Application Process

Medina Foundation

Basic Information

Helpful Tips:

- *Please read all instructions carefully.*

- *To preview questions (in Word or PDF format), view the **Sample Documents** page on our website.*

- *To view past requests, click "Organization History" from the dashboard menu. **You may cut and paste, where appropriate, from past requests by transferring answers to a Word document.***

- *We recommend preparing your answers in Word prior to submitting, in order to back up your data.*

- *Information that has been carried over from the LOI should not be changed in any significant way without contacting us first.*

- *To return later to finish or submit your request, click "Save" at the bottom of the form.*

- ***To preview the request prior to submission or save a copy,** click the "Application Packet" PDF button at top right.*

- *To allow multiple users to work on this request, click the blue "**Collaborate**" button at top right. Collaborator Feature: Video Tutorial and Written Tutorial*

- *View our **E-Grant System FAQs** for more information.*

In response to feedback, we have made some changes to our forms. Most responses have been given the maximum allowable count to save you time editing. We do not expect you to use the maximum character limits. Please be brief with your answers, for the sake of your time and ours, and feel free to use bullet points or short answers where applicable. Most questions can be answered with 1-2 paragraphs at most. If information has been covered in a prior question, you can refer to previous answers. Please do not repeat information. Note that character limits do include spaces.

Organization's Mission Statement*

Please provide your organization's mission statement.

Character Limit: 2000

Organization Legal Name

Organization name as registered with the IRS (if different than the organization name in the e-grant system).

Character Limit: 100

Fiscal Sponsor?

Is this organization fiscally sponsored, or are you applying on behalf of a fiscally sponsored organization? *If yes, additional instructions and contact fields will populate further down in the application.*

Note for fiscally sponsored organizations:
In general, where you see "Organization" throughout this application, you can consider this as pertaining to the fiscally sponsored organization that is applying for funds. Contact us with any questions.

Choices

Yes
No

Year Organization Incorporated*

In what year was your organization incorporated?

Character Limit: 4

Primary Services*

Please list up to four of your organization's primary services in the following numbered format: e.g. 1. Parent education; 2. Therapeutic child care; 3. etc.; 4. etc.

Character Limit: 250

Project Name*

If your organization is requesting funds for a specific project, e.g., Youth Tutoring Program, or Housing Case Management Services, please list that particular program as the "Project Name." However, **if you are requesting funds for general operating, please list "General Operating" as the Project Name.**

Character Limit: 100

Amount Requested

Character Limit: 20

Primary Geographic Area

This is the primary geographic area that your organization reported providing services in. *Please contact us if you wish to change this.*

Choices

Clallam County
Grays Harbor County
Island County
Jefferson County
King County
Kitsap County
Mason County

Pacific County
Pierce County
San Juan County
Skagit County
Snohomish County
Thurston County
Whatcom County

Secondary Geographic Area

If your organization provides services in more than one county, this is the county in which your organization provides the most services after the primary county.

Choices

Clallam County
Grays Harbor County
Island County
Jefferson County
King County
Kitsap County
Mason County
Pacific County
Pierce County
San Juan County
Skagit County
Snohomish County
Thurston County
Whatcom County

Volunteers*

Please list the approximate number of people who volunteer for your organization during any calendar or fiscal year.

Character Limit: 10

Full Time Equivalent (FTE) Employees*

Please list the number of full time employees or full time equivalents (FTEs) your organization employs.

Character Limit: 10

Board Contributions*

Please list the **percentage** of your organization's board members who contribute to your organization.
We know that financial contributions are not the only form of giving and understand that this may not be 100% for a variety of reasons.

Character Limit: 3

Name of Executive Director*

Name of Executive Director/CEO or equivalent. (If you have more than one Executive Director position, please list a main point of contact, and fill out the next question.)
Please email us with new Executive Director contact information if this has changed from when you first submitted your LOI.

Character Limit: 100

Executive Director Resume*

Please upload a copy of the current executive director/CEO's resume or bio. This is to help our staff familiarize ourselves with your leadership, particularly if this is your first application or there has been a recent change in leadership.

File Size Limit: 1 MB

(Optional): Co-Leadership Information

If your organization employs a co-leadership model and you have more than one Executive Director or equivalent, please list below the other <u>name(s), titles, pronouns, and email addresses</u> so that we may keep track of leadership information for our records.

If you would like to include more than one Executive Director in the site visit following submission of this application, please let us know.

