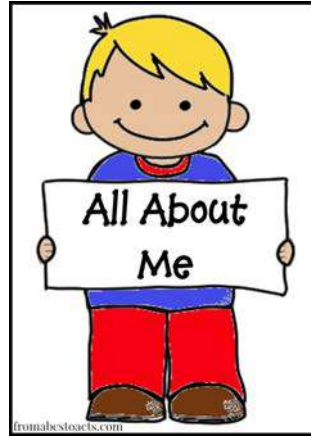


IDENTIFYING NEED & IDEA GENERATION

Why do you need/want
funding (strategic/ financial/
prestige etc.) and what will
you use it for?



About Me



Background



Barriers



Ideas & Enthusiasm



Creative Solutions



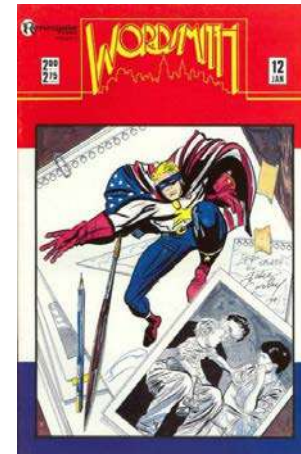
Share



Not Fair



Support



Wordsmith



Win-win



Successes



Ideation – A social
innovation approach

DEFINITION of 'Ideation' –

The process of forming and relating ideas. Ideation means to conceive or generate an idea and implement it. Ideas are the result of mental activity that can be based on past or present knowledge, thoughts, opinions, convictions or principles.

BREAKING DOWN 'Ideation'

Ideation means to conceptualise an idea. It is the thought processes involved in apprehending and expressing a new concept, often in a graphical format.

BRAINWRITING

- ☐ As its name implies, Brainwriting uses writing as its creative modus operandi, where it differs is we want people on their feet
- ☐ Each participant writes down an idea (or ideas) they would like the group to consider on a piece of flip chart paper posted on the wall
- ☐ People walk round the room and add comments to the initial idea to
 - a) trigger a build-on the original idea or
 - b) trigger an entirely new idea.
- ☐ Ideas end up being posted around the room for everyone to see and read. It's reinforcing for participants to see so many ideas generated in such a short time. Also, participants can continue to read and add throughout the session (during breaks) and building on these ideas

Problem Redefinition

What Is It?

☐ The Problem Re-Definition Technique helps you invent new ways of looking at a problem -- and ultimately come up with other, even better answers -- by first, re-defining that problem.

Rationale:

☐ Words carry with them their own creative limitations. How a problem is defined will often determine the kind and quality of ideas that will be generated to solve it. The problem re- definition technique allow individuals to create 100's of different ways to define a problem... and therefore helps you generate potentially 100's of different ideas to solve that problem

☐ Step 1: Working in groups, start with an opportunity/problem statement, or creative challenge. You can take one of the ones from exercise 1 and (if not already done) develop this into a "How do we....." statement.

☐ Step 2: Write this creative challenge on a flip chart in the group.

☐ Step3: Brainstorm alternatives words and actions

☐ Step4: Next, pick three of the more interesting words in the sentence and generate creative alternatives (8 to 10) for each choice.

☐ Step 5: Re-define the opportunity by randomly combining words to give us an entirely new opportunity statement.



So you want
funding – huh?

Why?

For the university?

For the region?

For Ukraine?

For specific individuals

- ✓ Institutional Autonomy
- ✓ Institutional Governance
- ✓ Leadership
- ✓ University Mergers
- ✓ Capacity Building

Drive towards super universities (alliances) and capacity building and cooperation programmes, centres of vocational excellence.....

A Beginner's Guide to funding

1. **Determine your initial Technological Readiness Level (TRL).** You will need to evaluate the state of your innovation in the time of the grant submission, and your capacity to reach your upcoming goals. The answers will determine which kind of grant programs best cater to your needs in terms of focus and time scale.
2. **Determine your goals.** Establish the goal you want to achieve (i.e. proof of concept, prototyping, validation etc.) after project completion. It is important to design the project scope and to check if the grant aligns with your project goals.
3. **Identify your partners.** You will need to check your network. It is a great opportunity to bolster new or existing partnerships. Try to balance the expertise of your consortium. For example, if you want to develop new healthcare applications, you might need software competencies as well as medical ones.
4. **Evaluate the status of your organisation** - Check the category of your company regarding EU regulation.
5. **Select your call through the EU tender portal (other sources exist)** Check the aims and scope of different grants. Take your time and select the grant which caters to the needs identified above.

