

instrumentl

The Ultimate Go vs. No-Go Grant RFP Evaluation Tool

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Introduction

Knowing which grants to pursue and which to avoid is crucial in saving time and investing your efforts in places that matter.

We created this **Go vs. No-Go: Ultimate Grant RFP Evaluation Tool** to help you bring clarity in which opportunities your nonprofit should go after.

This tool is meant to guide you through an iterative process of identifying the best fit funders for your nonprofit. Remember, successful grant seeking starts with you having a grants system and strategy.

With this tool, you'll have **three clear steps** you can take to identify the best grant opportunities for your nonprofit to pursue.

STEP 1

Take stock of your organization's efforts

STEP 2

Complete a first-pass of your Instrumentl matches

STEP 3

Run Researching opportunities through the Go vs. No-Go Tool

Introduction

Once you've identified which opportunities are "Go"s, put the "Go"s on a grant calendar and start working on them (so you can get one step closer to winning them)!

If you're an Instrumentl user, you can save the "Go" opportunities to your Tracker under the "Planned" status to stay on top of funder deadlines.

If you're looking for a tool to help power your grants system, you can [create a 14-day trial](#) of Instrumentl to bring your grant prospecting, tracking, and management to one place.

As you use this guide, if you need any additional help, you can feel free to email us at hello@instrumentl.com.

Now, it's time to jump into the tool!

Step #1:

Take stock of your organization's efforts

Before you start looking for grants, it's important to know what you're going to be looking for, and where your organization is coming from in terms of current needs, initiatives and partnerships. Answer these questions **before** you begin your grant search.

BEFORE YOUR GRANT SEARCH	NOTES
What are the objectives of your project?	
What issues or opportunities does your project address?	
Where is the location of your program or what communities do you serve?	
What is your timeline for funding?	
What is your budget?	
Do you have any current sources of funding or partnerships within your community that receive funding?	

Step #1:

Take stock of your organization's efforts

Helpful guidance for answering these questions

Here are some thoughts behind each of these questions, and why they are important:

1. What are the objectives of your project?

a. Here you should follow the SMART objective formula. By the end of

_____, increase _____ by ____% or more as demonstrated by _____.

b. Example: By the end of Year 1, increase the percent of the City of Cleveland's low-income senior citizens receiving hot meal deliveries

by 25% or more as demonstrated by the number of eligible individuals completing applications, number of new zip codes served, and number of new hot meal deliveries.

c. Your answer to this will help you identify keywords for your grant search on Instrumentl (or whatever grant search tool you use).

Step #1:

Take stock of your organization's efforts

Helpful guidance for answering these questions

2. What issues or opportunities does your project address?

- a. Example: lack of hot meals for senior citizens regularly delivered to low-income communities
- b. This further helps you identify keywords to use in your grant searches.

3. Where is the location of your program or what communities do you serve?

- a. Example: We primarily serve Cuyahoga County, with a secondary focus on surrounding areas.
- b. This helps you identify what locations to select when setting up your project on Instrumentl.

Step #1:

Take stock of your organization's efforts

Helpful guidance for answering these questions

4. What is your timeline for funding?

- a. Example: End of March 2022
- b. This helps you work backwards towards your goal and plan for how many RFPs you may be able to apply to ahead of your funding timeline.

5. What is your budget?

- a. Example: \$25K
- b. This helps you understand how much you need to fundraise and later, what percentage of your budget can be supported by each opportunity.

Step #1:

Take stock of your organization's efforts

Helpful guidance for answering these questions

6. Do you have any current sources of funding or partnerships within your community that receive funding?

a. Example: ABC Foundation - \$15K

b. Knowing this allows you to (a) think about historical funders to the organization even if it was a long time ago, and (b) to tap into other funders who give to partners or associated organizations.

Step #2:

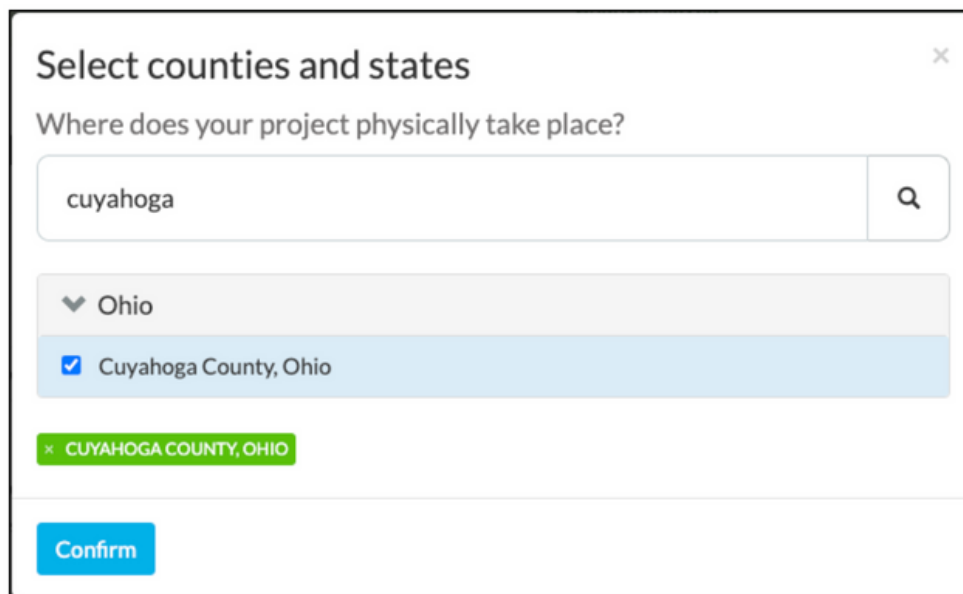
Complete a first-pass of your Instrument matches

If you don't have an Instrumentl account, you can create one at www.instrumentl.com.

If you already have one, [log into your Instrumentl account](#) and create a project for the program you're seeking funding for.

Use your earlier answers in **Step 1** to guide you in setting up your project for the best matches.