Character Limit: 5000

Executive Director/CEO Salary*

List the salary of the Executive Director/CEO

Character Limit: 20

Please list the titles and salaries of the next two highest paid employees after the Executive Director.
We would appreciate your sharing this information below to assist in our review. There are no right or wrong answers, as salaries are based on a number of factors specific to your organization. However, this information helps in our overall understanding of your organization's structure and practices. We support the value of transparency within nonprofit organizations and foundations. If this information does not apply to your organization (ie, you have fewer than three paid staff positions), please leave the appropriate fields blank.

1) Title
Character Limit: 100

1) Salary
Character Limit: 10

2) Title
Character Limit: 100

2) Salary
Character Limit: 10

Board List*
Please upload a list of the names and affiliations of your board of directors.

<u>Note:</u> If the applicant organization is a local affiliate of a national organization, please upload the <u>local board</u> or <u>local advisory board</u> list instead of the national one, if applicable.

File Size Limit: 1 MB

Physical Address*
Please list your organization's physical address (this is helpful if scheduling in-person site visits, although you may change the site visit location later).

Character Limit: 75

Returning Grantee*
- Has your organization received <u>3 or more grants from Medina Foundation within the past 7 years?</u> If so, select **"Yes".** *(You can check on this by clicking on "Organization History" from the dashboard menu, or reaching out to grants@medinafoundation.org)*

- If your organization has not received 3 or more grants from the Foundation within the past 7 years, please select **"No".**

The Foundation is working to streamline the application process for grantees with a history of funding.

Choices
Yes
No

Fiscally Sponsored

In general, where you see "Organization" throughout this application, you can consider this as pertaining to the fiscally sponsored organization that is applying for funds. If we need any additional information about the Fiscal Sponsor (besides contact information, below) we will contact you to request it.

___

Typically, if a grant is made to a fiscally sponsored organization, the grant agreement and check would go to the Fiscal Sponsor (with the applying organization cc'd on all communications). **Please include the following contact information** with your request, to ensure all communications go to all correct parties, and let us know if you have any additional questions.

Primary Contact - Fiscal Sponsor

Name, Title, Email Address - for the **Executive Director/CEO** of the Fiscal Sponsor.

Character Limit: 500

Mailing Address - Fiscal Sponsor

Character Limit: 500

Primary Contact - Fiscally Sponsored Organization

Name, Title, Email Address - for the **Executive Director/equivalent** of the fiscally sponsored organization.

Character Limit: 500

Mailing Address - Fiscally Sponsored Organization

Character Limit: 500

Streamlined question

Streamlined Application?*

- If your organization's budget is $500,000 or less <u>AND</u> you are requesting $15,000 or less, please select **"Yes".**

- <u>If your budget is over $500,000 and/or you are requesting more than $15,000, please select **"No".**</u>

For larger organizations/requests that are newer to the Foundation, there are a few additional questions that will populate further down in the application. The Foundation is working to streamline the application process wherever possible, including for smaller organizations and those with a longer history of funding.

Choices

Yes

No

Organizational Overview

<u>Instructions and helpful tips:</u>

- The following questions relate to your organization as a whole.

- Please answer the following questions concisely and avoid repeating information. Bullet points are encouraged.

- Brevity is encouraged out of respect for your time. A program officer follows up with every request at a site visit, which is a chance to discuss your programs further.

- Contact us if you have any questions, concerns, or feedback (see "Feedback" section at end of form).
- Be sure to click "Submit" when finished.

Organization's General Purpose*

What is the general purpose of your organization? What gap is the organization filling and what unique role does the organization play in providing these services?

Character Limit: 10000

Clients served*

Please include the number of clients served both during the prior full year and year-to-date. In addition, please describe the demographics and challenges of clients served.

Character Limit: 10000

Standard Process questions - general

Similar Programs*

Who else offers similar programs in your service area? How do you work with other providers in your community?

Character Limit: 10000

Planning*

Please provide a brief overview of your most recent strategic plan or your organization's plans for the future.

Character Limit: 10000

Income/Funding Structure*

What are the long-term funding plans for your organization's operating budget?

Character Limit: 10000

Specific Grant Request

- The following questions relate to this specific grant request.
- If this request is for a specific project or program, please answer the following questions with that project in mind.
- Please complete the following questions even if your request is for general operating support.
- Be concise and avoid repeating information. Bullet points are encouraged.

- For capital requests, please provide answers that relate to both the request as well as the organization.

Project Description*

For what purpose are you requesting funds? Please describe the **objectives** related to this request. **If you are requesting General Operating support, give a general description of how your organization operates, who you serve, and how.** If you are requesting project support, please explain how it aligns with your overall mission.

Character Limit: 10000

What is the issue you are trying to address with this work?

