



GRANT FUNDER DNA WORKSHEET

Ten dimensions of a funder, marked green, yellow or red. Use it to decide whether an opportunity is worth your hours before you start writing.

FUNDER UNDER REVIEW

PREPARED BY

DATE

HOW TO USE THIS

1. Fill what you can find. Work from the funder's own website and their most recent 990. Leave a field blank rather than guessing; a blank is information too.

2. Mark each dimension. Green means the evidence supports a fit. Yellow means unknown or mixed. Red means the evidence works against you.

3. Read the marks. Any red is a pass. Mostly green with a yellow or two is a pursue. Mostly yellow means you have research left to do, not a proposal to write.

1 IDENTITY & MISSION

G

Y

R

LEGAL NAME

EIN

GEOGRAPHIC SCOPE

TYPE ☐ Private foundation ☐ Family ☐ Corporate ☐ Community ☐ Government ☐ DAF / intermediary

THEIR MISSION, IN THEIR WORDS

2 GIVING HISTORY & 990 DATA

G

Y

R

FISCAL YEAR READ

TOTAL GIVING

NO. OF GRANTS

MEDIAN GRANT

THREE FUNDED ORGANIZATIONS THAT RESEMBLE OURS

ORGANIZATION	AMOUNT	WHAT THEY HAVE IN COMMON WITH US

3 PRIORITIES & EXCLUSIONS

G

Y

R

STATED PRIORITIES

STATED EXCLUSIONS

DOES OUR REQUEST SIT INSIDE A NAMED PRIORITY? ☐ Yes, named ☐ Adjacent ☐ No

4 GRANT SIZE & TERMS

G Y R

TYPICAL RANGE

OUR INTENDED ASK

TERM LENGTH

MATCH REQUIRED

WHAT THEY WILL FUND ☐ General operating ☐ Program ☐ Capital ☐ Capacity building ☐ Multi-year

INDIRECT / OVERHEAD ALLOWED

REPORTING BURDEN, AND CAN WE CARRY IT

5 DECISION-MAKERS & RELATIONSHIPS

G Y R

PROGRAM OFFICER / CONTACT

TITLE

WHO DECIDES (STAFF / BOARD / COMMITTEE)

ANYONE WE KNOW ON THEIR BOARD OR STAFF

WARM PATH IN, AND CONTACT MADE TO DATE

6 APPLICATION MECHANICS & DATES

G Y R

ROUTE IN ☐ Open RFP ☐ LOI first ☐ Rolling ☐ By invitation only ☐ No unsolicited requests

LOI DUE

PROPOSAL DUE

DECISION EXPECTED

FUNDS RELEASED

REQUIRED ATTACHMENTS WE DO NOT YET HAVE

HOURS THIS WILL TAKE US

7 THE LANGUAGE THEY USE

G Y R

WORDS THEY REPEAT

HOW THEY NAME THE PROBLEM

WHERE OUR WORDING DIFFERS

8

RED FLAGS

G Y R

Check anything that is true. One check makes this dimension red.

- ☐ They do not accept unsolicited requests
- ☐ Giving is concentrated where we do not work
- ☐ Our budget size is outside their grantee range
- ☐ Their priorities shifted in the latest 990 cycle
- ☐ No grants to organizations at our stage or structure
- ☐ Match or reporting terms we cannot meet
- ☐ Our request names an explicit exclusion of theirs
- ☐ The deadline leaves us no time to do it well

OTHER

9

ALIGNMENT VERDICT

1. Identity & mission	G Y R	5. Decision-makers	G Y R
2. Giving history	G Y R	6. Mechanics & dates	G Y R
3. Priorities & exclusions	G Y R	7. Their language	G Y R
4. Size & terms	G Y R	8. Red flags	G Y R

DECISION

☐ PURSUE ☐ WATCH ☐ PASS

Any red mark is a pass. Green throughout, with a yellow or two, is a pursue. Mostly yellow means the research is unfinished, and a watch is the honest answer.

BECAUSE – ONE SENTENCE

10

NEXT ACTIONS

ACTION	OWNER	DUE

IF WATCH: REVISIT ON

WHAT WOULD HAVE TO CHANGE TO MAKE THIS A PURSUE