



## Operating Grant Review Checklist

Please use this checklist as a guide when writing your full Operating Grant application. The more questions you can answer “yes” to, the stronger your application will be. The checklist is organized by sections in the proposal, with questions relevant to that section underneath it. Please note, applications that are incomplete will not be scored.

### **Executive Summary**

- Describe your organization. Please include the mission statement and the date established as a 501(c)(3). Limit your response to 250 words.
  - The Trust is interested in all aspects of your agency's work - both the direct services you provide and any work you do to go upstream to address systemic issues. Does your agency do public policy or systems change advocacy work? Advocacy can include activities like public education about issues facing your clients, building relationships with policymakers or training your patients to advocate for program improvements.
  - Collaborative Partners: Please describe your agency's collaborations and how they assist your organization in more effectively serving its target populations.
  - Please state your organization's statement of inclusiveness or non-discrimination policy. Limit your response to 100 words.
  - Please tell us about any changes that have happened within the agency over the past year. Please also describe any recent accomplishments. If there is anything that you would like us to know about your agency that isn't described in the rest of the proposal, please tell us here.
- 
- Does it include a general overview of the organization?
  - If the agency does advocacy, does the application describe systems change advocacy as opposed to individual advocacy?
  - Does the agency outline how its programs and services are meeting unmet needs?
  - Does it identify how long the agency has been offering services?
  - Does it describe how collaborations with other agencies work?
  - Are letters of support from collaborating agencies included? Are they detailed and do they explain the nature of the collaboration and/or the ability of the agency to deliver quality programs? Is it clear that

they are not form letters? Letters of support are optional for recurring operating grant applicants, and required for new operating grant applicants.

### **Needs Assessment**

- Please describe the prevalence of need in the communities that you serve and how the programs that you operate meet those needs. Local data is particularly helpful.
- Please detail the demographic information of your organization's clients. Be specific about your agency's clients.

*This information should help us understand the clients' vulnerability and diversity. Limit your response to 250 words.*

- Does it include the most currently available research and data? Is the research and data cited with relevant sources? Is the research and data connected to a health issue?
- Is the research relevant to the community served (county, city, state-level)?
- Does it explain how much it would cost the community if the organization did not exist? Can this cost be broken down per participant?
- Is the demographic data detailed? Does it describe the socioeconomic status of the agency's target population?

### **Goals and Outcomes**

- What are your agency's overall goals for the upcoming year?
- How many individuals will be served by your agency in the upcoming year?

*Please break down numbers by target populations and/or programs, if possible. Limit your response to 200 words.*

- Please list the outcomes that your agency hopes to accomplish in the upcoming year. Your outcomes should be measurable, and at least 50% of your stated outcomes should have positive health implications.
- Are the outcomes listed in The Healing Trust's preferred format (e.g., 50 out of 100 (50%) of clients will have a reduction in trauma symptoms)?
  - Does the agency use an effective and standardized method to track and report outcomes?
  - Are at least 50% of the outcomes health-related?
  - Are the goals and outcomes for the funding year requested? Please include a multi-year plan in the Strategic Plan section.

### **Leadership Team**

- The Trust cares about the sustainability of your organization and views sustainability as more than just financial. Please tell us about any succession planning that the agency has done in the past few years. If you anticipate any change in your agency's leadership team within the next

two years, please describe here. If you are expecting this change, please describe how you are preparing new leaders.

- Is there a documented process for any leadership staff transition? Is a brief explanation of the plan included?
- Are there emergency backup plans for key staff?
- What is the process for creating and maintaining succession plans and emergency backup plans? Are they reviewed and updated frequently?

### **Strategic Plan**

- Please describe how these operating funds will assist you in meeting your agency's goals and outcomes.
  - Please list the date of the adoption of your agency's most recent strategic plan and list the goals and benchmarks that were outlined in the strategic plan. Indicate what years are covered by the most recent strategic plan. If nearing the end of your strategic plan term, please report your progress on meeting the goals and benchmarks set forth in your plan.
- Is the strategic plan for multiple years (as opposed to the annual plan, which should be reflected in the Goals and Outcomes section)?
  - Does it describe how the funds will be used?
  - Is it evident that there is a clear strategic planning process?