



# Community Investment Program Application

Application Must Be Typed

Grant # \_\_\_\_\_

Grant Amount Requested: \$ \_\_\_\_\_

Date: \_\_\_\_\_

Specific Purpose For Grant: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Contact Person: Mr./Mrs./Ms. \_\_\_\_\_ Title: \_\_\_\_\_ Phone: \_\_\_\_\_

### Is your organization...

A Federal Tax exempt 501 c3 or equivalent org? Yes \_\_\_\_\_

Employer Identification No. (9 digits) \_\_\_\_\_

Affiliated with a national organization? Yes \_\_\_\_\_ No \_\_\_\_\_

(If yes, amount remitted to national) \$ \_\_\_\_\_

A recipient of Federal, State or local government funding? Yes \_\_\_\_\_ No \_\_\_\_\_

A United Way agency? Yes \_\_\_\_\_ No \_\_\_\_\_

A tax supported entity? Yes \_\_\_\_\_ No \_\_\_\_\_

A government agency? Yes \_\_\_\_\_ No \_\_\_\_\_

A taxing authority? Yes \_\_\_\_\_ No \_\_\_\_\_

### Type of Funding Requested:

Program Specific \_\_\_\_\_

Other \_\_\_\_\_

Special Event or Sponsorship \_\_\_\_\_

Date of Event (if applicable) \_\_\_\_\_

Location of Event \_\_\_\_\_

### Category of Application:

Educational \_\_\_\_\_ Community Support \_\_\_\_\_

Environmental \_\_\_\_\_ Arts & Culture \_\_\_\_\_

Civics \_\_\_\_\_

Other (Specify) \_\_\_\_\_

### Budget Information for Program/Project for Which Funding is Requested:

a. Funds raised to date \_\_\_\_\_

b. Total funds needed to complete project \_\_\_\_\_

c. Total Program/Project Costs (a+b) \_\_\_\_\_

Is administrative and clerical staff paid? Yes \_\_\_\_\_ No \_\_\_\_\_

Number of volunteers: \_\_\_\_\_

Has a 501(c)(3) Federal tax exemption letter or its equivalent been attached and the organizations W-9 form or Page 1 of 990? Yes \_\_\_\_\_

**Has a separate, detailed budget for this program been attached? If not, grant will be automatically denied.** Yes \_\_\_\_\_

### Organization's Annual Budget Information:

#### Expenses

a. Management/Admin Expenses \_\_\_\_\_

b. Fund Raising \_\_\_\_\_

c. Program Services \_\_\_\_\_

d. Other (Please specify) \_\_\_\_\_

**e. Total Expenses (a+b+c+d)** \_\_\_\_\_

#### Revenues

f. United Way \_\_\_\_\_

g. Government Support (Explain) \_\_\_\_\_

h. Tax Funding \_\_\_\_\_

i. Fund Raising \_\_\_\_\_

j. Other (Please specify) \_\_\_\_\_

**k. Total Revenue (f+g+h+i+j)** \_\_\_\_\_

**Operating Surplus/Deficit (K-E)** \_\_\_\_\_

#### Net Assets

(Fund Balance or surplus a beginning of the year) \_\_\_\_\_

Restricted Funding (must explain) \_\_\_\_\_

Unrestricted Funding (must explain) \_\_\_\_\_

The undersigned agrees that the following conditions will be met if a grant is awarded:

The grant must be used for the purpose stated in the grant award letter and is considered to be restricted to use for that purpose. The grant must be used in a 12 month period from the receipt of the funding: failure to use grant will be subject to return of monies. The grant must be spent within the Orange & Rockland service territory. After the program/project for which you receive the grant for has been completed, copies of related bills, press releases, receipts and any promotional materials recognizing Orange & Rockland's contribution must be forwarded to the Committee.

Note: All items requested, along with program budget, must be attached.

Officer's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Officer's Title: \_\_\_\_\_

Please attach a copy of the letter from the Internal Revenue Service confirming your organization's status as a Federal tax exempt 501(c)(3) or equivalent entity, Page 1 of the Organization's 990 Form and W-9 Form.

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### O&R Use Only

#### Type of Grant

Educational: \_\_\_\_\_

Comm. Support: \_\_\_\_\_

Environmental: \_\_\_\_\_

Arts & Culture: \_\_\_\_\_

Civics: \_\_\_\_\_

Other (Specify): \_\_\_\_\_

Amount Approved: \_\_\_\_\_

Date: \_\_\_\_\_

Chairperson's Signature: \_\_\_\_\_

Follow-up by: \_\_\_\_\_

Please attach typed responses on a separate sheet to each of the following questions using the titles on each of the categories. All items must be answered.

1. Provide your organization's mission statement (MISSION STATEMENT)
2. Describe in detail the program/project and specific purpose for which you are requesting funding. Describe the need for and the benefits of this program/project. (PROJECT/BUDGET DESCRIPTION)  
**(Include Budget – If not included grant will be denied)**
3. Describe the past history of the program (if any). (PROGRAM HISTORY)
4. Explain your organization's restricted and unrestricted funds.
5. Describe how you will evaluate the program/project at its conclusion. (PROGRAM EVALUATION)
6. Describe how you plan to promote/advertise your program/project. (PROMOTION)
7. Describe how O&R will be recognized for supporting your program or project. (RECOGNITION)
8. Describe the population served (i.e. elderly, youth, etc.) by the program, and the geographic areas in which they reside for which funding is requested. How many people has this served in the last five years? Also detail the anticipated number of people to be served by this year's grant request. (POPULATION SERVED)
9. Provide a list of the Board of Directors, their business affiliation, if any, and their county of residence. (BOARD OF DIRECTORS)
10. List the past history of contributions from Orange & Rockland (include the program/project, year and amount). (PAST O&R CONTRIBUTIONS)
11. List any other contributors to this program (include donor name, amount and year). (OTHER CONTRIBUTORS)
12. Will the funds requested from O&R be matched by another funding source? If so, include matching organization's name. (MATCHING FUNDS)