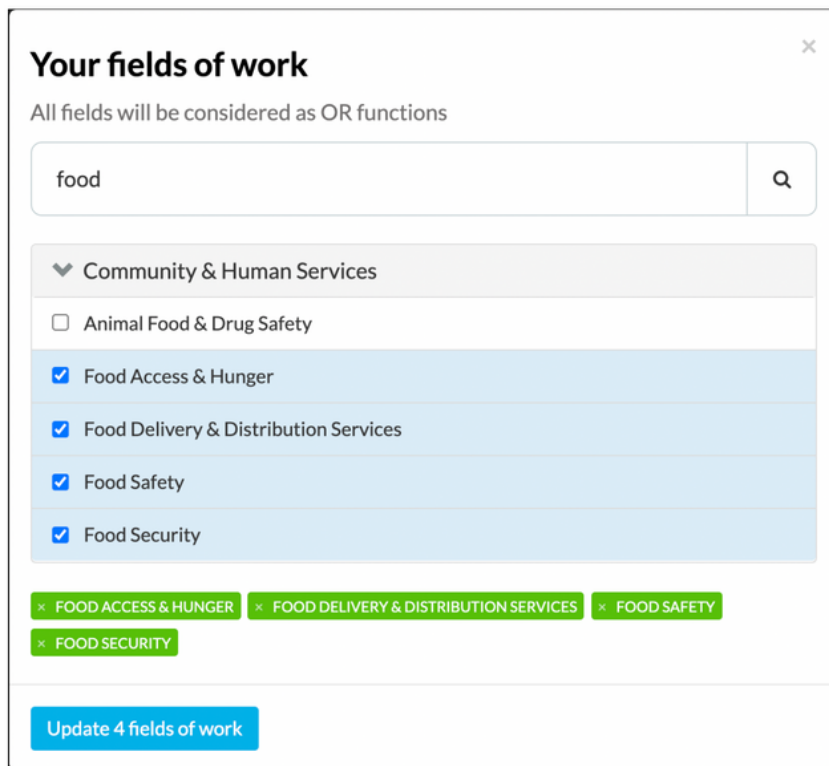
For example, if you were using our example from **Step 1** related to the City of Cleveland's low-income senior citizens receiving hot meal deliveries, you may start by selecting Cuyahoga County along with fields of work related to food.



The screenshot shows a web form titled "Select counties and states" with a close button (X) in the top right corner. Below the title is the question "Where does your project physically take place?". There is a search input field containing the text "cuyahoga" and a magnifying glass icon to its right. Below the search field is a dropdown menu labeled "Ohio" with a downward arrow. Under the "Ohio" dropdown, "Cuyahoga County, Ohio" is listed with a blue checkmark and a light blue background. At the bottom of the form is a blue "Confirm" button. A green pill-shaped tag with a white 'X' and the text "CUYAHOGA COUNTY, OHIO" is positioned above the "Confirm" button.

Step #2:

Complete a first-pass of your Instrument matches



The screenshot shows a web interface titled "Your fields of work" with a close button (X) in the top right corner. Below the title, it states "All fields will be considered as OR functions". There is a search bar containing the word "food" and a magnifying glass icon. Below the search bar, a dropdown menu is open, showing a list of categories under "Community & Human Services". The categories are: "Animal Food & Drug Safety" (unchecked), "Food Access & Hunger" (checked), "Food Delivery & Distribution Services" (checked), "Food Safety" (checked), and "Food Security" (checked). Below the list, there are four green tags with white text and a close button (X): "FOOD ACCESS & HUNGER", "FOOD DELIVERY & DISTRIBUTION SERVICES", "FOOD SAFETY", and "FOOD SECURITY". At the bottom, there is a blue button that says "Update 4 fields of work".

And then, you may select a few fields of work around community such as:

- **Community Services**
- **Senior Services**
- **Minority Services**

Your answers to the **Step 1** questions around timelines for funding and budget may guide your selections for grant sizes to target and types of grants to pursue.

Step #2:

Complete a first-pass of your Instrument matches

Continuing from our earlier example, we've selected \$20K as the individual max grant size we're looking for since our budget is \$10K. We recommend setting your individual max grant size over your budget.

What size grants are you looking for (in USD)?
Show me grants between...

No minimum

and

\$20k

What will you use the funds for? (Select all that apply.)

Ideal for nonprofits:

- ☐ Education / Outreach ⓘ
- ☒ Project / Program ⓘ
- ☒ General Operating Expense ⓘ
- ☐ Capital Project ⓘ
- ☐ Training / Capacity Building ⓘ

Ideal for academic researchers:

- ☐ Research ⓘ
- ☐ Fellowship ⓘ
- ☐ Scholarship ⓘ
- ☐ Conference ⓘ

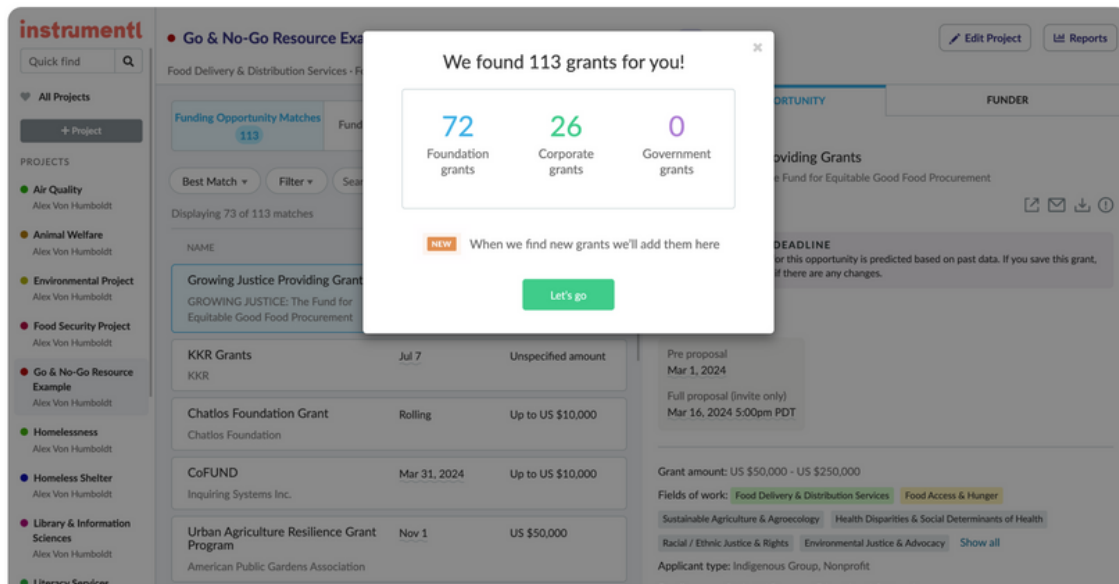
Save and Exit

We've selected **Project/Program** and **General Operating Expense** as our program is most likely to fall into these two types of grants.

