



## Online Application

OCF staff will be available for trouble-shooting if you have questions about the process or hit a snag along the way: 503.227.6846 or [grants@oregoncf.org](mailto:grants@oregoncf.org).

The application questions are organized into eight sections which can be completed over the course of several days or weeks.

Section 1: **Organization Contact Information**

Section 2: **Organization Mission & Structure**

Section 3: **Organization Financials**

Section 4: **Project Summary**

Section 5: **Project Revenue Budget**

Section 6: **Project Expenditure Budget**

Section 7: **Project Narrative**

Section 8: **Documents to Upload**

## Application Questions

The following pages list our application questions. Required fields are in **bold** and directions in *italics*. The first field requests a short name (or phrase) for your project.

### **PROJECT NAME**

*Please enter the name of your project to start the application process (50 characters)*

## SECTION I: ORGANIZATION CONTACT INFORMATION

### **Organization name**

Alternate name/Acronym

### **Employer ID number (EIN)**

Fiscal Sponsor Name

Fiscal Sponsor EIN

### **Mailing Address**

**City**

**County**

**State**

**Zip code**

Website

**Phone**

**Executive director or board chair’s information**

Prefix

**First Name**

**Last Name**

**Title**

**Email**

**SECTION 2: ORGANIZATION MISSION & STRUCTURE**

**Organization mission and primary activities** (500 characters)

**Year organization was established**

**Number of paid employees**

**Number of FTE** (full time equivalent)

**Number of volunteers**

**Number of board members**

**Number of board members who contribute to annual budget**

**Number of board meetings per year**

**Is the mission of your organization intended to benefit the general public or is it intended to reach a specific population group?** (Select one of two options)

- General population means no specific demographic group is targeted and services are open to everyone
- Specific population means one or more specific demographic groups are targeted for services

*If this option is chosen, the following question appears: If your organization does intend to reach a specific population group, please describe the group or groups it intends to reach (1,000 characters)*

**How many unduplicated persons did your organization serve directly last year? (This can be a rough estimation.)**

**How many persons do you expect to serve this year?**

**Counties where services are provided** (You may select multiple options)

**SECTION 3: ORGANIZATION FINANCIALS**

**Financials for the last year and this year:**

*(A fillable table will contain the following columns and rows, and you will enter figures as applicable)*

	<b>Current Year Budget</b>	<b>Current Year Actuals</b>	<b>Previous Year Actuals</b>
<b>Organization Revenues</b>			
<b>Organization Expenditures</b>			
<b>Operating Surplus/Deficit</b>			

**In connection with the above revenue/expenditure figures, please define the time period for “current year” (e.g. 7/1/2015-6/30/2015)**

**In connection with the above revenue/expenditure figures, please define the time period for “previous year” (e.g. 7/1/2015-6/30/2015)**

If your organization finances require additional explanation, or if either the current year or previous year represents an operating shortfall, please explain.

### **Breakdown of organization revenue for last year**

*(A fillable table will contain the following rows, and you will enter figures as applicable)*

- Memberships
- Individual contributions
- Earned income (ticket sales, fees for service, etc.)
- Fundraising benefits
- Corporate/business contributions
- Government support
- Endowment earnings
- Other

If you listed a figure in “Other,” please provide a description of this revenue.

### **Organization’s unrestricted cash reserves at beginning of current year.**

**List five single largest contributors from last year’s revenue sources.** Contributors include individuals, agencies, businesses, foundations, or other groups.

List grant applications to OCF, approved or declined, during the past three years. If grants were approved, please include amounts awarded.

## **SECTION 4: PROJECT SUMMARY**

### ***Project contact person’s information***

- First name**
- Last name**
- Title**
- Phone**
- Email**

**Project description** *(One sentence, 500 characters)*

**Key project components** *(A brief snapshot of your project, including measurable outcomes, 1,000 characters)*

**How many persons will benefit directly from the project?**

**Is the project for which you are requesting funds intended to benefit the general public, or is it intended to reach a specific population group?** *(Select one of two options)*

- General population: no specific demographic group is targeted and services are open to everyone.
- Specific population: one or more specific demographic groups are targeted for services

*If this option is chosen, the following question appears:* If the project is intended to reach a specific population group, please describe which group or groups it is intended to reach. *(1,000 characters)*

