

How to Build an AI Agent That Finds and Qualifies Grant Opportunities

A source-aware scouting system that ranks real opportunities against mission, eligibility, effort, and timing.

24 copy-paste prompts 6 chapters **nonprofit, education, civic, and social-impact teams**

A FIELD GUIDE, NOT A BINDER

Build a repeatable grant pipeline that produces evidence-linked shortlists and candid pursue-or-pass recommendations.

WELCOME

What this pack helps you build

Build a repeatable grant pipeline that produces evidence-linked shortlists and candid pursue-or-pass recommendations.

THE HUMAN BOUNDARY

The agent may discover, extract, compare, and recommend. A person must open the official notice, confirm current eligibility and deadlines, protect sensitive data, and approve every pursue-or-pass decision. Never invent funders, requirements, URLs, or fit evidence.

THE WORKFLOW

01 define the funding profile -> 02 search official sources -> 03 extract requirements -> 04 score fit and effort -> 05 verify the shortlist -> 06 run a weekly pipeline review

Choose the tool that fits the work

TOOL	SHINES AT	GOOD TO KNOW
Web-enabled AI assistant	finding current opportunities and tracing claims to official pages	Require an official source URL and access date for every candidate.
Spreadsheet or database	deduplication, scoring, ownership, and deadline tracking	Keep raw facts separate from the agent's interpretation.
Calendar or task manager	internal go/no-go and submission reminders	A person owns every date and status change.

1. Set the Agent's Charter

Give the scout a narrow mandate and a refusal rule before it searches.

IN THIS CHAPTER

- 01 Grant Scout System Prompt
- 02 Define the No-Go Rules
- 03 Set the Scoring Weights
- 04 Design the Human Handoffs

Grant Scout System Prompt

PURPOSE

Create a reusable, evidence-first opportunity scout.

WHEN TO USE IT

Use once when configuring a project, custom assistant, or fresh scouting thread.

COPY & PASTE PROMPT

You are Grant Scout for [ORGANIZATION]. Find and qualify funding opportunities; do not draft applications. Use current official funder or government sources whenever possible. For every claim, record the exact source URL, page title, quoted or closely paraphrased evidence, and date accessed. Never infer eligibility from a funder's general mission. Label unknowns UNKNOWN and conflicting dates CONFLICT—VERIFY. Deduplicate opportunities. Score only with the approved rubric. Present hard disqualifiers before the score. End each candidate with PURSUE, WATCH, or PASS plus reasons. Ask for missing organization-profile fields before searching. A human makes all final decisions and verifies the official notice.

PRO TIPS

- Save this as the standing instruction, not a one-off request.
- Do not upload donor, client, or beneficiary personal data.

EXAMPLE OUTPUT

Ready. Missing before search: applicant tax status, service geography, program area, typical request size, and staff capacity.

WHAT'S NEXT

Complete the funding profile worksheet.

Define the No-Go Rules

PURPOSE

Use the agent to convert strategic and capacity limits into automatic exclusions.

WHEN TO USE IT

Use during 1. set the agent's charter when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, convert strategic and capacity limits into automatic exclusions. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

A reimbursement-only award is PASS because the team cannot float \$60,000.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Set the Scoring Weights

PURPOSE

Use the agent to calibrate the weighted rubric to this year's funding strategy.

WHEN TO USE IT

Use during 1. set the agent's charter when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, calibrate the weighted rubric to this year's funding strategy. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

General operating support receives a 1.3 priority multiplier; new construction remains excluded.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Design the Human Handoffs

PURPOSE

Use the agent to name who verifies eligibility, finance, program fit, and final pursuit.

WHEN TO USE IT

Use during 1. set the agent's charter when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, name who verifies eligibility, finance, program fit, and final pursuit. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Eligibility: grants manager; match: CFO; program fit: director; final call: executive director.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

2. Build the Funding Profile

A useful scout knows both what fits and what the team cannot support.

IN THIS CHAPTER

- 05 Profile Interview
- 06 Build the Mission Vocabulary
- 07 Inventory Funding Readiness
- 08 Set the Opportunity Budget

Profile Interview

PURPOSE

Turn organizational context into search and exclusion criteria.

WHEN TO USE IT

Use at setup and whenever strategy or capacity changes.

COPY & PASTE PROMPT

Interview me one section at a time to create our Funding Profile: legal status; mission; populations served; geography; programs and outcomes; allowable project types; request range; match tolerance; reporting capacity; excluded funders or activities; earliest start date; and five proof points. Then return (1) confirmed facts, (2) unknowns, (3) search phrases, and (4) automatic disqualifiers. Do not improve or embellish my claims.

