



Grant Services Information Form

GENERAL INFORMATION

Organization Name:

Phone:

Business Address:

Year Founded:

Name of person completing form:

Title:

Email:

Website:

Type of Entity: Nonprofit / For-Profit / Governmental / Individual / Other

If other, please clarify:

How did you hear about the Community Foundation for Ocala/Marion County?

CLIENT NEEDS

What are your organization's greatest needs regarding grant funding? Why are you currently seeking grants? (Please include additional information on blank sheet if necessary)

What are some of the challenges your organization faces regarding grants?

What Grant Services are you interested in from the Community Foundation/Nonprofit Resource Center? (Bold all that apply)

- Search/Scan of potential grant fit for organization
- Help develop relationships with grant funders to determine success factors
- Help with writing grant applications
- Editing draft applications
- Submitting grant applications through grantor platforms and various other procedures
- Managing awarded funds and helping with reporting
- Attending a grant workshop
- Not sure yet



ORGANIZATIONAL BACKGROUND

In the space below, describe your organization's mission, vision, and goals. Provide an overview of your organization's history. This can be in sentence format or bulleted.

Mission Statement:

Vision and Goals:

History:

PROGRAMMING AND SERVICES

In the space below, describe all programs, projects, and services your organization provide? Who is the target group that your program or project will serve?

What county/counties does your organization provide services to?



GRANTS

Does your organization apply for grants? (If yes, please bold all that apply)

- Federal
- State
- Private foundations
- Public corporations
- United Way
- Hospital District
- We have not applied for a grant before

How many grants does your organization apply for in a year?

How many grants does your organization receive in a year?

List of previously awarded grants:

Can you currently provide the following checklist of documents typically required by grantors (bold all that you can provide):

- IRS Determination Letter
- Board of Directors List
- Organizational Budget
- Program/Project Budget
- Financials from past three years (audited/unaudited)
- 990s Tax Return Form from past three years
- UEI number

Type of targeted grants (please bold):

- Capital
- Program/Project



GOVERNANCE

Do you have a current list of board of directors including their names, addresses, position, and place of employment?

Yes / No

How many members are on your current board?

Are any of your board members family or related to you?

Yes / No

Do you have a fundraising board?

Yes / No

Do you have board tenure limits?

Yes / No

If yes, what is the term limit?

EXECUTIVE LEADERSHIP

Is your executive director paid or volunteered?

How many years has your current executive director been in the position?

Is your founder of the organization still involved with the organization?

Yes / No

NEXT STEPS/TIMELINE

Thank you for contacting the Community Foundation! You will be contacted by a member of our grants department within two to three business days. We look forward to talking with you.