



LODI COMMUNITY FOUNDATION
REQUEST FOR PROPOSALS for ENDOWMENT DEVELOPMENT MATCHING GRANT INITIATIVE
REQUIRED DOCUMENTS

<p>Governance</p> <ol style="list-style-type: none"> 1. 501 (c)(3) letter 2. Roster of Board of Directors (names & affiliations only) 3. By-laws 4. Strategic Plan 5. Minutes of Board meetings for 2014 	<p>Points</p> <p>10</p>	<p>What LCF is looking for: Evidence of organizational strength, forward thinking, board with influence and skills, legal requirements accounted for, etc.</p>
<p>Finance</p> <ol style="list-style-type: none"> 1. Current financial statement, including balance sheet 2. Last annual audit or financial review 	<p>Points</p> <p>20</p>	<p>What LCF is looking for: Evidence of financial strength</p>
<p>Program Results</p> <ol style="list-style-type: none"> 1. Organization and/or program specific narrative that describes the program goals and outcomes (limit to one written page) 2. Organization and/or program specific statistics that demonstrate program sustained impact and community change 3. List of organizations that work in partnership with your organization 	<p>Points</p> <p>20</p>	<p>What LCF is looking for: Evidence of sustained program impact and growth; evidence of Lodi specific outcomes; evidence of collaboration with other public and non-profit organizations</p>
<p>Fund Development History</p> <ol style="list-style-type: none"> 1. Three year history of organization’s annual support campaign 2. Campaign statistics: number of contributors, number of gifts, percentage of board members who contributed to the campaign and/or organization 3. Board approved endowment fund policy and plan, including the purpose of the funds, the decision-making process, investment policy 4. Organizational plan to raise matching \$2500 	<p>Points</p> <p>10</p>	<p>What LCF is looking for: Evidence of organizational understanding and commitment to fundraising from private sources in the community; evidence of broad-based financial support from the community; evidence that board has developed or is in the process of developing a well thought out endowment program to help sustain the organization over time.</p>
<p>Fund Development Plans</p> <ol style="list-style-type: none"> 1. An endowment program policy. 2. An endowment development plan, including promotional efforts to grow the endowment. 	<p>30</p>	<p>What LCF is looking for: Evidence that the board has developed a well conceived and thorough endowment program.</p>
<p>Marketing/Communications</p> <ol style="list-style-type: none"> 1. Copies of last three organizational newsletters 2. Number of individuals on mailing list 3. Annual reports from last three years 4. Organizational web-site address and any other social media sites 	<p>Points</p> <p>10</p>	<p>What LCF is looking for: Evidence of organizational capacity to communicate effectively with its constituency (including donors) and the community</p>