PRO TIPS

- Include operational limits such as reimbursement-only awards.
- Have finance verify request range and match tolerance.

EXAMPLE OUTPUT

Synthetic profile — Harbor Youth Lab; 501(c)(3); Baltimore City; paid STEM internships for ages 16–21; \$25k–\$100k; no construction; no reimbursement-only awards; unknown: audited-financial requirement.

WHAT'S NEXT

Approve the profile and automatic disqualifiers.

Build the Mission Vocabulary

PURPOSE

Use the agent to create controlled program, population, geography, and outcome synonyms.

WHEN TO USE IT

Use during 2. build the funding profile when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, create controlled program, population, geography, and outcome synonyms. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Search cluster: youth employment, workforce readiness, paid internship, career pathway.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Inventory Funding Readiness

PURPOSE

Use the agent to identify reusable evidence and missing prerequisites before discovery.

WHEN TO USE IT

Use during 2. build the funding profile when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, identify reusable evidence and missing prerequisites before discovery. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Ready: 501(c)(3) letter and FY25 outcomes; gap: current audited financials.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Set the Opportunity Budget

PURPOSE

Use the agent to translate staff capacity into a realistic number of pursuits.

WHEN TO USE IT

Use during 2. build the funding profile when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, translate staff capacity into a realistic number of pursuits. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Quarter capacity: 120 hours; reserve 20; pursue no more than three medium applications.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

3. Search with Evidence

Search in named batches so coverage and freshness are visible.

IN THIS CHAPTER

- 09 Official-Source Search Plan
- 10 Search by Funder Type
- 11 Verify Freshness and Provenance
- 12 Deduplicate the Pipeline

Official-Source Search Plan

PURPOSE

Create and run a bounded discovery plan.

WHEN TO USE IT

Use for each weekly or monthly scan.

COPY & PASTE PROMPT

Using the approved Funding Profile, propose a search plan across [SOURCES/REGISTRIES], including exact queries, geography variants, synonyms, and a freshness window. After approval, return up to [N] candidates in a table: funder, program, official URL, deadline, amount, geography, eligible applicant evidence, program-fit evidence, date accessed, and unknowns. Exclude expired items and mark recurring programs with no open notice as WATCH—not open. Do not use aggregator text as eligibility proof.

PRO TIPS

- Search both the population and the intervention.
- Cap each batch so every result can be verified.

EXAMPLE OUTPUT

Candidate HY-004: Northstar Youth Futures; official 2026 notice; deadline Oct 15; \$40k–\$80k; Baltimore nonprofits explicitly eligible; fiscal sponsorship policy UNKNOWN.

WHAT'S NEXT

Send viable candidates to structured extraction.

Search by Funder Type

PURPOSE

Use the agent to run distinct searches for government, foundation, corporate, and intermediary sources.

WHEN TO USE IT

Use during 3. search with evidence when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, run distinct searches for government, foundation, corporate, and intermediary sources. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Government batch returned two open NOFOs; corporate page had only an expired cycle and is WATCH.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Verify Freshness and Provenance

PURPOSE

Use the agent to trace every candidate to a current canonical notice.

WHEN TO USE IT

Use during 3. search with evidence when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, trace every candidate to a current canonical notice. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Aggregator deadline said Oct 1; official amendment says Oct 15, accessed Sep 2.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Deduplicate the Pipeline

PURPOSE

Use the agent to merge aliases, mirrored listings, and repeated program years without losing history.

WHEN TO USE IT

Use during 3. search with evidence when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, merge aliases, mirrored listings, and repeated program years without losing history. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Community Futures 2026 and CF Initiative are one opportunity; older 2025 record archived.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

4. Qualify Consistently

Separate hard gates from judgment so a glamorous award cannot hide a fatal mismatch.

IN THIS CHAPTER

13 Fit-and-Effort Scorecard

14 Run the Eligibility Gate

15 Estimate Pursuit Cost

16 Compare the Portfolio

Fit-and-Effort Scorecard

PURPOSE

Apply a transparent go/no-go rubric.

WHEN TO USE IT

Use only after official-source fields are captured.

COPY & PASTE PROMPT

Evaluate each candidate in two passes. Pass 1 hard gates: applicant type, geography, deadline, project dates, funding use, and mandatory match. Any failed gate means PASS. Pass 2 score 0–5 with cited evidence: mission fit 25%, program fit 20%, population/geography 15%, award usefulness 10%, competitiveness/relationship 10%, reporting burden 10%, and readiness 10%. Show arithmetic, confidence (high/medium/low), missing facts, estimated staff hours, and one decisive verification question. Do not award points when evidence is absent.

PRO TIPS

- Calibrate scores on three known past opportunities.
- Treat effort as a decision factor, not an afterthought.

