

## GRANT APPLICATION CHECKLIST

### 1. Cover Sheet

Present your organization, program, project or proposal to grantor with dated signatures from your nonprofit's Board President and Director.

### 2. Cover Letter

Although the Cover Letter sets the professional tone to your grant application, it should actually be written after you have collected all of the required documentation so that you have a thorough understanding of what is required by the grantor and what you are enclosing to meet the specific guidelines of a particular grant. In essence, the Cover Letter serves a similar purpose to a Cover Letter written for a resume submission: it's the first impression. Your Cover Letter should make the reader want to delve deeper into your application submission, piquing interest and passion.

Your Cover Letter should affirm your nonprofit's serious intention to engage in a relationship with the funder, summarizing your program and the enclosed materials without sounding redundant.

### 3. Executive Summary

The Executive Summary provides a snapshot of your proposal, a concise but comprehensive overview of what the program or project central to your application is seeking to accomplish. As long as it is effective, an Executive Summary can range in length from a few sentences to a full page, but never longer than one page. If your grant application were a meal at an upscale restaurant, the Cover Letter would be the enticing menu and the Executive Summary the appetizer that is so good you can't wait for your meal, the main event, to be served.

### 4. Need Statement

This is the entree of your grant proposal, an opportunity to demonstrate that what you propose, a program or Mission-related project, is worthy of maximum funding and your nonprofit is the ideal mechanism to successfully direct and implement it. This is where your expertise of and passion for the need or cause your nonprofit addresses should shine. Even if the program responds to a well-known concern, such as hunger in America, a captivating Executive Summary would be written as if the reader were completely unaware of the issue. It should clearly explain the essence of the issue along with any research to support a potential or proven solution.

### 5. Program Goals and Objectives

Specify what and how your nonprofit, program or project will do in direct response to the Need Statement and precisely what it intends to achieve, enumerating specific results or outcomes. The goal(s) of your program should serve as the general but measurable impact, supported by the explicit steps or objectives undertaken to achieve the outcome(s).

## 6. Methodologies, Strategies, Model or Program Design

Consider this section a verbal video, taking the reader through a step-by-step process of how your nonprofit and/or program will accomplish the goals and objectives set forth. As the operational nuts and bolts, it should be logical, with a chronological timeline citing who will be responsible for what and sufficiently detailed so there are no unanswered questions of how the program operates or how it enables the previously itemized goals and objectives to be achieved. Depending on the particular application guidelines, a logic model or business model may also be required.

## 7. Evaluation Section

Now that you have quantified the intended goals, present the metrics that will be used to measure the effectiveness in achieving those goals. Define the measures to be used to assess or evaluate the personal and social impacts of your program as well as the timeframe or frequency of those metrics. Let the grantor know in advance how you will demonstrate the value of their funding in terms of quantitative and qualitative measurable results.

## 8. Other Funding or Sustainability

Provide a big picture of the proposed program's revenue requirements and sources, emphasizing the source(s) that will fund the remaining portion of the project beyond what you are requesting from the grantor. Include information on financial or gift-in-kind contributions already received, confirmed and/or anticipated. Pilot programs should specify duration but for long-term programs, financial sustainability must be established beyond the grantor's financial support.

## 9. Organizational Information

Providing organizational details establishes the credibility and viability of your nonprofit. Prepare an overview of your nonprofit, its Mission, programs, constituents, history and track record of good financial stewardship, programmatic management and demonstrated effectiveness. Never presume you can minimize the information about your nonprofit because the Program Officer or funder is already familiar with your organization, Board or leadership or because they have previously awarded grants to your organization.

## 10. Budget

Account for all expenses related to your plan, including personnel, administrative, operations, materials, overhead, and evaluation costs. Then identify how those expenses will be funded, specifying type of source, i.e., earned income, contributed income, matching income. The budget must be accurate and realistic, demonstrating fiscal savvy in developing a cost-effective program that will be operating in the black now and sustainable in the future to achieve its goals.

