

Grants Accelerator Project General Intake Questionnaire

To complete, please select File>Make a Copy to save a copy that you can fill in. When you're finished, send your forms to sgsteam@elevatedeffect.com

On behalf of the team at Elevate, we are excited to work with you on a Grants Accelerator Project! This intake questionnaire is designed to begin your engagement by collecting foundational information about your organization and your institutional fundraising program. Please respond to each question as completely as possible, but feel free to use lists and/or reference other documents or provide links where relevant.

Your Elevate consultant will go through these questions with you during your first meeting. If there are responses that require more explanation than you can put in writing, please flag that for discussion.

General Information About the Organization

Name:

Founding date:

Total annual revenue:

Mission statement:

Purpose:

Key Programs and Initiatives

Briefly, what is the need the organization addresses?

How is this need addressed? In other words, what are the organization's key programs or initiatives?

Who ultimately benefits from this work?

How do these individuals (or groups) benefit from the organization's work?

How do you determine if the programs are successful? Do you track data on program outcomes? Please describe these outcome metrics at a high level.

Who are your key partners or collaborators? What other organizations are essential to the organization's success?

Fundraising Information

What are the organization's primary types of revenue? Roughly what percentage of your budget comes from each revenue stream? For example, 10% event revenue, 20% fee-for-service, 70% grants.

Have you secured any grants from foundations? Please list the grantmaker, amount, and year the grant was received. If you have secured many grants, please feel free to note that and provide a few representative examples.

What else should we know?

What is your primary goal for this engagement?

What else do you want us to know that we haven't asked yet?