Tips & Planning Tools to Successfully Meet Grant Deadlines

Step 1: Review the proposal to understand the complexity and time it could take to prepare and complete it.

- Read the request for proposal/solicitation and create a checklist of the proposal requirements and any supporting materials you will need to collect such as financial statements, 501c3 determination letter, or a list of key staff and resumes.
- Determine who needs to be involved. Who are the key staff in your organization and external partners who need to be involved in developing the proposal, e.g., program staff, or finance staff? Are there organizations you will partner with that need to be at the table for initial planning meetings?

Step 2: Prepare a calendar that includes due dates for all the tasks you identified in Step 1.

- The sample work plan below offers a task list to support the grant proposal development and submission process based on a month-long period of time from planning to submitting.

Insert Name of Funder and Project Grant Proposal Task List	
ACTIVITY	**TIMEFRAME**
PREPARATION AND PLANNING	
Determine which staff and external partners need to be involved in the grant process.	Week 1
Set up an initial launch meeting for the grant project to clarify roles and responsibilities, and provide an overview of key tasks and timing, e.g., who will need to review drafts, what will you need from partners if applicable, etc.	Week 1
Create a timeline for everyone involved in completing the grant proposal to support meeting the deadline.	Week 1
Identify what supporting materials are needed and who will be able to provide those items, e.g. finance staff to support the budget development.	Week 1
DEVELOPING THE NARRATIVE	
Create a proposal outline	Week 1-2
Collect feedback, revise, and finalize the proposal outline (this can be completed prior to the first team meeting based on a general idea of the project, and can seek input during the meeting).	Week 1-2
Prepare the first draft of the narrative	Week 2

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Send the first draft of the proposal to key staff and partners for feedback. Provide a due date for when you need to receive revisions. ● Allow 4-7 days for review of the first draft depending on when the grant is due. ● Use a document-sharing platform like Google Docs or SharePoint to facilitate tracking edits.	Week 2-3
Schedule a meeting if needed to discuss the proposal feedback and revisions.	Week 2-3
PROPOSAL SUPPORT	
Collect supporting materials.	Week 2-3
Request and secure letters of support from partners if applicable.	Week 1-3
Meet with finance staff if needed to support budget development.	Week 2-3
FINALIZING THE NARRATIVE	
Finalize the narrative proposal and send it to your team for final revisions.	Week 3
Editing of the final proposal and any last formatting to ensure the proposal meets all character counts and word limits, and other guidelines.	Week 3-4
SUBMITTING THE PROPOSAL	
Prepare the submission cover emails if applicable	Week 4
Upload the documents to a submission portal. Submit at least one day before the grant is due to allow for time to navigate any technical issues with online platforms.	Due Date (ideally one day prior)
Add submitted grant information to the grants calendar or other grant management system to have a record of when it was submitted, the amount requested, and the estimated date of notification, along with other pertinent information.	After submitting grant