Step #2:

Complete a first-pass of your Instrumentl matches

From here, click **"Save and Exit"** and let **Instrumentl** do the work for you in curating a shortlist of good fit opportunities. You can see from our example, we just found 166 active opportunities!



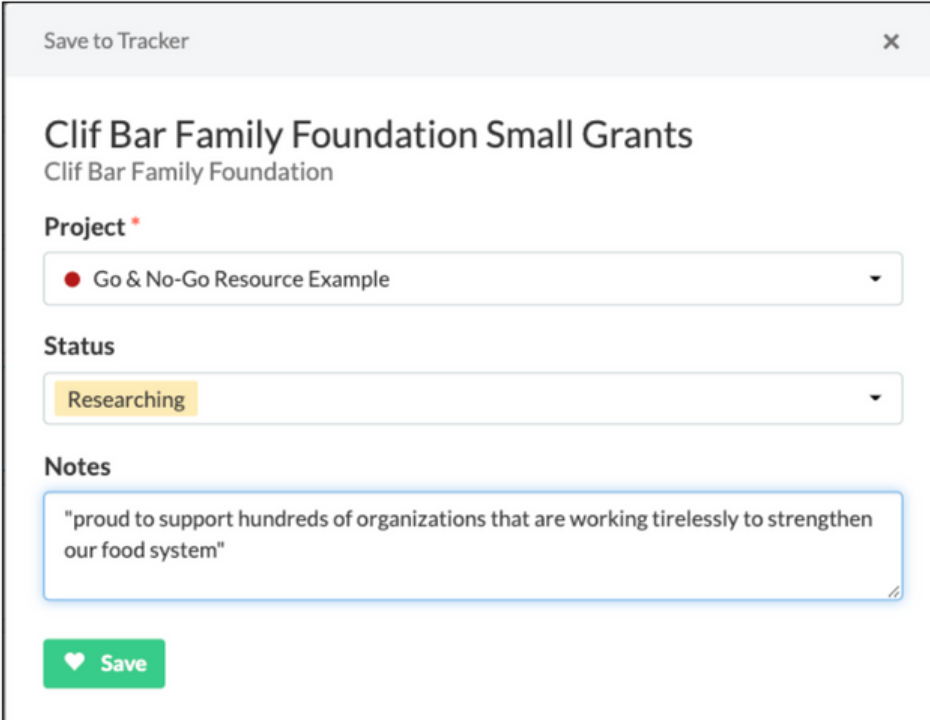
If you prefer using another grant tool, aim to identify at least three open grant opportunities you can use the **Go vs. No-Go** Evaluation Tool on.

If you're using Instrumentl, you'll now want to complete a passthrough of the initial opportunities in your Matches, focusing on things like funding interests and eligibility to start. Then save a few of these grant opportunities to your Tracker for further diligence.

Step #2:

Complete a first-pass of your Instrument matches

Try to leave quick notes for review later as to why you think it's worth researching further. Here's an example from the **Clif Bar Family Foundation Small Grants**:



The screenshot shows a web form titled "Save to Tracker" with a close button (X) in the top right corner. The form is for "Clif Bar Family Foundation Small Grants" under the "Clif Bar Family Foundation" header. It contains three main sections: "Project" with a dropdown menu showing "Go & No-Go Resource Example" and a red dot icon; "Status" with a dropdown menu showing "Researching" and a yellow highlight; and "Notes" with a text area containing the text "proud to support hundreds of organizations that are working tirelessly to strengthen our food system". At the bottom left is a green "Save" button with a heart icon.

Helpful tip: You may find it useful to search for different keywords commonly related to your project.

For example, searching for "food" narrows down results from 165 to 34. We recommend sticking to one or two-word phrases to cast a wide enough net in this initial filtering process.

Step #2:

Complete a first-pass of your Instrument matches

Best Match ▾

Filter ▾

food ✕ 🔍

Displaying 34 of 165 matches

Once you've identified at least three opportunities, your Tracker should start to look something like this:

instrumentl

Quick find 🔍

♥ All Projects

+ Project

PROJECTS

Air Quality

Alex Von Humboldt

Animal Welfare

Alex Von Humboldt

Environmental Project

Alex Von Humboldt

Food Security Project

Alex Von Humboldt

Go & No-Go Resource Example

Alex Von Humboldt

● Go & No-Go Resource Example

Tracker **5**

Calendar

Tasks

Matches **300+**

AWARDED

GOAL

WAITING TO HEAR FROM

\$0

\$0

\$0

0 opportunities

[Edit](#)

0 opportunities

View All **5**

Applications

Researching **5**

2023, 2024 ⌵ ℹ

Dis

NAME	OWNER	DEADLINE	STATUS	AMOUNT	N
June 2023					
P.E.A.R.L. Pledge Pearl Milling Company		Jun 14, 2023 3:00pm PDT	Researching	Unspecified amount	
October 2023					
Clif Family Foundation Operation... Clif Bar Family Foundation		Oct 1, 2023 8:59pm PDT	Researching	Approximately \$7k	

Congrats! It's now time to move on to Step 3.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

At this point, you should have at least three grant opportunities you can pursue. You'll now want to run through each opportunity through the following **Go vs. No-Go Tool**.

RFP EVALUATION TOOL TEMPLATE

Create a copy of this tool for each opportunity you're conducting due diligence on. Circle go or no-go based on your notes for each criteria. If you need help figuring out when to mark something **Go vs. No-Go**, we've included guidance and a description for each criteria below the template.

KEY DATES

RFP Deadline (or Rolling):	
Grant Notification Date: (if available)	

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

RFP EVALUATION TOOL TEMPLATE CONT.

KEY FUNDER INFORMATION:

NOTES

EIN:

Website:

Key Contacts:











Annual Report URLs:

Existing Relationship?

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool





RFP EVALUATION TOOL TEMPLATE CONT.

RFP OVERVIEW REVIEW	NOTES	GO/NO GO
What's the grantmaker's mission? Does it align to your project?		 
What are the specific goals of the RFP?		 
Do you meet their eligibility requirements?		 
What's the size of grants being made? Does it align with your budget needs?		 
What type of grant is this RFP for?		 
	Total	/5

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

RFP EVALUATION TOOL TEMPLATE CONT.

GIVING MEDIANS	NOTES	GO/NO GO
What's the median grant size from this funder?		 
How did the median grant amount change over the last 3 years?		 
	Total	/2

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool







RFP EVALUATION TOOL TEMPLATE CONT.