6. **Pre-evaluate your proposal regarding financials.** Does the fund cover 100% or partial funding? Is match funding a prerequisite?

7. **Approach the project as a business plan.**

It will help you to leverage the project beyond the grant program. You will be able to use it and adapt it to different scenarios: start up and innovation contests, internal fundraising, strategic R&D partnerships, etc.

8. **Place your team in the limelight.** This is the opportunity to showcase your team's track record. EU grant schemes usually include a gender perspective section, hence pay special attention to gender balance. Male- or female-only teams are not a good look.

9. **Highlight the impact.** Acknowledge that the impact research makes just as much as the innovation itself. You need to have an idea about the market opportunity you are trying to address and provide a detailed description of your target group.

10. **Amplify the public.** Think about project dissemination, as well as bringing your innovation to the relevant stakeholders and the general public. Open Access materials and dissemination activities are a key component for EU grants.



Planning from a
proposal writing
perspective

Introduction and checklists

Do you want to be a partner, or do you want to be a coordinator in a research and innovation project? Not an easy question to answer, and my Horizon 2020 and Horizon Europe projects have shown me how important it is to find a suitable project coordination team.

Remember that, as a coordinator, you need to consider a few key issues:

- ✓ When you start putting together a partnership, you need to have a good idea and concept on your mind;
- ✓ When you start thinking about what your project should be about, you need to do your homework thoroughly – you need to research the target groups in the work programme, be sure to know what the European Commission wants from you through these projects, what will they be financing, and what do the evaluators wish to see;
- ✓ And finally, you have to invest a lot of effort in finding the best partners for your consortium.

After these are sorted, and after the partners join, there are still bits and pieces you need to be careful about:

- ✓ Make sure you understand all the questions and have an overview of the crucial issues. The partners will help you with this, but it is essential for you to understand what the concept will look like. You have to know how the **approach** is going to be presented to the evaluators, and **what the methodologies will be**.
- ✓ You need to know how to put together the **scientific sections**;
- ✓ And what kind of past projects are you going to be building on;
- ✓ The overview of **putting together different packages** will be up to you;
- ✓ **Take into consideration milestones and risks**;
- ✓ Pay special attention to **developing a budget**;
- ✓ And finally, you need to be aware of what different partners have to put in their profile, since this will convince the evaluators that you **have the best team** to implement this specific project.

Since, as a coordinator, you have to put in a lot of effort, the key question is do you have the capacity to put the entire project together. It takes a lot of time and effort, and it requires a lot of different skills. This is why it can seem scary for many organisations, especially if you haven't done it before. Therefore, many organisations only want to become a partner, not the coordinating organisation. But what the practice shows is - if you invest the effort once, you will be invited back to a partnership. Many organisations love working together on projects and are just switching the coordination role.

If you only want to be a partner, still read through this list:

- ✓ you still need to understand the idea,
- ✓ and know what the commission intends to finance because you will be requested to contribute to the proposal and convince the evaluator that your perspective can benefit the project,
- ✓ you have to check the budget for your organisation,
- ✓ you need to have a good partner profile and showcase your role,
- ✓ you have to contribute to the administrative tasks,
- ✓ you have to help with the work packages and do the tasks after you commit.

Remember that it is not your only task to fill in the partner profile, as some partners sometimes believe. Next time you accept the partnership, ensure you have the capacity to commit to the tasks, since consortia members are not keen on partners are not proactive, don't reply to emails, who can't attend meetings and workshops, etc. After all, coordinators are assigning budgets based on the roles, and no coordinator wants to give you a high budget for no or very little commitment. When you say YES to a partnership, please understand that it requires commitment, attention to details, and deadlines, too.

First tasks

As in every other process, the first tasks are crucial for proposal writing, too. The first tasks will show to the coordinator and the entire partnership which organisation and which person you can rely on and who will be contributing more. The first tasks will be indicative to show the partners what is expected from them. They will set the expectations regarding deadlines, quality, details to be provided, different tasks, etc. This phase is a kind of testing for partners to understand the requirements of proposal writing and what is expected from them in the project management phase.

What are these first tasks?

