

Streamlined 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. 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

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

(Reminder: this application process is for requests of up to \$15,000 only.)

Character Limit: 20

Funding Type

Choices

General Operating
Project Support
Capital Campaign
General Operating + Capital

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

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's resume.

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 name(s), titles, pronouns, and email addresses 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

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 of Directors*

Please upload a list of the names and affiliations of your board of directors. In addition, please list the names of those members who also serve on your executive committee in the space below.

Note: If the applicant organization is a local affiliate of a national organization, please upload the local board or local advisory board list instead of the national one. If there is no local/advisory board for your chapter, please specify so in the box below and upload the national board list instead.

Character Limit: 1500 / File Size Limit: 1 MB

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

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

Organizational Overview

Instructions and helpful tips:

- 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

Additional Information*

Is there any additional information that you feel would be relevant to this application and is not otherwise covered (e.g. leadership transitions, organizational shifts, etc.)?

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** of your evaluations, or any relevant outcomes.

Character Limit: 10000

Financial Information

Organization Budget*

The total amount of your organization's operating budget

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 dollars, please put a zero in the box below.

Character Limit: 20

Organizational & Project Budgets (required)

Previously, 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, for this year we are allowing applicants to upload this information in whatever formats you already have. At the end of the year we will assess whether we can make this a permanent change.

Please read the instructions carefully and upload all of the requested information, using one or more uploads. If you have any questions about the information we need, please contact us at grants@medinafoundation.org for assistance. If the documents you attach are not what we are looking for, we will contact you to request further information.

NOTES:

- *When running financial reports, please save in "portrait" mode rather than "landscape."*

- *If possible, please collapse minor sub-categories to keep each report to a minimum number of pages (ideally 1-2) in length. Thank you for your assistance.*

For all requests:

Please upload the following financial documents for the organization as a whole.

Option 1 (Part A)

A report of the organization's **actual Income/Expenses** for the last full fiscal year (whether that is a calendar year or another 12-month period),

- *This report is often called a Profit and Loss, Statement of Revenue and Expenditures, or similar.*

File Size Limit: 2 MB

AND

Option 1 (Part B)

The current year's **budget**, with the same categories for income/expenses as the previous year.

File Size Limit: 1 MB

-OR-

Option 2

You may download and use our Budget Template excel sheet linked **here** (<http://www.medinafoundation.org/application-templates.html>) if it is helpful to you, or submit a similar report combining both last year's actuals and current year budget, if you have one.

File Size Limit: 1 MB

The following four questions relate to the **Income** section of the above **organizational budget** (we understand these may or may not add up to 100% of the organization's income):

Foundation & Corporate Funding*

Please list the amount of **Foundation & Corporate** funding in your **current year budget**.

Character Limit: 20

Contributions from Individuals*

Please list the amount of funding in your **current year budget** that comes from **individual donor contributions**.

Character Limit: 20

Earned Income*

Please list the amount of **Earned Income** (e.g. rent payments received, fee for service, etc.) in your **current year budget**.

Character Limit: 20

Government Funding*

Please list the amount of **Government Funding** in your **current year budget**.

Character Limit: 20

Balance Sheet*

Please upload a recent **Balance Sheet** (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 (Option 1 Part A); see instructions or contact us for assistance.

Note: If uploading a pdf document, it is helpful if this is in Portrait mode rather than Landscape.

File Size Limit: 2 MB

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

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

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 - Option 1 (Part A)

A statement of your **actual Income/Expenses** for the PROJECT for the last full fiscal year,

File Size Limit: 2 MB

AND

PROJECT - Option 1 (Part B)

A copy of the current fiscal year's **budget** for the PROJECT for the current fiscal year.

File Size Limit: 1 MB

-OR-

PROJECT - Option 2

You may still download and use our Budget Template excel sheet linked **here** (<http://www.medinafoundation.org/application-templates.html>) and use the second (Project) sheet, if it is helpful to you, or you may submit a similar combined report if you have one.

File Size Limit: 2 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 Information (part 2)

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.

Typical operating budget over the past few years:*

Character Limit: 20

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

Roughly how much of your income (%) is general operating?*

*Note: "general operating" **income** is anything that is flexible and can be used for any needs the organization has, including overhead, staff, responding to crisis opportunities, etc.*

Please list as a percentage (%). Include all government and other funding sources.

Character Limit: 5000

Roughly how much of your income (%) is private vs. public?*

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](http://www.medinafoundation.org/index.php?p=Application_documents&s=137) to download the template to list your major foundation and corporate contributors (in Word). Once it is complete, please upload the file below.

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.

Notes:

- If you already have this information in a different document, feel free to attach that instead. 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.

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 alexia@medinafoundation.org.**

Character Limit: 5000