FUNDER GIVING HISTORY	NOTES	GO/NO GO
Can you identify at least 3 previously funded organizations similar to yours?		<input checked="" type="checkbox"/> <input type="checkbox"/>
Is your organization's geographic location represented historically?		<input checked="" type="checkbox"/> <input type="checkbox"/>
What percentage of those funded are new grantees?		<input checked="" type="checkbox"/> <input type="checkbox"/>
Has the funder been giving to more and more new grantees over time, or giving more to repeat grantees?		<input checked="" type="checkbox"/> <input type="checkbox"/>
Does the median grant amount for new grantees align well with your project budget?		<input checked="" type="checkbox"/> <input type="checkbox"/>
Does your organization's impact areas align with the funders 3 year historical giving (by NTEE codes)?		<input checked="" type="checkbox"/> <input type="checkbox"/>
	Total	/6

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

RFP EVALUATION TOOL TEMPLATE CONT.

INTERNAL CONSIDERATIONS	NOTES	GO/NO GO
Does your nonprofit have enough bandwidth to take on this application?		 
Does your nonprofit have capacity to meet the reporting requirements outlined by the funder?		 
Does this RFP have parts where your nonprofit can repurpose past grant proposals?		 
	Total	/3

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

HELPFUL GUIDANCE FOR USING THE RESOURCE

Here are thoughts behind how to use the Go vs. No-Go Tool:

KEY FUNDER INFORMATION

1. First, fill in the RFP deadline and grant notification date provided by the funder (if available).
2. Next, fill in the Key Funder Information. You can find website and key contact information from the Funder's 990 Report in Instrumentl.

Example: from the [Clif Bar Family Foundation](https://www.clifbarfamilyfoundation.org/)

Contact Information			
EIN	204345935	Phone	510-596-6349
Address	1451 66TH STREET, EMERYVILLE, CA 94608-1004	Website	www.clifbarfamilyfoundation.org
Key People			
Title	Name		
President	Kathleen F Crawford		
Secretary/Treasurer	Gary J Erickson		
Vice President	Thao Pham		
Director Of Accounting	Jennifer Herman		

3. Visit their website to find the funder's past annual reports, and answer the question as to whether or not you have an existing relationship with the funder.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

RFP OVERVIEW REVIEW

1. What's the grantmaker's mission? Does it align to your project?

- a. Go: Clear language that mirrors or aligns to your project's impact.

Example: You offer food delivery services for low-income seniors and you spot this in the funder's background information:

Who We Support

Over the years, the Furthur Foundation has focused on a few simple themes. We care about the planet we live on, so we give to organizations that try to preserve the Earth's ecosystems. That's why we support groups saving wolves, forests and dolphins, and groups growing gardens, fighting toxic waste, and greening schools.

We care about the people and communities falling through our country's social safety net. That's why we fund organizations giving away food, helping people find jobs, and helping develop the skills that support people and families.

We care about the Bay Area, because, well, this is pretty much our home. And we like people and organizations that try things out, set an example for other organizations, and blaze a trail for a better society.

You can learn more about this opportunity by visiting the funder's [website](#).

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- b. No-Go: If you feel it'd be a stretch for this funder's mission to relate to your project, you're best not giving points to it here.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

2. What are the specific goals of the RFP?

- a. Go: Clear language connecting your project to the RFP.

Example: You see exact keywords that relate back to your program or initiative:

Furthur Foundation Grant

Our executive director and our board of directors meet once a year, usually in the fall, to consider and select worthy causes. There is no deadline for applications.

Nearly all of our grants are between \$1,000 and \$5,000. This is not much money, and we therefore do not ask for much work from you.

FYI, We tend to support smaller, grassroots and community-based organizations whose orientation is to apply the money directly toward realizing their goals.

These range from providing food and shelter to planting trees, from children's summer recreation programs to activist training camps, from educating about endangered plants to preserving the culture of endangered peoples.

- b. No-Go: You cannot easily identify how the RFP's goals align to your project.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

3. Do you meet their eligibility requirements?

- a. Go: You review their fields of work, desired applicant types, location of project, and overall eligibility requirements and see no reason you cannot pursue the opportunity.

Predicted deadline: Apr 15, 2022 4:00pm PDT

Grant amount: Approximately US \$10,000

Fields of work: Food Security Food Delivery & Distribution Services Academic Success & Enrichment Art Education Early Childhood Development
Financial Literacy [Show all](#)

Applicant type: Nonprofit, Government Entity, Indigenous Group

Funding uses: Education / Outreach, Project / Program, Training / Capacity Building

Location of project: *Matches:* Ohio *Other eligible locations:* Georgia, Arizona, Colorado, Idaho, Illinois [Show all](#)

Location of residency: Georgia, United States, Arizona, Colorado, Idaho [Show all](#)

- b. No-Go: You review the requirements and believe there may be a point of clarification where you'll need to reach out to the funder, or you do not qualify for a clear reason.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

4. What's the size of grants being made? Does it align with your budget needs?

- a. Go: You can see the grant amount playing a meaningful role in your ability to meet your desired project goals.

Example: You are fundraising for a \$100K project and find an opportunity where you'd be able to request \$10K.

Grant amount: US \$10,000 - US \$20,000

- b. No-Go: You struggle to see how this grant will play a part in you meeting your fundraising goals.

Example: You are fundraising for that same \$100K project and find an opportunity where the max grant is \$500.

5. What type of grant is this RFP for?

- a. **Go**: You review the Funding Uses in **Instrumentl** and it aligns to your project.