1. All organisations would have to do background research:
 - a. **Scientific research:** There will be different partner organisations representing various disciplines and fields, so they will do different kinds of research. But, on the partnership level, you need to have a good understanding of the state of the art (i.e., what is happening in the field — e.g., what kind of projects has European Union has been financing on different levels, (international, regional or national, local levels));
 - b. Good **background check of the sector and the industry:** What kind of needs and requirements does the sector have, **who are the competitors**, what are the **market conditions**, what is the technological landscape, and which organisations should be approached for **collaboration**;
 - c. And finally, **policy (papers, joint research centre reports, Commission agendas and priorities)**: You need to understand the state of the art from the policy perspective.

Since there are a lot of details to be checked, you need an excellent team to work on them since all these will be tailoring your concept.

2. While you have to put together objectives that are aligned with the expected outcomes of the topic, you also need to make sure that those objectives are aligned with the workplan (where it is visible who will be in charge for what) - this is how you can see if you are missing any partner, associated partner, or advisory board member, etc. with specific expertise.
3. Explore your contribution to the expected outcomes and impact: You need to clearly see which results and actions will deliver what benefits on which target group or geographical region to be able to tell the direct short- and medium-term outcomes and long-term impact contribution.
4. A part of concept finalisation is also trying to put together the heart of the consortium, core partners at least, and understand the role of each partner.
5. After you finish the concept, make sure you have a plan - what is the timeline you imagine: How much time do you think you will have for the proposal writing? It will broadly define when you must have your first and second draft ready, when the partners will do the first and final check, when you must meet (online or in person), etc. A good timeline will also help you push the partners to action.

Work together

- ✓ Working together is another important aspect you should consider when entering the consortium since the proposal writing is not a task for one person or organisation with all the others just editing their organisation descriptions, expertise, and competence.
- ✓ **Working together means delegating** – as a proposal coordinator, you must ask for help. It is useful if you have an assigned so-called proposal writer who will ensure that all contributions come into place and the style is uniform at the end. The partners must understand that their contribution, ideas, and concepts are vital for the project and that they are a part of the bigger picture because only with collaboration will the proposal succeed.
- ✓ As a part of this entire process, you need to **define the concept and the methodology TOGETHER**. The main goal is for the concept to be clear to everyone and not only to the coordinator. Here, doing a visual and showing it to all the partners has proven to be a good practice. When you send out the graphic, ensure it has the same meaning for everyone. If anything is unclear, change the visual and repeat the process. Make sure not to lose the concept in all the details! At this point, please keep it straightforward, or break it into more charts and visuals. All the partners also must agree with the proposed concept, ideas, methodology, and core details, since everyone will work towards the same cause. More meetings can be of help at this stage to make sure you reach the agreement faster.
- ✓ You might need **input from a specialist** in sections such as Open Science, Data Management, and gender dimension since you might not be understanding certain parts the way experts understand them. Of course, to create a good proposal, you need to have these aspects developed correctly and entirely, thus consider if any expertise is missing.
- ✓ Finally, **collaborate with the stakeholders**, and determine during the proposal writing process, together with them, how your project can benefit from co-creation, co-design, or co-assessment!



Strategic Planning

What is strategic planning?

Strategic planning is a process in which an organization's leaders define their vision for the future and identify their organization's goals and objectives. The process includes establishing the sequence in which those goals should be realized so that the organization can reach its stated vision.