In other words, what is the *problem* or *opportunity* that is being addressed with this specific intervention? *(If not already answered above.)*

Character Limit: 10000

Evaluation*

Please explain the **methods** of evaluation your organization uses to assess impact and track outcomes.

Character Limit: 10000

Outcomes*

Please list the most recent **results** (not goals) of your evaluations, or any relevant outcomes.

Character Limit: 10000

Additional Information*

Is there any additional information about the organization or request that is not otherwise covered above (e.g. **recent or anticipated leadership transitions**, organizational shifts, etc.)?
Character Limit: 10000

Character Limit: 10000

Standard Process questions - specific request

Community Engagement*

How are the voices of the community you serve being represented in the work you do?

Character Limit: 10000

Please describe your specific workplan as it relates to your request.

(If not already answered above.) **How** do you achieve your stated goals and objectives?

Character Limit: 10000

What is your plan for future funding of this project?
If this request is for general operating support and you have already answered this question above, please skip this question.

Character Limit: 10000

Financial Information

Organization Budget*
The total amount of your organization's current operating budget (expenses)

Character Limit: 20

Project Budget*
If you are applying for a specific project or program, and not general operating dollars, please insert the amount of the project or program budget. **If you are applying for general operating, please put a zero in the box below.**

Character Limit: 20

Organizational & Project Financials (required)

Until recently, Medina Foundation required all requests to include our Budget Template (Excel) sheet, filled out with the previous year's actual Income/Expenses and the current year's budget. This provided staff and trustees who review your requests with valuable information in the understanding of your organization's financial structure and operations, but caused extra work for our grantees.

In response to applicant feedback, we are working on finding a solution that lessens burden for applicants. Our Board still requests to see the last year's and current year's information side-by-side for ease of review, but you may provide this report in your own format if available, and do not need to adjust categories to match our template.

Please read the instructions carefully. Thank you for your assistance in providing this information. If you have any questions, please contact us at grants@medinafoundation.org for assistance. If the documents you attach are not what we are looking for, we may contact you to request further information.

Organization Financials*
Option 1)
Upload a <u>side-by-side</u> report in your own format, showing the organization's **actual Income/Expenses** for the <u>last full fiscal year</u> -- *this report is often called a Profit and Loss, Statement of Revenue and Expenditures, Statement of Activities, or similar* -- AND the <u>current year's</u> **Budget** (projections).

- You may be able to run this report from accounting software you use, but the easiest way might be to run two separate reports (last year's actuals & this year's budget) in Excel, then combine them into one sheet so they are side by side.

- Make sure all categories line up.

- Contact grants@medinafoundation.org for any assistance needed.

- **Please do not run these reports by month -- we only need the total (annual) amounts in each column.**

Option 2)
If helpful, you may download and use the Budget Template (Excel) sheet linked
here (http://www.medinafoundation.org/application-templates.html) instead, or use it as an example or reference sheet.

NOTES:

- Please show columns as totals for the year only (not by month).

- Save report in Portrait (not landscape) mode, especially if submitting a pdf.

- Condense reports to 1-2 pages long if possible. Collapse all sub-categories. We do not need detailed sub-categories.

- Be sure reports have titles with the year for each column's data.

- If your data is too small to read or we have other questions, we will contact you for further information and may require additional reports in alternate formats.

File Size Limit: 2 MB

Next Year's Budget (if applicable)
If you are submitting your request close to the end of your current fiscal year, please also upload next year's budget, if available.

File Size Limit: 1 MB

In-Kind
If you have **in-kind** income/expenses (donations of rental space, services, food, supplies, or other program expenses), **please enter that amount here, and provide a brief list of what this includes.**

Character Limit: 1000

Foundations & Corporations*
Please list the current year's budgeted income for all Foundation & Corporate funding:

Character Limit: 20

Individuals*
Current year's budgeted income for Individual Contributions:

Character Limit: 20

Earned Income*

Current year's budgeted income for Earned Income (enter zero if your organization does not have earned income):

Character Limit: 20

Government*

Current year's budgeted income from all Government sources:

Character Limit: 20

Balance Sheet*

Please upload a recent **Balance Sheet** (for a period ending within the past 3 months) showing total **Assets and Liabilities**, including any off-balance accounts.

Please do not upload a Profit & Loss (Statement of Revenue & Expenditures or Income/Expenses) here. Income/Expense reports are attached above; see instructions or contact us for assistance.

*Note: If uploading a pdf document, please save in **Portrait** mode rather than Landscape.*

File Size Limit: 2 MB

If you have any comments on the financial documents attached, you may include them in the narrative fields on the next section.

