



Get funding. Create change.

## Organizational Assessment

### Win Grants! 4 Steps to Become a Top Competitor

#### Step 1 – Basics

Does your organization have . . .	YES	NO	NOTES
1. A well-defined, up-to-date mission statement?			
2. Bylaws?			
3. Articles of incorporation?			
4. An EIN number			
5. A Dun & Bradstreet (DUNS) number			
6. A 501(c)(3) letter of determination from the IRS?			
7. A board of directors with diverse skills and knowledge			
8. An engaged, active board of directors			
9. A board of directors that makes personal financial contributions			

## Step 2 – Operations

Does your organization have . . .	YES	NO	NOTES
1. Strong, credible administrative leadership			
2. Policies & procedures addressing major administrative and operational areas?			
3. Consistent adherence to policies & procedures?			
4. Policies & procedures governing grants?			
5. Diverse funding streams?			
6. Good financial audit results?			
7. History of submitting financial and program reports on time?			
8. An up-to-date strategic plan?			
9. A positive on-line presence?			
10. Regular access to a high-quality funder research database?			
11. Solid, up-to-date technology for use in grant development?			
12. Adequate dedicated time for grant proposal development?			

### Step 3 – Knowledge, Skills, Attitudes

Does your organization have . . .	YES	NO	NOTES
1. Varied, high-quality, up-to-date data that defines the service area and its unique strengths and challenges?			
2. Varied, high-quality, up-to-date data that defines the beneficiaries of your services?			
3. Varied, high-quality, up-to-date data on emerging trends and challenges of the service area and its beneficiaries?			
4. High level expertise in the field in which it works?			
5. Knowledge of trends and directions of the field in which it works?			
6. Understanding of best practices and research-based approaches in the field?			
7. Solid internal data systems that track service provision?			
8. Solid internal data systems that track impact of services?			
9. Realistic understanding of organization’s capacity to implement new programming?			
10. Realistic understanding of how grant funding fits into an organization?			
11. Ability to design effective responses to community needs?			
12. Skills and knowledge to identify appropriate grantmakers to approach for support?			

Does your organization have . . .	YES	NO	NOTES
13. Skills and knowledge to interpret the application guidelines of various funders even when they use different terminology?			
14. Ability to develop high-quality proposals that respond to funders' interests, community needs, and organizational capacity?			
15. Ability to develop high-quality, logical grant proposals that specify realistic, achievable, and measurable outcomes? Realistic methods? Solid evaluation plans? Thorough, defensible budgets?			
16. Competent writers who can communicate ideas clearly in an active, engaging voice?			
17. Real passion in pursuing its mission?			
18. Hopefulness that the organization's work can improve the problems being addressed?			
19. Absolute integrity in its work within the community, its relationships with colleague organizations, and in the preparation of grant proposals.			

#### Step 4 – Culture

Does your organization have . . .	YES	NO	NOTES
1. A commitment to teamwork?			
2. A team of staff members who collaborate to produce grant proposals?			
3. A commitment to collaboration as a means of increasing impact?			

Does organization have . . .	YES	NO	NOTES
4. A commitment to planning?			
5. A commitment to producing grant proposals that respond to community needs rather than to funding opportunities?			
6. A grant development approach that is proactive and strategic?			
7. An annual proposal development plan?			
8. A commitment to evaluation of its work?			
9. A commitment to gathering data and information on service provision and using that data to improve its work?			
10. A commitment to continued learning that supports professional development			