

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?

GRANT-READY CHECKLIST

- 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?