GRANTSMANSHIP
CHECKLIST OF ACTIVITIES AND CORE TASKS

Prospect Research

- ❑ Conduct research to determine appropriate foundation and corporate prospects to solicit for funds.

- ❑ Capture prospect information in donor management database and identify all next steps and deadlines for submission process. Prioritize prospects based on best fit and approaching deadlines.

- ❑ Determine appropriate ask amount, for what, and for what impact for each foundation/corporation prospect.

Cultivation and Solicitation

- ❑ Vet top prospects with your nonprofit's key leadership such as board, staff, volunteers, and other stakeholders to determine if there is an existing relationship with the foundation or corporation's top staff or board.

- ❑ Strategize and draft key talking points for solicitation by your nonprofit's leadership.

- ❑ Create a schedule to identify and record key activities, to include:
    1. Identify the primary contact at the foundation/corporation.

    2. Request a phone or in-person meeting to introduce funder to your nonprofit.
        - o Always make contact with a funder before applying, even if they publish "no phone calls." A 5-minute phone call can allow your nonprofit to see if the funder is a good fit, based on the foundation/corporation's current focus.
        - o Demonstrate that you've done your homework. Don't waste a funder's time by asking simple questions that are readily available online.

    3. Conduct phone or in-person introduction to organization, introduce request amount and for what, gain funder's input to appropriateness of project and ask amount, and build relationship. The Executive Director should place the call or attend the meeting.
        - o Invite prospective funder for a site visit, if appropriate.

    4. Draft proposal/LOI.

    5. Submit proposal/LOI.

6. Follow up with funder contact to let them know your nonprofit has applied for funding.

7. Input request in donor management database and submissions calendar.

8. Follow up on submission according to the submission calendar (approximately 4-6 weeks after submission).

- ❑ Conduct and track the cultivation activities listed above

Submission Follow Up

- ❑ If grant is awarded:
  1. Update grant tracking and contact information.

  2. Schedule mid-year and end-of-grant report deadlines. If grant reporting is not a requirement, schedule mid-year and end-of-grant check-ins to demonstrate the impact of the funds and thank the funder for their support.

  3. Send acknowledgment letter to funder.

  4. Publish award in external documents and/or your nonprofit's website, according to funder's preferences (as some do not want to be recognized publicly).

  5. Invite funder to your nonprofit's programming, as appropriate.

- ❑ If award is not granted:
  1. Follow up to determine why grant was declined. Ask for feedback that could help in reapplying or in applying to other foundations in the future. What can you learn?

  2. Ask if you may submit again during the next funding cycle.

- ❑ Add funder to general communication outreach so they receive ongoing updates and information on the organization. Strive for 5 – 7 points of contact between each ask for funding.

- ❑ Schedule next grant submission deadline, if there is potential for second-year funding or to reapply.