What to do

BEFORE YOU WRITE A GRANT APPLICATION

WITH CHECKLISTS AND SAMPLES

TINA L. TURNER, MPA

TTM
Community Solutions Consulting
LLC
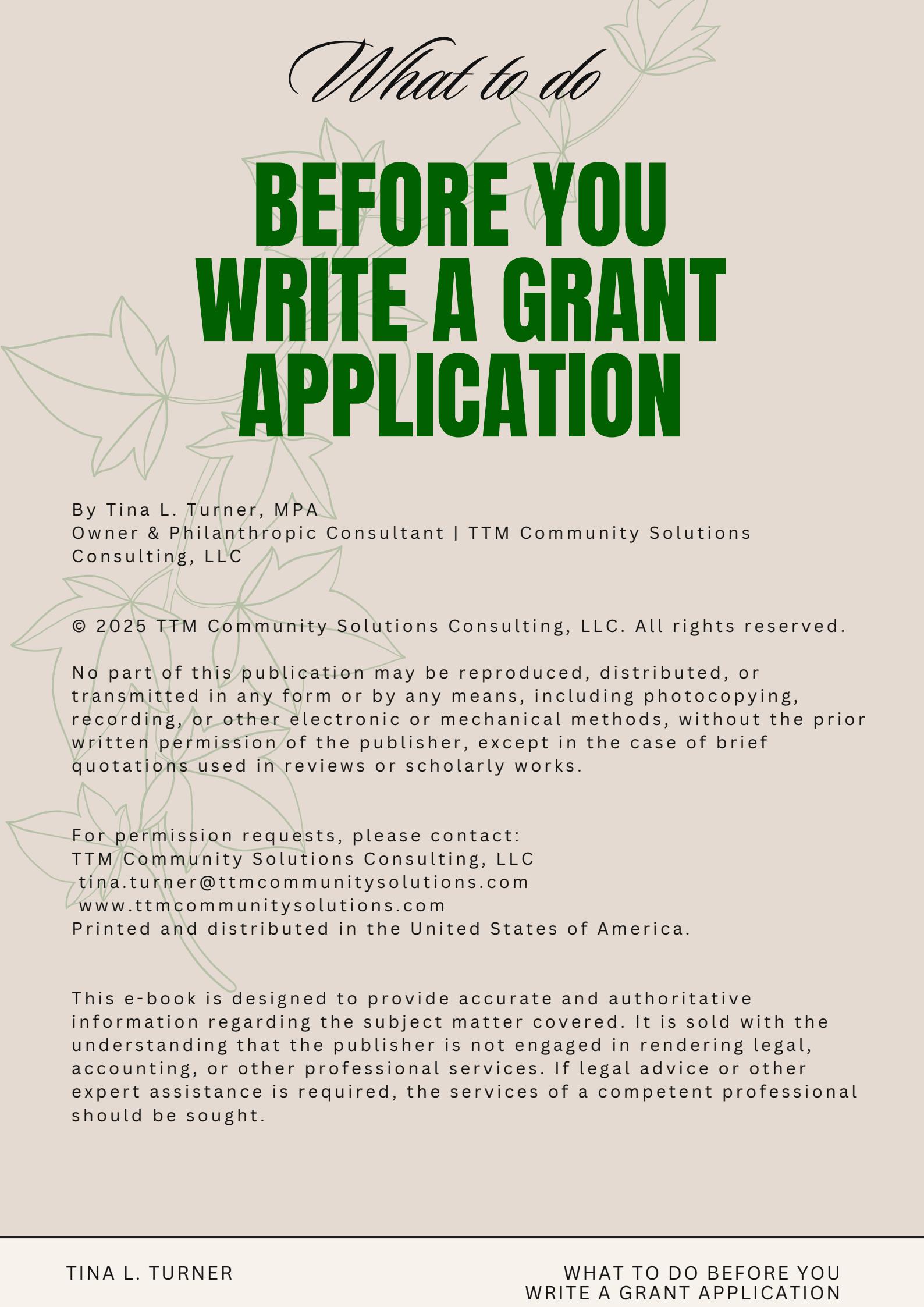
What to do

