

Fundraising Checklist

What to prepare:

INTERNAL DOCUMENTS

- Prospect list
- Fundraising calendar
- Tracking list

(All of the above can be one in the same document.)

PROPOSALS AND ATTACHMENTS

- Fact sheet (1-2 pages)
- Organizational brochure
- Basic letter of inquiry (LOI) (1-3 pages)
LOI should be no more than 1 or 2 pages, clear and concise.
- Basic proposal (4-8 pages)
Should include overview, mission statement, history, statement of need, target population, goals & objectives, outcomes & achievements, evaluation, key staff, organizational capacity, partners, funders.

SUPPLEMENTAL MATERIALS

Supplemental materials may demonstrate your outcomes or organizational capacity.

- Financials & Forms
Financials are very important and should be audited wherever possible or indicate when they are unaudited. Revenue sources should be listed by percentages and amounts (e.g. government, foundation, corporate, individual, other)
- Board list with affiliations
- Organizational Chart
- Logic model with metrics
Many funders require a logic model with overall goals & measurable outcomes short-term, mid-term and long-term.
- Annual report
- Strategic plan
- Evaluations and/or testimonials
- Job descriptions/resumes
- Numbers of social media followers
- Funder/partner references
- Letters of support
You may also need references, testimonials, an annual report
- Government grants forms
To qualify for government grants you need to register with Grants.gov, SAMS, CCR, and for state grants with the grants opportunity portal for that state e.g. NYS grants gateway. They require additional attachments, like vendor responsibility forms, statements on worker's comp, disability, etc.