EXAMPLE OUTPUT

*HY-004: 79/100, medium confidence, estimated 32 hours.
PURSUE if indirect-cost cap is compatible; decisive
question: does the 10% cap apply to all applicants?*

WHAT'S NEXT

Verify every finalist against the notice.

Run the Eligibility Gate

PURPOSE

Use the agent to test applicant type, geography, dates, use, and match before scoring.

WHEN TO USE IT

Use during 4. qualify consistently when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, test applicant type, geography, dates, use, and match before scoring. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

PASS: award requires a state agency as lead applicant; nonprofit partners alone are ineligible.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Estimate Pursuit Cost

PURPOSE

Use the agent to calculate staff effort, cash exposure, partner work, and registration lead time.

WHEN TO USE IT

Use during 4. qualify consistently when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, calculate staff effort, cash exposure, partner work, and registration lead time. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Estimated 46 hours plus two partner letters and SAM renewal; readiness confidence medium.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Compare the Portfolio

PURPOSE

Use the agent to rank opportunities together to expose deadline collisions and concentration risk.

WHEN TO USE IT

Use during 4. qualify consistently when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, rank opportunities together to expose deadline collisions and concentration risk. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Two October bids need the same evaluator; recommend pursuing HY-004 and watching WF-011.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

5. Run Human QA

The shortlist is a decision aid, not proof of eligibility.

IN THIS CHAPTER

- 17 Red-Team the Shortlist
- 18 Check the Fine Print
- 19 Draft the Funder Question
- 20 Prepare the Go-No-Go Memo

Red-Team the Shortlist

PURPOSE

Find stale facts, unsupported optimism, and hidden burdens.

WHEN TO USE IT

Use before presenting a recommendation to leadership.

COPY & PASTE PROMPT

Audit the shortlist as a skeptical grants manager. For each finalist, test every eligibility, deadline, amount, match, reporting, and submission-method claim against the supplied official notice. List unsupported claims, conflicts, missing attachments, portal-registration lead time, and reasons the fit score may be inflated. Produce a verification checklist with owner and due date. If the notice is unavailable or ambiguous, recommend HOLD and draft a concise question for the funder.

PRO TIPS

- Open links in a clean browser session to catch access problems.
- Have a second person verify the top candidate.

EXAMPLE OUTPUT

HY-004 HOLD: notice says 'up to \$80k' but FAQ says first-time applicants max \$50k. Owner: Maya; verify by Sep 3; funder question drafted.

WHAT'S NEXT

Record the human decision and rationale.

Check the Fine Print

PURPOSE

Use the agent to inspect FAQs, amendments, attachments, indirect costs, and reporting clauses.

WHEN TO USE IT

Use during 5. run human qa when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, inspect FAQs, amendments, attachments, indirect costs, and reporting clauses. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

FAQ caps first-time applicants at \$50,000 and requires quarterly participant-level reporting.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Draft the Funder Question

PURPOSE

Use the agent to turn one decisive ambiguity into a short, neutral inquiry.

WHEN TO USE IT

Use during 5. run human qa when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, turn one decisive ambiguity into a short, neutral inquiry. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Does the 10% indirect-cost cap apply to the full project budget or only requested funds?

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Prepare the Go-No-Go Memo

PURPOSE

Use the agent to give leaders a one-page decision with evidence, tradeoffs, and expiry.

WHEN TO USE IT

Use during 5. run human qa when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, give leaders a one-page decision with evidence, tradeoffs, and expiry. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Recommend PURSUE by Sep 5; 79/100; blocker is unresolved indirect-cost treatment.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

6. Operate the Pipeline

A small weekly ritual keeps the agent from becoming a forgotten search experiment.

IN THIS CHAPTER

- 21 Weekly Funding Brief
- 22 Create Deadline Triggers
- 23 Learn from Outcomes
- 24 Refresh the Watchlist

Weekly Funding Brief

PURPOSE

Turn search results into an accountable portfolio review.

WHEN TO USE IT

Run weekly during active fundraising periods.

COPY & PASTE PROMPT

Using the tracker, prepare a one-page weekly brief: new verified opportunities; deadlines in 30/60/90 days; candidates awaiting facts; pursue/pass changes; workload by owner; and the three decisions needed this week. For stale records, propose re-verification. Include a change log showing what changed, why, source, date, and person who approved it. Never silently overwrite a human decision.

PRO TIPS

- Archive passes with reasons to reduce repeat work.
- Track conversion rates by source and fit tier.

EXAMPLE OUTPUT

Week of Sep 1: 3 new verified; 1 HOLD; decision needed Thursday on HY-004; October pipeline requires 68 estimated staff hours across two applications.

