



Grant Template Checklist

1. Executive Summary

Length: 1-3 paragraphs

Purpose: The executive summary sets the tone for your proposal and inspires donors to keep reading. Think of it as a “trailer” for your proposal.

Pro Tips: While the executive summary comes at the beginning of your proposal, it is often best to write it last, when you are most familiar with your full proposal.

Bonus: Learn more about writing an executive summary that inspires donors.

2. Organization Mission, Vision, and Background

Length: 1-2 paragraphs

Purpose: You are introducing donors to your organization. Cover key information such as when and why your organization was founded and the inspiring vision you have for the future.

Pro Tips: This is your chance to invite a funder into your overall vision for a better world!

3. Recent Accomplishments

Length: Aim for 3-4 brief and relevant bullets

Purpose: You are demonstrating to potential donors that you know how to make an impact. If you are writing a proposal for an existing program or project proposal, accomplishments will ideally be related to that work.

Pro Tips: Your accomplishments should be inspiring to donors, so be sure to focus on impact rather than activities.



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4. Statement of Need



Length: 2-4 paragraphs

Purpose: Your statement of need is a concise and compelling description of the need your organization, program, or project seeks to address.

Pro Tips: Be sure to include data documenting the need, as well as information about gaps in existing services.

Bonus: Check out our guide for how to write a powerful statement of need.

5. Goals and Strategies



Length: Half page to full page

Purpose: You are describing the impact you aspire to make and the strategies (or methods) you will use to achieve that impact. Funders are looking for evidence that you have a well-thought-out approach to achieving your goals. This is also an opportunity to remind donors of your organization's unique qualifications to undertake this work.

Pro Tips: Keep in mind that strategy is not the same as activities. You want to be sure you are describing WHY you are taking the approach you are taking and HOW it will create change.

6. Activities



Length: 1-3 pages (if you are writing a five-page proposal)

Purpose: Here is where you finally get into the details of WHAT you will be doing. Where possible, include numerical targets.

Pro Tips: One simple way to approach this section is to align activities by strategy. For example, if you have outlined three core strategies for your program, you might detail 3-4 activities for each strategy.



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7. Evaluation

Length: 2-3 paragraphs OR one paragraph plus bullets or chart.

Purpose: Funders increasingly want to see how their grant dollars are making a difference on issues they care about. Building evaluation into your programming and your grant template will put you ahead of most other grant applicants.

Pro Tips: Where possible, you will want to have specific numerical benchmarks, such as number of people served by your organization. If you also have advocacy goals, consider benchmarks like the number of public or press events, the number of press hits, or any change in local policy or practice.

Bonus: Learn more about evaluation methods and how to choose the right ones for your work!

8. Conclusion

Length: Aim for a brief paragraph of 3-4 sentences.

Purpose: Though not necessarily required, a conclusion is a final chance to thank donors for their consideration and inspire them to be a part of your work.

9. Attachments

These are the most commonly requested attachments. If you have them on hand in advance, submitting proposals will be much easier!

- 501c3 letter
- Board of Directors list, including affiliations
- Bios of organization and/or program leadership
- Most recent audited financial statements
- Most recent 990
- Current year organizational operating budget
- Current year program or project budget, if applicable
- Most recent budget vs actuals report