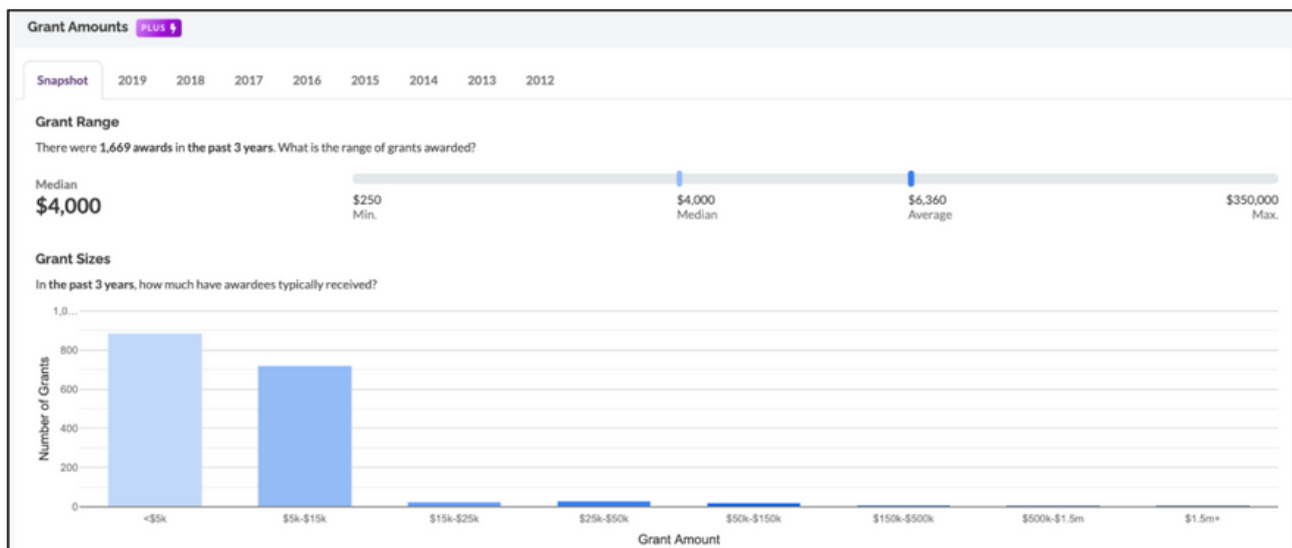
Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

GIVING MEDIANS

1. What's the median grant size from this funder?

a. Go: The median grant amount affirms what you've reviewed thus far that this funder could play a meaningful part in helping you reach your fundraising goals.



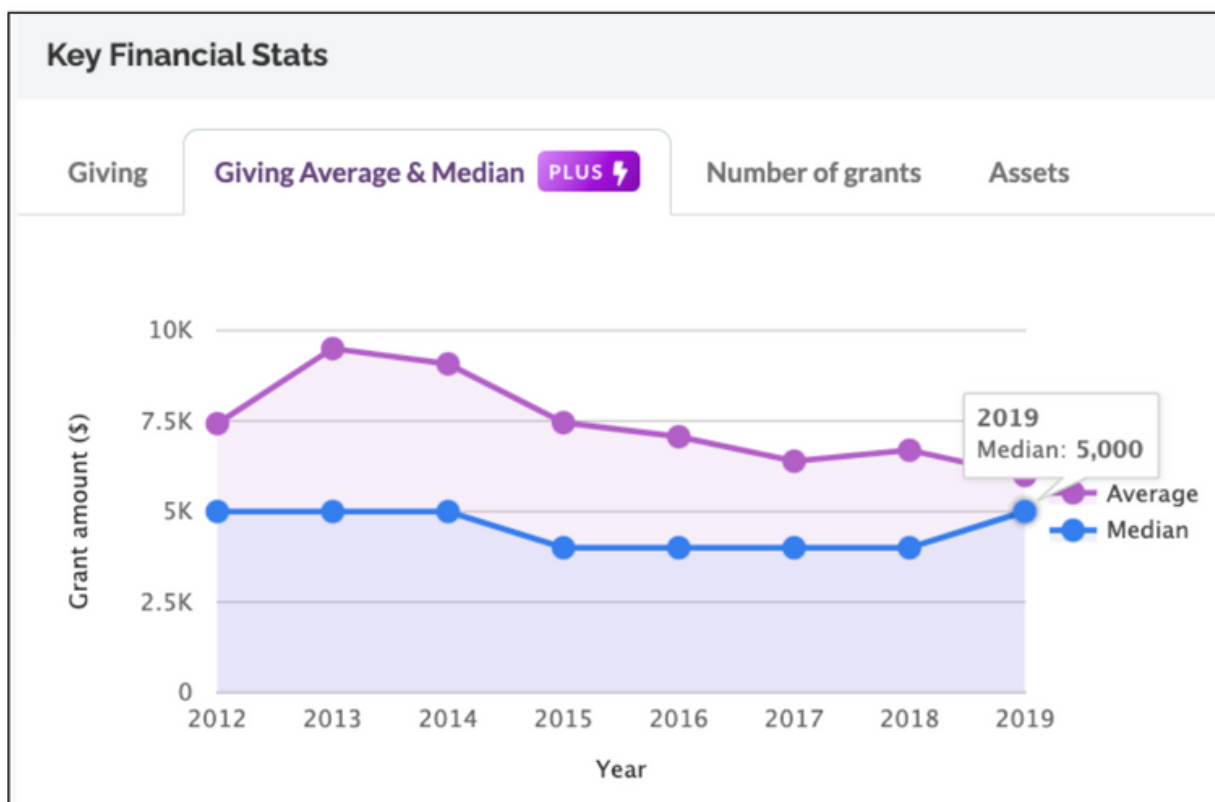
b. No-Go: You are not excited by what the most common grant amount is from this funder or are not sure how it might fit in your overall efforts.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

2. How did the median grant amount change over the last 3 years?

a. Go: Giving medians are trending upwards over the last three years.



b. No-Go: Giving medians are trending down over the last three years.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

FUNDER GIVING HISTORY

1. Can you identify at least 3 previously funded organizations similar to yours?

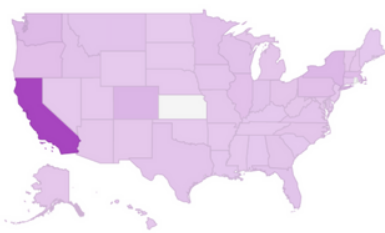
a. Go: You can clearly identify previously funded organizations that seem similar in impact to yours.

Example: you search "food" within the Past Grantees section and see a number of organizations who have received grants towards a similar impact to your project.

Past Grantees

All-time **PLUS** 2019 2018 2017 2016 2015 2014 2013 2012

There were 559 awards in 2019. Who received these awards and where are they located?



