## **New Client Information Intake Form**

This form is designed to assist clients of the Ramsay Group with assembling the pertinent information needed when applying for grants from funding sources. The information requested on this form will be kept confidential and not shared with any other entities, with the exception of client information required on grant applications by funding agencies. **Please note that all grant applications will be submitted to clients for their review and approval prior to being formally submitted to any funding agency.** Also note that each grant maker has different guidelines, priorities, deadlines, timetables, and requested information; we may seek additional information from clients depending on individual funding agency requirements.

**Proposal Narrative Information**

Geographic Area Served:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Funds are being requested for (check one) | | | | | | |
|  | General operating support |  | Start-up costs |  | Capital |  |
|  | Project/program support |  | Technical assistance |  | Other (list) |  |

List items needed, with dollar amount and purpose/use of items requested.

**Funding Amounts**

|  |  |
| --- | --- |
| Dollar amount requested: | $ |
| Total annual organization budget: | $ |
| Total project budget (for support other than general operating): | $ |

General Information

Separate sheets with requested information can be attached instead of filling out spaces under each section.

1. Brief summary of organization history, including the date your organization was established. Can provide an attached sheet.
2. Brief summary of organization mission and goals.
3. Brief description of organization’s current programs or activities, including any service statistics and strengths or accomplishments. Please highlight new or different activities, if any, for your organization.

1. Your organization’s relationship with other organizations working with similar missions. What is your organization’s role relative to these organizations?
2. Names of board members.

Please describe your criteria for success. What do you want to happen as a result of your activities? You may find it helpful to describe both immediate and long-term effects.

1. How will you measure these changes?
2. Who will be involved in evaluating this work (staff, board, constituents, community, consultants)?
3. What will you do with your evaluation results?

**Attachments**

Generally the following attachments are required:

1. Finances

1. Most recent financial statement from most recently completed year, audited if available, showing actual expenses. This information should include a balance sheet, a statement of activities (or statement of income and expenses) and functional expenses. Some funders require your most recent Form 990 tax return.
2. Organization budget for current year, including income and expenses.
3. Project Budget, including income and expenses (if not a general operating proposal).
4. Additional funders. List names of corporations and foundations from which you are requesting funds, with dollar amounts, indicating which sources are committed or pending.
5. A copy of your current IRS determination letter (or your fiscal agent’s) indicating tax-exempt 501(c)(3) status.
6. Two completed grant applications that are similar in scope or purpose as the funding request(s) we will prepare.

**Organizational Budget**

This format is optional and can serve as a guide to budgeting. If you already prepare an organization budget that contains this information, please feel free to submit it in its original form. Feel free to attach a budget narrative explaining your numbers if necessary.

### INCOME

|  |  |  |
| --- | --- | --- |
| **Source** |  | **Amount** |
| Support |  |  |
| Government grants |  | $ |
| Foundations |  | $ |
| Corporations |  | $ |
| United Way or other federated campaigns |  | $ |
| Individual contributions |  | $ |
| Fundraising events and products |  | $ |
| Membership income |  | $ |
| In-kind support |  | $ |
| Investment income |  | $ |
|  |  |  |
| Revenue |  |  |
| Government contracts |  | $ |
| Earned income |  | $ |
| Other (specify) |  | $ |
|  |  | $ |
|  |  | $ |
|  |  | $ |
|  |  |  |
| **Total Income** |  | **$** |
|  |  |  |