



Organization Checkup Application

Name of Organization: _____

Address: _____

Phone: _____ Fax: _____

Executive Director: _____

Phone: _____ Email: _____

Eligibility Guidelines:

- The applicant must be a private tax-exempt organization under Sections 501(c)(3) or 501(c)(4) of the Internal Revenue Code. Schools (except those with significant community outreach), municipalities, political, lobbying and religious organizations are ineligible.
- Applying organization must be established as a nonprofit organization for at least one year and is not seeking to dissolve or merge with another agency.
- Must have minimum six-member board, representative of the community, of which a majority is neither employees nor relatives of employees.
- Located in Beacon Falls, Bethlehem, Bridgewater, Cheshire, Goshen, Litchfield, Middlebury, Morris, Naugatuck, New Milford, Oxford, Prospect, Roxbury, Southbury, Thomaston, Warren, Washington, Waterbury, Watertown, Wolcott or Woodbury.
- Organization must primarily serve the residents in the above listed towns.

Please answer the following questions below (text boxes will expand to fit):

1. What is the organization's mission statement?
2. Give a brief history of the organization.
3. Please briefly describe your programs and services and indicate the total number of clients served. What percentage are from our service area?
4. Does the organization have a strategic plan? If so, when was it created/updated?
5. Describe your board of directors (number of directors, committees, board chair name)
6. How many staff are there? List types of positions (ex. Executive Director, Development Director, Finance Director, Program Directors, direct service staff, etc).
7. Annual budget
8. Why are you requesting the assessment and what do you hope to accomplish from it?
9. Does your board agree to participate in an online organizational checkup?

Signatures:

Executive Director _____ Date _____

Board President _____ Date _____