## 11. Additional Documentation

- IRS letter verifying your organization qualifies as tax-exempt
- List of your Board of Directors, their affiliations and credentials
- List of organizational leadership, staff and program managers, including credentials
- Financial statement from the previous fiscal year
- Annual budget for the current fiscal year
- Proposed annual budget for the upcoming fiscal year (if application is being submitted during Q4)

## 12. Putting it all together

A proposal or grant application should have a professional, polished presentation. All documents should be in the proper order as stipulated by the grantor's instructions. Fancy or expensive binders are more likely to project an image of fiscal mismanagement so let the preciseness and orderliness of your application speak to the professional quality of your nonprofit and its program.

## Sample Letter of Inquiry (LOI)

Mr./Ms. <<Name>>  
Program Officer  
<<Foundation Name>>  
<<Address>>  
<<City>><<State>><<Zip>>

Dear Mr./Ms. <<Name>>:

Thank you for accepting this letter of inquiry to your ABC Foundation. We hope to determine your interest in receiving a full proposal for our Dinner with Friends program. We are respectfully requesting your consideration of a grant in the amount of \$50,000.

This project is designed to address the special needs of the elderly in our community who want to continue living independently. The data and our personal engagement reflect many elderly are confined to their homes because of transportation, physical or emotional limitations, unable to benefit from our many valuable onsite programs. We intend to address this unhealthy and unsafe isolation by providing socialization opportunities, health and wellness information, and social services when needed, to seniors who are isolated from the community by providing meal delivery and companionship. Our program is an ideal fit with your Foundation's areas of interest.

Since its inception in 1975, XYZ nonprofit has grown to become the largest senior service organization in our county, serving more than 1,000 seniors each day at our conveniently located facilities. We are dedicated to our Mission to help seniors improve and maintain healthy, independent lifestyles through a broad range of improvements in the quality of their lives. We have consistently earned a satisfaction rating from the elderly we serve of 95%, based on our quarterly surveys.

In addition to providing nutritious lunches and dinners, those we serve benefit from social opportunities, physical exercise, relevant and informative educational events.

As our country ages, the senior population is projected to increase by 25% over the next 15 years. The majority of those seniors are or are expected to be living at or below poverty income levels and many are mildly to seriously disabled. Some of these

homebound seniors can be brought to our community center with our existing fleet of five vans which currently transports 50-75 clients each day.

Expanding the transportation system to meet the growing demand would be costly and will not adequately address the myriad physical, emotional and social needs of an increasing number of low-income homebound seniors.

In response to the current and anticipated needs of our beloved senior population, XYZ nonprofit is proposing the Dinner with Friends Program to evaluate the cost-effectiveness and practicality of bringing services to these individuals in their homes. By enlisting our trained volunteers under the direct supervision of John James, LMSW, who would serve as a fulltime program manager, XYZ nonprofit can significantly expand the health, education and social opportunities for more than a thousand homebound seniors.

The one-year pilot program objectives include 1) establishing weekly visits to 250 homebound seniors; 2) recruiting and training an additional 100 volunteers to make in-home visits; and 3) elevating the health and activity levels of program participants as measured by several available survey tools, used at quarterly intervals.

Some of the activities included in our home visits would be cooking lessons designed to prepare meals that are both nutritious and simple to make; teaching exercise routines specific to elderly physical conditions and needs; the introduction of socialization through companionship of volunteers and shared activities; ongoing evaluation of mental capacities; and the introduction of common methods of combating loneliness and depression, loss of memory, and lack of mental stimulation.

The total cost of our pilot program for one year is \$100,000, half of which has already been provided by the county government and other funders. Your investment of \$50,000 would fulfill the funding necessary to fully implement the project. Our Board of Directors, staff and volunteers are very enthusiastic about the project.

We look forward to partnering with ABC Foundation on this vital project. If you have any questions or would like to receive a full proposal, please contact me directly at 123.456.7890 or via email at me@gmail.com. We deeply appreciate your consideration of our request and look forward to hearing from you soon.

Sincerely,

Dr. Joan Ash  
Executive Director