

Exhibit 20.1
Foundation Research Form

The following form outlines the data you need to collect in order to make a decision to seek funding from this grant source. Your attempts to collect as much of this information as possible will prove rewarding. (When feasible, record the source of the information and the date it was recorded.)

1. Name of Foundation: _____
Address: _____
Phone: _____ Fax: _____ E-mail: _____
Web site: _____

2. Contact Person: _____
Title: _____
Any Links from Our Organization to Contact Person: _____

3. Foundation's Areas of Interests: _____

4. Eligibility Requirements/Restrictions:
a. Activities Funded/Restricted: _____

b. Organizations Funded/Restricted: _____

c. Geographic Funding Preferences/Restrictions: _____

d. Other Requirements/Restrictions:
Application Information _____
Proposal Length/Restrictions _____
Application Submittal _____
Deadline Date(s) _____
Submittal Rules _____

Exhibit 20.1 - Continued

5. Information Available In Possession Of

IRS 990-PF Tax Return (Year)	_____
Guidelines	_____
Newsletters	_____
Annual Report	_____
_____	_____
_____	_____

6. a. Board Members:

b. Staff

Full Time

Part Time

_____	_____	_____
_____	_____	_____
_____	_____	_____

7. Deadline: _____

Application Process/Requirements/Submission:

8. Financial Information

Asset Base: \$ _____

Are there current gifts to build the asset base? Yes _____ No _____

If yes, how much? \$ _____

Total number of grants awarded in 20__ : _____

Total amount of grants awarded in 20__ : \$ _____

High Grant: \$ _____

Low Grant: \$ _____

Average Grant: \$ _____

In our interest area, there were _____ grants, totaling \$ _____

High grant in our interest area: \$ _____

Low grant in our interest area: \$ _____

Average grant in our interest area: \$ _____

Exhibit 20.1 - Continued

9. Grants Received Versus Grants Funded

Number of proposals received in 20__ : _____

Number of proposals funded in 20__ : _____

10. Sample Grants in Our Area of Interest:

<u>Recipient Organization</u>	<u>Amount</u>
_____	_____
_____	_____
_____	_____
_____	_____

Exhibit 20.2
Funding Executive Research Worksheet

1. Funding Source Name: _____
2. Name of Contact Person/Contributions Officer: _____
3. Title: _____
4. Business Address: _____

5. Education
College: _____
Post Graduate: _____
6. Military Service: _____
7. Clubs/Affiliations: _____

8. Corporate Board Memberships: _____

9. Business History (Promotions, Other Firms, etc.): _____
10. Other Philanthropic Activities: _____

11. Newspaper/Magazine Clipping(s) Attached: Yes _____ No _____
12. Contacts/Linkages in our Organizations: _____

13. Recent Articles/Publications: _____
14. Awards/Honors: _____

Exhibit 21.1

Sample Letter to a Private Foundation Requesting Information

Date

Name
Title
Address

Dear _____:

I am developing a project which deals with _____ and provides benefits to [or in] _____ . My research indicates that this area is an important concern of the [name of foundation].

Please use the enclosed e-mail address or label to send me information on your desired format for proposals or other guidelines. I would also appreciate it if you could add us to your mailing list so that we could receive your annual reports, newsletters, and any other materials you think might be useful to us as we work on this and related projects.

Thank you for your cooperation.

Sincerely,

Name/Title
Organization
Address
E-mail Address

Exhibit 21.2
Private Foundation Report Form

Complete one of these forms after each contact with a private foundation.

Funding Source: _____

Funding Source Address: _____

Funding Source Contact Person: _____

Telephone Number: _____ Fax: _____ E-mail: _____

Contacted On (Date): _____

Contacted By (Name): _____

Type of Contact: Phone _____ Visit _____ Other (Explain) _____

Objective of Contact: _____

Results of Contact: _____

Follow-up: _____