



**Self-Assessment Form for Non-Profit Organizations  
Technical Assistance in Microenterprise  
Ohio CDC Association**

Please complete this form and return it to Amy J. Rosenthal, Ohio CDC Association, 33 North Third Street, Suite 200, Columbus, Ohio 43215. You can also fax the form to OCDCA at (614) 461-1011 or email form to [arosenthal@ohiocdc.org](mailto:arosenthal@ohiocdc.org). Please email or mail any attachments.

This form was completed on \_\_\_\_\_ (provide date)

Name of individual completing form \_\_\_\_\_

**Basic Information about your Not-for-Profit Organization**

Name of Organization \_\_\_\_\_

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

City, State, Zip Code \_\_\_\_\_

Telephone, Fax, e-mail \_\_\_\_\_

Contact Person and Title for Purpose of Request \_\_\_\_\_

Person Authorized to sign Contracts \_\_\_\_\_

**I. Self-Assessment**

1. Date of Incorporation: \_\_\_\_\_

2. Year that 501(c) (3) was received \_\_\_\_\_

*Please provide a history of your organization. Please attach the information to this form*

3. Is microenterprise or entrepreneurship part of your organization's mission statement?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

*Attach a copy of your organization's mission statement.*

4. Is Microenterprise part of your purposes in your Articles of Incorporation?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

5. Are Microenterprise activities mentioned in your bylaws or code of Regulation?  
\_\_\_\_\_ Yes \_\_\_\_\_ No

6. Size of Organization's operating budget \$ \_\_\_\_\_
7. Total number of staff in agency \_\_\_\_\_
8. Size of Microenterprise program budget if applicable \_\_\_\_\_
9. Number of staff in Microenterprise program if applicable \_\_\_\_\_  
Please list their names and titles below: (If you are creating a program, please list the individuals who will be involved in the program) Attach resumes of key staff.
12. Please provide the following information about your Board of Trustees.
1. How many board members do you have?
  2. How many are low income (80% of area median and below)
  3. How often does the board meet?
  4. When was your last meeting?
  5. How are board members selected?
  6. Please provide a list of board members. Please note low-income board members.
13. How often is your organization audited?
14. Date of most recent audit \_\_\_\_\_

Please attach a copy of your most recent audited financial statement.

15. Please list some of the strengths of your organization with reference to your activities in Microenterprise.
16. Please list some areas of weakness or in need of improvement in your organization with reference to your activities in Microenterprise.

## **II. Microenterprise Program Experience**

1. If you have a microenterprise program, please provide a description. If you plan to start a program, please indicate the steps you have taken to plan and design your microenterprise program, including microloan component. Name of Project or Program:
2. Target population for your program (please describe):
3. Private and Public sector partners in the program in and outside of the community (Please list)

**List of Attachments Needed:**

- Copy of Mission Statement, Articles of Incorporation and Bylaws
- History of the organization
- List of Board Members
- Most recent audited financial statement
- Resumes of key CED and/or Microenterprise staff
- Recent newsletter, brochure, annual report, etc.
- Technical Assistance Description: A letter that requests technical assistance and specifically describes the type(s) of assistance needed. This letter should not be more than one page. Explain how the assistance would contribute to a microenterprise project and who would benefit from the assistance. The request must be on your organization's letterhead and signed by your executive director or other appropriate supervisor. If there is a specific consultant you would like, please request them by name in this letter. Although final consultant selection will depend upon the consultant's schedule, geographic concerns, and the consultant's expertise relative to your technical assistance need, efforts will be made to pair you with the consultant you seek.