

Ask The Grantbuilder™ Learning Activity  
Organizational Profile Worksheet (for grantreadiness)

Instructions: Complete the Organizational Profile worksheet for two nonprofit scenarios described below and answer the following questions: 1) Is the organization grant ready?, if not, 2) What else do they need to put in place in order to become eligible for grants?

Organization #1

Tandy Walkis, the founder of Community Help Center is interested in getting grants for her nonprofit and has been referred to you by a colleague. You have scheduled an interview with her and are able to gather the following information:

- Organization started in 2018; EIN # 95-3938274
- She has established a nonprofit in Lincoln, Nebraska and is in the process of completing the IRS 1023EZ application to become a tax-exempt nonprofit
- She hosts a Community Job Fair once a quarter and estimates she spends at least \$3,000 for each event
- Currently everything is done by volunteers
- A local church allows her to hold a Neighborhood Book Sale event every year and she is able to raise approximately \$6,000 each year from renting spaces to vendors and selling used books
- She has some very nice looking marketing flyers online that provide information about her program
- The board of directors consists of Tandy, two family members and four friends

Organization #2

Tri-County Social Services is a 501(c)(3) founded in 1982 and is the largest organization of its kind in the San Fernando Valley region of Los Angeles County. You have scheduled an interview with the CEO and are able to gather the following information:

- Annual budget \$5.3M, 22 paid staff, 50 volunteers
- 3 Special Events for clients each year: Back-to-School, Mobile Dental Clinic, and Thanksgiving Food Giveaway
- 2 major fundraising events each year: Annual Gala (net of \$95,000 raised last year); Fall Food Festival (net of \$43,500 raised last year)
- The agency's budget is funded by a mix of grants, individual donations, fee for service and special events
- There are four main programs: Food Pantry, Homeless Services, Workforce Development and Community Health Services
- The agency has a history of success securing government grants and currently has a federal Human Resources and Services Administration (HRSA) grant for \$1.5M.
- The board is in the process of developing a new 3-year strategic plan to replace the one that ends December 31, 2024
- There are 11 board members
- The most recent IRS Form 990 was filed for fiscal year ended (FYE) 12/31/23
- The organization's audit for FYE 12/31/23 is currently underway, with an anticipated completion/delivery date of mid-September 2024. The FYE 12/31/22 audit was completed