

Inspired Philanthropy:
Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy
 www.inspiredphilanthropy.com

Worksheet 6.1
Evaluating a Group for Possible Funding

Name of organization:

Contact:

Location:

E-mail:

Web address:

Phone:

Date of assessment:

Assessment Area	Strengths (√ or rate)	Challenges (√ or rate)	Notes or Next Steps
Values and culture match			
Mission match			
Strategy alignment			
Program effectiveness			
Leadership (ED or board chair)			
Board (#) plus key leaders			
Staff (#) and quality			
Board, staff, and volunteer teamwork			
Number of volunteers			
PR, marketing, or messaging			
Web presence			
Location and feel of office			
Geographic reach of organization			
Commitment to and evidence of diversity			
Key organizational collaborators			

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Evaluating a Group for Possible Funding, Cont'd

Assessment Area	Strengths (√ or rate)	Challenges (√ or rate)	Notes or Next Steps
Accessibility and transparency			
Impact and evaluation standards and measures			
Outcomes or results communicated well			
Accountability standards			
Staff benefits			
Financial reporting clear			
Balance sheet			
Cash flow			
Financial need			
Fundraising process			
Donor systems and thanks			
Development plan			
Development committee			
Donor engagement programs or evidence of commitment in past			
Structure of the organization and power dynamics			
Other			