



Q G I V P R E S E N T S

GRANT WRITING TOOLKIT

INCLUDING TEMPLATES TO HELP YOU ORGANIZE,
WRITE AND WIN GRANTS



www.qgiv.com

Introduction to Grant Writing

If you're new to the world of grant writing, this toolkit's for you! Within each section of this guide, you'll find all the essential information necessary to get you from the grant research phase to the submission and reporting stage successfully. But before we get into what a grant is and how to write a successful application for funding, it's important to understand why grants are important to nonprofit organizations.

We totally understand that writing grants requires a lot of hard work. It takes research, interdepartmental coordination, and time-management skills. So, it's important to know what you're doing is the best use of your time.

You'll be glad to know that grants are a great opportunity to fund new programs or expand existing programs that provide a crucial need to those you serve. Grant funders give to a wide variety of nonprofits for a variety of purposes. Chances are, if your nonprofit needs something, there's a grant out there to help you get it.

Grants can come from private foundations, for-profit corporations, and government agencies. With sources of grant funding coming from three different sectors, there's a wealth of opportunity to fund your programs using grants.

Strong grant programs at nonprofits have funded major capital projects, instituted and expanded important programs, and have even provided emergency funding to help communities after a natural disaster or when there's drastically increased need for services in the nonprofit's service area.

While grants can't solve all a nonprofit's problems, they are varied in purpose and plentiful in number if you know where to look. They can be a huge help to your organization both in times of difficulty and in times of growth.

This toolkit provides you with the lowdown on grants and includes information on where to find them, how to write them, and what to do after you've been awarded funding.

Happy Grant Writing!

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Section 1: The Nitty Gritty on Grant Writing

First, you may be wondering how grants differ from outright donations and sponsorships. Grants provide your organization with crucial funding needed to start or continue a new program, fund capital projects, and provide your organization with other important resources so that your nonprofit can achieve its mission. Some grant funders even provide nonprofits with general operating funding that can be used in any way that supports the organization.

Grants are competitive, and your nonprofit's request for funding will be compared and judged against applications from other organizations. A successful application may receive some or all of the requested funding. Understandably, grant funders have a limited amount of money they can give out during each grant cycle.

You may be surprised to learn that grants are not just free money. The purpose of a grant is to achieve a goal by utilizing funds from grant makers. Grant makers want to ensure that the initial purpose of the grant is being met and that the funding was used in the way your nonprofit described in the grant application. Financial and progress reporting are the strings attached to grants that ensure your organization is not just receiving free money in exchange for a well-worded grant application. If your nonprofit fails to hold up its end of the grant agreement, the grant maker may demand funds be paid back to them. If your organization fails to meet the goal the grant was supposed to help them achieve, it is likely your organization will not be eligible to receive additional support from the foundation, corporate entity, or government body that supplied your nonprofit with that funding.

Writing grants means taking on the task of completing post-award reporting to the grant funder to illustrate that your organization has been a good steward of its resources. Successfully completing all requirements of grant reporting may, in some cases, ensure your nonprofit's eligibility for future funding from the grant maker.

Now that you know what grants are, how they work, and what is expected of grant recipients, the following six sections will provide you a walkthrough of how to research, write, and track grants as well as what to do once your organization receives a grant award.

Section 2: Resources for Identifying Grants

Important Update: The Foundation Center and GuideStar announced a new partnership on 2/5/2019. They'll be combining their tools as a new resource for nonprofits under the name Candid. The website to access these resources in the future once the process has been completed is www.candid.org.

The first question many first-time grant writers ask is how they can identify potential grant funders for their nonprofit organization. There are several grant databases that house records on thousands of grant makers. These tools vary in functionality and grant funder exclusions, so it is important to know which subscription your nonprofit would benefit from most before signing a contract.

For instance, [GrantStation](#) is a grant funder database that excludes grant funders that don't accept unsolicited applications and grant funders that only provide scholarships. If your nonprofit organization is seeking scholarship funding for students, you wouldn't use GrantStation as this would exclude all the most likely funders.

On the other hand, if your organization doesn't want to waste a lot of time weeding out grant funders that don't actively accept unsolicited applications, a service such as the Foundation Center's [Foundation Directory Online](#) may not be helpful. This is a broad database that contains data on (at the highest subscription package) 88,000 foundations and 900,000 grants. Even the lowest subscription package contains data on 10,000 different grant funders. The exclusivity of a donor database like GrantStation would serve your organization better in this instance because it is limited to active grant-makers accepting unsolicited applications.