California food

NAME	NEW GRANTEE? PLUS	LOCATION	AMOUNT	PURPOSE
Agriculture And Land Based Training Assoc	-	PO BOX 6264, SALINAS, CA 939126264	\$6,500	Expanding organic food & farming
Berkeley Youth Alternatives	-	1255 ALLSON WAY, BERKELEY, CA 947021833	\$5,000	Expanding organic food & farming
Ccof Foundation	-	2155 DELAWARE AVE SUITE 150, SANTA CRUZ, CA 95060	\$10,000	Expanding organic food & farming
Center For Urban Education About Sustaina	-	ONE FERRY BUILDING SUITE 50, SAN FRANCISCO, CA 941114231	\$6,000	Creating a robust & healthy food system

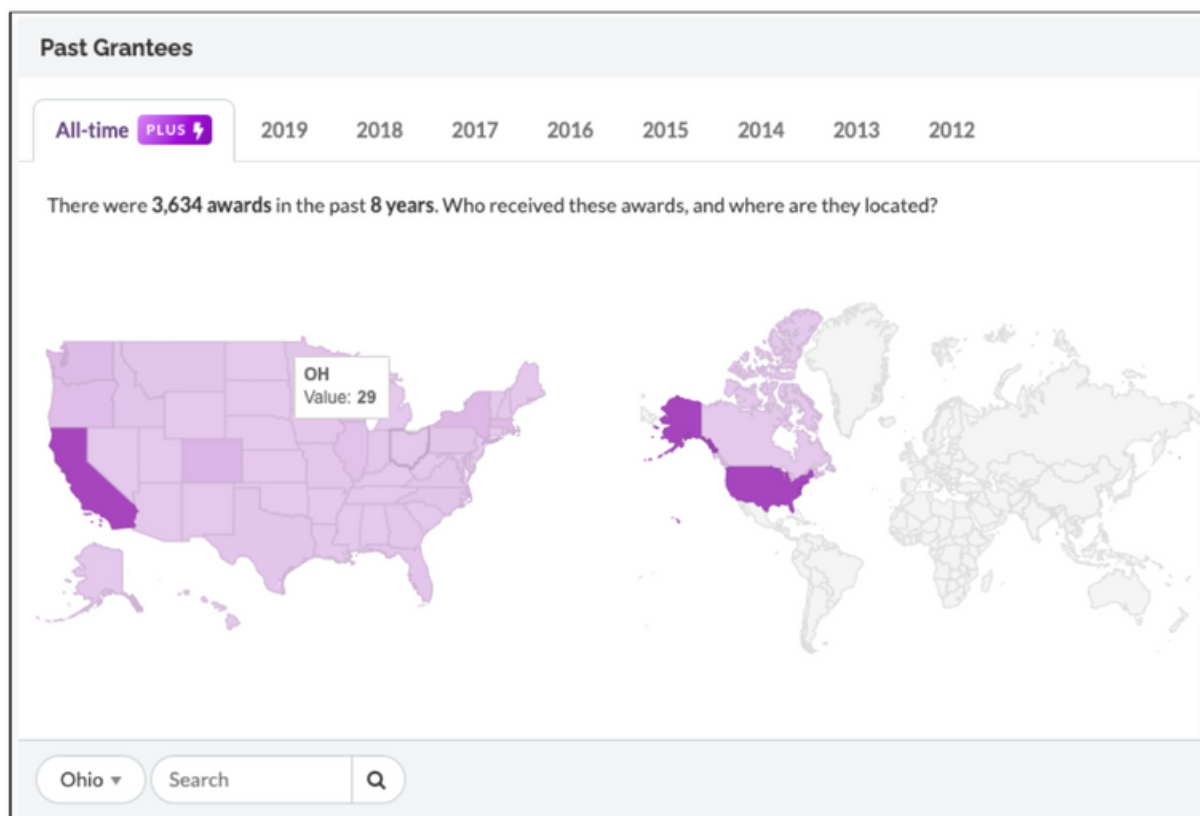
b. No-Go: You cannot easily identify this funder previously funding organizations similar to yours in impact.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

2. Is your organization's geographic location represented historically?

- a. Go: You see organizations within your state or nearby region who have been funded for similar initiatives.



- b. No-Go: You do not see a history from the funder of funding nonprofits in your area.

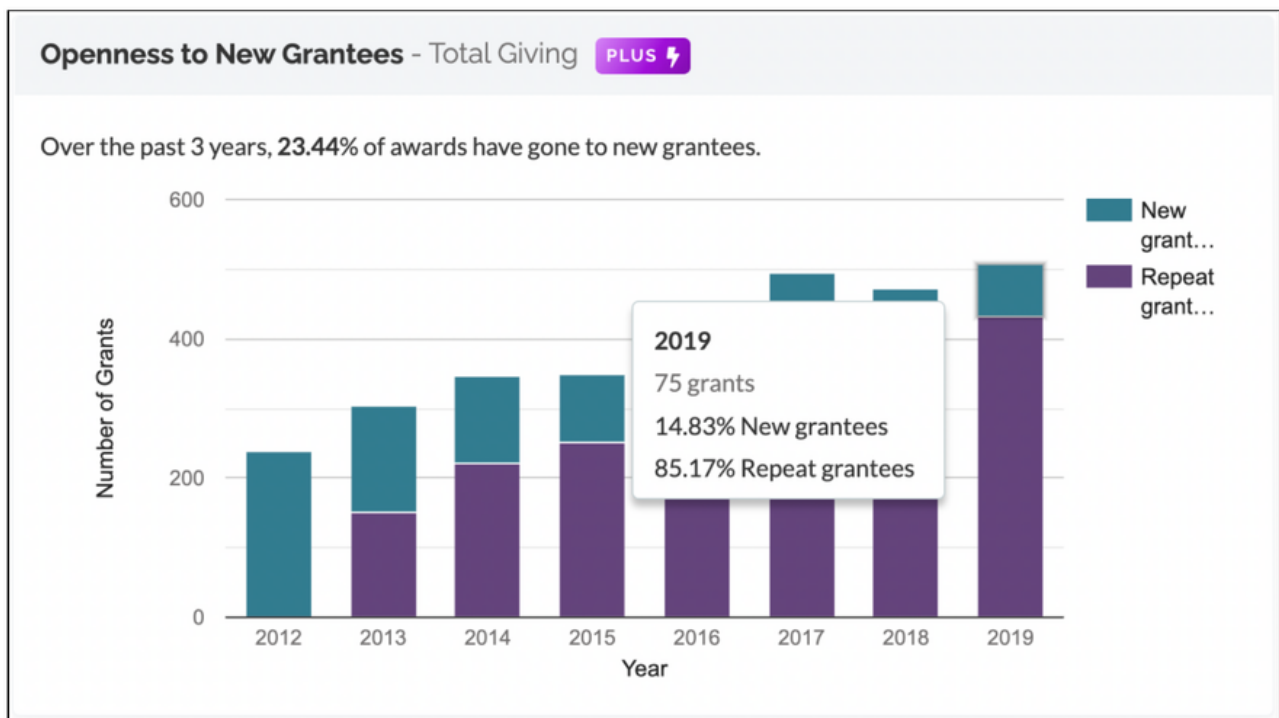
Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

3. What percentage of those funded are new grantees?

a. Go: You see a decent representation of new grantees being funded by the funder (greater than 25%).

b. No-Go: You do not see a high percentage of new grantees being funded every year.