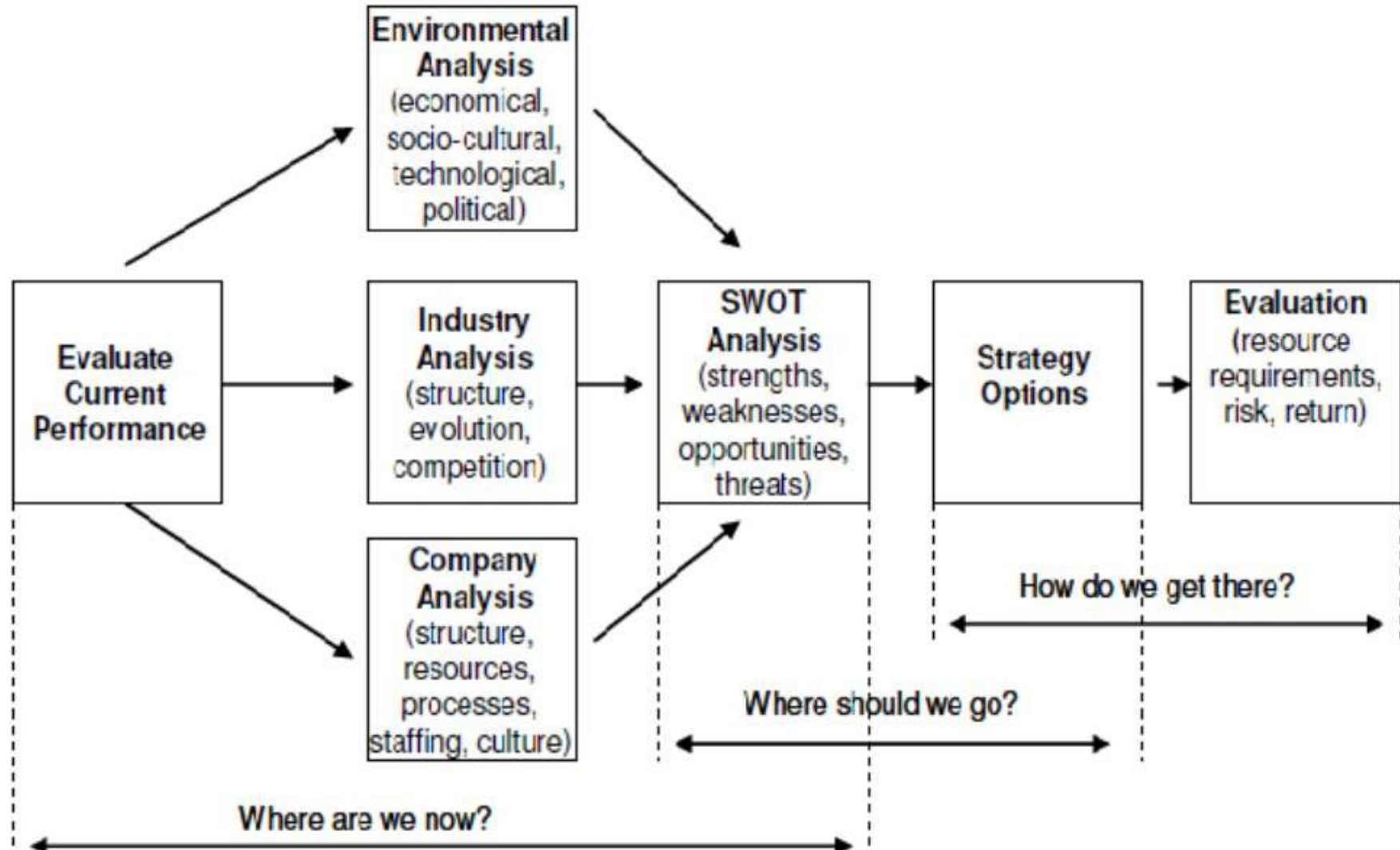
Strategic planning typically represents mid- to long-term goals with a life span of three to five years, though it can go longer. This is different than business planning, which typically focuses on short-term, tactical goals, such as how a budget is divided up. The time covered by a business plan can range from several months to several years.

The product of strategic planning is a strategic plan. It is often reflected in a plan document or other media. These plans can be easily shared, understood and followed by various people including employees, customers, business partners and investors.

Organizations conduct strategic planning periodically to consider the effect of changing business, industry, legal and regulatory conditions. A strategic plan may be updated and revised at that time to reflect any strategic changes.



What does it look like?



3-Phase Approach

The Strategic Planning Toolkit includes a 3-Phase Approach that we built and refined over the past 20 years, by constant trial and error. The good news is that you don't have to waste your time and money going through that lengthy trial-and-error process. You can simply leverage our work and customize it based on the specificities of your organization.

Phase I: Set up your strategic planning project

1. Strategic planning team
2. Guiding principles
3. Strategic plan structure
4. Strategic plan key inputs
5. Strategic planning project plan

Facilitator?
Go it alone?

