

# SUMMARY FUNDING RESEARCH WORKSHEET

## I. Initial Research

1. Today's date: \_\_\_\_\_
2. Research Completed by: \_\_\_\_\_
3. Name of Funding Source: \_\_\_\_\_ Web URL: \_\_\_\_\_
4. Funding Source (circle one): PG    NP    PS    TR    O (list): \_\_\_\_\_
5. Type/Method/Scope of Support: \_\_\_\_\_
6. Next Deadline for Application: \_\_\_\_\_ URL/Contact to Get Application: \_\_\_\_\_
7. Based on geographic region, organizational type, and all other requirements noted by the funder, are you an eligible organization to apply? Yes or No (circle). If yes, move to next question. If not, is there an organization you could partner with? \_\_\_\_\_
8. Has this source funded you in the past? If yes, provide dates, years of support, name of project, and amount of total award. If no, skip and move to next question.
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
9. Organizationally (broad alignment) what characteristics, interests, networks, etc. do this funding source and your organization have in common?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. Individually (focused alignment) how do your needs and your proposed project align with this funding source's program funding priorities?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. Looking on past annual/program reports, website information, or using other organizational/program documents, what projects similar to yours have been funded in the past 3 years? Consider type of project, geographic scope, amount of award, organizational types funded, etc.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## II. Reflect & Refine

1. Does the project align with your organization's current mission and programming? **YES or NO**
2. Do you have the support of internal and external decision-makers and/or stakeholders? **YES or NO**
3. Is it realistic given your organizations current budget and funding history? **YES or NO**
4. Does your organization have the capacities (operations, staffing, infrastructure, expertise, skills, reputation, leverage points, etc.) for carrying out this project effectively and efficiently? **YES or NO**
5. Are the project needs supported by data and the project focus timely/significant? **YES or NO**
6. Will this project improve a short term need (1-3 years) or a longer term need (3-5+)? **CIRCLE ONE**

## III. Decide & Organize

- *Priority* (circle only one):    **HIGH**                      **MEDIUM**                      **LOW**
- *Submission Timeframe* (circle only one): **SHORT** (next 6-12 months)    **LONG** (next 12-24 months)