populations in the most under-resourced communities.
4. How does your organization partner or collaborate to leverage resources and increase the impact of your work?

#### Where you work:

5. Geographic Area Served: Select primary (drop down)
  - Los Angeles County
  - Orange County
  - Riverside County
  - San Bernardino County
  - Santa Barbara County
  - Ventura County
  - Other California County: (specify) \_\_\_\_\_
  - Multiple Southern California Counties: (specify) \_\_\_\_\_
  - California/Statewide
  - National
  - Other: (specify) \_\_\_\_\_

If California/Statewide and/or National, what percentage of your work is based in or impacts communities within the six Southern California counties served by the Weingart Foundation? \_\_\_\_\_%

Who you serve:

6. What is the demographic profile of the population(s) and community(ies) you serve?

7. Population served statistics:

Total number of unduplicated persons served/reached by organization:
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Socioeconomic status:
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- |  |
|--|
| <ul style="list-style-type: none"><li>• _____% Low-income</li><li>• How does your organization define low-income?</li><li>• % of ages served ___ under18 ___ 19-64 ___ 65 and up</li></ul> |
|--|

Staff and Board: (For most recently completed fiscal year ending: FY\_\_)

8. Number of paid staff:      Full-time      Part-time

9. Number of volunteers:

10. Number of persons serving on the Board:

**TAB - Financials**

Fiscal Year Summary (Use figures from your financial audit if completed within the past 12 months. If you do not have an audit, use figures from your financial statements for the most recent fiscal year.)

1. Fiscal year ending (mm/dd/yyyy)

Type of Financials (Drop down: audit, independent review, internal)

Revenue	\$
Expenses	\$
Private Contributions (revenues from foundations, corporations, individuals, and/or special events)	\$
In-kind	\$

Annual Operating Budget

- 2. Current Fiscal Year Ending: (mm/dd/yyyy)      Revenue: \$      Expenses: \$
- 3. Next Fiscal Year Ending (mm/dd/yyyy)      Revenue: \$      Expenses: \$
- 4. Describe any significant or anticipated changes in your annual operating budget in the current fiscal year or projected in the next fiscal year.

Total Amount Requested: \$ \_\_\_\_\_

## **TAB – Organizational Goals and Priorities**

1. What key goals toward advancing its mission is your organization prioritizing over the next one to two years?
2. What are your organizational capacity needs in the following areas (as applicable) that will improve your effectiveness in achieving the goals identified above over the next one to two years?
  - a. Programs/Services
  - b. Infrastructure/Operational
  - c. Finances
  - d. Other
3. Briefly describe your organization's short- and long-term strategies, and any progress made to date, in addressing the organizational capacity needs that you identified in Question 2 above for each area (as applicable).
  - a. Programs/Services
  - b. Infrastructure/Operational
  - c. Finances
  - d. Other