



## Grant Writing Process Checklist

Please use this check list as a general guide and easy reference as you prepare to complete the grant writing process. The following information will need to be gathered.

### Legal & Organizational

- Determination letter from the IRS granting 501(c)3 status
- Executive Director name, phone number, and email address
- Primary contact name, phone, and email of person and who may be able to answer questions regarding the specific project or other organizational information
- Organization's address, phone, fax, and web address
- Organization legal name (must be the 501(c)3 name)
- Year of Incorporation
- Organization's official mission statement as approved by board of directors
- Summary of organization's programs and number of people served
- Geographic area served by the organization (city, county, state, school district etc.)
- List of names and affiliation of current board members
- Number of board members, percentage making a personal contribution (cash, not in-kind), and total amount contributed
- Executive summary of organization's strategic plan, year developed, and by whom
- Description of how this project relates to or supports the strategic plan

### Financial Information

- Annual budget of the organization
- Summary of organization income and expenses
- Percentage breakdown of income, i.e. public funding, corporate support, earned or generated income, foundation support, individual donors
- Most recent audited financial statement
- Most recent year-end financial statement
- Total amount requested
- Total expenses budgeted for the project (breakdown of costs such as printing, supplies, postage, etc.)

- List of anticipated funding sources (committed, secured, pending-including other grant applications submitted if any)
- Sustainability Plan-for securing funding beyond the grant period and or outlining how the project will continue without grant support

## **Project Details**

- Project Title
- Project Timeline i.e start and end dates
- Number of people who will benefit from the project (key audience) and recruitment strategy
- Description of project including key goals and intended outcomes of the project.
- Principal staff working on the project and their qualifications
- Collaborations and partnerships with other organizations and their role
- Evaluation process to determine success of the project and tools to determine success
- How do you monitor progress i.e. benchmarks along the way?
- External communications and marketing strategy and planned recognition of grant support.