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?