Phase II: Gather & analyze data and provide key insights

1. Market analysis
2. Competitor analysis
3. Customer feedback
4. Company data analytics team
5. Employee feedback
6. Executive feedback
7. SWOT summary of the key business insights

Phase III: Define and implement your strategic plan

1. Mission, vision and values
2. Key strategic objectives
3. Strategy map
4. Balanced scorecard and key performance indicators
5. Potential initiatives to reach strategic objectives
6. Business cases and financial models
7. Prioritization of the initiatives
8. Business roadmap and detailed initiatives plan
9. Strategic plan implementation
10. Dashboards to track & manage progress
11. Key lessons learned
12. Quarterly update of the strategic plan based on new data

Objectives

The Strategic Planning Toolkit includes frameworks, tools, templates, tutorials, real-life examples and best practices to help you:

- **Easily define and execute your corporate and business strategy** to ensure high profitable growth
- **Identify where the company should go, and how to get there**
- **Increase the value creation of your organization with a simple and comprehensive 3-phase strategic planning approach:** (I) Set up your strategic planning project, (II) Gather & analyze data and provide key insights, (III) Define and implement your strategic plan
- **Set up your strategic planning project:** (1) Strategic planning team, (2) Guiding principles, (3) Strategic plan structure, (4) Strategic plan key inputs, (5) Strategic planning project plan
- **Gather & analyze data and provide key insights:** (1) Market analysis, (2) Competitor analysis, (3) Customer feedback, (4) Company data analytics team, (5) Employee feedback, (6) Executive feedback, (7) SWOT summary of the key business insights
- **Define and implement your strategic plan:** (1) Mission, vision and values, (2) Key strategic objectives, (3) Strategy map, (4) Balanced scorecard and key performance indicators, (5) Potential initiatives to reach strategic objectives, (6) Business cases and financial models, (7) Prioritization of the initiatives, (8) Business roadmap and detailed initiatives plan, (9) Strategic plan implementation, (10) Dashboards to track & manage progress, (11) Key lessons learned, (12) Quarterly update of the strategic plan based on new data
- **Build a strategy map and balanced scorecard to easily translate your strategy** into strategic objectives, key performance indicators and targets
- **Build a strong business case** to get your project approved by the executive committee
- **Build simple and sophisticated financial models to estimate your project financials:** revenue, cost savings, cash flow, net present value (NPV), ROI, IRR, payback period, WACC, etc.
- **Prioritize your initiatives** based on impact and effort
- **Carry out a market & competitor analysis** to better define your strategy and outperform your competitors
- **Quickly improve the strategic planning capability of your organization**
- **Become the strategic planning subject matter expert of your organization**

While many organisations have a history of successful income generation from traditional sources, they often seek to diversify their funding sources to increase their long-term sustainability, as well as widening the range of services offered and growing their research capability.

There are many important assets, skills, and resources that impact success in raising money from grants and non-grant sources. Many of these can be developed and strengthened over time. But there are several organisational factors that must be in place from the outset.

Organisations are smart to conduct an internal “gut check” and honestly assess their organisational readiness before embarking on non-grant income generation and funding strategies. Too many organisations spin their wheels, waste time, and wonder why they aren’t achieving success because they fail to ask themselves the hard questions up front – before they start.

In order to embark upon a diversified fund plan and successfully raise money from non-grant sources of revenue, organisations should be able to honestly answer “yes” to each of the following questions.

- Do we have a viable mission and organisation, including demonstrated success, strong support from constituents, and a compelling need for our work?
- Do we have the staff and Board “bandwidth” (time, resources, capacity, and interest) to implement new funding strategies?
- Are our Board members and staff open to at least a few new income generation/funding strategies such as EU projects, research projects, or fee for service/contract work?
- Is our organisational leadership unanimously and completely committed to raising money from other/new sources, both in principle and in practice?
- Do we have Board members./Senior Management Team who will be actively involved/engaged with staff in executing income generation/funding strategies?
- Are our organisation’s board members and SMT willing to leverage their personal and professional relationships for raising funds?
- Are we willing to elevate new Eu projects to at least the same level of importance as our main educational programmes and activities?
- Do our senior staff and Board members believe we are ready to begin?

This checklist will help you to:

- Understand the mindset and requirements of project funding and delivery
- Identify the things you will need in place to attract funding
- Systematically consider your structure, systems, skills, and business model
- Identify gaps or weaknesses you will need to work on
- Secure the funding you need to take your organisation to the next level

Projects are often utilised as a means of achieving an organization's strategic plan. Projects are typically authorized as a result of one or more of the following strategic considerations:

- • Market demand (e.g., a car company authorizing a project to build more fuel-efficient cars in response to gasoline shortages),
- • Strategic opportunity/business need (e.g., a training company authorizing a project to create a new course to increase its revenues),
- • Customer request (e.g., an electric utility authorizing a project to build a new substation to serve a new industrial park),
- • Technological advance (e.g., an electronics firm authorizing a new project to develop a faster, cheaper, and smaller laptop after advances in computer memory and electronics technology), and
- • Legal requirements (e.g., a chemical manufacturer authorizes a project to establish guidelines for the handling of a new toxic material).

