

WORKSHEET - PREPARE

Objective: To identify administrative obstacles before they block a submission.

STEP 1 - THE TOOLBOX

Check the documents that you currently have on hand, up-to-date and in professional PDF format.

- Proof of legal status:** Letters patent, registration with the business registrar or charity number.
- Governance:** Up-to-date list of board members (names, professions, roles).
- Financial health:** Most recent financial statements (audited or reviewed by an accountant).
- Overall budget:** Your organization's operating budget for the current year.
- Proof of insurance:** Certificate of civil liability (often required for public projects).
- Expertise:** CVs or brief biographies of the 2 or 3 key people who will lead the project.

STEP 2 - GAP ANALYSIS

Look at what you haven't checked. Which of these is the most difficult to obtain?

- Most critical missing document:
- Who is responsible for producing/finding it?
- Internal deadline for obtaining it:

STEP 3 - CAPACITY ASSESSMENT

Answer **YES** or **NO**. Be honest, the landlord will find out anyway.

- Do we have a dedicated accountant to track this money?
- Have we dealt with a similar amount in the past?
- If the landlord requests a progress report in 6 months, do we know who will write it?

If you answered "NO" to any of these questions, what action can you take today to secure this point? (e.g., hire a freelance accountant, find a trusted partner).

STEP 4 - THE FIRST CONTACT

Write two sentences that demonstrate the strength of your organization. Hint: Mention your years in operation, the number of people served, or a major past success.

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PRO TIP: DON'T STORE THESE DOCUMENTS ON AN EMPLOYEE'S PERSONAL COMPUTER. CREATE A SHARED FOLDER (IN THE CLOUD) NAMED "**MASTER GRANTS FOLDER**." THIS WILL SAVE YOU HOURS OF PANIC 15 MINUTES BEFORE A DEADLINE.