

CLIENT CHECKLIST

Jimmy Reader

Based on the Grant Proposal Process we will follow, this checklist shows the documents and data the organization will need to provide to complete the proposal.

1. Define a specific project to be funded.

- ☐ Key leaders of the organization (staff, board, volunteers) generate ideas for a project or program to be funded by a grant. (The grant writer may facilitate this initial phase of the process.)
- ☐ Write a summary description of the project (or of an existing project/program that needs additional funding).
- ☐ Gain board approval for the intended project to be grant-funded and for a working agreement with the grant writer.

2. Describe details of the project (objectives, timeline, personnel, budget).

- a. *This step may be done by organization staff / key leaders of the project in consultation with grant writer as needed.*
- b. *More details about each of the items below may be needed later in the proposal process.*
- ☐ Describe how this project aligns with the organization's mission.
- ☐ Provide background information and history for the organization, as well as the program or project if it already exists.
- ☐ Name the specific goals and objectives of this project.
- ☐ Describe the focus population for the project – who will be helped and how - or ways in which this project will enhance justice and peace in the world.
- ☐ Define the roles and responsibilities, with time and resources required, of everyone involved in completing the project or continuing the program.
- ☐ Develop a timeline for this project, based in part on whether this is a one-time or a multi-year grant. Include when evaluations and reports will be done.
- ☐ Build a budget for the project and show how it will impact the full financial resources of the organization. Include recent financial reports and budgets for the organization.
- ☐ Gather supporting documents – annual reports, Form 990, existing research or work already completed for this program/project and the organization.

3. Research options for funders and available grants.

- ☐ Provide the grant writer with information about available grants that organization staff or leaders already possess.
- ☐ Provide details about grants received in the past five years – information often asked for in proposals, especially if the grants came from a funding source being considered.
- ☐ Key leaders will review funding options with the grant writer to select one (or more) to move forward with the proposal process.

4. Submit a letter of intent (LOI) to one or more funders, if required.

- ☐ If any funder requires an LOI before submitting a proposal, the grant writer will do that now. The process can continue with a separate proposal for any funder that does not require that.

- ☐ If a chosen funder has issued an RFP (Request for Proposal), key leaders and grant writer will review that in detail to decide if it aligns with this project. If so, the grant writer can move to the next step.
- ☐ If no LOI is required and RFP was issued by a selected funder, the grant writer will move to the next step. (More than one proposal for the same project can be edited and submitted to more than one funder at the same time, unless the funder prohibits it.)

5. Create a draft proposal and gain approval from key leaders.

In step 5, the details provided in step 2 may need to be updated or additional data and documents requested by the grant writer to complete a draft proposal

- ☐ Key decision-makers will review the first draft of the proposal based on all the details described in Steps 1-4 and suggest any changes they want to make.
- ☐ Consultations with the grant writer and key leaders may result in decisions to change part of the project as initially designed or adjust specific details (timeline, budget, e.g.).
- ☐ More drafts of the proposal may be prepared by the grant writer for review and approval by decision-makers.
- ☐ Board approval to proceed would be important at this time.

6. Edit the proposal for each funder, aligning it with their mission.

- ☐ Versions of the proposal the grant writer will submit to each potential funder will be edited to align with the mission, goals, and objectives of the funder.
- ☐ Final approval from decision-makers and the board will be required before submission.

7. Submit completed proposals with final approval from key leaders.

- ☐ Submissions, especially if they are electronic, may need signatures or other final confirmation.
- ☐ The grant writer will submit each completed and approved proposal as agreed upon.

When a funder approves the grant proposal and issues the funding, the project as designed will specify what kind of oversight, evaluation, and reporting will need to be done. This is the responsibility of the organization unless the work agreement with the grant writer includes tracking and reporting.