

FUNDER PROFILE



FUNDER: _____

ADDRESS: _____

WEBSITE: _____

CONTACT: _____ TITLE: _____

EMAIL: _____ PHONE: _____

AVG GRANT AWARD: _____ MAX GRANT AWARD: _____

MISSION/AREAS OF INTEREST

ELIGIBILITY REQUIREMENTS

DEADLINE(S)

COMMUNICATION NOTES

DATE	CONTACT METHOD	PERSON CONTACTED
PURPOSE OF CONTACT		
RESULTS/OUTCOME		
NEXT STEPS		

DATE	CONTACT METHOD	PERSON CONTACTED
PURPOSE OF CONTACT		
RESULTS/OUTCOME		
NEXT STEPS		

COMMUNICATION NOTES

DATE	CONTACT METHOD	PERSON CONTACTED
PURPOSE OF CONTACT		
RESULTS/OUTCOME		
NEXT STEPS		

DATE	CONTACT METHOD	PERSON CONTACTED
PURPOSE OF CONTACT		
RESULTS/OUTCOME		
NEXT STEPS		

How To Best Use Grantli's "Funder Profile" Document

Purpose:

The "Funder Profile" helps you build a profile for all potential funders with relevant information and contact info. The second part helps you keep track of the telephone conversations, in-person visits or other contacts you have with program officers at the organizations with which you're working.

Using the Worksheet:

Create a new tracking sheet each time you contact a potential funder for the first time. Then simply keep a record of your future contacts on that same sheet. This fillable form allows you to keep all records in digital form. But print and staple to any file folder that holds additional materials about that funder.

Mission/Areas of Interest: Include the funder's mission, as well as any other pertinent information you find on their website. This will help you gain an understanding of this potential funder and their areas of interest.

Eligibility Requirements: Include all information available to determine if your organization is eligible to apply for funding.

Deadline(s): Include any available grant (and LOI) submission deadlines.

Purpose of Contact: Complete this section prior to making the contact, to know exactly what you intend to discuss or ask. This will help you communicate your needs clearly and quickly.

Results/Outcome: Give a brief description of what was discussed and any new information revealed.

Next Steps: This will help you track the specific steps, actions or communications you need to take next.