BEFORE YOU WRITE A GRANT APPLICATION

By Tina L. Turner, MPA
Owner & Philanthropic Consultant | TTM Community Solutions
Consulting, LLC

This e-book is designed to provide accurate and authoritative information regarding the subject matter covered. It is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

Table of
CONTENTS
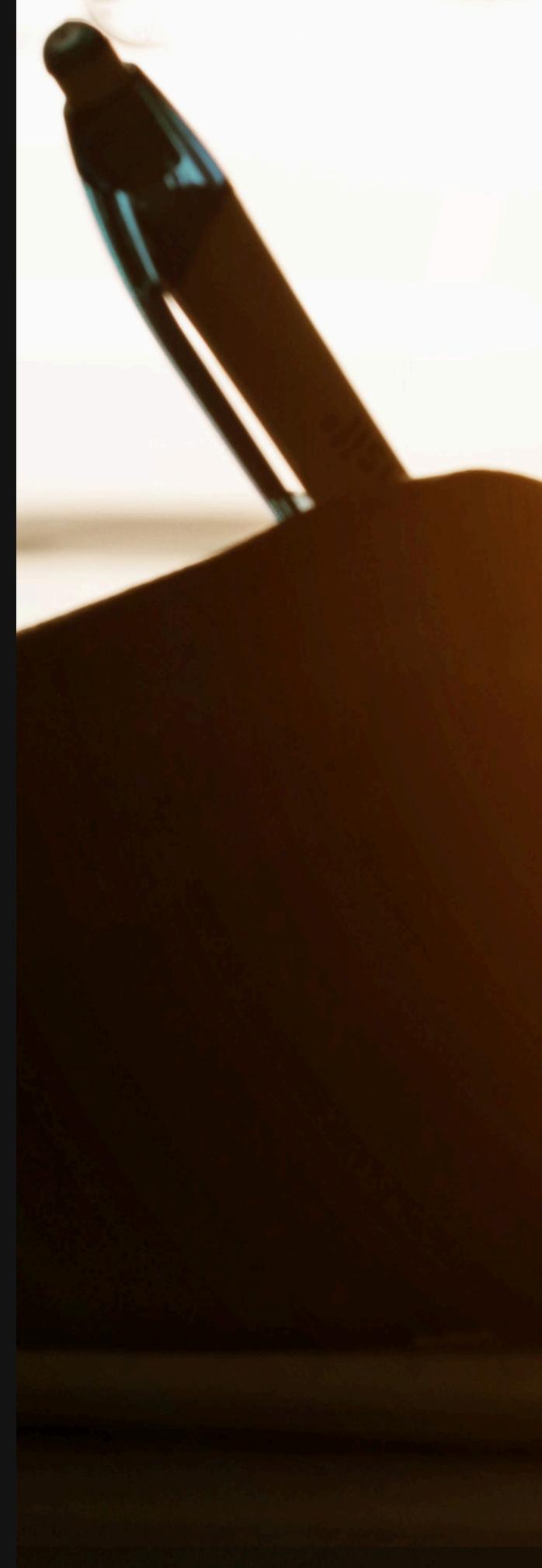
A message from the Author

Over the years, I have had the privilege of collaborating with nonprofit leaders, government agencies, and community advocates who share one goal — creating lasting impact. Great ideas often struggle to move forward, not because they lack passion, but because they lack critical resources such as time and funding.

I wanted to provide an affordable way for nonprofit organizations to gain practical knowledge related to all of the work that they do. This e-book is centered around grant writing and being prepared to seek funding.

To date, my grant success rate is 91.4% with grants written from 2009 through 2025 (I have been writing grants since 1991) all without the support of AI apps. This success includes federal, state, city, and foundation grant applications. I have also managed state-wide programs in Ohio, California and Georgia that funded local governments and community organization that provided me with the grant management expertise that I will share with you in this book.

Whether you are new to grant writing and management or sharpening your skills, I hope these pages empower you to build stronger programs, secure sustainable funding, and make the difference you were meant to make.

Tina

Tina L. Turner, MPA
 Owner & Philanthropic Strategic Consultant
TTM Community Solutions Consulting, LLC

A NOTE OF DEDICATION

I am specifically dedicating this book to my two "loves", my mother and my children.

My mother recently passed in October 2025. Her faith in God and love for helping others is what molded me into person that I am today. Mrs. Evelyn Turner (affectionately known as Ma), may the joy you experience in heaven be beyond all human understanding. I will see you there my Queen.

My children (Jordan Myers and Mistie Daniels) and I founded a nonprofit organization a few years ago to mitigate poverty in both Atlanta, Georgia and Columbus, Ohio. My son, Jordan, was the brainchild for the nonprofit organization that we founded. I am proud of their unselfish act to improve the communities in which they were raised and now work, live, and flourish. They both attended many community meetings, workshops, and planning sessions with me on my professional journey and during their infancy, youth, and young adult lives. A percentage of the proceeds from this book will be donated to the charity in which my children and I founded.

My two "loves" prove that generational wealth is more than material things, but also the seeds of wisdom, faith, and giving back to the community that you plant along the way for your children to one day grasp and improve.

Lastly, I dedicate this book to nonprofit leaders creating lasting community impact. May your work continue to inspire and improve others.

CHAPTER

1

DETERMINE YOUR ELIGIBILITY TO APPLY | 2 PAGES

What you will learn

How to identify if the grant and funder is
the right fit for your organization,
understand the basic documents you
need, and how to track and organize
grant opportunties.

DETERMINE ELIGIBILITY
CHAPTER 1

Before beginning the grant writing process, you will need to confirm that your organization is eligible to apply for the grant opportunity. Each grant opportunity will list what type of organization (501 c3, governmental, faith-based, churches, etc.) is eligible to apply for the grant and what type of programs or activities they will or will not fund. Do not take this information as if it is subjective, it is definitive.

Usually, you will find the eligibility criteria on the first page of the grant guidance and when the grant is presented online, it is stated in the first few sentences or paragraphs.

Trust me, they mean what they said and said what they meant regarding who is eligible to apply for their funding. Often, foundations and state agencies have internal policies that dictate who they can provide funding to and for what purposes. If you have questions about your eligibility, contact the representative of the funding organization that they list as the contact person for more information.

Example:

To qualify for a grant from our Foundation, you must:
- Be a 501(c)(3) public charity, a state or political subdivision, a government–owned or operated college or university, or an exempt operating foundation; and

Organizations and activities not eligible:
- The Foundation does not provide grants directly to any individuals for travel, study, healthcare or any other purpose.
- Religious organizations. The Foundation may consider grants requested by such an organization if it is an eligible organization and the grant would support non-sectarian social service activities that are available to the broad community.

DETERMINE ELIGIBILITY CHAPTER 1

If the grant opportunity lists a conference call or online seminar to learn more about the grant opportunity, make sure your organization attends. Key details and questions are discussed and answered during these calls and by the time the recording or Q&A are provided you will find that you had wasted vital days or weeks that you could have begun preparing an application.

Read the grant application thoroughly (both the program and financial staff involved in preparing the grant) before the conference call and have your questions written down and prepared ahead of time. Oftentimes, these calls do not allow enough time to answer all the questions and guests are asked to place their questions in the chat during the virtual meeting or to email them to the contact person. You will want to also take notes during the conference call.

If the grant application contact person offers the opportunity to discuss any questions with them one on one, it would be a great opportunity to develop a relationship. Be prepared with questions and any parts of the application that you may need clarified. Be prepared and to the point. It is not a social call, but an opportunity to ask well thought out questions and add your face or voice to the application.

CHAPTER

2

| CLARIFY YOUR MISSION, VISION, AND CORE GOALS | 3 PAGES |

What you will learn

What makes a good Mission and Vision Statement and what are SMART goals.

WHAT TO DO BEFORE YOU
WRITE A GRANT APPLICATION

CLARIFY YOUR MISSION, VISION, AND CORE GOALS

CHAPTER 2

Successful grant writing starts with a clear understanding of who you are, what you do, and how you align with funders priorities. The more prepared your organization is before writing, the stronger and more credible your proposal will be.

Grant opportunities often present themselves with little warning or lead time to prepare. You must be ready. If you have programs that you implement regularly and according to your organization's strategic plan, you should have grants for these programs prepared in advance to then edit specifically according to a funder's requirements.

Below are essential pre-writing steps to ensure your organization is "grant ready."

Clarify Your Mission, Vision, and Core Goals
- Your mission defines what you do.
- Your vision paints the picture of what success looks like.
- Your goals set the direction for how you will get there.
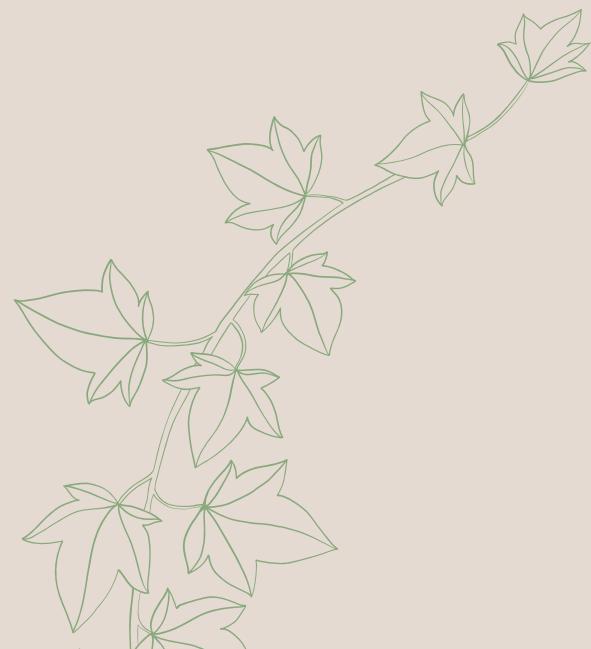
CLARIFY YOUR MISSION, VISION, AND CORE GOALS

CHAPTER 2

Before you write any proposal, review and refine these statements. You should not spend too much time on reviewing your mission, vision, and goals if you have been in operation for a while. However, it is a crucial step to take annually especially when your funding priorities or leadership changes. A clear mission keeps your proposal focused. A strong vision keeps it inspiring. Revisit these statements at least once a year to ensure they reflect your organization's current impact and growth direction.

What makes an effective Mission Statement:
- Uses plain language and not buzzwords or jargon.
- Expresses why your organization exists.
- Expresses who you serve/who benefits from your organization.
- States your core beliefs and what makes you different from other organizations.
- Uses inspirational, action-oriented, realistic, and concise language.

Example: To empower survivors of human trafficking by providing housing, counseling, and workforce training so they can rebuild their independence.

What makes a good Vision Statement:
- Inspirational
- Concise and memorable
- Values-driven
- Positive and hopeful
- Future focused
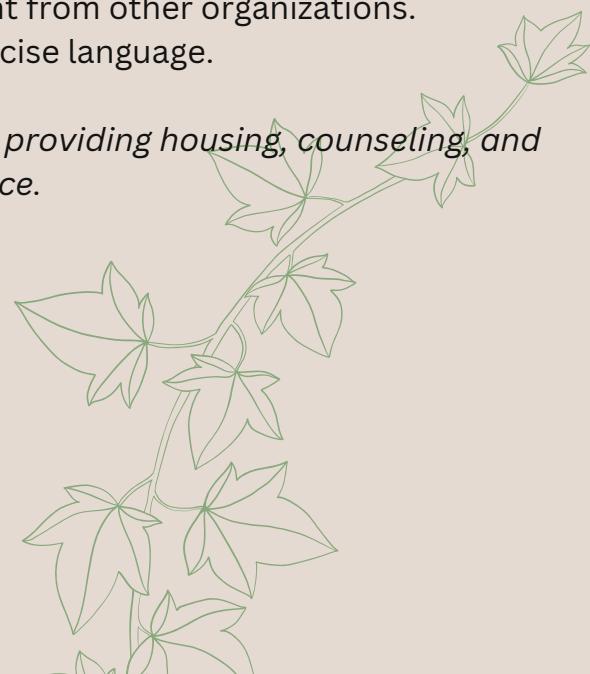
CLARIFY YOUR MISSION, VISION, AND CORE GOALS

CHAPTER 2

SMART goals show that your organization knows exactly what success looks like and how to prove it. The SMART framework stands for:

- Specific – What do you want to accomplish?
- Measurable – How will you know it is successful?
- Achievable – Can this realistically be done with your current capacity?
- Relevant – How does this align with your mission and the funder's priorities?
- Time-Bound – When will the results be achieved?

When you write SMART goals, you move from broad intentions to actionable outcomes that can be tracked, reported, and celebrated.

It is recommended that you base your goals on past performance and data. If you do not have past performance data, clearly state that you intend to establish a baseline with the goal to compare results later. Incorporate both quantitative (numbers) and qualitative (stories, testimonials) data. Make sure you only identify a change that you have responsibility and authority to change. For example, an organization that serves only a specific zip code in a county cannot predict a county-wide, state-wide, or nation-wide change.

SMART goals transform your proposal from inspirational to actionable. They show funders that your organization:

- Has a clear plan
- Can measure progress
- Knows what success looks like
- Will deliver on its promises

CHAPTER

3

GATHER AND ORGANIZE DOCUMENTS | 2 PAGES

What you will learn

What you will need to have on hand and how to organize your grant writing process.

GATHER & ORGANIZE DOCUMENTS

CHAPTER 3

Grant reviewers expect documentation that demonstrates legitimacy, structure, and accountability. Keep a digital Grant Binder which is a shared folder (Google Drive, OneDrive, or Dropbox) that includes all key documents. It makes responding to funder requests faster and more professional.

This Grant Binder should be made available to all parties involved in preparing your grant application to assist with the communication of needs and timelines. It should include all the resources that are needed to prepare your grant application.

Having your important business documents ready in advance saves time as they are often requested. Some normally requested documents are:

- IRS 501(c)(3) Determination Letter
- Current Bylaws and Articles of Incorporation
- Employer Identification Number
- Most recent Strategic Plan
- Annual Budget (organizational and program-specific)
- Board of Directors roster with affiliations and demographic data
- Audited or internally prepared financial statements (past 2 years, if available)

Unfortunately, I have encountered a lot of client organizations that did not have their determination letter. If you have misplaced your determination letter that you received from the IRS, you can go to the IRS.gov website and search for a copy using your name and EIN.

Also note that being recognized as a charitable organization in your state or only filing your articles of incorporation are not the same as having been determined a charitable organization or foundation by the Internal Revenue Service.

GATHER & ORGANIZE DOCUMENTS

CHAPTER 3

As a nonprofit organization, you should have Bylaws. They are your operating document to not only structure your organization but provide protocol and guidelines for your board of directors. Some new and small nonprofits have not developed Bylaws since they are not required to receive a determination letter from the IRS with the EZ application form. They are still a necessary document for good nonprofit management.

An EIN is requested by your organization and often used by your finance department. Inquire with your finance department on gaining access to your organization's EIN.

A most recent strategic plan will be used as reference for your grant application; however, I have prepared some grants where it was requested. Keeping an updated strategic plan is a good business practice and allows your leadership and staff to remain focused on performance.

An annual budget and program budget for the funds you are apply for are typically requested. Consult an attorney with nonprofit financial management experience. Have internally prepared financial statements in good order, as well as an annual audit is good practice for nonprofit organizations. If you are a new nonprofit and have not performed an audit, consult an attorney with nonprofit financial management experience and contact the grant funding contact person. They may provide your organization with an exception with a letter from your accountant.

CHAPTER

4

ASSESS CAPACITY

3 PAGES

What you will learn

How to assess your organization's capacity to deliver the objectives of the proposed grant.

ASSESS CAPACITY
CHAPTER 4

KEY PRE-WRITING STEPS

1. Determine if you are eligible to apply for the grant funds.
2. Clarify your mission, vision, and goals.
3. Gather organizational documents (IRS 501(c)(3) letter, bylaws, strategic plan, budget).
4. Assess capacity—staffing, data systems, partnerships.
5. Research funders and match their interests to your programs.
6. Build a Grant Calendar to identify, track, and manage grant opportunities throughout the year.

Funders invest in organizations with the capacity to deliver and clearly show a potential for return on their investment through achieving measurable outcomes and impact. Before applying, evaluate whether your team and systems can realistically implement and manage the proposed project with the resources you have available in your organization with the amount of funding being provided. There are times when you will find a grant opportunity that requires a heavy lift without offering enough funding to support your proposed project. For example, your project may require personnel, but the funding opportunity states that it does not allow staffing or personnel to support the program implementation. Consult with your entire leadership team while determining if you should move forward with a grant opportunity.

Consider the following:

- Staffing: Who will manage the grant, lead the program, and track outcomes?
- Data Systems: Do you have tools to collect, store, and report accurate data?
- Partnerships: Which community partners or collaborators can strengthen your project?

An effective way to quickly assess your organization's capacity is with use of a S.W.O.T. analysis. A SWOT Analysis is a strategic planning tool used to evaluate your organization or project(s):

- S – Strengths (internal advantages)
- W – Weaknesses (internal challenges)
- O – Opportunities (external factors that can help you grow)
- T – Threats (external risks that could affect success)

ASSESS CAPACITY
CHAPTER 4

ASSESSMENT

In grant planning, a SWOT analysis helps you identify your organization's readiness to manage a project, strengthen your proposal narrative, and anticipate potential challenges before funders do. You may have conducted a SWOT during the strategic planning process that you should conduct for organizational effectiveness; however, it is necessary to focus on your ability to manage grant opportunities. A funder sees your SWOT as a reflection of self-awareness. It shows you know your organization, your environment, and your capacity to deliver results. Remember to consider if you can consider match requirements in grant opportunities in your analysis. A SWOT analysis allows your organization to:

- Identify internal capacity strengths and gaps before applying.
- Develop solutions for weaknesses that may concern funders.
- Align your project with current opportunities in your community.
- Prepare mitigation strategies for potential threats.
- Strengthen your project narrative and sustainability plan.

Assemble the right team for your SWOT analysis. Include people who understand distinct parts of your organization:

- Executive leadership
- Program and finance staff
- Board members
- Clients or community partners (if appropriate)

Hold a brainstorming session (in-person or virtual) and use a whiteboard, flip chart, or shared document to collect input. Define the focus of the SWOT and decide what you are analyzing. Are you analyzing the entire organization, or a specific program or grant project? Clarify your goal for your team. For example, "We are conducting this SWOT to assess our readiness to apply for the [Name of Grant Program] and manage the proposed project successfully." Take time to list the internal factors (Strengths & Weaknesses) that are within your organization's control, such as resources, systems, and capabilities.

Involve diverse voices. A finance officer may see "budget forecasting" as a strength, while a program coordinator might see it as a challenge and both perspectives are valuable. Be honest but solution oriented. Funders respect transparency paired with a plan for improvement.

List the external factors (Opportunities & Threats) that are outside your organization's direct control but influence your success.

Funders appreciate it when you acknowledge threats, it shows you are proactive and strategic, not reactive. Turn weaknesses and threats into opportunities by addressing them directly in your grant proposal. Be proactive in finding your solutions. Use the findings from you SWOT in your grant proposal, you can present them in a table (like shown below) or weave it into the narrative grant sections that they strengthen or support in your grant application.

It is recommended that you conduct a SWOT analysis before major grant applications, annually during strategic planning, and/or after significant organizational changes (such as the establishment of new programs and/or leadership shifts or changes). A current SWOT keeps your grant proposals relevant and your organization's strategy responsive to changing needs.

A SWOT analysis is a decision-making tool that helps you identify your strongest assets, address internal gaps, leverage new opportunities, and prepare for potential challenges. When you integrate your SWOT findings into your grant proposal, you communicate foresight, professionalism, and strategic alignment. If any areas are weak, identify strategies to build capacity, such as forming partnerships, outsourcing evaluation, or engaging volunteers.

When funders see evidence of strong internal systems and reliable partners, they gain confidence that your organization can deliver what you promise.

CHAPTER

5

RESEARCH FUNDERS AND MATCH INTERESTS | 1 PAGE CHECKLIST

What you will learn

How to apply for grants that align with your organization's mission and needs.

RESEARCH FUNDERS

CHAPTER 5

One of the most common mistakes in grant writing is applying for funds that do not align with your organization's mission or program goals. Take time to identify funders whose priorities match your purpose. It is a green light to apply when there is a strong mission fit, and you meet the grant eligibility criteria.

Start your research by:

- Searching federal, foundation, and philanthropic databases.
- Reviewing local foundations and community giving programs.
- Reading past grant award lists to see who they have funded in the past.
- Understanding their funding cycles, eligibility requirements, and geographic focus.
- Searching your local state agencies websites that relate to your program(s).

You can ask an AI virtual assistant to search for grant databases, past awards for funding in your topic of interests, and to create a list of current grant opportunities with deadline dates for your geographic target area.

Taking the time to clarify your purpose, organize your documents, assess your readiness, and align with the right funders is what separates reactive grant seekers from successful grant winners. Preparation builds confidence for you and your grant writing team.

RESEARCH FUNDERS

EXAMPLE

GRANT READINESS CHECKLIST

TTM
Community Solutions Consulting
LLC

GRANT NAME:

PROJECT PERIOD:
PROJECT MANAGER:

1 ELIGIBILITY CRITERIA

Does our organization meet the required criteria?

Are our mission and vision statements aligned with the funder priorities?

Does the funding amount meet the needs of the program?

2 ORGANIZATIONAL DOCUMENTS

Do we have our IRS Determination letter and EIN?

Do we have our Bylaws and Articles of incorporation:

Do we have a recent strategic plan?

Do we have an Annual Budget and Program Budget?

Do we have a current list of our Board of Directors?

Do we need audited or internally prepared financial statements?

3 CAPACITY

Do we have the staff capacity?

Do we have the data collection and evaluation capacity?

Do we have partnerships in place?

CHAPTER

6

BUILD A GRANT CALENDAR | 3 PAGES

What you will learn

How to apply for grants that align with
your organization's mission and needs.

BUILD A GRANT CALENDAR

CHAPTER 6

The grant calendar will support your grant project management and serve as your organization's roadmap for identifying, tracking, and managing grant opportunities throughout the year. A grant calendar can serve as a strategic tool that keeps your organization proactive instead of reactive.

It can help your organization:

- Plan strategically for upcoming deadlines
- Balance staff workload and responsibilities
- Avoid last-minute rushes and missed opportunities
- Maintain consistent funding pipelines
- Develop and maintain long-term relationships with funders

Identifying funding priorities is an important part of the process. To identify funding priorities and cycles, start by defining your funding priorities by what types of grants you will pursue, for which programs, and in what order. Build your calendar around program priorities, not random grant openings. Focus effort where impact and alignment are strongest. Ask yourself:

- What programs or projects need funding this year?
- What are our top three funding goals?
- What types of grants fit those needs (foundation, federal, corporate, state)?
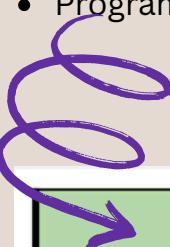- When do those funders typically release RFPs or deadlines?

Once you have identified your priorities, use grant search engines, government websites, and your AI virtual assistant to search for federal, foundation, and local government grant opportunities. Log each opportunity's details into your calendar as soon as it is found.

A successful grant calendar does not just list submission deadlines but builds in internal checkpoints to keep everyone accountable. Considering it your communication plan for grant opportunities. When you view it from the standpoint of a communication plan you can add what type of communication is necessary (i.e., report, email, phone call, or submission in grants portal). For each opportunity, add:

- Start date for research
- Draft due date
- Internal review deadline
- Board or executive approval date
- Final submission date
- Program or Person responsible or subject matter expert

Annual Funding Priorities - Grant Calendar

Program Area	Funding Need	Potential Funders	Grant Type	Target Submission Period	Final Submission Date	Start Date for Research & Document Gathering	Draft Due Date	Internal Review Date	Board or Exec. Approval Date	Program Person Responsible
Workforce Development	Training materials & staffing	Dept. of DEF, XYZ Foundation	Federal / Foundation	March–June						
Youth Mentorship	Program expansion	XYZ Foundation, DEF	Corporate / Local	May–Sept						
Housing Stability	Operational support	Local Government ABC County	Government	August–Oct						

BUILD A GRANT CALENDAR

CHAPTER 6

Project Management

Always note the estimated award notification date to help you plan for overlapping grant cycles and future reporting workloads and work backward from the submission date and allow at least 2 to 3 weeks buffer for writing, review, and final approval. If you are preparing grants for a bureaucratic agency or preparing a research or federal grant application the process may be longer with more points of approval, collaborative partners, and information required that require more time.

Use your calendar to clearly assign who is responsible for each grant and task.This helps avoid duplication and ensures accountability. Include columns for a lead writer or program lead, finance/budget preparer, reviewer, or approver, reporting contact after award. Treat each grant like a mini project and assign roles, deadlines, and communication checkpoints. Your grant calendar can be simple or advanced. Choose what fits your organization's and team members' capacity. You can use options such as:

- Excel or Google Sheets: Easy to update and share.
- Project Management Tools: Asana, Trello, Airtable, or Monday.com for team collaboration.
- Calendar Apps: Outlook or Google Calendar with reminders.
- CRM Systems: Salesforce or Foundant for tracking multiple funders.

Set a recurring reminder to review your grant calendar quarterly (more often during busy seasons). During each review you will need to add new funding opportunities, remove inactive or completed grants, update status (submitted, awarded, declined, reporting), update staff, and adjust upcoming deadlines and responsibilities.

A well-maintained grant calendar transforms your organization's approach from reactive grant chasing to strategic funding management. When you plan, assign responsibility, and review regularly, you ensure that deadlines are not missed, staff time is optimized, and opportunities are aligned with your organization's mission and capacity. Keep your grant calendar accessible on your desktop, it is your nonprofit financial GPS. It keeps you focused, on time, and always moving toward sustainability.

Thank you

FOR READING

TINA L. TURNER
OWNER AND PHILANTHROPIC STRATEGIC CONSULTANT

WWW.TTMCOMMUNITYSOLUTIONS.COM
(614) 329-6509
TINA.TURNER@TTMCOMMUNITYSOLUTIONS.COM