**In which counties will services be provided through this project?**

**Total project budget**

**Total amount requested**

## SECTION 5: PROJECT REVENUE BUDGET

**Please list all proposed sources of funding.** You may include the value of in-kind support. Please indicate whether or not the funding has been secured. *(A fillable table will be made available, allowing you to enter specific revenue lines for your project, including the amount requested of OCF)*

If your project revenues require additional explanation, please offer it here. *(750 characters)*

## SECTION 6: PROJECT EXPENDITURE BUDGET

**Please list all budgeted expenditures.** Project expenses listed here should correlate to project activities. *(A fillable table will be available, allowing you to enter specific expenditure lines for your project)*

**Describe how OCF funds would be allocated for the project.** *(750 characters)*

If your project expenses require additional explanation, please offer it here. *(750 characters)*

## SECTION 7: PROJECT NARRATIVE QUESTIONS

### New Projects

**Is this application for a project that is: new or previous recipient?** *(Select one of two options)*

**What funding priority does this project address?** *(select one of six from drop-down menu)*

**Tell us about your organization.** What are your mission and track record? Highlight two or three key facts and accomplishments that best define your organization.

**Tell us about your project.** What exactly are you proposing to do? Whom will you serve? What are your goals?

**How will you do it? When and with whom?** What are the specific activities for which you are seeking funding? How long will they take? If your project involves partnerships with other organizations, have the proposed partners agreed to participate?

**What community need does your project address?** Please cite current local statistics, if possible.

**OCF's mission is to improve the lives of all Oregonians. If your project focuses on a population that experiences disparities in education, health, income or other areas due to geography, ethnicity, gender, sexual orientation or another factor, please explain.** And tell us about any systemic barriers to be considered. *[We recognize that this question is not applicable to all projects. If that is the case, please offer a brief note and move to the next question.]*

**How will your expertise, partnerships or community connections help you reach the populations to be served?** How has the population to be served been involved in the development of your strategy?

**Describe your organization's use of and/or awareness of "best practices" or "promising practices" in your field.**

**Who is responsible for your project?** Briefly describe your project leaders and the role that each will play in the project. How do these leaders reflect the population or community that you serve?

**How will you measure results?** What will success look like? How will you measure or document project success or impact? Please outline your evaluation plan.

**How will you sustain the proposed activities or build on what you achieved?** Please describe your plan for securing the financial, human and in-kind resources needed to sustain or build on project achievements, should future OCF-Walker funding not be available.

## Previously Funded Projects

**What funding priority does this project address?** (select one of six from drop-down menu)

**For how many years has this project received support from the OCF Walker Fund?**

**Tell us about your organization.** Remind us of your mission and track record. Highlight two or three key facts and accomplishments that best define you.

**Please restate the goal(s) of your project and the proposed use of funding from OCF – from your original application.** We are interested in seeing a thumbnail sketch of the project – the community problem being addressed, and/or the organizational capacity being built. Please include information about the population you are serving, and any collaborations or partnerships involved.

**Please describe your activities and results over the past year.** What did you do and what were the results?

**If your project has already received multiple years of OCF-Walker funding, please describe your results to date.** Refer back to the measurements you outlined in your original application. Has the measurement changed? What has been the project's impact so far on the people you serve and on your organization? Please be concrete.

**Sometimes the impact of your project is not easy to communicate via measurable results, so please share with us a story that illustrates the impact of your project so far.**

**Has your project changed since you first applied for OCF-Walker funding?** What has worked particularly well or not worked? We recognize that circumstances may have required you to make some adjustments to your project. If so, please tell us about the changes and what led to them. Or, given what you have learned since implementation, is there something you wished you had done differently?

**What are your planned goals and activities for the coming year?**

**How will you sustain the proposed activities or build on what you achieved?** Please describe your plan for securing the financial, human and in-kind resources needed to sustain or build on project achievements, should future OCF-Walker funding not be available.

## SECTION 8: DOCUMENTS TO UPLOAD BEFORE SUBMITTING YOUR APPLICATION

- **501(c)3 letter from the IRS**
- **Board of directors list**, including contact information, affiliations, and the expertise each contributes
- **Project Budget Detail for current year with income and expenses**
- **Organization budget detail for current year**
- **Organization actuals and balance sheet for past year**
- **For organizations with an annual budget of 1 million or more, the most recent audit.** Please indicate how often the organization has an audit
- **Additional Documentation:** Letter of support, photo, etc. (optional)