

Name: Kristin Zika
Occupation/Employer: Name of Org
Position: Legal EIN Name of Organization
Position Title: Position of Contact Person
Organization Mission: Organizational Mission
Email: email@gmail.com
Address: Address
Address 2:
City: City
State: State
Zip: Zip
Organization Website: Org Website
Organization Federal EIN: Federal EIN Number

Subject: Impact Grant

Organizational Financial Review Type: Impact Grant in the amount of \$100,000

Proposal ID#: 107588225

Organization Name: Organization Name Requesting Financial Review

Organizational Financial Review File: PROP107588225-Template_for_those_missing_990s_1.xlsx

Organization Name

Organization Requesting a F

this field is mandatory

Organization Federal EIN

Federal EIN

this field is mandatory

Year Agency Established

What year was the local organization, which will be applying for the ICI grant, established?

Year Established

Total Reported Gross Receipts for the Last Full Fiscal Year

- If equal to or over \$250,000, you qualify for the Impact Grant.
- If less than \$250,000, you qualify for the Inspire Grant.

Last fiscal year gross receipt

this field is mandatory

Number of Employees

How many FTE (full-time equivalent) employees does your organization currently have?

-- you may make a selection -- ▾

IRS 990 Filing Requirement

Is the agency required to file a 990 annually with the IRS?

-- you may make a selection -- ▾

Pending Litigation

(This field will only be seen by admin)

Is there any pending litigation involving your organization or have there been any legal judgments against your organization in the past three years? If yes, please explain.

Please list any pending litigation - all responses are kept confidential within the assigned financial or organization review team

Organizational Changes

Has the organization undergone an organizational restructuring (including a merger with, or spin-off from, another agency, creation of, or re-absorption of an affiliate or affiliates) in the past 5 years? If yes, please explain, including the legal name and EIN of all other agencies that have been merged out of existence as a result of any restructuring. Please also describe the effect of any such activity on your agency's financial information.

Please list any recent or pending legal organizational changes and the effect of said changes on your organization

Senior Management Changes

Please describe any recent or expected changes in your senior management staffing in the past or anticipated upcoming 24 months and how the organization is addressing those changes. If there are no recent or expected changes, please answer "None."

Please list any recent or expected changes in senior management in the past two years or expected 24 months

Chapter or Branch of Larger Organization

Is your organization a chapter or branch of a larger (regional or national) agency or organization? If yes, what is the name of the larger organization? Please explain the nature of your relationship with the larger organization of which you are a chapter or branch. Include a description of the nature of the financial support given by the larger organization to your organization.

If applicable, please describe your organization's relationship with the larger regional or national organization

Consolidated Financials

For financial reporting, please check here if your organization consolidates financials with the larger organization (balance sheet, income statement and 990)? (If yes, you will be required to complete the ICI Financial Review Template with your local financial information.)

Primary County of Operation

In which counties, listed below, does your organization have significant operations? Organizations must serve the Central Illinois Tri-County region of Peoria, Tazewell, or Woodford counties.

Peoria

Tazewell

Woodford

select 0 to 3 options

Insurance Coverage

Does the organization have current adequate insurance coverage (Director & Officers liability, liability, auto, and property) given the nature of the operations?

-- you may make a selection -- ▾

Further Explanation

Please use this space to further explain or clarify anything about the organization or financial reporting, or other responses on this questionnaire, as you feel necessary (significant growth or reduction in receipts, selling or buying of assets, etc.)

Our FRC teams will be reviewing three years of your financial data as due diligence to assess your organization's ability to receive and implement an ICI grant and because of our commitment to stewardship of our members' contributions. Please feel free to add anything you feel will make their assessment more complete.

You may wish to comment on any unusual financial events or spikes in your past three years. You may also wish to explain financial events further here.