With most paid subscription packages to grant directories like Foundation Directory Online or GrantStation, you have the option to apply specific search criteria in order to only receive relevant responses to grant queries.

Any good grant database offers its subscribers the capability to search for grant makers within a set geographical location. This is important because not all funders in your search results will operate in your service area. An important tip is to take advantage of these geography-narrowing tools so that you only see the most likely funders in all your search results. Make sure initially to limit your searches to your geographic area (state, county, or region), then include organizations that fund grants nationally with no geographic preference. This will weed out funders that may sound appropriate but don't accept applications from outside of their select service area.

Another important bit of information is on corporate funders. Many for-profit companies

have established foundations that accept grant applications from regions in which their company has a significant presence. If you are going to apply for a corporate grant, make sure the corporation operates in and gives to your area for the best chance of application approval.

Your search criteria should also include keywords or selected categories so that the generated results align your funding needs with the funders' priorities. Just because a foundation serves your geographic location doesn't mean they'll support the work your organization does. For example, an environmental protection grant maker providing funding in Florida is unlikely to support a Florida-based nonprofit that provides hot meals to seniors in need. Having this organization show up in your search results does little good for your nonprofit. Choosing the right keywords for your search will save you research time that can be better spent putting together stellar grant applications!

You may need several different searches to find grant opportunities for your projects. You'll want to make a list of grants to further investigate. The easiest way to accomplish this is through spreadsheet software like Excel. Spreadsheets allow you to organize foundations' information in neat rows and columns. You can use the enclosed Grant Tracking Template to store this valuable data. Important notes to have are the application deadline, grant funder's giving area, the program you're requesting funding for, the funder's contact information, and (if listed) the typical grant award range.

Section 3: Use GuideStar to Learn More About Prospective Funders

The search results from your database won't always be perfect, but they provide good base-level data in order to get an idea of what the funder is likely able to do for your organization. In cases where you want to know if a funder has awarded grants to similar nonprofit organizations or projects to the one you'd like funded, or if you're curious as to a funder's average grant size within their provided grant range, you can use a free resource called [GuideStar](#) to obtain this additional information.

GuideStar is a consumer resource tool that allows citizens to freely search nonprofit organizations and view multiple years of that organization's Form 990. A nonprofit's Form 990 is submitted to the IRS on an annual basis and includes information on a nonprofit's revenue, expenses, donations received, and grant awards given. Viewing a prospective funder's Form 990 can provide invaluable insights into what that foundation has supported in past years and how much they've given. The Form 990 may also include contact information for the nonprofit organization if no contact data was provided in the database. You should use this information sparingly, if at all, because if a foundation doesn't typically share its contact information it may mean they are not open to cold calls from grant writers seeking funding. This is especially true of small family foundations or foundations that wish to communicate exclusively through an online application on their website.

To use GuideStar, you only need to create a free account. From there, your organization can make an unlimited number of searches on prospective funders and gain access to their Form 990s. It may take a little bit of scrolling to find the information on the grants awarded, but typically, the Form 990 of grant-making organizations will include a listing that shows the non-profit's name and award amount if the foundation awarded any grants over the course of that fiscal year.

Section 4: Grant Tracking Template and How to Use

When you've compiled all necessary data on prospective grant funders, you'll need a way to keep track of that information. Use of a grant tracking spreadsheet is a great way to keep track of funder information and also track your grant writing progress. The Grant Tracking Template included in this toolkit breaks down necessary information on each funder so that it is easily digestible and sortable. You have the option to sort all funders by their deadline or, if your board or executive team want a breakdown of grant opportunities by project, you can sort your data by program to segment your grant funders.

When you've begun the writing process, the Grant Tracking Template can serve to track your grant writing progress. When you've submitted grants, you can simply cut the data from the Grants to Pursue tab and move it to the Grants Submitted tab. This tab is a queue of grant applications that you are waiting for a status update on. In this tab, you can also establish dates to follow up on grant applications if you don't hear anything from the funder beforehand. In cases in which the grant funder welcomes nonprofits to check the status of their applications, you can set dates to reach out based on when you should expect to hear back. The organization's contact information will be on this tab as well, so there is no need to search for an email address or phone number.

