Prospect Worksheet— Institutional Funders

Date:	
Basic Information	
Name	
Address	
Contact Person	
Financial Data	
Total Assets	
Total Grants Paid	
Grant Ranges/Amount Needed	
Period of Funding/Project	

Is Funder a Good Match?	*Funder*	*Your Organization*
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)		

Application Information
Does the funder have printed guidelines/application forms?
Initial Approach (Letter of inquiry, formal proposal)
Deadline(s)
Board Meeting Date(s)
Sources of Above Information
990-PF — Year
Annual Report — Year **Requested   Received**
Directories/Grant Indexes
Grantmaker Website
Foundation Directory Online
Notes:
Follow-up:

Area(s) of Commonality with the Prospect
Prior giving history:
Geography:
Subject field:
People:
Other:

Sources Consulted *(provide URLs, dates, and other details)*
Search engines (terms used)**:**
Websites:
Databases:
Contribution lists:
Directories:
Newspapers:
Other:

History of Past Cultivation *(if any)*

Type (letter, call, invitation, meeting, etc., and dates)**:**

Recommended Next Step(s)

(Indicate deadlines):