



# Unlocking Federal Funding

## A Systematic Checklist for Maximizing Funding Opportunities

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It is crucial to follow a systematic approach to navigate the complex world of grant applications effectively. This checklist outlines key steps and considerations to maximize your chances of securing funding for your project, such as searching for applicable grants, reviewing the requirements, timing, assembling work groups, creating a framework, and presenting the proposal to senior leaders for submission approval or rejection.



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## Funding Checklist

- Search for grants applicable to the project
  - Federal funding
  - State funding
  - Foundation funding
  - Loan funding
  - Pay for Success of Social Impact Bond Funding
- Review the grant requirements and determine if institutional needs can be met
  - The goals of the funder align with the organization's goals
  - The organization suits the funder's requirements
- Determine if sufficient time remains to develop an application
  - Develop a stash of generic narrative and budget templates to be nimble in developing responses
- Assemble a work group to perform an in-depth dive into the funding opportunity
  - Include project managers and finance staff
  - Review grant objectives, budget parameters, and project evaluation requirements
- Create a loose framework for the project proposal
  - What is being achieved (the goals)?
  - How is it going to happen (the objectives)?
  - What does the timeline look like?
  - Is staffing required?
  - How much will it cost?
  - Is there a cost-matching requirement?
  - What is the final result expected?
- Present project proposal to senior leaders, including finance and board of directors
- Approve or reject proposal submission

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**If approved, applicants may begin to design their application using the materials issued by the funder.**

- Assign a project lead
- Note dates for submission of questions to the funder
- For online grant submissions, applicants should determine if a web login sign up is required to submit a proposal
- Develop a timeline for when each piece of the grant is due
- Note any external needs (letters of support, certifications, documentation) and assemble them immediately
- Engage staff more globally to ensure project buy-in post-award
- Outline the pieces of the grant narrative and assign them to a work group to begin narrative assembly
- Work with finance and budget teams to ensure internal controls and external requirements are met
- Select a date to review the entire proposal as a team before finalizing
- Develop a post-award marketing plan to thank the funder