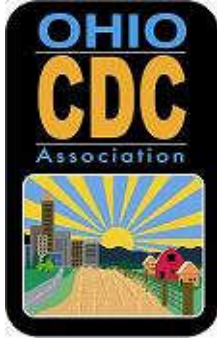


**Self-Assessment Form
Technical Assistance
Community Economic Development (CED)
Ohio CDC Association**



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. 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 Community Economic Development is part of your organization's mission statement? Yes No

Attach a copy of your organization's mission statement.

4. Is Community Economic Development or Microenterprise part of your purposes in your Articles of Incorporation? Yes No

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5. Are CED activities mentioned in your bylaws or Code of Regulations?

Yes No

6. Size of Organization's operating budget

7. Total number of staff in agency

8. Size of CED budget if CED TA request:

9. Number of staff in CED activities

Please list their names and titles below. If you are developing CED activities for the first time, please list the individuals who will be involved in the activities. Attach resumes of key staff

10. 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 with information about their professions, backgrounds or who they represent. Please note low-income board members.

11. How often is your organization audited?

12. 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 CED .

16. Please list some areas of weakness or in need of improvement in your organization with reference to your activities in CED.

II. Community Economic Development Experience

Please describe your current and past community economic development projects. Please provide additional pages if more than one project or program must be described. If you do not have a completed CED project, skip this section.

1. Name of Project or Program:

2. Location:

3. Type of Project or Program:

_____ Commercial Real Estate Development	_____ Business Networks
_____ Sectoral Development	_____ Microenterprise Program
_____ Non-For-Profit owned Business	_____ Small business Incubator
_____ Business retention/expansion	_____ Other _____
_____ Workforce Development	_____ Other _____

4. Target population for Project/Program (please describe):

5. Private and Public sector partners in the project/program in and outside of the community (Please list)

6. Please describe the project or program. Is/Was it successful? How did you evaluate the success of the project or program?

7. Funding sources (please name specific programs or sources)

Federal grant or loan	The Finance Fund
Other city or county funding	Ohio Dept. of Development
Financial Institutions	Foundations (names and purpose)
Ohio Dept. of Human Services	Religious funding
CDBG	Other _____
	Other _____

III. Request for Assistance

Please indicate your organization's need for TA in any of the following areas, which are applicable. In the space provided, explain how the assistance would contribute to a successful project/program and who would benefit from the assistance. (check areas of need and complete information requested)

A. _____ Community Economic Development strategic planning

Identify staff and any others (such as board members) who would participate in the technical assistance.

How would this assistance contribute to the development of a community development project or program by your agency?

B. _____ Commercial real estate development (describe)

Identify staff and any others who would participate in the technical assistance.

How would this assistance contribute to the development of a community economic development project or program by your agency?

C. _____ Business retention and Expansion Program (please describe)

Identify staff and any others who would participate in the technical assistance.

How would this assistance contribute to the development of a community economic development project or program by your agency?

D. _____ Workforce Development Strategies (please describe)

Identify staff and any others who would participate in the technical assistance.

How would this assistance contribute to the development of a community economic development project or program by your agency?

E. _____ Other project or Program (describe)

Identify staff and others who would participate in the technical assistance.

How would this assistance contribute to the development project or program by your agency?

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List of Attachments Needed:

- Copy of Mission Statement, Articles of Incorporation and Bylaws
- History of the organization
- History and background of your CED project
- List of Board Members
- Most recent audited financial statement
- Resumes of key CED staff
- Written CED strategy or relevant portions of strategic plan
- 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 community economic development 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.