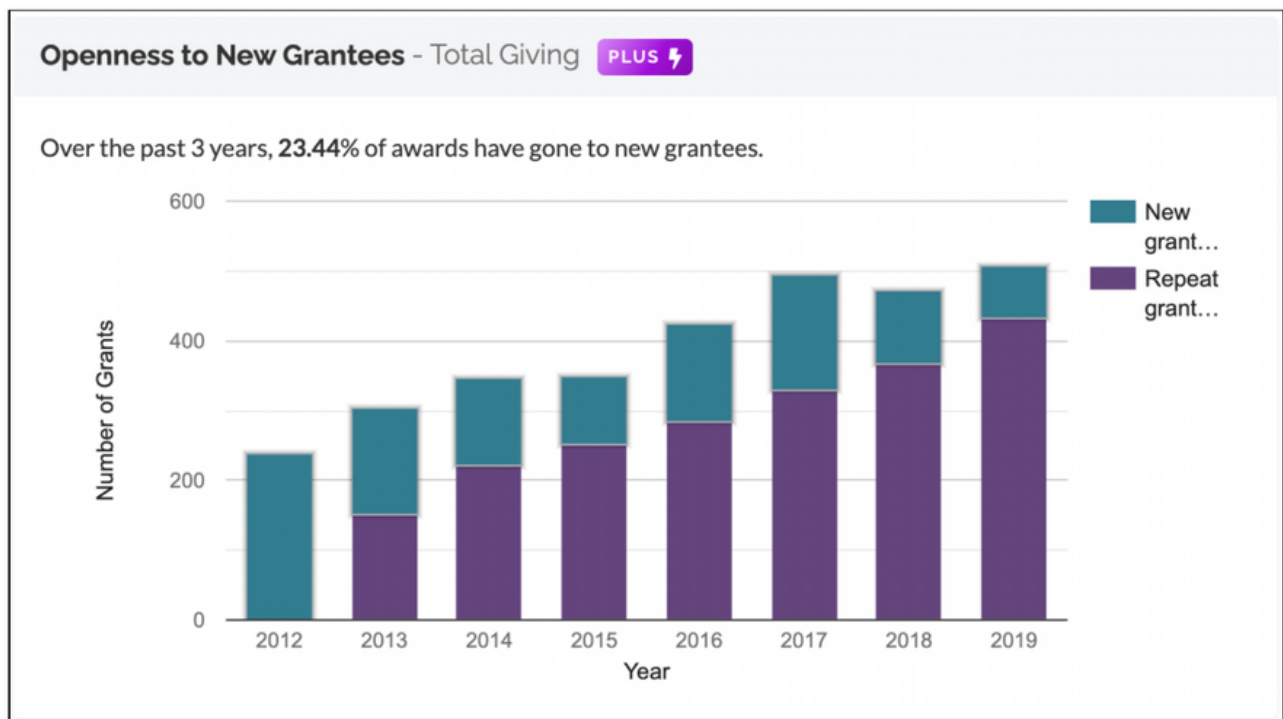
Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

4. Has the funder been giving to more and more new grantees over time, or giving more to repeat grantees?

a. Go: You see the percentage of new grantees over the last three years is trending positively.

b. No-Go: You see the percentage of new grantees over the last three years has trended downwards.



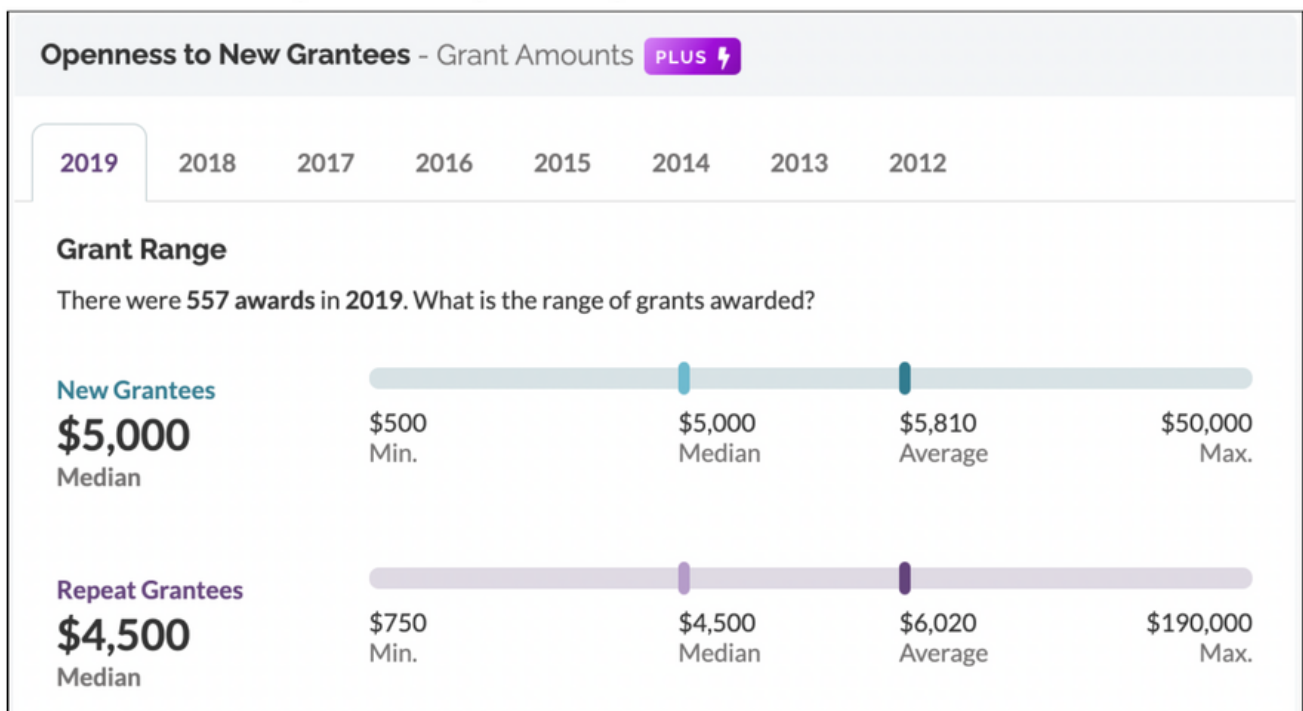
Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

5. Does the median grant amount for new grantees align well with your project budget?

a. Go: The median amount over the last few years to new grantees aligns well with your overall budget.

b. No-Go: The median amount over the last few years to new grantees does not align well with your budget needs.



