GRANTBUILDER™ Organizational Profile Sheet

Instructions

This document provides instructions to complete each section on the profile sheet. Download, print and fill-in the worksheet with information for as many categories of information for your organization as possible. Once completed, the document can be used by (or shared with) an experienced grant writer to determine the "grant-readiness" of an organization for a range of funding sources.

I. General

A. **Name of Organization:**
Enter the legal name of the organization, as listed on IRS documents

B. **E.I.N.#:**
Enter the IRS-issued Employer Identification Number used for tax reporting purposes.

C. **AKA:**
List all other names and/or acronyms commonly used and recognized by the public to identify or reference the organization

D. **ADDRESS**
Enter the street address of organization's headquarters

E. **PRIMARY CONTACT:**
- Enter the name and title of the individual who serves as the primary, authorized representative
- Enter the phone number and email

F. **MISSION**
Enter the official, board-approved mission statement

G. **PRIMARY FOCUS**
Indicate the main focus of the organization's work – i.e. health, education, environmental, arts, youth/education, women's health

H. **WEBSITE**
Organization's URL/website address

I. **SOCIAL MEDIA PLATFORMS**
List of all social media platforms the organization uses to communicate with its constituents and the public – i.e. FB, Twitter, Instagram (For each platform, it may be helpful to include the number of followers, visitors, re-tweets, etc. to indicate the level of activity)

II. Budget & Personnel (Section 1 of 2)

A. AGENCY BUDGET

1. Annual Budget
   Enter amount of the agency's total, current annual budget. This should be the version of the budget that has been approved by the board of directors.

2. Most recent 990
   Indicate the year of the most recently submitted IRS Form 990.

3. Most recent audit
   - Check "Yes" or "No" to indicate if your organization has a formal audit prepared by a CPA
   - If yes, indicate the fiscal year of the most recent audit

4. Board Audit Committee?
   Check "Yes" or "No" to indicate if your organization has established a Board Audit Committee entrusted with the responsibility of establishing the organization's internal audit process.

5. Program Budget(s): Budget information for individual programs will be entered into the "III. Program Section."

B. Board

1. # Boardmembers

   Total Number of Boardmembers (respond with any or all of the following):
   - How many are noted in the By-Laws?
   - Current number of boardmembers approved/seated
   - How many of the current boardmembers are actively involved?

2. Annual Board Minimum
   - Enter $0 if your organization does **not** have a policy/requirement for each boardmember to make a minimum annual cash donation contribution, or
   - Enter the amount of the minimum annual giving requirement.

3. Board Giving
   Enter the total dollar amount raised by the board of directors during the past year.

4. Meeting Schedule
   Indicate the total number of board meetings per year, including an indication of the schedule (i.e. Quarterly on 1st Tues (i.e. Jan, Apr, July & October), Monthly, 2nd Wed.)

C. Staffing

1. # FTE Paid
   Indicate total number of full-time paid staff positions

2. # Part-Time
   Indicate total number of part-time paid staff positions

3. # Volunteers
   Indicate total number of volunteers on an annual basis

4. Other:
   Indicate number of any other personnel positions (consultants, etc.)

II. Budget & Personnel (Section 2 of 2)

D. Fundraising

Place a check mark next to each of the methods your organization uses to raise funds. Use the open spaces next to the methods to jot down brief notes (most recent annual amount raised, number of special events, etc.).

- Individual Donations – contributions by individual supporters
- Grants – funding provided by government, foundation or other grants that require the preparation and submission of applications/proposals
- Sponsorships – funds donated by businesses, foundations or individuals to support specific programs and events (typically in exchange for sponsorship acknowledgement)
- Direct Appeals – requests for cash contributions via an organized solicitation (online or traditional mail). If more than one annually, please indicate the number of appeals. If possible, list the types of appeals (i.e. Back-to-School, Holiday)
- Special Events – organized event(s) promoted to sell tickets or provide activities that require payments/contributions from attendees
- Endowment – a fund created and maintained to invest, for the purpose of generating interest/returns to support the organization.
- Investment Income – return (interest, dividends or other profits) generated by the organization's portfolio of securities, financial products or other investments.
- Earned Income – Fees or contract income the organization earns for providing goods or services that are related to the organization's mission (i.e. registration fee for youth to participate in an after-school tutoring program at a nonprofit that provides educational services.
- Other – Provide a brief description of any other types of fundraising methods used by the organization.

III. Program	This section has space to record information for up to six programs, under the following headings: *(Use an additional blank sheet If your organization has more than six programs.)* • Distinct Programs – indicate the name of the program • Budget – Enter the current annual budget for the respective program • Target Population – Identify the target population served by the respective program • # Clients = indicate the total number of clients for the respective program • Service Delivery Area – Identify where the organization provides programs and services
IV. Administration	A. IRS List the federal IRS status for your organization (i.e. 501c3). Include the date/year the status was granted. B. State List the date of the state nonprofit incorporation C. UEI (Unique Entity ID) – on 4/4/22, the federal government switched from using the DUNS number (Dun and Bradstreet). This is now required for all applicants for grants and other government contracts. The Unique Entity ID is a 12-character alphanumeric ID assigned to an entity by SAM.gov. D. SAM List your federal SAM# (System for Award Management), which is used to establish eligibility and apply for federal grants and contracts. www.sam.gov E. Other List any other registration statuses (and their related I.D. numbers) and any licenses or certifications held by your organization.
V. 10 Blocks	Place a check mark in front of each category of information that you have available for your organization (in a written format, digital and/or traditional hardcopy). For the Budgets section, use check boxes as follows: • Use the first box is to indicate the agency has a current, board=approved annual budget readily available • If applicable, use the second box to indicate the organization has budgets readily-available for each specific program
VI. Other	This section is used to document information about the Strategic Plan and any other categories of information that may apply to your organization and be of interest to a funding source (i.e. special awards, industry-specific certifications, pending or current litigation)

