

# Community Economic Development Law Project

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## NONPROFIT LEGAL ASSESSMENT INTAKE FORM

A legal assessment is a comprehensive review of your organization's legal documents, including its Articles of Incorporation, bylaws, leases, contracts, personnel policies and insurance policies. To begin the legal assessment, complete this form and return it to CEDLP. If you don't know or can't find the answer to a question or are unable to locate the information, please indicate that in your response. **There are no wrong answers.** If you have questions about this form or the program, call or email Jody Adler, the program director. Upon receipt, Jody will review the information and contact you to discuss the next steps.

### Fee Schedule

The CEDLP requires an application fee in order to process your request. The fee schedule is as follows:

Organizations with budgets	\$0 - \$500,000.....	\$100.00
Organizations with budgets	\$501,000 - \$1 million.....	\$250.00
Organizations with budgets	Over \$1 million dollars.....	\$500.00

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### PART I. GENERAL INFORMATION

#### Organization

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Website: \_\_\_\_\_ Email: \_\_\_\_\_

#### Staff Contact

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

### Board Contact

Name: \_\_\_\_\_ Board Role: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

### PART II. STATISTICAL INFORMATION

CEDLP is a not-for-profit service organization that is dependent on funding from government, corporate and private sources. Without this support, the CEDLP would not be able to provide you with legal advice and representation. To apply for funding, we must supply statistics on our clients.

Does your organization specifically service one or more of the following constituencies?

Native American \_\_\_\_ African American \_\_\_\_ Latino/Hispanic \_\_\_\_ Asian \_\_\_\_ White \_\_\_\_  
Disabled \_\_\_\_ Women \_\_\_\_ Homeless \_\_\_\_ Unemployed \_\_\_\_ Elderly \_\_\_\_  
Gender/Sexual Orientation \_\_\_\_\_ Other \_\_\_\_\_

Does your organization specifically service one or more of the following age groups?

Under 18 \_\_\_\_ 60 & Over \_\_\_\_

Does the organization's work focus on a specific neighborhood or community? Identify the community (ies) \_\_\_\_\_

### PART III. DOCUMENT REQUEST

Submit the following documents. If you are unfamiliar with any of them, cannot find them or are unsure if they exist, please let us know. This will not jeopardize the intake process. If you prefer, you can email the documents with a copy of the application to [jadler@cedlp.org](mailto:jadler@cedlp.org).

#### A. Organization (The person who does proposal writing in your office may know what or where these documents are.)

1. Articles of Incorporation and any amendments	copy provided <input type="checkbox"/>	Can't locate <input type="checkbox"/>
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2. Bylaws and any amendments	copy provided <input type="checkbox"/>	Can't locate <input type="checkbox"/>
3. Tax exemption application (1023) and determination letter from the IRS	copy provided <input type="checkbox"/>	Can't locate <input type="checkbox"/>

**B. Employment (If there is an human resources person or department, they will have these documents. If not, the executive director should know where they are. )**

1. Personnel policy or employment policy, if there is one.	copy provided <input type="checkbox"/>	Can't locate <input type="checkbox"/>	May not exist <input type="checkbox"/>
2. Corporate structure chart showing number of employees and independent contractors.	copy provided <input type="checkbox"/>	Can't locate <input type="checkbox"/>	May not exist <input type="checkbox"/>

**C. Board of Directors (The executive director, the president or secretary of the board should know where these documents are.)**

1. List of all current board members, with addresses, email and phone	copy provided <input type="checkbox"/>	Can't locate <input type="checkbox"/>	May not exist <input type="checkbox"/>
2. Conflict of interest policy, if there is one.	copy provided <input type="checkbox"/>	Can't locate <input type="checkbox"/>	May not exist <input type="checkbox"/>

**PART IV. ORGANIZATION SPECIFICS**

A. Mission and Main Activities of Organization - Attach a statement of the organization's mission and its main activities or printed material that includes its mission and main activities or the link to the online location of this information.

B. If there is an attorney(s) who has worked with the organization in the past that you would like us to contact assist with this project, please list their name (s): \_\_\_\_\_

\_\_\_\_\_

C. In addition to general legal assistance, is there a specific legal issue that needs to be addressed? \_\_\_ leases \_\_\_ contracts \_\_\_ employment \_\_\_ intellectual property \_\_\_ governance (board issues) \_\_\_ compliance with tax exemption matters \_\_\_ fiscal \_\_\_ other (attach a statement of the issues).

BY SIGNING THIS FORM YOU ARE AGREEING THAT THE INFORMATION YOU PROVIDED AND WILL PROVIDE TO CEDLP MAY BE DISCLOSED TO ATTORNEY/VOLUNTEERS, LAW FIRMS AND LEGAL DEPARTMENTS AT CORPORATIONS IN OUR EFFORTS TO RECRUIT PRO BONO ASSISTANCE FOR YOUR ORGANIZATION. THIS INFORMATION IS SUBJECT TO ATTORNEY-CLIENT PRIVELEGE. ALSO YOU AGREE THAT CEDLP MAY DISCLOSE THE ORGANIZATION'S NAME TO OUR FUNDERS. WE WILL NOT SHARE THE NATURE OF YOUR REQUEST.

SIGNATURE: \_\_\_\_\_

TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_

**RETURN TO: CEDLP, 100 N. LaSalle Street, Suite 600, Chicago, Illinois, 60602. If you submit this form and attachments electronically, please submit the application fee via mail.**