

Organizational capabilities to move at the pace of change are critical. Capacity to secure funding through grants, partnerships, contracts, donations and so forth is fundamental for operations.

The following “Fund Development System” and “Fund Readiness Checklist” helps determine an organization’s capability to engage in successful fund development.

**GENERAL ORGANIZATIONAL READINESS**

- STRATEGIC and BUSINESS PLAN** Does the organization have a current strategic plan that includes a review of its mission, the needs, its goals, and priorities, including identification of capacities needed to support delivery of its programs, services, and other deliverables?
- COMPETITIVE ADVANTAGE** Does the organization have a competitive advantage? How does the organization’s structure, clientele, location, history, staff, partners, volunteers, etc. make it visible and attractive to potential sources of support?
- ESSENTIAL SUPPORT SYSTEMS** Does the organization have the five essential support systems in place – information system to monitor fund management, statistic and data to document need of a project/service or organizational eligibility, policy making system (usually a board of directors), Information Technology (IT) and software to track and monitor progress, and business systems to assist with defining all types of resources needed for the project/service?

**ORGANIZATIONAL FUNDING READINESS**

- FUND DEVELOPMENT and MANAGEMENT**
  - Does the organization continuously scan the funding environment?
  - Have capacity to either generate well developed proposals?
  - Have systems in place to manage funds and partnerships?
- PROPOSAL DETAIL** Most grant proposals require specific information about the organization and information is usually submitted electronically. Keeping this information current and readily available is extremely helpful.
- Mission Statement** Current mission statement. It is not unusual to include a description of the mission statement that may include the organization’s values and vision statement.
- Organization’s History** Number of years in existence, founding principles, etc.
- Location** Physical address, Congressional/Legislative Districts, service area(s) including a description of the area(s), demographics, and map.
- Non-Profit Status**
  - IRS determination letter
  - Articles of Incorporation
- By-laws or charter** Current by-laws with date of last review/update.

GRANT FUND DEVELOPMENT – **ORGANIZATIONAL FUNDING READINESS CHECKLIST**

- Including:
- Board of Governors/ Directors**
    - Roster with contact information including community/professional affiliation
    - Terms of service
    - Percentage of financial support to the organization
    - Roles and/or committees
    - Board development efforts
  - Staff Roster**
    - Include – biographies/qualifications/resumes for current staff (picture helpful in some cases) and, job descriptions
  - Clients**
    - Demographic profile including geographic distribution
  - Organizational Assets**
    - This may include:
    - Facility – description, photos, floorplan, value
    - Partnerships – Organization name, role/contribution, longevity
    - Volunteers – Number of active volunteers, roles/contributions/ demographics, geographic distribution, Number of volunteer hours by activity, and longevity
    - Systems – fiscal, data, communication,
  - Fiscal**
    - Most recent IRS 990, audit report or review, and organizational budget. For specific grant proposals fundraising events and activities, other funding requests and grants secured including funding period, amount requested/secured, and purpose of the funds.
  - Impacts Made**
    - Information about impacts made over time.



Within the organization, five core areas broadly define the capacity needed to generate grants.

- **INFRASTRUCTURE** – Staff with the responsibility for simultaneously keeping an eye on funding sources and emerging funding needs.
- **RESEARCH** – Acquiring and maintaining data, partnerships, and information resources useful in developing and managing funded projects/services.
- **FACILITIES and EQUIPMENT** – Identifying and if need be, acquiring or identifying facilities and equipment needed to operationalize the funded program/services.
- **ORGANIZATION and CULTURE** – Fostering a culture of partnering, outcome and impact focused efforts, among staff, volunteers, and stakeholders. Ensuring diversity, equity, and inclusion is key to the culture of how work is done.
- **PARTNERSHIIPS** – Develop and build upon existing partnerships. Partnerships may be intra- or inter – organizational and help to meet shared visions and missions.



<p><b>Internal</b> - What is the need?  <b>External</b> - Who funds this need?                  What is the history?</p>	<p><b>Internal</b> – Who is develops?  <b>External</b> – Who are the partners? What is their contribution?</p>	<p><b>Internal</b> – Who manages?  <b>External</b> – What is the report criteria for funders and partners?</p>
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<p><b>Drivers:</b> Does the need align with the org. Strategic Plan? Does the org. have a competitive advantage</p>	<p><b>Capacity:</b> Strategic approaches Research, partnerships, expertise, timeline...</p>	<p><b>Capacity:</b> What data, outputs, impact information is required? Aligned with organization’s goals?</p>
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<p><b>Funders:</b> What funding trends are emerging?</p>	<p><b>Funders:</b> Does a relationship with funder(s) exist? Can one be developed?</p>	<p><b>Funders:</b> Beyond reporting, how will the partnership with the funder continue?</p>
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<b>So What?</b>		
<p>Is the organization and need well aligned with funding options?</p>	<p>Does the organization have the capacity to deliver a timely well-developed fundable proposal?</p>	<p>Does the organization have the capacity to manage the funding and the , project?</p>
<p> Taking a chance to see if a proposal “will fly”</p>	<p> Submitting poor proposal</p>	<p> Poor reporting</p>