FREE WORKSHEET

Grant Go/No-Go Decision Matrix (Free Fillable PDF)

Knock-out questions, a weighted seven-factor scoring table and a decision record for deciding whether a grant opportunity is worth applying for.

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> Every application costs staff time that could go elsewhere. This matrix helps a team decide, in one short meeting, whether an opportunity is worth that time. Answer the knock-out questions first, score the seven factors, then record the decision and the reasons. Use the funder's own published rules for every answer. The total is a prompt for discussion, not a measurement.

The opportunity

Funder:

Opportunity title:

Deadline:

Amount we would request:

People in this decision:

Step 1. Knock-out questions

A "no" to any of these means stop. Do not score an opportunity you cannot apply for.

Question	Yes or no	Evidence (document and page)
Do we meet every eligibility rule the funder states?		
Can we produce a complete, reviewed application by the deadline, with the staff we have?		
If match or cost share is required, is it available and can we document it?		

☐ All three answers are yes, and each has evidence

If an answer is "not sure", find out before you go further. Ask the funder's program contact where the rules are unclear.

Step 2. Score the factors

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Score each factor from 1 (poor) to 5 (strong). Multiply by the weight. The suggested weights are a starting point. Change them to suit your organization, but set them before you score.

Factor	What a 5 looks like	Weight	Score (1 to 5)	Weighted score
Fit with the funder's priorities	Our project matches a stated priority without bending the program	3		
Competitiveness	We can answer every scoring criterion with evidence, and we know who else is likely to apply	3		
Capacity to write	Named people have the hours, and the needed data and documents exist	2		
Capacity to deliver	We could start on time and do the work as described if funded	3		
Cost to apply against the award	The hours and expenses of applying are reasonable for the amount and period	2		
Relationship with the funder	The funder knows us, or we have spoken with the program contact	1		
Reporting and compliance burden	We can meet the reporting and financial rules with current systems	2		
Total		16		

Highest possible total with these weights: 80.

Cost to apply

Estimated staff hours to prepare the application:

Outside costs (consultant, audit, travel, other):

Work that will be delayed if we apply:

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Step 3. Read the total

The bands below are a rule of thumb for use with the suggested weights. They are not based on research and do not predict an award.

Weighted total	How to read it
60 to 80	Strong case to apply. Confirm capacity and go.
44 to 59	Mixed. Apply only if you can name what will raise the weak factors before the deadline.
43 or below	Weak case. Decline, or keep the funder on the list for a later round.

Two checks matter more than the total:

- ☐ No heavily weighted factor scored 1 or 2
- ☐ The people who will write and deliver the work agree with the scores

A high total with a 1 on capacity to deliver is still a no. A middling total for a funder you want a long relationship with can still be a yes, if you say so plainly.

Factors scored 1 or 2, and what would change them:

Step 4. Decision

- ☐ Go
- ☐ No-go
- ☐ Not this round, review later

If not this round, date to review again:

Reasons for the decision:

Conditions that must be met for a "go" to stand (for example, a partner letter by a set date):

Decision made by:

Date:

If the decision is go

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Application lead:

Internal deadline:

First three tasks and owners:

If the decision is no-go

What we would need in place to apply next time:

Follow-up with the funder, if any:

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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