WHAT'S NEXT

Assign owners and schedule the next scan.

Create Deadline Triggers

PURPOSE

Use the agent to build internal dates backward from the official submission time zone.

WHEN TO USE IT

Use during 6. operate the pipeline when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, build internal dates backward from the official submission time zone. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Oct 15 5 p.m. ET submission; internal go/no-go Sep 5; budget lock Oct 1; portal check Oct 13.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Learn from Outcomes

PURPOSE

Use the agent to compare recommendations with submissions, awards, declines, and effort.

WHEN TO USE IT

Use during 6. operate the pipeline when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, compare recommendations with submissions, awards, declines, and effort. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Foundation directory produced 0/8 viable leads; state registry produced 3/5—shift scan time.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Refresh the Watchlist

PURPOSE

Use the agent to recheck recurring programs without pretending they are open.

WHEN TO USE IT

Use during 6. operate the pipeline when this decision or artifact is needed.

COPY & PASTE PROMPT

Using only the approved project inputs, recheck recurring programs without pretending they are open. Show the evidence or assumption behind every material field. Separate confirmed facts, proposed interpretations, unknowns, and items requiring human approval. Return a practical table or checklist with owner and next action. Flag contradictions, sensitive information, stale sources, and downstream consequences. Do not invent missing facts or take external action. End with the three most important human verification questions.

PRO TIPS

- Keep the evidence beside the recommendation so review is fast.
- Record the responsible human and review date for every unresolved item.

EXAMPLE OUTPUT

Northstar historically opens in March; set Feb 15 verification, status WATCH—not available.

WHAT'S NEXT

Review the result with the named owner, resolve unknowns, and record approval before continuing.

Make the system yours

Funding Profile

Approve these facts before the first search.

LEGAL STATUS AND REGISTRATIONS

MISSION AND PROGRAM KEYWORDS

POPULATION AND GEOGRAPHY

REQUEST RANGE AND PROJECT DATES

MATCH AND REIMBURSEMENT TOLERANCE

EXCLUDED USES AND FUNDERS

REPORTING CAPACITY

APPROVED PROOF POINTS

Opportunity Evidence Card

Create one card per candidate and preserve the official wording.

FUNDER AND PROGRAM

OFFICIAL URL AND ACCESS DATE

DEADLINE AND TIME ZONE

ELIGIBILITY EVIDENCE

AMOUNT AND MATCH

ALLOWABLE AND EXCLUDED COSTS

REQUIRED ATTACHMENTS

UNKNOWN AND CONFLICTS

FIT SCORE AND CONFIDENCE

DECISION, OWNER, AND RATIONALE

Pre-Pursuit Safety Check

A human initials every item before work begins.

OFFICIAL NOTICE OPENED

ELIGIBILITY INDEPENDENTLY VERIFIED

DEADLINE/CALENDAR VERIFIED

BUDGET CONSTRAINTS REVIEWED

CAPACITY ESTIMATE ACCEPTED

DATA AND CONFIDENTIALITY RISKS REVIEWED

AUTHORIZED DECISION RECORDED

Search Batch Log

Complete this task-specific record with verified inputs and a named human owner.

SEARCH DATE AND OWNER

SOURCES AND EXACT QUERIES

FRESHNESS WINDOW

CANDIDATES FOUND

DUPLICATES REMOVED

COVERAGE GAPS

Eligibility Gate

Complete this task-specific record with verified inputs and a named human owner.

APPLICANT TYPE

GEOGRAPHY

PROJECT DATES

ALLOWABLE USE

MATCH REQUIREMENT

PASS-FAIL EVIDENCE

Fit Scorecard

Complete this task-specific record with verified inputs and a named human owner.

WEIGHTED CRITERIA

EVIDENCE PER SCORE

TOTAL ARITHMETIC

CONFIDENCE

HARD GATES

RECOMMENDATION

Pursuit Capacity

Complete this task-specific record with verified inputs and a named human owner.

ESTIMATED HOURS

STAFF ROLES

PARTNER WORK

CASH EXPOSURE

DEADLINE COLLISIONS

CAPACITY DECISION

Funder Question Log

Complete this task-specific record with verified inputs and a named human owner.

OPPORTUNITY ID	
AMBIGUOUS RULE	
QUESTION SENT	
DATE/CONTACT	
RESPONSE EVIDENCE	
PIPELINE UPDATE	

WHEN YOU REACH THE LAST PAGE

You have a working system

- ☐ A reusable evidence-first grant scout
- ☐ A verified and ranked opportunity pipeline
- ☐ A documented pursue-pass process
- ☐ A weekly funding brief with accountable owners

Keep the human accountable. Let the agent make the work repeatable.