Citywide Nonprofit Monitoring and Capacity Building Program

## Nonprofit Request For

## Financial Management Coaching

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| **Nonprofit Name** |  | **Date of Request** |
| **Primary Contact**  |  |
| **Title** |  |
| **Email** |  |
| **Phone** |  |
| **FUNDING DEPARTMENTS** (please check one): |
| [ ]  Adult Probation Department [ ]  Arts Commission[ ]  Department of Children Youth and Families[ ]  Department on the Status of Women[ ]  Department of Public Health[ ]  Children and Families Commission (First 5)[ ]  Human Services Agency | [ ]  Human Rights Commission[ ]  Department of Homelessness and Supportive Housing [ ]  Mayor’s Office of Housing and Community Development[ ]  Office of Economic and Workforce Development[ ]  Sheriff’s Office[ ]  Other/not listed (please list): |
| [ ]  **Please check this box if you are a shelter-in-place (SIP) hotel provider** |
| **COACHING REQUEST** |
| Coaching is tailored to a nonprofit’s needs and is meant to address strategic, operational, and transactional finance and governance functions to ensure your organization has the foundational tools you need to succeed.**Please describe the financial management improvements you would like to make through coaching. What is the reason for your request?** (brief narrative) |
| **Please Select the Primary (1-2) Goal Categories** |
| [ ]  Agency-wide Budget/Cost Allocation [ ]  Accounting/Reporting Systems (e.g., QuickBooks)/Chart of Accounts)[ ]  Financial Reports and Metrics[ ]  Audited Financial Statements | [ ]  Board Oversight[ ]  Policies & Procedures[ ]  Timesheets, Invoicing, Payroll [ ]  Other (please describe below) |
|  | Other description: |
| **How much time do you anticipate you and your staff can dedicate to the coaching engagement?** |
| Estimated number of hours per month: | Estimated number of months: |
| **How confident are you that your organization can devote this amount of time to coaching?**[ ]  Very confident [ ]  Moderately confident [ ]  Uncertain |
| **How will your finance and governance staff participate in coaching?** |
| **Do you have the right staffing currently to make and sustain the changes? What concerns do you have, if any, about your current staffing?** |
| **Please provide additional comments about the above questions, as needed:** |
| **Please attach these documents to the request** |
| [ ]  Most recent Monitoring Report Letter (if available) |
| [ ]  Most recent audit and financial statements |
| [ ]  Current agency-wide budget |