Is this a Project Request?*

If answered "yes," additional financial uploads will appear below. Please attach both Organizational and Project information if applicable.

Choices

Yes, this is a Project Request
No, this is a General Operating Request
No, this is a Capital Request

Project Financials

For Project Requests only:

If your request is for Project funding and not General Operating, in addition to the financial documents pertaining to the organization as a whole, please **also** upload:

PROJECT Financials

Preferred. Download and use our Budget Template excel sheet linked **here** (http://www.medinafoundation.org/application-templates.html) and use the second (Project) sheet, or submit a similar combined (**side-by-side**) report if you have one, showing last fiscal year's **Income/Expenses** (or Profit & Loss report), and current year's **Budget** for the specified program only.

File Size Limit: 1 MB

PROJECT - Financials 2 (if needed)

Additional file upload, if needed

File Size Limit: 1 MB

(Optional) Next Year's Project Budget

If close to the end of your current fiscal year and next year's project budget is available, you may upload here.

File Size Limit: 1 MB

Capital Financials

Capital Budget (if applicable)

If you are applying for a capital project, please include the following information in your own format:

1) Capital **project budget** including income, projected income and expenses
2) Explanation of how debt service, maintenance and operating expenses will be met
3) Size of proposed facility and cost per square foot
4) Anticipated completion date

File Size Limit: 2 MB

Financial Narrative

The next few questions are meant to further illustrate your overall financial picture, and approximate answers are fine.
We have left ample room for responses, but please feel free to answer these as briefly as possible.

Roughly how many months of reserves do you have, if applicable?*

Character Limit: 5000

Does your organization have an endowment? If so, are there plans for its use?*

Character Limit: 5000

If you have earned income, what source(s) does this come from?*

Character Limit: 10000

Surplus/Deficit*

If you have budgeted a surplus, what are your plans for that surplus? If you have budgeted a deficit, how do you plan to cover it?

Character Limit: 10000

Are there any major changes to your budget you anticipate in the next year?*

Character Limit: 10000

Project/Program Budget Narrative

Do any of the above questions apply to your program budget (ie, surplus, anticipated changes, etc.)? If so, please elaborate.
If your request is for general operating, please skip this question.

Character Limit: 5000

Additional Financial Narrative

Is there anything else about your budget that you would like to share with us that is not covered in the previous questions?

Character Limit: 10000

Other Contributors

Corporate and Foundation Contributions*

Click here to download the template to list your major foundation and corporate contributors (in Word). If you already have this information in a different document, feel free to attach that instead. Once it is complete, please upload the file below.

- Please include the contributor name, amount, year received (or pending/projected), and project name. Please DO NOT include any confidential donor information such as addresses.
- If the applicant organization is a local affiliate of a national organization, please focus on local contributors instead of national.

We kindly request that you include major contributors for the past two years and those who your agency is approaching in the current fiscal year. The purpose is to get a general sense of your other contributors rather than a comprehensive list. *Please limit your list to no more than 2 pages. What constitutes a "major" contribution is defined by the organization and can be over any internally determined threshold/dollar amount.*

File Size Limit: 2 MB

ELECTRONIC SIGNATURE

ELECTRONIC SIGNATURE*

Enter your full name *(i.e., Jane Smith)*

Character Limit: 100

Enter your business title*

(i.e., Executive Director)

Character Limit: 100

Date of Signature*

Select the date of electronic signature

Character Limit: 10

Signature*

By entering your signature information above and clicking "I Agree" below, you certify that the statements contained in this application are true and correct to the best of your knowledge and belief.

Choices

I Agree.
I Do Not Agree.

Be sure to click "Submit" at the bottom of this page when finished! (You may click "Save" to return to your work later.) You will receive an automatic email notification when your submission has been received. If you believe you have submitted your application but do not receive this message, please contact us.

Feedback

Optional User Experience Rating

How difficult / time consuming would you rate this application process? (Please read carefully before responding)

1 = very easy, quick, simple

10 = very difficult, time consuming, complicated

Scoring Options: 1 - 10

Application Form Feedback

We value feedback from our applicants as an important part of improving our work and processes.

Please use this space to share any feedback you may have regarding the application process and our online system. To provide feedback anonymously, please submit a review on GrantAdvisor.org.

Note: Information entered below will *not* be considered as part of the application.

Staff reviews feedback periodically and makes adjustments to our instructions, processes, and website accordingly. Please check our E-Grant System FAQs, General FAQs, and medinafoundation.org/feedback for updates. **If you would like to discuss any feedback, or have questions, please call us at 206-652-8783 or email grants@medinafoundation.org.**

Character Limit: 5000