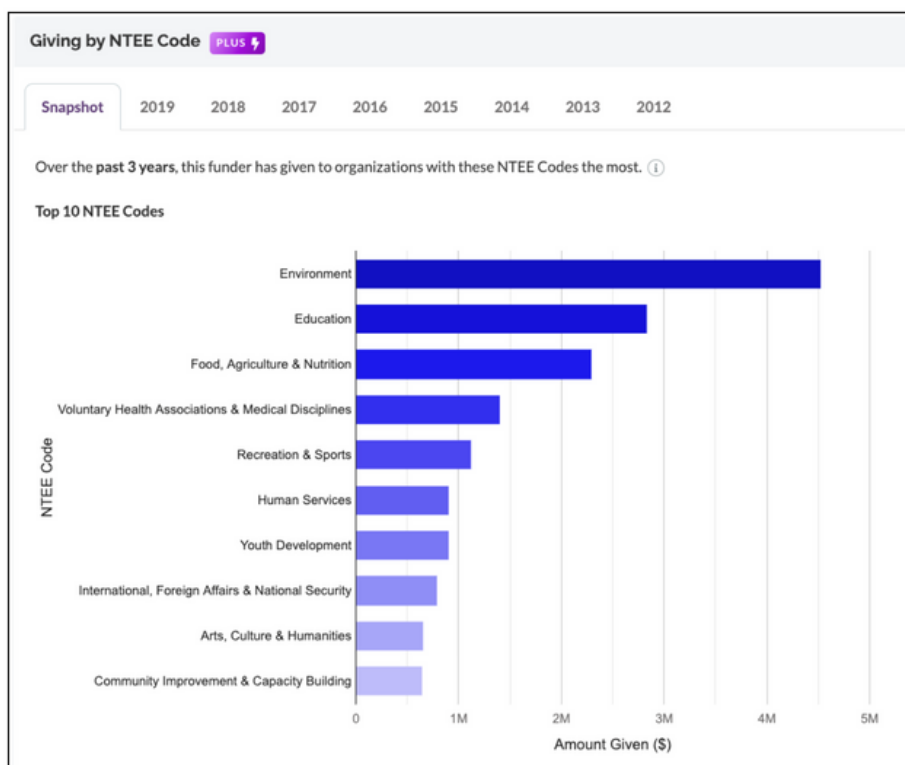
Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

6. Does your organization's impact areas align with the funders 3 year historical giving (by NTEE codes)?

a. Go: Your organization's impact areas rank in the top 5 NTEE codes the funder has funded in the last three years.

b. No-Go: Your organization's impact area does not rank in the top 5 NTEE codes the funder has funded in the last three years.



Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

INTERNAL CONSIDERATIONS

1. Does your nonprofit have enough bandwidth to take on this application?

a. Go: You know exactly who will take on what to get this grant RFP completed, and are confident everyone will be able to do their part. You feel comfortable with the length and complexity of the grant application while considering it to the potential return on investment in grant size.

b. No-Go: You have reservations when considering all the necessary parts to complete this RFP, and feel there is some uncertainty to your organization's ability to complete everything by the deadline. You're unsure the length and complexity of the opportunity is worth the investment of time relative to the potential grant award.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

2. Does your nonprofit have capacity to meet the reporting requirements outlined by the funder?

- a. Go: You have a clear understanding and confidence in your organization's ability to complete the reporting requirements outlined by the funder while considering it to the potential return on investment in grant size.
- b. No-Go: You are unsure about your organization's ability to meet the reporting requirements of the funder while considering them to the potential return on investment in grant size. Further conversations are needed.

3. Does this RFP have parts where your nonprofit can repurpose past grant proposals?

- a. Go: You can identify portions of the RFP where you can repurpose past responses to other RFPs to use towards this RFP.
- b. No-Go: You believe the bulk of this RFP would require new writing that cannot be based on prior proposals.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

The highest possible marks an RFP can have using the RFP Evaluation Tool Template is 16.

Below are general guidelines by the Instrumentl team regarding when an opportunity should be a **"Go" vs. "No-Go"** situation.

Please note: every organization is different, so it is best to use these as guidelines and adapt the scale to meet your organization's situation accordingly.

SECTION

SCORING GUIDELINES

RFP Overview Review
(out of 5)

You should proceed in evaluating the opportunity as long as you mark ✓ for at least 3 of the 5 criteria.

Ideally, you mark ✓ for all five.

Step #3:

Run Researching opportunities through the Go vs. No-Go Tool

SECTION	SCORING GUIDELINES
Giving Medians (out of 2)	Aim to have at least one ✓
Funder Giving History (out of 6)	Aim to have at least four ✓
Internal Considerations (out of 3)	Aim to have at least two ✓

In general, the threshold for an opportunity to be a **“Go”** is a score of at least **10 out of 16**. **The higher, the better!**

What can be helpful is running the opportunities you're considering through the framework once, then evaluating the pros and cons of pursuing the opportunities you've identified as **“Go”s** with another framework, such as your organization's decision making matrix.

Wrapping Up the Go vs. No-Go Evaluation Tool

Hopefully from this tool, you feel better equipped to pursue the best good fit funders for you. If you found this resource helpful, here are a few more things we want to leave you with:

- [Bookmark our blog](#): check out the Instrumentl blog for in-depth guides and free resources, including our grant workshop replays. New content is added every week.
- [Free grant writing classes](#): Instrumentl hosts regular learning opportunities for nonprofit professionals to hone their grant writing skills. We hope you'll join us for our next one. You can [RSVP here](#).
- [10 Best Lessons from 10 Grant Writing Experts](#): If you enjoyed this freebie, you'll also love this one. It digs into ten key insights from grant writing educators who have previously presented in our workshops.

Feel free to pass along this evaluation tool to a friend or colleague you think may benefit from it.

Lastly, if you haven't already, [create a 14-day Instrumentl account](#) to get personalized grant recommendations for your nonprofit!