Projects, within programs or portfolios, are a means of achieving organizational goals and objectives, often in the context of a strategic plan. Although a group of projects within a program can have discrete benefits, they can also contribute to the benefits of the program, to the objectives of the portfolio, and to the strategic plan of the organization.



Honest Gut Check —
self assessment

Readiness Component	Complete and Available	Improvement 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 organisation				
Solid reputation in the community (locally and in education circles)				
Credible track record: <ul style="list-style-type: none"> • Organisational accomplishments AND/OR • Credentials of key individuals (board members, key staff, researchers, consultants, partners, etc.) 				
Focus on long-term change, not short-term fixes				
Effective ongoing communications – formal and informal <ul style="list-style-type: none"> • Internal (audiences?) • External (audiences?) 				
Clearly stated policies: <ul style="list-style-type: none"> • Ethical principles for marketing and fundraising • Grants management, reporting outcomes and results • External communications • Equalities • Safeguarding • Gift management 				

Readiness Component	Complete and Available	Improvement Needed	Resources Needed	NA
Readiness Component				
Mission statement				
Vision statement				
Values statement				
Case statement: <ul style="list-style-type: none"> • Organisation history • Programme descriptions (needs, priorities, clients, services, location, staffing, etc.) • Future goals and strategies 				
Prioritised 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: <ul style="list-style-type: none"> • Communications • Decision-making protocols • Lines of authority and responsibility • Resources 				

Readiness Component	Complete and Available	Improvement Needed	Resources Needed	NA
Rule 3: PLAN, PLAN, PLAN – PLAN! – Culture and Infrastructure				
Long-term strategic planning process				
Organisational process for review and update of: <ul style="list-style-type: none"> • Mission, vision, values • Strategic plan • Case statement • Mid- and short-range goals 				
Sound accounting practices and systems: <ul style="list-style-type: none"> • Certified Public Accountant • Audited financial statements • Fund accounting capability 				
A master grants plan (as part of 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				
Programme(s) budget				
Country tax status and any letters of determination				
Board list – names and community affiliations				
CVs of key personnel				
Operating budget				
Other				

Readiness Component	Complete and Available	Improvement Needed	Resources Needed	NA
Rule 4: KNOW YOUR FUNDER – Culture and Infrastructure				
Processes in place for: <ul style="list-style-type: none"> Identifying potential funders – EU, other Developing funder profiles Securing funder guidelines and application materials 				
Sound plan for ongoing development of funding research and relationships				
Clear understanding of funders as mission partners (not cheque-writers)				
Commitment to clear, honest, ethical, timely and helpful communications with funders and potential funders				
System for tracking: <ul style="list-style-type: none"> Communications with funders Proposals submitted Responses received Necessary action steps and follow-up 				
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 organisation’s board members, staff, researchers, partners, volunteers, and clients and people affiliated with the funding entity)				

Readiness Component	Complete and Available	Improvement Needed	Resources Needed	NA
Rule 5: CREATE A WINNING PROPOSAL – Culture and Infrastructure				
Effective grants development “team” (installed throughout the organisation), with clear understanding of roles and responsibilities (or ability to buy in resources)				
Ability and commitment to plan the proposal development effort effectively, in order to: <ul style="list-style-type: none"> • 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	Improvement Needed	Resources Needed	NA
GRANTS MANAGEMENT				
Plan for thanking funder and partners (as well recognising on website and project materials)				
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!				



Checklist— self
assessment

GRANT READINESS CHECKLIST

PURPOSE

Items you will need for many grant proposals that you should have in an easily accessible location. Review all and prepare, locate, or create those that you do not have current or available.

Store these electronically in a projects file (updating yearly as things change and new forms are added) that is accessible to anyone who is likely to make applications (giving permissions where necessary). A hard copy is also useful.

