



## Grants Office Information Collection Tool

### Research request process:

- ◆ Fill-out the Information Collection Tool or online form as thoroughly as possible. The more complete and comprehensive information you can provide, the more targeted the research will be.
- ◆ Within one week of your request, a Grants Development Consultant (GDC) will send you a research report cataloging the funding opportunities available to the client.
- ◆ Review the research and share it with your client.
- ◆ Schedule a conference call with your client and the GDC to review the funding opportunities outlined in the research report and to discuss the client’s project in greater depth, as well as the next steps in the grantseeking plan.

### Helpdesk requests can be submitted via:

- ◆ **UPstream™** - You may submit the request online at [www.grantsoffice.com/aboutus/helpdeskRequest.aspx](http://www.grantsoffice.com/aboutus/helpdeskRequest.aspx). If you do not have an UPstream™ account, or if you have a question concerning your account, please contact Bethany Butler at [bbutler@grantsoffice.com](mailto:bbutler@grantsoffice.com).
- ◆ **Email** - You may submit your research request via email to the Grants Office Help Desk at [helpdesk@grantsoffice.com](mailto:helpdesk@grantsoffice.com).
- ◆ **Hard copy** - A copy may be faxed to (585) 473-1436 or mailed to 69 Cascade Drive, Suite 102, Rochester, NY 14614.

Please contact the Helpdesk with any questions at (585) 473-1430, Option 2.

<b>Intel Representative Contact</b> *REQUIRED – an incorrect Intel contact may delay research	
Name	
Phone	
E-mail	
<b>Customer Information</b>	
Customer Organization	
Executive contact name & title	
Executive contact email	
Address	
City, state, & zip code	
County	
Phone	
Fax	
Web address	
Estimated project cost	
Does the project have the approval of the customer’s lead executive? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is the customer currently seeking or approved for funding for this or a similar project? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Does the customer employ a grant writer? <input type="checkbox"/> Yes <input type="checkbox"/> No	

## **Project Overview**

**Why is the customer seeking grant funding? What problems does the customer hope to address?**

**Please list in order and briefly describe their top three priorities.**

**How does the customer intend to use the grant funding to achieve this goal(s)?  
(i.e. brief project description, actions to be taken, products to be secured)**