**Streamlined Application Process - 2023**

*Medina Foundation – Streamlined Application Form Questions*

*Note: This document is meant solely to assist in the preparation of a request. All applications come through our online system at: www.medinafoundation.org / How to Apply / E-Grant System. All requests begin with by submitting an LOI form through the system. Selected LOIs will be invited to apply, and will fill out the full application in our system.*

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.
 *\*asterisk indicates required question*

🗗 **NOTE: Questions with this symbol have answers carried over from the LOI.**

Organization's Mission Statement\* 🗗
Please provide your organization's mission statement.

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

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.

Amount Requested\* 🗗

Funding Type
(Read-only; determined by Foundation staff)

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.*

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.*

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.*
Executive Director Resume\*
Please upload a copy of the 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: 2 MB*Board Contributions\*
Please list the **percentage** of your organization's board members who contribute to your organization.
*Character Limit: 3*Physical Address\*
Please list your organization's physical address (this is helpful in scheduling a site visit, although you may change the site visit location later).
*Character Limit: 75
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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?

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.

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.)*

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

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

Organizational & Project Budgets\*
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*

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
**\_\_\_**

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 Budget (if applicable)
If you are applying for a capital project, you are welcome to use your own budget format.
Please include the following information:
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*

**\_\_\_**

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

**\_\_\_**

The next few questions are meant to further illustrate your 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: 5000*

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 or unrestricted funding?\*
*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*

Audited Financial Statements or 990\*
Please upload your audited financial statements for the last fiscal year. If this is not applicable, please upload a copy of your latest 990.
*File Size Limit: 8 MB
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Other Contributors

Corporate and Foundation Contributions\*
Click [**here**](http://www.medinafoundation.org/application-templates.html) (<http://www.medinafoundation.org/application-templates.html>) 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.
* 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*

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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.

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***Be sure to click "Submit" at the bottom of the 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.*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Optional: 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

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**](https://grantadvisor.org/survey.php)**.**

**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](http://www.medinafoundation.org/e-grant-system-faqs.html), [General FAQs](http://www.medinafoundation.org/general-faqs.html), and [medinafoundation.org/feedback](https://www.medinafoundation.org/feedback.html) 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*