

Are You Grant Ready?

Grant Ready Checklist: The Practice of Preparation in Grantseeking



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GRANT READY CHECKLIST

ORGANIZATIONAL DOCUMENTATION	Complete	Pending
<p>These documents can be collected and maintained in a dedicated file within your organization so they are readily accessible.</p>		
<p>1. Is your organization a 501c3 nonprofit organization? If so, make sure you have an electronic copy of your organization's IRS Determination Letter on file.</p>		
<p>2. Do you have a copy of your organization's most recent audited financial statement showing total operating revenue? Ask your Finance Department for the most recent copy they have on hand. Also, keep your Finance Department in the loop with your intent to apply for grants – they will be instrumental in helping you to develop your grant budget. <i>Note: Most federal grants will want to see at least three (3) years of audited financials which speak to your organization's capacity to manage funds.</i></p>		
<p>3. Do you have a copy of your organization's Form 990? Form 990 is an annual reporting return that certain federally tax-exempt organizations must file with the IRS. It provides information on the filing organization's mission, programs, and finances. All 501c3 organizations are required to file a Form 990.</p>		
<p>4. Do you have a copy of your organization's most recent Annual Report? Funders often want to see what your organization has been up to during the previous year to help them put into context the ask you are making.</p>		
<p>5. Do you have an updated Board of Directors List? With board members transitioning on and off boards on a regular basis, make sure that the board list is current and includes each board members employer and title.</p>		
<p>6. Do you have an updated Organizational Chart? The structure of an organization is constantly in flux with new leadership and new program/administrative staff. Make sure that you have a current Organizational Chart on hand – and even Org Charts for specific programs.</p>		
<p>7. Do you have a copy of your most current Strategic Plan? Some funders will ask to see a copy of your organization's current Strategic Plan so they can see how your funding request supports your organization's mission moving forward.</p>		

PROSPECTING & VETTING POTENTIAL FUNDERS It's important to "do your homework" on what funding agencies you want to pursue to support your program or project. Taking the time to thoroughly research funders giving priorities, geographic region, and funding amounts will help you to identify the most appropriate funders that align with the needs of your program or project.	Complete	Pending
8. Do you know what type of funders are you planning to approach? Foundations (community, family, corporate), local government? State agencies? Federal agencies?		
9. Are you considering State or Federal funding? Determine if the scope of your program/project warrants State or Federal funding. Again, be realistic about the scope of your project and the population you intend to serve. When considering federal funding, be sure that you are able to answer "complete" to Questions 1-3 above. If not, you are <u>NOT</u> ready to pursue federal grant funds.		
10. Have you thoroughly "vetted" the funding agencies you want to approach? Do your research!!! Make sure that you evaluate every detail about a particular funder – you'll need to connect this information to your proposal. If available, look at the funder's website, their annual report and their Form 990.* If you're exploring a federal or state funding opportunity, make sure to review the funding department/agency's webpage to see a list of previous grantees and abstracts of previously funded projects. <i>*Note: You can review the 990's of corporations and foundations via the Foundation Directory Online http://fconline.foundationcenter.org/. A foundation's 990 can show you the list of the foundation's grants by organization and dollar amount. This information can be valuable in vetting foundation's to find out what types of organizations have received funding and what is a reasonable dollar amount to request.</i>		
11. How does the scope of your program/project relate to funders? Evaluate the scope of your project and be realistic. A national foundation (i.e., Bill & Melinda Gates, W.K. Kellogg, etc.) is not going to be interested in making an investment in a program that only serves 100 single mothers in Blairsville, PA. National foundations will want to support programs that have regional (many counties), state-wide or national reach. If it's a local program, a foundation or corporation that funds efforts in your community will be your best bet.		
12. Have you read through the Request for Proposal (RFP) thoroughly? If you are responding to an RFP, it's important to read an RFP very carefully and make notes on what pieces your program/project can meet and which pieces you need to develop in order to meet the intended goal(s) of the funding opportunity.		

DRAFTING THE PROPOSAL Start composing your program or project idea! A grant proposal is a working document until it is submitted, so consider this a first step in developing or designing your program or project concept.	Complete	Pending
<p>13. Who will be contributing information or time to the grant writing process? Gather your key staff for the program and ask who can write up the program description? Who has the research that we need for the Need Statement? Who will be responsible for maintaining the Organizational Documentation (listed above)? Is your Finance Department available to help you build the budget? Is your HR Department available to round up staff resumes and job descriptions? Who will reach out to partners to collect letters of support and Memorandum of Understanding (MOU)?</p> <p><i>Tip: get comfortable with Track Changes in Microsoft Word or use Google Docs – both are great tools to use so multiple staff are able to contribute to grant proposal drafts and review.</i></p>		
<p>14. Have you collected “boilerplate” information relevant to your organization’s background, history, experience and grant management capacity? This narrative can be duplicated for each grant proposal submitted in a given year. Having this information on hand will save you time when completing the “Organizational Description” section of a grant proposal.</p>		
<p>15. Do you have a brief WRITTEN description of the proposed program/project? Take the time to get the ideas out of your head and onto paper. Start working out the “need” for the project, what activities will take place, what staff will be involved, what resources you have vs. what resources you’ll need, partners, budget, etc.</p>		
<p>16. Are you including S.M.A.R.T. goals and objectives for the program or project? Essential to the development of any quality grant proposal is the inclusion of program or project goals and objectives that are Specific, Measureable, Achievable (or Attainable), Relevant (or Realistic), and Time-bound. S.M.A.R.T. goals and objectives make developing truly impactful outcomes much easier.</p>		
<p>17. Do you know what personnel/staff will be dedicated to the program/project? It’s important in the description of your program/project that you have an idea of what current employees can spare some time to work on the program/project, if new hires are needed, or if consultants will play a part. Be thoughtful in your selection of staff – the most experienced and seasoned personnel will strengthen a proposal.</p> <p>Make sure you have up-to-date staff resumes/CV’s & job descriptions. Reach out to your HR department to make sure that staff resumes/CV’s are updated and that job descriptions are current. Long-time staff may have received a degree, certification, or training that was not identified on a resume at time of hire. Make sure your staff education and qualification requirements are up to date as well.</p>		

<p>18. Do you know how select community partners that will support the program/project? Most funders want to see that you are partnering with other community agencies to support your program/project. If you don't have these partnerships, take the time to identify agencies that have a shared mission or service population and explore opportunities for partnership.</p> <p>A grant proposal is only as strong as its partners! Make sure to select only those partner agencies that have the most experience in their particular field. Will community partners be providing services in-kind or will they expect payment for services? Make sure to know what \$ amount you have in your budget to allow for paying partner agencies. Some partners will need to be paid, others will provide services in-kind. This is sometimes an unavoidable cost, so make sure that your budget leaves room for this scenario.</p>		
<p>19. Do you have Letters of Support/Memorandum of Understanding (MOU's) from partner agencies? Letters of Support and MOU's are still the norm in submitting a foundation, state or federal grant. Make sure you give your partners enough lead time to put together a letter of support. Tip: have a letter of support template ready to email a partner – something they can customize.</p>		
<p>20. What is your program/project budget? Again, be realistic. Base your line item costs on actual operational expenses that your organization incurs in a given fiscal year. Consult with your Finance Department to get figures on salaries, payroll taxes, fringe benefit percentages, and any insurance or indirect costs.</p> <p><i>Tip: Approach grant budgets with a minimum "70/30 split" – 70% of funds will go directly to the population(s) that you serve, the remaining 30% will be allocated to administrative and indirect costs.</i></p>		