When you've heard whether your application for funding was accepted or rejected, you move that grant data from the Grants Submitted tab to the Grant Maker Response tab. In this tab you can enter whether the grant was accepted or rejected, the reward amount, and add notes on follow up requirements.

One important caveat to keep in mind is that just because the Grant Tracking Template allows you to sort your applications by deadlines, it does not mean that you will be incapable of overlooking a grant deadline. The Grant Tracking spreadsheet is best used in tandem with a scheduling application such as your Outlook Calendar, to set reminders of grant deadlines well in advance so that you are not caught off guard by an approaching deadline.

If you know you'll need to have certain pieces of information ahead of a grant deadline, work with other departments to gather the necessary information early. Get your deadline on their schedule and set a due date with them for when they should get the requested grant materials to you. Set calendar reminders for yourself to follow up with different departments if you haven't received the grant materials by the time everyone agreed upon.

The key to managing multiple applications simultaneously is staying ahead of schedule and allowing yourself enough time to plan for any holdups that may arise that are outside of your control. Because grant funds are limited, getting your application in sooner in

the grant cycle is often more beneficial than waiting until the last minute. Working ahead on tasks and submitting grants early will lower stress levels and allow for more time to research additional grant opportunities.

In the rare instance your team can't complete and submit the application on deadline, you can cut and paste the funder's data from the "Prospective Grant Maker" tab to the "Grants Unable to Submit" tab so you know to prioritize that grant in the next giving cycle. This tab also allows you to track your team's efficiency in completing and submitting grants. The fewer funders listed on the last tab the more efficient your grant-writing efforts.

Section 5: Building and Maintaining Relationships with Funders

There's more to grant writing than researching and submitting to grants. You may be surprised to hear that many grantmaking organizations want you to reach out and introduce your organization before applying. Unless the funder specifically states not to contact them or provides you with no contact information, it's always a great idea to get in touch.

Not only will reaching out to the funder start familiarizing them with your organization, but you stick out in their minds when you take this step. That first contact is a great opportunity to ask questions about the application process, the funder's preferences, and to inquire whether the program you're seeking funding for is something the organization would support. Keeping that relationship going after the initial introduction will build a relationship that may lead to receiving more funding in the future. You can break down grant funder relationship building into four easy steps.

Step 1: Introduce Your Organization

Reaching out with a phone call or email is a good first step in introducing your organization. If you're reaching out to a local grant funder, you have the advantage of being able to request an in-person meeting to make their acquaintance and put a face to your organization. People give to people. So, local grant makers are more likely to support local organizations that go the extra mile to introduce themselves. That introduction could be what you need to get a grant reviewer to give your application special consideration.

Step 2: Follow Up with Grant Funders

After your initial contact, work on the grant application and get it submitted. Once submitted, reach out to check the status of your application after a reasonable amount of time has passed. Only do this if the funder allows you to follow up! This shows you're earnest about creating a relationship with the funder, and you're also reinforcing the importance of receiving funding to make your program successful.

Step 3: Thank the Grant Funder (Regardless of the Outcome)

When the grant funder sends word that your application was accepted or rejected, it's a good idea to reach out again with a thank you. If your application was accepted, thank the funder for accepting your application. It's a good idea to ask about any required progress reports you need to supply in order to accept the grant during this call. You may also want to further nurture your relationship with the funder by inviting representatives from their organization to tour your facility or see your nonprofit in action.

If your application was rejected, you'll still want to reach out and thank the funder for considering your application. If the reviewer added any feedback on your application, thank them for their advice as well. If your application wasn't given feedback, now is a good opportunity to ask the funder how you could strengthen your application for the next submission cycle. Knowing exactly what the funder is looking for gives you a greater chance to have your program funded during the next grant submission period.

Step 4: Update Your Grant Funders

Once you've received funding, provide the funder with updates on the program. This goes beyond just providing them with required reports. Instead, consider this an opportunity to further cultivate your relationship with them in case there are opportunities to receive grants in the future. Send the funder handwritten thank-you notes, your nonprofit's newsletter, and pictures of your staff hard at work making the world a better place. Grant funders want to trust that their money made a difference – showing them your organization is a good steward of resources demonstrates that their faith in your organization was not misplaced!

