

# THE RETIREMENT RESEARCH FOUNDATION

## Organizational Capacity Building (OCB) Program Flexible OCB Fund Application

Applications are accepted on a rolling basis throughout the year. Generally, funding decisions are made within four to six weeks. Please complete this form, print it, and attach it with a copy of your organization's IRS tax determination letter. Send the materials via mail (8765 West Higgins Road, Suite 430, Chicago IL 60631), fax (773/714-8089), or email ([info@rrf.org](mailto:info@rrf.org)). If you have questions, feel free to contact us at 773/714-8080 or [info@rrf.org](mailto:info@rrf.org). Thank you.

### I. Organization Information:

Name of Organization:

Address:

City:

State:

Zip:

Phone:

Website Address:

Year Incorporated:

Fiscal Year Begins:

Employer ID Number (EIN):

Number of Full Time Equivalent Staff:

Number of Volunteers:

Mission:

Total number of clients served:

Total number of clients age 65 or older served:

Annual Budget of organization: \$

Percentage and dollar amount of annual budget for older adult programs: % \$

Describe any recent or expected leadership changes (e.g., new CEO, interim management):

Number of Board members:

Number of times/year Board meets:

Total contributed by Board in past fiscal year: \$

Number of Board members that contributed:

Organization has current Strategic Plan? Yes No Date completed:

Organization has current Fundraising Plan? Yes No Date completed:

### Eligibility for OCB Program

Applicant is a nonprofit organization, and not a unit of government: Yes No

Located in one of the following Illinois counties: Cook DuPage Kane Kendall Lake McHenry

### Overview of Financial Support

Percentage of support from the following sources:

Government Individuals Foundations/Corporations Fees Other (specify)

List the top three (non-governmental) financial contributions received in the past fiscal year:

Example: ABC Foundation \$25,000/one year 12/16/2013

## **II. Select Which Category of Flexible Funds You Seek:**

### **OCB Readiness Assessment**

Attach a brief paragraph describing why you are interested in the OCB Readiness Assessment and how you believe it will help your organization. *For example, is your organization facing a specific capacity-building challenge? Do you want support to prioritize capacity-building opportunities or determine which area to tackle first? Is this a significant time in your organization's development?*

### **OCB Targeted Consultation**

Attach a brief paragraph describing the type of targeted consultation you seek. Describe why you are interested in this opportunity and how it will help your organization. *For example, are there emerging issues within your organization that require a particular type of expertise? Have there been unanticipated changes in your personnel, board, revenue streams, or other areas of organizational functioning that you need assistance addressing?*

### **Check the appropriate box:**

I would like assistance identifying resources for a targeted consultation. Please send information to me about technical assistance providers I may consider.

I have already identified a technical assistance provider I plan to use, which was identified by RRF.  
The provider I have chosen to work with is:

I have already identified a technical assistance provider I plan to use, which was identified independently.  
The provider I have chosen to work with is: *Please attach a profile of the technical assistance provider/consultant you have identified and a description of the services that will be provided for your organization.*

### **CEO Contact Information:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Check here if you would like to be added to RRF email group.**

\_\_\_\_\_  
Signature of CEO                      Date                      Signature of Board President/Chair                      Date

\_\_\_\_\_  
Name of CEO above (print)                      Name of President above (print)

\_\_\_\_\_  
Title of CEO above

How did you find out about this funding opportunity?