Grant-Ready Checklist

This is not a score sheet. It is a checklist for helping you consider all the important factors when assessing your appeal to a foundation donor.

DO YOU DO SOMETHING IMPORTANT?

• Can you show the need?
• Can you show how your impact is significant and appropriate?
• Is there competition? Can you say why or why not?

FOR ANYONE IN PARTICULAR?

• Can you provide a detailed description of your audience?
• Can you show how they matter to you and to your donor?
GRANT-READY CHECKLIST

• Why this particular audience?
• Are there others you expect to serve in the future?

DO YOU DO IT WELL?

• Are you accredited or qualified in appropriate ways?
• Do you regularly and conscientiously evaluate staff performance and program success?
• Can you provide award information or complimentary letters as third-party endorsements?
• Do you continue to improve your performance?

DO YOU MAKE A DIFFERENCE?

• Can you describe your work in terms of benefits, not features?
• Can you explain and demonstrate the difference you make?
• Can you explain why that difference matters?

ARE YOU A SMART INVESTMENT? A SAFE ONE?

• Is your mission statement clear?
• Do you have qualified consultants, collaborators, advisors, staff, board members, and volunteers?
• Do you demonstrate best practice in your field?
• Does your governing body have a clear purpose and clear, appropriate roles?
  • Do you have effective, up-to-date by-laws?
  • Do you have a personnel policy? An ethics statement?
GRANT-READY CHECKLIST

• Do you have an interpretive and/or education plan? A preservation and/or collections plan?
• Are you accredited or qualified in appropriate ways?
• Do you have plans to remedy any gaps here?
• Do you have a charitable edge? Professional and innovative edges?
• How about financial management?
  • Is your financial situation reasonable?
  • Do you have an annual audit?
  • Is there an investment plan?
  • Are there guidelines for restricted financial gifts and for sponsorships?
• Do you maximize impact by replicating or extending the project?

ARE YOU A GOOD PARTNER?

Internally:

• Do you apply your mission internally?
• Do you say thank you for grants?
• Do you manage projects intelligently and well?
• Do you submit thorough, useful reports on time?
• Do you supply visual evidence of your work the donor can use for its own promotion?
• Do you maintain the relationship even when you aren’t asking for funding?

Externally:

• Can you show how you behave well in your own community?
• Can you demonstrate successful partnerships with credible, important partners?
• Can you demonstrate your awareness of both your environment and your donor’s?
• Will they want to fund you again?