

GRANTS READINESS:

The Culture and Practices Of Successful Grantseeking Organizations

A GrantsUSA Presentation

www.GrantsUSA.net

(623) 412-8650

PO Box 5456

Glendale, AZ 85312-5656

info@GrantsUSA.net

ASSESSING ORGANIZATIONAL GRANTS READINESS

QUESTION FOR DISCUSSION:

**What does it mean to be
a “grants-ready” organization?**

THE TWO LEVELS OF GRANTS READINESS:

- **Culture and Infrastructure**
- **Resources and Documentation**

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GRANTS READINESS CHECKLIST

Readiness Component	Complete and Available	Improve-ment Needed	Resources Needed	NA
Rule 1: KNOW YOURSELF – Culture and Infrastructure				
Visionary leadership				
Continuity of vision regardless of leadership				
Solid board support; clear board roles and responsibilities				
Clear lines of decision-making within the organization				
Solid reputation in the community				
Credible track record: - Organizational accomplishments AND/OR - Credentials of key individuals (board members, key staff, consultants, partners, etc.)				
Focus on long-term change, not short-term fixes				
Effective ongoing communications – formal and informal - Internal (audiences?) - External (audiences?)				
Clearly stated policies: - Ethical principles for marketing and fundraising - Donor rights - Grants management, reporting outcomes and results - External communications - Gift solicitation - Gift acceptance - Gift management				
Rule 1: KNOW YOURSELF – Resources and Documentation				
Mission statement				
Vision statement				
Values statement				
Case statement: - Organization history - Program descriptions (needs, priorities, clients, services, location, staffing, etc.) - Future goals and strategies				
Prioritized wish list				

Readiness Component	Complete and Available	Improvement Needed	Resources Needed	NA
Rule 2: BUILD TRUE PARTNERSHIPS – Culture and Infrastructure				
A culture that values collaboration over competition				
Existing networks of potential partners				
Existing active collaboration project(s)				
Methodology to approach potential partners				
Rule 2: BUILD TRUE PARTNERSHIPS – Resources and Documentation				
Letters of agreement detailing partnership roles and responsibilities				
Working agreements with partners re: • Communications • Decision-making protocols • Lines of authority and responsibility • Resources				

Readiness Component	Complete and Available	Improve-ment Needed	Resources Needed	NA
Rule 3: PLAN, PLAN, PLAN – PLAN! – Culture and Infrastructure				
Long-term strategic planning process				
Organizational process for review and update of: • Mission, vision, values • Strategic plan • Case statement • Mid- and short-range goals				
Sound accounting practices and systems: • CPA • Audited financial statements • Fund accounting capability				
A master grants plan (as part of the overall fund development plan)				
Effective program tracking and recordkeeping systems				
Commitment to evaluation as a tool for project management, quality control, success monitoring and program improvement				
Environmental scan or SWOT analysis				
Rule 3: PLAN, PLAN, PLAN – PLAN! – Resources and Documentation				
Budget planning checklist				
Program budget				
IRS letter of determination				
IRS 990				
Board list – names and community affiliations				
Resumes of key personnel				
Operating budget				
Other				

Readiness Component	Complete and Available	Improve-ment Needed	Resources Needed	NA
Rule 4: KNOW YOUR FUNDER – Culture and Infrastructure				
Processes in place for: - Identifying potential A-list funders - Developing funder profiles - Securing funder guidelines and application materials				
Sound plan for ongoing development of funder research and relationships				
Clear understanding of funders as mission partners (not check-writers)				
Commitment to clear, honest, ethical, timely and helpful communications with funders and potential funders				
System for tracking: - Communications with funders - Proposals submitted - Responses received - Necessary action steps and followup				
Rule 4: KNOW YOUR FUNDER – Resources and Documentation				
Access to credible, current funder information (print or online)				
Internet access				
Detailed records of previous funders/grants awarded				
“Who do you know?” documentation (pre-existing connections between your organization’s board members, staff, volunteers, and clients and people affiliated with the funding entity)				

Readiness Component	Complete and Available	Improve-ment Needed	Resources Needed	NA
Rule 5: CREATE A WINNING PROPOSAL – Culture and Infrastructure				
Effective grants development “team” (installed throughout the organization), with clear understanding of roles and responsibilities				
Ability and commitment to plan the proposal development effort effectively, in order to: - Meet the deadline - Meet the technical requirements - Present a solid project plan - Clearly demonstrate “mission match”				
Rule 5: CREATE A WINNING PROPOSAL – Resources and Documentation				
Project information worksheet				
Project planning and review guide				
Current copies of common appendices and attachments				

Readiness Component	Complete and Available	Improve-ment Needed	Resources Needed	NA
GRANTS MANAGEMENT				
Plan for thanking funder and partners				
Project review plan (to review/revise project targets, budget and timelines as needed)				
Project communication plan (staff, media, partners, etc.)				
Project accountability plan (accounting and reporting systems)				
Ongoing evaluation process for quality control, project management, assessment and improvement				
Project sustainability plan (how project will be funded in the future)				
Celebration!				