



## Grantseeking Basics

# 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 (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>		