



Module I.A.

Course Introduction

Easy Grants, LLC
1817 Crane Ridge Drive, Suite B-1
Jackson, Mississippi 39216
www.easygrants.us

A. What to Expect

We are looking for the right match - No more looking for love in all the wrong places

B. Every Money Source Has Its Own DNA

1. What they like to fund
2. Average Donation Amounts
3. Application Processes

C. Grant Writing is Work

1. It takes time and effort
2. Don't have wasted effort looking in the wrong spots
3. This is NOT looking for the needle in the haystack
4. We are intentional and focused

D. Don't Be in 3rd Circle of 10% Hell

- 220,000 foundations in the US - Less than 10% have a website

E. You Can DO This!



Module I.B.

**Are you really ready for
grants?**

Easy Grants, LLC
1817 Crane Ridge Drive, Suite B-1
Jackson, Mississippi 39216
www.easygrants.us

We wish there was a magic formula for getting a grant award from a funder. Wouldn't that be nice for all of us? But we know there is no such thing as a magic formula.

However, there are things your organization can do to make it grant ready and this checklist is a starting point. We have compiled a list of things that show viability. It shows a funder who is grant-ready. To use a biblical example: we are separating the sheep from the goats.

Keep in mind a couple of things:

- Not every funder will care about each of these. Some will care about many things like audited financials and board support. All will care about some things like up to date 990s and a copy of your IRS determination letter.
- More than likely you don't have all of this information. Don't panic – it's OK. But hopefully you will see this as a way to do more planning and thinking. When we are in the middle of getting a grant prepared, you don't want to take the time to update your minutes.
- You're not dead in the water until the checklist is complete. (Maybe we should say you're probably not dead in the water.) We don't have to halt all applications. Remember there will be funders who aren't asking for some of this documentation. But for those who will care, keep in mind we can't make an application until the pieces are in place.

For example, say we found you a grant opportunity from Aunt Darlene's Lover of Cats Foundation for your animal shelter. But Aunt Darlene's 990PF clearly states "must have 3 years of audited financial statements" so that means we have to wait until time has passed or you have paid your accountants to complete the audits. Or you can have us submit the application only to pay for a rejection.

A. Long Term Stability. Here is a probing question: If the founder/visionary that started the non-profit went into a coma tomorrow morning would the non-profit's work continue?

1. Is there continuity for the vision of the organization no matter who the executive director is/board member are?
2. Does the board have a clear understanding of its board roles and responsibilities?
3. Is there written policy/training documentation for new board members?
4. Is there an organization chart/decision tree that clearly shows lines how decisions are made?
5. How would you rate your notoriety in the community? "Everybody knows us" is not the correct answer. Everybody knows Osama bin Laden and Charles Manson but it's not a good thing.

B. Measurable Success. What are the measurable accomplishments of the organization?

1. What are the matrices and can anyone understand them? Say you are an after-school tutoring organization. How many students have better test scores? Or how many stayed in school? What is the trend? If your organization went away would anyone notice?

2. What are the credentials of the organization's top management? Specifically:

a. Board members?

b. Management (not every staff member but those in leadership/decision making roles)?

c. Any consultants?

d. Partners? Maybe you're a food bank. Is there a grocery store chain that turns to you as its first place to donate items?

3. What documentation do you have to show the credentials? Resumes? Letters of support? Memorandum of Understanding?

4. Does your organization focus on long-term change or short term solutions? Using the food bank analogy, are you only interested in feeding people today and tomorrow or trying to eliminate hunger by various programs and empowerment?



Module I.C.

**Are you really ready for
grants?**

Easy Grants, LLC
1817 Crane Ridge Drive, Suite B-1
Jackson, Mississippi 39216
www.easygrants.us

A. Policies and Documentation. Some of these need to be in the file to retrieve as needed, some the staff and board need to review often.

1. Mission statement
2. History of the organization
3. Full written descriptions of your programs of work. This one can take a while. These quick questions may help you to think through them:
 - (a) What needs are you trying to meet with the program?
 - (b) How big of a priority is this for the organization?
 - (c) Which staff position is assigned to this program?
 - (d) Who are the people/entity/creature you are trying to help?
 - (e) Where does this program take place?
4. What is the 3, 5 and 10-year plan for the organization? Is it measureable?
5. How up to date and prioritized is the Wish List?
6. Fundraising plan. Does it show a donor solicitation plan, an events plan as well as a grants plan? (We will hire Easy Grants and they will get us millions of dollars AIN'T the plan funders will want to see.)
7. Grant management plan. (Who will report to the board, report to the funder, track the results/outcomes? Write thank you letters?)
8. Human resources policy
9. All board minutes are up to date
10. 990s are up to date
11. Copy of IRS determination letter
12. Budget information. This is for operations as well as for specific programs.
13. Financial statements – are they audited? Is there a board policy that a committee reviews them?
14. Written gift/donation acceptance policy.



Module I.D.

**Are you really ready for
grants?**

Easy Grants, LLC
1817 Crane Ridge Drive, Suite B-1
Jackson, Mississippi 39216
www.easygrants.us

A. Internal Go/No-go Grant Questions

1. Does the board know you are soliciting this grant?
2. Do they understand there is no guarantee the grant will be funded?
3. Do they understand the amount of staff time it will take to produce it?
4. Can the staff meet the deadlines?
5. Can you meet the technical components of the grant? In other words, can you deliver on the grant's requirements?
6. Can you sustain this project without the grant funds?
7. Is the money there for a match requirement if needed?
8. Does the grant require any other partners?

Key Element Needed	Have It	Don't Have It	Person Responsible	NA
A. Long Term Stability				
1. Vision continuity				
2. Board roles/responsibilities				
3. Written board training manual				
4. Organization chart/responsibility flow				
5. Community notoriety assessment				
B. Measureable Success				
1. Program success matrices				
2. Top management credentials:				
a. Board Members				
b. Key staff				
c. Consultants				
d. Partnerships				
3. Documentation: resumes, MOUs, agreements?				
4. Long-term or short-term?				
C. Policies and Documentation				
1. Mission statement				
2. History of the organization				
3. Written programs of work descriptions				
4. 3, 5, and 10 year plan				
5. Up to date and prioritized Wish List				
6. Fundraising Plan				
7. Grants management Plan				
8. Human Resources Policy				
9. Up to date board minutes				
10. Up to date 990s				
11. IRS determination letter				
12. Budget information				
13. Financial statements				
14. Written gift/donation acceptance policy				





Go or No-Go Grants Checklist

1. Name of the Foundation/Grant:

- | | | |
|------------------------------------------------------------------------------|-----|----|
| 2. Does the board know you are soliciting this grant? | YES | NO |
| 3. Does the board understand there is no guarantee the grant will be funded? | YES | NO |
| 4. Does the board understand the amount of staff time? | YES | NO |
| 5. Can the staff meet the deadlines? | YES | NO |
| 6. Can you meet the technical components of the grant? | YES | NO |
| 7. Can you sustain this project without the grant funds? | YES | NO |
| 8. Is the money there for a match requirement if needed? | YES | NO |
| 9. Does the grant require any other partners? | YES | NO |