# Foundation Prospect Evaluation and Tracking Sheet

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| **Foundation information** |
| Name |  |
| Address |  |
| Phone/email |  |
| Website |  |
| Contact person |  |
| Financial information (size of endowment; number of grants) |  |
| Foundation Interests/Priorities |
| Are applications accepted?(If not, skip the rest of this form.) |  |
| Scanning grants list, do they give to the same organizations year after year, or do they seem open to new applicants? |  |
| Type of funding source (Independent, corporate, community or operating foundation? Corporate giving program?) |  |
| Subject focus (note subjects related to your organization’s work) |  |
| Types of support (note those relating to your organization’s needs) |  |
| Geographic limitations (if a corporate foundation or giving program, note where it and subsidiaries operate) |  |
| Populations served |  |
| Grant size — typical grants for subject focus of your nonprofit’s work |  |
| Online application? |  |
| Trustees/staff/employees known by your board and staff |  |
| Preferred approach (letter, phone call, online eligibility survey, full proposal?) |  |
| Deadline(s); board meeting dates |  |
| Date of first contact with foundation. Guidance given? |  |
| Date of follow-up contact. Guidance given? |  |
| Date of letter of inquiry or online survey |  |
| Outcome of letter of inquiry or online survey |  |
| Date of full proposal if invited |  |
| Notes — Follow-up to full proposal? |  |
| Outcome of full proposal |  |
| Acknowledgement and thank you for grant or proposal consideration |  |
| Interim or final report due dates |  |
| Notes for future applications if appropriate |  |

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| **Financial Information** |
| Total assets | Total grants paid | Gifts received |
| Grant ranges | Average grant in your subject area? | Average grant awarded for the type of support you’re seeking? |
| Number of first-time recipients (if known) | Funds obligated for future years | Fiscal year for financial data |
| **Other Questions** |
| Policy about multiyear support? |  |
| Staff review, trustee review, or peer review? |  |
| Willing to fund new organizations? |  |
| Other significant policies? |  |
| **Information Sources** |
| Directory/website and date of info |  |
| Directory/website and date of info |  |
| Grant maker website |  |
| 990 |  |
| Annual report |  |
| Personal contact (who?) |
| **Contact History** |
| Date contacted | Person contacted and by whom? | Result? Call back/write again? If so, when? |
| Follow-up date | Person contacted and by whom? | Result? |