Grant
ULTIMATE
Checklist

✔ *Proposal Summary*

✔ *Statement of Need*

✔ *Program Narrative*

✔ *Outcomes*

An expansive list of the elements you will need for your grant proposal!

A little about me...

For the last five years, I have helped nonprofit organizations create strategies to fine-tune and expand their fundraising efforts. Over the course of my career, I've led agencies in growing, and even doubling, their fundraising revenue through various income streams, particularly through grant writing. Take a look at what some of my clients have to say:

"We could not be happier with having [Julia] work with us to find and write grants for our organization. She is very professional, organized, detail oriented and a go-getter. I would highly recommend her services to any organization."
-Tim Hogsed, Macon County Care Network

"Ms. McRae has worked diligently to secure funding for Bascom programs through her collaborative approach and compelling writing...[She] maintained a steady track record of finding and securing funding essential for growing existing programs, and establishing new ones. With an organized and methodical approach, she instilled confidence within The Bascom that fundraising goals would always be met or exceeded."
-Billy Love, The Bascom: A Center for the Visual Arts

Elements of a
Gold Level Proposal

In this checklist, I am going to show you what you will need to get a head start in putting together your perfect master grant proposal, or what I like to call the *Gold Level Proposal.* This is the same checklist I use when gathering information from new clients.

Creating a *Gold Level Proposal* that you can refer back to ensures a good foundation from which to build solid future proposals. The following items are the most commonly requested application components that you can include in your master narrative.

Proposal Summary

As the title suggests, you will use this section of your application to give a general overview of what will be included in the remaining pages of your application. Here, you will introduce what your organization and/or project does, who it reaches, and what it seeks to accomplish. In many applications, you will also include the amount of support you are requesting from the donor as well.

History, Mission, & Accomplishments

Time to brag! This is where you convey exactly what your organization was created for. You will include your mission statement, annual goals, a brief history of your nonprofit and reasons for formation, and any notable accomplishments of the organization as a whole.

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Statement of Need

This is your time to pull on heart strings! In this section, you will detail the problem that your organization, program, or project is designed to meet, emphasizing its magnitude through a mix of qualitative and quantitative data, as well as emotionally triggering personal stories and images. The Statement of Need sets the stage for your detailed Program Narrative (below), showing exactly why your offering is beneficial to the community you serve.

Detailed Program Narrative

Here is where you get into the nitty gritty of your program! You want to give as much detail as possible - and definitely as requested - to show each service included within your project, the timeline for its implementation, the group or groups it intends to reach, your desired goals, and the measurement method used to track progress toward your goals.

You also want to include information about the qualifications of those in charge of the program and any partnerships that help make it possible. Remember, you want to build confidence in the donor that you can and will accomplish what you are proposing! A great professional trick that you might use to boost that confidence is to include past accomplishments of the same program or similar programs (if applicable) in years past.

Elements of a
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Project Budget (if applicable)
This document is absolutely essential to building trust in your ability to carry out the proposed work. One tried and true approach to creating the strongest application possible is ensuring that the expense items in your project budget align with the services and offerings you have included in your narrative.

For example: If your project is a traveling library, it wouldn't make sense to only have $150 worth of gas budgeted for the year while budgeting $50,000 for a new HVAC system at a fixed site unrelated to the project.

Donors want to connect the budget to the services offered. Additionally, you may want to show multiple sources of support, both financial and in-kind, that will help sustain the project (if applicable). Many donors will not want to be the sole contributor unless otherwise stated or if the project is small and/or a one-time cost. They may also only give in support of direct expenses.

Always check the application guidelines for budget specifics. Doing so will make sure your application remains **golden**!

Elements of a
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Operational Budget

You'll want to show that you have a financial plan for the year. The budget that is decided upon by the board and executive staff is usually always required and can be included as an attachment in many situations. There will be times, however, that certain donors will have specific instructions on the budget layout. Refer to any budget specifications outlined in the application guidelines.

Sustainability Plan

Donors want to know that they are supporting programs and agencies that will be able to thrive beyond the current operating year. Use this section to provide greater detail on how you will continue the program in years to come, any plans for expansion, and other sources of financial support.

IRS Determination Letter - 501(c)3 Documents

Lastly, you will want to include your 501(c)3 letter. This letter provided by the IRS proves your tax-exempt status has been granted and that you are eligible to receive charitable, tax-deductible donations.

Supplemental Documents Toolbox

In addition to the core elements of your proposal, many donors will allow you to attach additional items that give more information about your organization, partnerships, impact, audience, and financial stability. Including the following items can help your application **stand out** from the crowd!

- Board of Directors List
- 2 Years of Financials (990 and audits)
- Staff Resumes
- Prior Year(s) Grant Awards
- Current Year List of Additional Funding Sources
- Letters of Support from Donors and/or Partners
- Strategic Plan
- Past Successes
- Organization History Overview
- Organizational Chart
- Annual Reports
- Articles of Incorporation
- Client Testimonials
- Data/Trends
- Outcomes

Final Thoughts

As a nonprofit professional, your time is often stretched thin between the inner- and outer-workings of your agency. Creating a *Gold Level Proposal* can save you time in your grant writing process as it houses the most critical information in one convenient place that can be pulled from when building future applications and informational copy.

One final tip that I will leave you as you begin crafting is to remember that the *Gold Level Proposal* is **only the beginning**. You will always need to read the **specific guidelines** of each funding opportunity to make sure you are providing all of the required information and to **personally tailor** the application to the interests of each reviewer.

With this in mind, you are on your way to **great success** for the financial stability of your organization!

Best of luck!

Pathway Grant Consultants leads your nonprofit through the grant seeking process, from research to submission. Our goal is to help your nonprofit position itself for success. We walk with our clients through the entire grant seeking process to identify the best approach to secure the most funding.

www.PathwayGrantConsultants.com