

## PROSPECT WORKSHEET

|  |                                    |                                   |
|--|------------------------------------|-----------------------------------|
| <b>Date:</b>   |                                    |                                   |
| <b>Basic Information</b>                                   |                                    |                                   |
| Name   |                                    |                                   |
| Address  |                                    |                                   |
| Contact Person   |                                    |                                   |
| <b>Financial Data</b>                                      |                                    |                                   |
| Total Assets   |                                    |                                   |
| Total Grants Paid  |                                    |                                   |
| Grant Ranges/Amount Needed                                 |                                    |                                   |
| Period of Funding/Project                                  |                                    |                                   |
| <b>Is Funder a Good Match?</b>                             | <b>Funder</b>                      | <b>Your Organization</b>          |
| Subject Focus<br>(list in order of importance)             | 1.                                 | 1.                                |
|  | 2.                                 | 2.                                |
|  | 3.                                 | 3.                                |
| Geographic Limits  |                                    |                                   |
| Type(s) of Support   |                                    |                                   |
| Population(s) Served                                       |                                    |                                   |
| Type(s) of Recipients                                      |                                    |                                   |
| People (Officers, Donors, Trustees, Staff)                 |                                    |                                   |
| <b>Application Information</b>                             |                                    |                                   |
| Does the funder have printed guidelines/application forms? |                                    |                                   |
| Initial Approach (letter of inquiry, formal proposal)      |                                    |                                   |
| Deadline(s)  |                                    |                                   |
| Board Meeting Date(s)                                      |                                    |                                   |
| <b>Sources of Above Information</b>                        |                                    |                                   |
| <input type="checkbox"/> 990-PF -- Year:                   | <input type="checkbox"/> Requested | <input type="checkbox"/> Received |
| <input type="checkbox"/> Annual Report -- Year:            | <input type="checkbox"/> Requested | <input type="checkbox"/> Received |
| <input type="checkbox"/> Directories/grant indexes         |                                    |                                   |
| <input type="checkbox"/> Grantmaker Web site               |                                    |                                   |
| <b>Notes:</b>  |                                    |                                   |
|  |                                    |                                   |
| <b>Follow-up:</b>  |                                    |                                   |
|  |                                    |                                   |