

* CODA CONSULTING * APPLICATION *

Contact Information

Full Legal Organization Name

Street Address

City

State

Zip Code

Phone

Website URL

Organization Leader Name

Title

Best Phone Number

E-Mail Address

Contact Person

(if different from above,
authorized to set up initial
communications)

Title

Best Phone Number

E-Mail Address

Potential Project Lead

Title

**Potential Board Member
Project Advisor**

Title

Organization Information

501(c)(3)?

Yes

No

Year Established

**Total Organization Annual
Budget**

Total # of Board Members

Total # of Staff

Total # of Volunteers

**Organization Mission or Service
Statement**

**Brief Description of
Organization**

Population Served

(include age groups, race &
ethnicity, income levels, etc.)

Financial Information (checklist for required attachments)

Most recent financial statements

Last Form 990 Filing

**Current budget and if available,
budget for next fiscal year**

**Narrative information re
financial state and projected
financial outlook**

Consulting Program Request and Goals

**High-priority reason(s) for
seeking CODA Consulting
Services**

Nature of identified challenge or opportunity
(indicate relationship to your mission and strategic goals)

Desired outcome(s) of working with CODA

How will you measure success?

What additional information will help us understand your organization and its current needs?

Resources and Support Checklist

Ability to cover nominal administrative fee and create working budget for direct costs of consulting program.

Yes

No

Notes:

The Board of Directors supports this initiative and is willing to share relevant assessment info.

Yes

No

Notes:

Senior Leadership supports and is willing to fully participate in this initiative.

Yes

No

Notes:

Staff will be given the support and time to fully participate in the initiative.

Yes

No

Notes:

The organization is willing to consider sharing positive outcomes of the initiative for the benefit of other potential client organizations.

Yes
No

Notes:

Onsite meeting facilities are available.

Yes
No

Notes:

Preferred start/end dates or other timing considerations: