LEVITATE

LEGAL & CONSULTING

Grant Checklist Tool

February 2025

Introduction to the Grant Checklist Tool

This tool provides a high-level starting point for organizations and individuals engaged in the pursuit of grant funding. It outlines key steps and best practices for both philanthropic and federal/state grant processes, offering a practical framework to support readiness, compliance, and competitiveness.

These checklists are not meant to be exhaustive or one-size-fits-all. Instead, they serve as a foundational guide to help you think strategically about what's needed at each stage of the grant lifecycle—from pre-application planning to post-award management. Whether you're a nonprofit leader, local government agency, or an emerging fund development professional, this tool can help you structure your approach to grantseeking more effectively.

We recommend refining and customizing these checklists based on your organization's internal capacity, fund development strategy, and the specific requirements of each funding opportunity. Aligning these tools with your long-term goals and operational realities will increase your chances of success and sustainability in competitive funding environments.

Philanthropic Grant Checklist

1. Pre-Application

- Review eligibility criteria and alignment with funder priorities
- Assess funding range, restrictions, and reporting requirements
- Gather recent audited financials and 990 (if applicable)
- Identify project or general operating need
- Draft high-level project budget and narrative
- Secure internal approval from leadership/Board (if required)

2. Proposal Development

- Prepare compelling narrative aligned with the funder's mission
- Include SMART goals and anticipated outcomes
- Draft project timeline and deliverables
- Complete project budget with justification
- Compile supporting documentation (e.g., IRS letter, board list, internal policies)

3. Review & Submission

- Conduct internal review (proofreading and funder fit)
- Confirm formatting and word/page limits

- Upload/submit via online portal or email before deadline
- Save a PDF copy of submission for your records

4. Post-Submission

- Send a thank-you or acknowledgment email to funder (if appropriate)
- Track submission status and follow-up date
- Schedule internal debrief and grant calendar update
- Prepare to respond to requests for clarification or site visits

5. If Funded

- Review and sign award agreement
- Set up reporting schedule and internal tracking
- Acknowledge the funder publicly (if required)
- Submit reports on time and maintain communication

Federal/State Grant Checklist

1. Organizational Readiness

- Register or confirm status in SAM.gov (active UEI & CAGE code)
- Ensure Grants.gov or state portal account is active and accessible
- Confirm eligibility based on NOFO/RFP
- Review matching/in-kind requirements and cost allowability

2. Pre-Application Planning

- Read full Notice of Funding Opportunity (NOFO) or RFP
- Hold kickoff meeting to assign roles and set deadlines
- Develop logic model or theory of change
- Collect required attachments: resumes, letters of support, MOUs
- Check federal/state assurances and certifications (SF-424, SF-LLL, etc.)

3. Narrative & Budget Development

- Address all evaluation criteria in narrative
- Prepare clear, detailed budget using federal/state forms (SF-424A, budget narrative)
- Justify each line item per Uniform Guidance (2 CFR 200)
- Incorporate sustainability and equity components if required

4. Review & Submission

- Internal compliance review (double-check for responsiveness and errors)
- Confirm all required forms and attachments are complete

- Validate system submission deadlines (Grants.gov, JustGrants, state portals)
- Submit at least 24–48 hours before the deadline

5. Post-Submission

- Save Grants.gov tracking number and confirmation email
- Track award announcement dates
- Organize files in grant folder (narrative, budget, forms, correspondence)

6. If Funded

- Review Notice of Award and terms
- Schedule onboarding with grant officer (if offered)
- Set up grant in internal accounting and compliance system
- Create reporting calendar and assign responsibility
- Train relevant staff on grant compliance and tracking