**NON-PROFIT/ UNINCORPORATED ASSOCIATION INTAKE FORM**

TakeRoot Justice supports the work of grassroots and community-based groups to dismantle racial, economic, and social oppression. We provide legal assistance to not-for-profit corporations and unincorporated associations that (i) are unable to pay market rates for legal services, (ii) are aligned with our mission and (iii) work with other grassroots and community-based organizations. We strive to serve as many organizations as possible, but, unfortunately, we cannot meet all of the requests for our services. This form helps us learn more about your organization so that we can determine what next steps to take. Please feel free to fill out the information as little or as much as you like as well as add any information that you believe is important but may be missing a field. We would like to get the fullest picture possible of your organization, your lived experiences, and how our work can support you.

|  |  |
| --- | --- |
| Organization Name | Click here to enter text. |
| Organization Address | Click here to enter text. |
| Organization Phone Number | Click here to enter text. |
| Organization Email Address | Click here to enter text. |
| Organization Website | Click here to enter text. |
|  |  |
| Contact Person | Click here to enter text. |
| Contact Person Title/Role | Click here to enter text. |
| Contact Address (if different from Business Address) | Click here to enter text. |
| Contact Phone Number (if different from Business Phone) | Click here to enter text. |
| Contact E-mail (if different from Business Email Address) | Click here to enter text. |
|  |  |
| Referred by | Click here to enter text. |
| If you’ve worked with TakeRoot (or CDP) before, name of organization to which we provided our services | Click here to enter text. |
| Race/Ethnicity of Organizer(s) (optional) | Click here to enter text. |
| Gender of Organizer(s) (optional) | Click here to enter text. |
| Date of Intake | Click here to enter text. |

1. Please describe the legal issues that the organization is experiencing now or you believe will require the support of TakeRoot Justice.

Click here to enter text.

1. Are there any time deadlines we should know about? What are they?

Click here to enter text.

1. Have you worked, or are you working, with a lawyer already? Please identify the lawyer and explain any experiences with them. If the lawyer is no longer working with you, please explain why not.

Click here to enter text.

1. Do any of the officers or directors have a **total annual household income** (see definitions below) that exceeds **250%** of the federal poverty guidelines (see [here](https://familiesusa.org/product/federal-poverty-guidelines) to determine amounts based on household size)?
   1. **Household income** is income from all sources including earned income, social security, SSI, SSD, survivor’s benefits, pension, retirement funds, employment benefits, workers’ compensation, business income, child support payments, alimony payments, foster care payments, armed forces income, and any other income in the home.
   2. **Household includes** head of household, as well as any person who is claimed as a dependent when filing year-end tax forms. A dependent is usually a relative and financially dependent on the head of household.

Click here to enter text.

1. Please tell us more about the organization:
   1. What is/will be the mission of the organization?

Click here to enter text.

* 1. What are the current/planned activities of the organization?

Click here to enter text.

* 1. What community does or will it serve?

Click here to enter text.

* 1. How long has the organization been running?

Click here to enter text.

* 1. Where is it located (neighborhood/borough)?

Click here to enter text.

* 1. Where do you provide your products/services (city-wide/borough)?

Click here to enter text.

* 1. What is the organization’s current/anticipated budget?

Click here to enter text.

* 1. Is the anticipated budget for the next three years under $50,000 annually?

Click here to enter text.

* 1. What are the current/anticipated sources of funding?

Click here to enter text.

* 1. Who are/will be the directors of the organization, if any? What is their experience in the organization?

Click here to enter text.

* 1. How familiar are the directors with the obligations that they will have as directors of a non-profit with 501(c)(3) status?

Click here to enter text.

* 1. Attach any brochures, fliers or other materials you have.

Click here to enter text.

1. Is the organization:
2. Incorporated?  Yes  No
3. Does it have federal tax-exempt status?  Yes  No
4. If yes, in what state? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. If it is just starting, what steps have been take to create the organization?

Click here to enter text.

1. Does the organization have employees? How many?

Click here to enter text.

1. If you have them, please include the following:

Incorporation/LLC formation documents

Bylaws

Exemption letters from the IRS

Most recent financial statement

Budget for the upcoming year

1. Please provide any other information that you deem is relevant to your matter, your request, or to the intake process but was not specifically requested above.

Click here to enter text.