Section 6: How to Obtain Info for Grant Applications and 5 Most Commonly Required Items

Each grant funder has its own special requirements for submitting a grant application. For people starting out in grant writing, the materials you need to gather can seem overwhelming. You may be struggling to figure out exactly what grant funders are looking for. Aside from special requirements, there are five items that are commonly required in applications for funding.

1. Organization's Fiscal Year Budget

Most funders to whom you'll be submitting grant applications will require you to share your nonprofit's budget for the current fiscal year. Grant funders use your fiscal year budget to make sure your organization is fiscally sound and that there are no red flags from an accounting perspective. Your organization's accounting department should have a budget at the beginning of your company's fiscal year. Reach out to this department to secure the current budget. It is worth getting an explanation of the budget when meeting with accounting so you can explain the organization's financials if the grant funder has any questions. This budget is different from program-specific budgets in that all prospective program, administrative, and fundraising expenses and revenue are reported.

2. Most Recent Audited Financial Statement

Another document you'll want to have on-hand for grant writing is your organization's most recent audited financial statement. Your accounting department should have a copy of a recent audited financial statement of your organization's financials. These reports are written by an external agency that scrutinizes the nonprofit's finances. Grant funders use these reports to ensure the nonprofit has not engaged in financial mismanagement or misconduct.

3. Program-Specific Budget

If your organization is seeking support for a specific program, rather than seeking general operating funds, you will be asked for a program-specific budget. The program budget should break down what required materials, staff, and intangibles are projected to cost for the program. A program budget should not only list what expenses are expected; the budget should include the revenue that is projected from different funders. While program-specific budgets are projections, you'll want to be as specific as possible when illustrating the costs of implementing your program. Funders may choose a portion of your budget to fund or may choose to fund the entire program if the budget is realistic and reasonable.

As you may have guessed from the first three items, grant funders want to ensure your organization is financially sound and that the funds you're requesting will be used appropriately. Being able to produce error-free budgets and financial statements indicates to funders that they can rely on you to accurately report how your organization used their funds. Confidence that your organization is a good steward of resources will go a long way when asking for grants.

4. List of Board Members with Their Affiliations

Most grant funders will request a list of your organization's current board members and the businesses and other organizations they are associated with. Your nonprofit organization's leadership should have a list of active board members. The members' positions on the board and their relationship with external companies should be included on this list. Grant funders will want to research your nonprofit's board to get an idea of who is leading the organization. Knowing that knowledgeable, talented community leaders are directing the actions of the organization gives grant funders peace of mind that your organization will deliver the results you promise.

5. Your Organization's 501 (c)(3) Determination Letter

The last document you'll want to have on-hand is a copy of your organization's 501 (c) (3) Determination Letter. This is a letter issued to your nonprofit by the IRS that confirms your organization's status as a charity. Grant funders rely on your determination letter to verify your organization's status as a nonprofit organization. Paired with your company's EIN, funders can weed out for-profit organizations and organizations that haven't been recognized as a charitable organization.

Generally, financial information is obtainable by the accounting department. Questions regarding program-specific information can be directed at the individual who oversees that program. Work with staff members to establish reasonable timelines for other departments to provide that information to you and hold them accountable with gentle reminders when deadlines grow near.

Section 7: Creating a Master Checklist of Application Requirements

Looking over many grant funders' FAQ sections, you will discover that one of the main reasons that applications get rejected is because the organization didn't provide all the requested information. If your nonprofit wants to be taken seriously and get its programming funded, it's important to accurately complete the application.

One way to make sure you're able to keep track of each individual requirement of the grant application, is to make a master checklist using the funder's application and any additional items they've posted as being required for consideration.

Read through the funder's website sentence by sentence and, at every mention of a required item, add it to your list of the required materials. If the funder allows you to reach out to them prior to submission, run through your checklist with them and ask if you missed anything. This will determine if you have a full understanding of what you'll need or if you missed something and need to add it to your list.

Here is an example of a basic grant writing checklist typical to what you'll make when pursuing grants for your organization:

1. Nonprofit Mission Statement and History
2. Program Description
3. Program Budget
4. Organization's Fiscal Year Budget
5. Most Recent Audited Financial Statement
6. Nonprofit Determination Letter
7. List of Board Members

Each funder's checklist of required items is different, so your checklist will change with each application. Ensure your application is never rejected due to a missing application component by making a checklist for each grant.

