Checklist for Grant Writers:
How to Step Up Grant-Writing Success

Resource

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Powerhouse

Ideally, whether you're grant writing for your own nonprofit or someone else's, you're passionate about your mission. You believe you're doing difference-making work. And you know that for that difference-making work to happen, there needs to be funding. You also likely know that there are a variety of circumstances, both internal and external to a nonprofit, that can cause a once-relied-upon funding source to disappear. For example, staffing changes within your organization could mean an important relationship with an internal champion at a foundation no longer exists. Or current events (like a global pandemic) might shift a funder's charitable priorities.

A smart strategy is to diversify an organization's potential sources of income. Grant writing is one of several different strategies an organization can utilize to strengthen its financial outlook and ensure it has the necessary resources to continue to provide needed services to its target population. In this checklist, we'll share information about how to write grants successfully. (But we'd like to lovingly remind you that having your proverbial eggs in several baskets, rather than one, is always a good idea.)

Some guidance in advance: Grant writing isn't for the weak of heart. Consider these factors before you begin and you'll be better prepared as the process unfolds:

- [ ] **Consider 501(c)(3) status.** While it's not necessary for all funders, having 501(c)(3) status *does* matter for most funders. You can bypass this by refining your funders' search to grants that don't require tax-exempt status, but be prepared for it to be a much shorter list of potential funders. You can also consider the possibility of working under the umbrella of an already tax-exempt organization if your own status has not been resolved.

- [ ] **Know your motivation.** Is your plan to secure grant funding to reach and serve more people in need? Or add much-needed programming/resources? Great! Keep on keeping on. Is your plan to pull off a quick fix to save a messy financial picture for your organization? You'll need a bigger/better strategy than grant writing alone. Any grant that's meant to save you will leave you in the same mess (or a bigger mess if you've now added additional programs, staff, etc.) when the funding period ends.

- [ ] **Be prepared to be rejected.** Frequently. It's not personal. There are lots of nonprofits doing great work and competing for the same resources. Learn from the rejections. Reach out and see if a funder will share feedback about what wasn't a fit for them. Do better next time with what you've learned. While it's not likely you'll avoid rejections entirely, you will find that as you're more strategic with your approach, there won't be as many of them. (Or you'll become more comfortable with accepting them and carrying on!)

- [ ] **Focus on what you as an organization do best.** Resist the siren call to chase funding for programs/services with which you have no experience or expertise. Apply only for funding that is aligned with your mission. Promise to deliver only those things that are a fit for what you know and do well. (You'll thank us for this tip when it comes time to report on promised deliverables once you've been awarded funding.)

Now that you know what you need to know, let's get started!

Start in-house. Your job as a grant writer isn't just to ask for money. Your job is to tell your story. To be able to paint a picture with words of what you do and why it matters. To do that, you need to be an expert on all things related to your organization—or be able to communicate with key team members who can help supply that information. You should be able to answer the following questions:

☐ What problem(s) does your organization address?

☐ Why does solving that problem matter? (Why should a funder care?)

☐ What is your organization's solution to the problem? (What are your programs and services?)

☐ What differentiates your organization from other places doing similar work?

☐ What are the outcomes you expect (or have seen) as a result of what you do?

☐ How do/will you evaluate yourself/your program(s)? (What are your benchmarks for success?)

☐ What is your plan to sustain your program(s) beyond any funding you may receive?

☐ What's the projected budget for your project?

Set yourself up for success. A little preparation in advance of a search for funding can help you utilize your time and effort most efficiently.

☐ **Define your grant search keywords.** What might someone type into a Google search box if he or she were hoping to find your organization? What words/phrases best describe the work you do? Having that list of words/phrases prepared will aid you in your research.

☐ **Identify how/where you'll find your opportunities.** Perhaps you'll use an online directory. Or a weekly newsletter of funding notices. Or a list your board of directors handed you. Or you'll be at the grocery store and bump into your neighbor who suddenly remembers that you're a grant writer and mentions that her cousin's brother's wife works at XYZ Company and they fund what you do and she hands you a business card she just happens to have stashed in her wallet. Maybe you'll have access to any combination of these things. If you need inspiration, check out our Grant Library Resource .

☐ **Determine what system you will use to organize the information you find.** Will you be using a spreadsheet? A notebook? A program or app? A shared notes document? The best answer to this question is whatever logically works for how *you* work. You need to be able to use what you create, or it will serve no purpose. If you're working on identifying leads/prospective funders with others, organization matters a little bit more—your system will have to work for them as well. One person's idea of a perfectly organized system may not make a bit of sense to a team member who organizes information differently. Hash that out with them in advance so you're on the same page and not wasting time on a tool that's supposed to be saving you time.

Do your research. Now that you have some prospects, it's time to become an expert on *them*. If you're using an online directory, you should be able to learn a lot fairly quickly. But it's worth your time to dig even deeper than that. A quick check of their social media channels and/or any mention of them in the news (good or bad) can be helpful as well:

- [ ] What are their areas of interest? (And are those a match for what you do or want to be doing?)
- [ ] When is their funding cycling?
- [ ] What is their submission process?
- [ ] Do they accept unsolicited requests for funding?
- [ ] How much do they typically award?
- [ ] Whom have they funded previously?
- [ ] How engaged and involved do they like to be with the organizations they fund? (And can you accommodate the level of engagement they want?)
- [ ] What are their pain points? (And is there something you can help *them* accomplish?)

Now to the grant-writing part of grant writing. Now that you've found your "best fit" potential funders, you're ready to start writing. (And yes, grant writing can seem only very minimally about writing.)

- [ ] **Familiarize yourself with the funder's grant process.** Can you find a sample application? An FAQ section? Are there grant instructions/guidelines? Save any important URLs so you can easily go back and find the information if you need it. And pay special attention to any word or character limitations or you might find that your perfectly crafted responses to questions need to be half as long!

- [ ] **Create a checklist for yourself of any/all application requirements.** Include information about what they want, who is responsible for each item (if you work with a team), where you can find the information you need, etc. When it comes time to finalize your submission, you'll have a system of checks and balances already in place to ensure you're providing a complete application. And don't forget to include getting a second set of eyes on your application before submission time. It's too easy to miss an error or typo when you edit your own work!

- [ ] **No matter how ridiculous a required detail is, comply with it.** Even if they stipulate a certain type of staple, size of paper, a hundred copies, a drop of unicorn blood. Show that you pay attention to the details. That you can be trusted to honor their wishes. That you are a trustworthy partner for them to have.

You've finally arrived at the best part of this process. The part where you get to use your storytelling to share the important work you do with someone else and hopefully make them care enough to join in your efforts.

You'll already know that you're a great match for each other because you've done your homework. You'll be able to speak both to what's important to them *and* to your organization. And there will be one of two possible outcomes, neither of which will be awful: You'll be funded and celebrate briefly before moving on to the next grant proposal, or you'll have learned from what didn't work. Either way, you'll be in a better place than when you started.