



Advisor Request Form

We provide advisors to selected nonprofit organizations free of charge. Our advisors have extensive experience in for-profit and nonprofit management. Skilled in facilitation, coaching and best practices for nonprofit organizations, they can help you plan and implement changes to make your organization more efficient and effective. Use this form to apply for an advisor for your organization.

Organization: _____

Address: _____

Phone: _____

Executive Director: _____

Phone: _____ **Email:** _____

Board President: _____

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, municipalities, political, lobbying and religious organizations are ineligible.
- The applying organization must be established as a nonprofit for at least one year and cannot be seeking to dissolve or merge with another agency.
- The organization's board of directors must have a minimum of six members who are representative of the community. The majority of the board can neither be employees nor employees' relatives.
- Organization located in our 21-town service area and serve residents of these towns are eligible: Beacon Falls, Bethlehem, Bridgewater, Cheshire, Goshen, Litchfield, Middlebury, Morris, Naugatuck, New Milford, Oxford, Prospect, Roxbury, Southbury, Thomaston, Warren, Washington, Waterbury, Watertown, Wolcott or Woodbury.

Please answer the following questions:

1. What is your organization's mission statement?

2. Give a brief history of your organization. (Year founded, major accomplishments, etc.)

3. Briefly describe your programs and services and indicate the total number of clients served. What percentages are from our 21-town service area? (View our towns served at www.conncf.org/our-story/towns-served/)

4. Does your organization have a strategic plan? If so, when was it created or updated?

5. Describe your board of directors (number of directors, committees).

6. How many staff members does the organization have? List types of positions (ex. Executive Director, Development Director, Program Directors, direct service staff, etc.).

7. What is your annual budget for the current and past two years?

8. What has been working well with your organization over the past year?

9. Why are you requesting the assistance of an NAI Advisor and what do you hope to accomplish from it?

10. Has this request for assistance been reviewed and approved by the board?

Please sign and date this form and return it to Patrick McKenna electronically at pmckenna@connctf.org. You may also send a print copy to the Connecticut Community Foundation, c/o Patrick McKenna, 43 Field Street, Waterbury, CT 06702.

Executive Director _____ Date _____

Board President _____ Date _____