When you're finished writing your grant and are preparing to submit it, check your application materials against your checklist a final time to ensure that every component of the grant is there before sending.

Section 8: Guide to Post-award Reporting

Once you've received grant funding from a foundation, you will likely have to meet reporting requirements in order to accept and use those funds. Post-award reporting requirements vary from grant to grant, but virtually all ask the nonprofit organization to demonstrate that grant funds were used responsibly and that those funds positively impacted the project for which the nonprofit sought funding.

When writing a report, you'll want to include a financial statement illustrating how grant funds were used. You'll want a detailed financial statement that clearly shows an itemized breakdown of how money was spent. It may be useful to attach a statement that spells out how each item purchased was valuable and necessary for the program's success. Another element to a good grant report is a narrative outlining what the grant funded and how those activities helped achieve overall program objectives. Included in this narrative should be a statement on the results of the funded program and how it impacted the community. State how grant funding made a difference in achieving those goals. If your results were not what you were anticipating, be honest and express that the program didn't meet the goals outlined in your nonprofit's grant application. Explain what went wrong and what you've learned from your data in order to improve outcomes in the future.

Lastly, your report should discuss your nonprofit organization's future plans and how they will sustain the program that grant funding helped implement. This is a section of the grant report in which your nonprofit can share how it plans to expand its services in the future and keep the program the funder supported going. Funders want to know that their contribution made it possible for your nonprofit to make changes now and for years to come. Making the world a better place by funding programs that align with their interests is the legacy grant-makers want to leave behind. Honor that desire to leave a lasting legacy by making this section of the report detailed and specific so the foundation is assured their funds will continue to make a difference.

Conclusion

At first glance, grant writing can seem overwhelmingly complicated. Hopefully, this grant writing toolkit has better familiarized you with the process of writing grants, so the process doesn't seem so scary. Remember, with access to foundation directories, making checklists, and tracking grant writing with an Excel template and calendar reminders, it's possible to break the process down into smaller, more manageable tasks. Approaching grant writing with a step-by-step approach makes it simple to write winning grant applications and get them submitted on time!

Q G I V P R E S E N T S

GRANT WRITING TOOLKIT



Letter Template: Thank You - Application Acceptance

Date

Contact Name

Grant Maker Name

Address 1

Address 2

City, State Zip

Dear Contact Name,

Thank you for accepting my nonprofit's grant application. We at, Nonprofit Organization, are grateful to you for your consideration of our request for funding. Thanks to you, we'll now be able to (list objectives of program the grant will fund).

Your support is crucial to helping address this important need. We are going to address this problem using the approach outlined in our grant application. We will (list steps to addressing the need the grant addresses. Make sure that your approach matches what your organization said it would do!).

Nonprofit Organization was established in (insert year) to (insert mission) and helps make the community/service area a better place by (insert your nonprofit's different programs here). We would love to show you how our nonprofit works. If you'd like to schedule a tour or receive more information, give me a call at (insert business phone number).

Thanks again for making it possible for Nonprofit Organization to resolve this need/start new program/expand services. Your trust in us has not been misplaced. Your support will help us make a big difference in (insert area served).

Sincerely,

Grant Writer/Development Director/or CEO Signature

Name of Letter Writer, Position

Letter Template: Thank You - Application Rejection

Date

Contact Name

Grant Maker Name

Address 1

Address 2

City, State Zip

Dear Contact Name,

Thank you for reviewing Nonprofit Organization's application for funding to support Program Name. While we were disappointed you couldn't support our organization during this grant cycle, we understand that Grant Funder Name, can't fund every request you receive. I would love to speak with you further about our application and what Nonprofit Organization can do to improve our chances during the next grant submission period.

We would be grateful for any feedback you have on our application. We are eager to fund Project Name but can't do it without the support of grant funders like Grant Funder Name. Any suggestions you have would be much appreciated.

Thanks again for your consideration. I hope to hear from you soon.

Sincerely,

Grant Writer/Development Director/or CEO Signature

Name of Letter Writer, Position

Grant Tracking Spreadsheet Template

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