



TOOL | Funder Profile

TIME REQUIRED: 1 hour to prepare and ongoing use after set-up.

A Funder Profile is a tool used in donor relations from prospecting to ongoing relationship support. This tool lays out the primary categories to consider when building a funder profile.

USING THIS TOOL WILL HELP YOU:

- Understand your donor prospects and how you will engage them
- Track your relationships with current and prospective donors
- Keep track of the specific granting requirements to support your application process

OVERVIEW

Fund development is ultimately about friendraising and relationship building. This tool is targeted to organizations new to donor relationship building and those interested in improving how they track grants and relationship development. This tool is best implemented during the prospecting phase when investigating potential donors; however, it should be updated regularly as relationships evolve. Using this tool will help to identify key supporters and track important grant information.

USING THE TOOL

The Funder Profile tool should be used throughout your friendraising strategy from prospecting to stewardship. By working through the headings below, you will be able to identify prospective funders that are able and likely to fund your collaborative. Once you complete the initial profile, this document should be reviewed before each meeting with the funder and updated with information as the relationship develops.

The three best places to find information about funders are their websites, existing relationships, and the [Government of Canada's list of Charities](#). This searchable list provides information about past giving, total assets, programs, contact information, and the charities directors.

Funder Profile

FUNDER QUALIFICATION PROFILE

Brief Description:

Contact Information:

Website:

RATINGS

Interest: <Rate interest out of 10 and provide rationale>

Involvement:<Rate the existing level of engagement that they have with your organization>

Ability: <Rate ability to support organization low to high and provide rationale>

BACKGROUND

<What information do you have about the donor, their vision for the community, and their past work>

GRANTING INFORMATION

<Provide a detailed description of the kinds of grants offered by the prospective donor>

FUNDING INFORMATION

<Identify similar projects / organizations that have been funded and the amount that they have received>

TECHNICAL NOTES

<These notes are meant to help you write your eventual ask. Use bullets to note important technical details about grant applications for the organization. This information can come from meetings you have had with contacts, workshops run by the donor or research you have conducted from materials prepared by the prospective donor.>

CONTACTS

<use this section to highlight and track your relationships within your prospective donor's organization>

Contact Name – Individuals within your organization who maintain this relationship and notes about their contact with the individual

DEADLINES AND TIMING

<Put information about the deadline to register and apply for grants here>

<Include information about the process to support your grant (links to the application and web portals)>

FURTHER NOTES

<Any additional notes that will help further your relationship or assist in preparing your grant request>

NEXT STEPS

<Track your strategy for the funder from prospecting to stewardship and communicate your next steps for deepening the relationship>

DIVING DEEPER

¹Tamarack Workbook – [Friendraising: Raising Funds, Finding Friends to realize a Bold Community Vision](#)

²Tamarack Tool – [Friendraising: From Raising Funds to Making Friends](#)

³ Anne Morais – [Getting the Grant](#)