ORGANISATIONAL BACKGROUND

- | | |
|--|---|
| <input type="checkbox"/> Address, Phone, Web Address | <input type="checkbox"/> Target Population |
| <input type="checkbox"/> History of Organisation (narrative) | <input type="checkbox"/> Current Programs/Services Descriptions |
| <input type="checkbox"/> Year Established | <input type="checkbox"/> Number Served in Previous Year |
| <input type="checkbox"/> Mission, Vision, & Values Statements | <input type="checkbox"/> Number FTE |
| <input type="checkbox"/> Service Area/Location Addresses/Contact Information | <input type="checkbox"/> Other/Notes |

TAX DOCUMENTS

- | | |
|--|---|
| <input type="checkbox"/> Tax Letter | <input type="checkbox"/> Dun & Bradstreet Number (DUNS) |
| <input type="checkbox"/> Any tax forms | <input type="checkbox"/> Educational Registration |
| <input type="checkbox"/> Annual accounts | <input type="checkbox"/> Other Registrations as necessary |

FINANCIAL INFORMATION

- | | |
|---|--|
| <input type="checkbox"/> Detailed Organisational Budget | <input type="checkbox"/> Programme/Project Budgets |
| <input type="checkbox"/> Financial Statement /Accounts (last 3 years) | <input type="checkbox"/> Sources of Funding |
| <input type="checkbox"/> Most Recent Audit | <input type="checkbox"/> Other/Notes |

GOVERNANCE

- | | |
|--|--|
| <input type="checkbox"/> Board of Directors (including affiliations & contact information) | <input type="checkbox"/> Articles of Incorporation |
| <input type="checkbox"/> Organisation Chart /Organogram | <input type="checkbox"/> Executive Director/President/CEO Bio |
| <input type="checkbox"/> Current Strategic Plan | <input type="checkbox"/> Executive Director/President/CEO Compensation |

PROGRAMME/PROJECT INFORMATION

- | | | |
|---|---|--|
| <input type="checkbox"/> Detailed Programme/Project Description | <input type="checkbox"/> Target Population | <input type="checkbox"/> Staffing Structure/Org Chart(s) |
| <input type="checkbox"/> Year Established | <input type="checkbox"/> Number Served in Previous Year | <input type="checkbox"/> Job Descriptions |
| <input type="checkbox"/> Location Address | <input type="checkbox"/> Current Outcome Measures | <input type="checkbox"/> CVs/Bios of Key Staff |
| <input type="checkbox"/> Contact Information | <input type="checkbox"/> Outcomes from Previous Year | <input type="checkbox"/> Success Story |

OTHER DOCUMENTATION

- | | | |
|---|--|--|
| <input type="checkbox"/> Corporate Compliance Plan | <input type="checkbox"/> Letters of Support | <input type="checkbox"/> Solicitation License (where applicable) |
| <input type="checkbox"/> Performance Improvement Plan | <input type="checkbox"/> Collaborating Partners | <input type="checkbox"/> Articles of Incorporation & By-Laws, including year established |
| <input type="checkbox"/> Policies/Procedures | <input type="checkbox"/> Contracts | |
| <input type="checkbox"/> Best Practices Utilized | <input type="checkbox"/> % of Board Giving Financially | |
| <input type="checkbox"/> MOAs/MOUs | <input type="checkbox"/> History of grants received and denied | |



Review Areas

key questions.....

Clear impact – educational, social, economic, social capital.....	Do you have clear evidence that a social need exists and support from your whoever you are targeting? Can you show clearly who will benefit from your work and how?
A solid organization	Does your organisation or team a solid track record of delivery? Can you should a good financial systems and safeguards are in place? Do you have effective systems in place to measure and report on impact?
An appropriate legal form	is your organisation eligible for the funding? Do you need to work with others, or establish a subsidiary to make you eligible?
A clear requirement	Are you clear what you need the funding for? Can you justify how much money you are asking for and how it will be used?
The ability to manage the funding as well as the project	Do you have robust financial projections in place? Can you show you will be able to manage projects of scale? Have you considered the risks if income (and surplus) doesn't happen exactly as you predict?
The right team	Do you have board members/Senior manager with appropriate professional skills? Do you have solid business and financial skills within the staff team? Do you have the right partners and advisors around you?
The right revenue model	Do you deliver activities that will generate a revenue stream and create surplus? Is there a good profit margin in your activities? Are revenues stable and predictable?
A clear business plan	Are you able to simply and clearly explain your business model? Can you show that your business concept is viable? Do you have your business plan in a form acceptable to investors/funders?

