Request for Proposal: Moody’s Signature Initiative
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About Moody’s CSR
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OPEN THE DOOR TO A BETTER FUTURE

Moody’s is committed to empowering people around the world with the knowledge, resources and confidence they need to create a better future — for themselves, their communities and the environment.

Together with our employees and our partners, we are building a world where everyone has a chance to prosper. Where the doors to progress and opportunity are wide open.
Reshape Tomorrow™
Reshape Tomorrow™

Moody’s is seeking proposals for its signature CSR initiative from best-in-class nonprofits that support individuals to **grow their small businesses** by providing:

- Access to vital credit information and education
- Connection to lenders
- Support to advance business assets

**Moody’s CSR will prioritize organizations serving:**

**Preferred Regions:**
- Africa
- China
- Europe
- Latin America

**Populations:**
- Emerging markets
- Underserved communities
- Women
Moody’s Support
Financial & Non-Financial Capital

Funding
» Level of funding (up to $200,000) dependent on program*
» Multi-year grants will be considered.

Measurement
» Efficacy scorecard provided by Moody’s evaluation partner, Mission Measurement

Employee Engagement
» Pro bono services
» Capacity building support & thought partnership
» Board service
» Hands on volunteering

Networking
» Access to events and conferences

*Proposals must be specific to a program and may not be for general operating support.
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Eligibility Criteria
Eligibility Criteria

In order to apply, organizations must meet the following eligibility criteria:

» Prove to be tax exempt under the United States IRS as a 501(C)(3) charitable organization or local government charitable status equivalent

» Registered charity with a recognized government body

» Is not in support of an individual or family

» Does not support the following: political, labor, fraternal or civic activities; religious organizations (for sectarian purposes); advertising activities; development or production of books, films, videos or TV programs

» Has at least two years of independently examined audited financials

» Has at least one year of successful track record of delivering projects or initiatives under the small business growth focus area
Process and Timeline
Process and Timeline

- **April/May**: Request for proposal period
- **June**: Moody’s CSR team review period
- **July/August**: NGO interviews & due diligence
- **September**: Final review period
- **October**: Moody’s Foundation Board approval & NGOs notified
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How to Apply
How to Apply

» Access the Eligibility Quiz here
  - If you are eligible to apply, the proposal will “unlock”
  - Organizations should submit one proposal for their strongest program

» Complete proposal by May 31, 2018
  - Questions include details on your organization’s:
    › General Mission and Purpose
    › Finances
    › Governance
    › Leadership
    › Proposed Project/Program
    › Evaluation and Impact Metrics

» Questions? Please consult our FAQs at the end of this document.
6 FAQs
FAQs

1. I have submitted my proposal, but I’m not sure if it was received. What should I do? To check to see if your proposal was submitted, please log back into the portal. A status of your submission can be found on the main page.

2. Can I call or meet with someone from the CSR department before the deadline to discuss my proposal? Due to the expected volume, we are not able to accept applicant phone calls or meeting requests. Feel free to email any remaining questions to csr@moodys.com.

3. Will Moody’s provide feedback if my proposal is not successful? No, unfortunately due to expected volume, we will not be able to provide feedback on proposals.

4. My organization does not yet have its local government charitable status, but I do have a fiscal sponsor. Can I still apply? Yes, provided you meet all other requirements.

5. Can my organization apply if we are not operating in a preferred region? Possibly, we are only considering proposals from organizations that operate in the regions listed in our eligibility quiz. For a full list of locations please begin the eligibility quiz.
6. Is there a maximum or minimum grant amount? Grants will be considered up to $200,000. All requested funds must be justified by program need and detailed line-item budget.

7. I’m confused, the proposal is not on your website, where do I find it? In order to access the proposal, you must first complete and pass our eligibility quiz.

8. I took the eligibility quiz, but did not pass. Can I still submit a proposal? No, all organizations must pass our eligibility quiz in order to be considered.

9. I submitted my proposal. What’s the next step? Please review page 11 that provides an overview of the process and the different stages by month.

10. I submitted my proposal but need to make a revision. What do I do? If you would like to make an edit, please email moodyssupport@cybergrants.com and request to have your proposal returned.

Thank you for your interest.
Please contact csr@moodys.com with any other questions.