ORGANISATION INFORMATION FORM

Revised August 2026



The Freedom Fund uses this form to collect organisational information from potential grantee partners. This is typically a pre-cursor to a full application and is referenced in our due diligence process. In addition to basic information, the form includes key questions about governance and finance, allowing us to flag any issues or concerns early on. We keep these forms on file for all partners and ask them to update it periodically to ensure information is current. This template has been adjusted for use by any funder; the bracketed fields will need to be updated before use.

INSTRUCTIONS

The purpose of this form is to give the [Funder Name] background information about your organization and provide the details of key employees/board members for sanctions checks. If you have any questions while reviewing or completing the form, please contact [Funder Contact].

SANCTIONS CHECKS AT THE [FUNDER NAME]

The [Funder Name] is committed to ensuring its funds and resources are used solely to achieve its essential purpose. It aims to prevent the diversion of funds for any illegal purpose, including financing terrorism or breaching sanctions, and stop funds or resources reaching individuals or entities who are proscribed or designated on counterterrorism or sanctions lists.

To prevent diversion, comply with legislation and meet requirements of regulators, donors and banking partners, the [Funder Name] runs sanctions checks on individuals and organisations as part of its due diligence process. By completing this form, you grant the [Funder Name] permission to run these checks. If you would like further information about the [Funder Name]'s aid diversion policy, please contact [Funder Contact].

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A. ORGANISATION INFORMATION

Organisation information	
Full legal name of your organisation	
Organisation's alternative name (If you use an acronym or different name in your day-to-day work, please tell us what it is.)	
Organisation's email address	
Is your organisation registered in the US?	[yes or no]
If registered in the US, EIN/SNN	

Organisation background	
Year Founded	
Organisation size *(How many staff members does your organisation have in total?)*	
Date registered [dd/mm/yyyy]	
Place registered	
Year Founded	

B. ORGANISATION CONTACTS

Head of organisation Please give us the contact details of an individual who is authorised to sign contacts on behalf of your organisation, such as a Chief Executive.	
First name	
Last name	
Position held in organisation	
Email address	
Date of Birth [dd/mm/yyyy]	
Telephone number (including country code)	
Country	

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Main Contact Please give us the contact details of an individual who will be the main, day-to-day contact for this grant.	
First name	
Last name	
Position held in organisation	
Email address	
Date of Birth [dd/mm/yyyy]	
Telephone number (including country code)	
Country	

Chair of Board Please give us the contact details of the Chair of your organisation's Board.	
First name	
Last name	
Email address	
Date of Birth [dd/mm/yyyy]	
Telephone number (including country code)	
Country	

C. PROJECT STAFF

Please provide information for key staff that will be working on the [Funder Name] project.

Full name	Gender	Job Title	Qualification*	Years with organisation

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* Please list the highest-level qualification this staff member has achieved.

D. FEMALE LEADERSHIP

We aim to track how many of the organisations we fund are led by women. Please put an 'x' into each cell that applies in the table below.

	Female
Head of Organisation	
Head of Programs	
Comments:	

E. GOVERNANCE

Please provide details each member of your organisation's governing body.

Full name	Gender	Position	Occupation/Employer

Additional questions
How often does the governing body meet?
How, if at all is a diversity of populations represented within your staff and governing body? (Please explain how different groups, for example, economic, ethnic, racial, tribal age groups and former beneficiaries are represented within your staff and governing body membership.)

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Are any people serving on the governing body related to a member of staff or another governing body member? (Yes or No)
If answer above is Yes: How are the governing body/staff members related? (For example, are they from the same family or related by marriage?)
How do you ensure conflict of interest is avoided?

F. FINANCIAL INFORMATION

Within the below table, please complete the boxes with your organisation's operating budget for the last three fiscal years. An operating budget is defined as the total budget required to run your organisation, covering all expenses for the given year.

For the current fiscal year period, please provide the projected operating budget for the fiscal year which is the amount of funds required to run the organisation for the year. Please provide how much of the operating budget is currently raised and how much is yet to be raised.

Please note, your organisation's operating budget should be a set figure whether or not you receive a [Funder Name] grant. When completing the form, you should not inflate or increase the organisation's current operating budget to include the [Funder Name] grant.

Enter all figures in US Dollars.

Fiscal Year	
What is your organisation's fiscal year end date? (dd/mm)	

Organisation Annual Budget (in U.S. dollars)	
Historical budgets	
2 Years ago	

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1 Year ago	

Current budget	
Amount of annual budget raised so far in current year	
Amount of budget yet to be raised in current year	

G. PRIMARY SOURCES OF FUNDING

Provide a list of your three largest funders for the most recent three-year period.

Funding Organisation 1	
Funding organisation name	
Funder location	
Amount of funding received (USD)	
Duration of funding (YYYY – YYYY)	

Funding Organisation 2	
Funding organisation name	
Funder location	
Amount of funding received (USD)	
Duration of funding (YYYY – YYYY)	

Funding Organisation 3	
Funding organisation name	
Funder location	
Amount of funding received (USD)	
Duration of funding (YYYY – YYYY)	

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H. WIRE TRANSFER INFORMATION

Please provide the organisation's banking information below.

Bank information	
Bank name	
Bank address/physical location (no P.O. Box)	
City (and U.S. state, if applicable)	
Country	
Bank account number (enter twice)	
Official name for the account	
SWIFT Code (or routing number if in the U.S.)	
Bank contact name and telephone number	
Additional bank code (if applicable)	

Additional questions
Is the bank account listed above registered in the name of your organisation?
If no, please explain the reason for the difference between the account name the organisation's name.

Please ask your bank if US correspondent bank details are required for remittances from the UK or the US, and if yes, please complete.

Corresponding U.S. bank information	
Bank name	
Bank address/physical location (no P.O. Box)	
City (and U.S. state, if applicable)	
SWIFT Code (or routing number if in the U.S.)	

Is your organisation registered with the U.S. Internal Revenue Service as a (501)(c)(3) charitable organisation?

Yes ☐ No ☐

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I. COMMUNICATION

Please provide links to your organisation's social media and external communication channels, if applicable.

Social media and external communication information	
Organisation website address	
Facebook	
Instagram	
Tiktok	
Blog	
You Tube	
Other (please specify)	

Additional questions
[Funder Name] may share grantee information and updates on its website, blog, and in other publications. Does [Funder Name] have permission to publicize your organisation and its work? (Yes or No)
If no, please elaborate on your concerns.

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