FREE TOOLKIT

Board Member Grant Toolkit (Free Fillable PDF)

What board members can do for grants and what to leave to staff, with a connections map, a 10-minute board report format, an annual checklist and a short script.

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> This toolkit is for nonprofit board members and the staff who work with them. It sets out how a board can help with grants without writing them, and gives you four things to fill in. Each funder's own instructions and contact rules come first.

What board members can do

- [ ] **Make introductions.** Tell staff who you know at foundations, companies and agencies, and offer an introduction where the funder welcomes contact
- [ ] **Approve budgets and policies on time.** Many applications need a board-approved budget and policies such as conflict of interest and financial controls
- [ ] **Sign or secure letters.** Sign the board's letter when asked, and help get letters of support from partners you know
- [ ] **Join site visits.** Attend when staff ask, know the program, and answer governance questions honestly
- [ ] **Thank funders.** A short note or call from a board member after an award is welcome where the funder allows contact
- [ ] **Give.** Some funders ask what share of the board gives. A personal gift of any size from every member lets the organization report full participation
- [ ] **Ask good questions.** Does this grant fit our mission, can we deliver it, and can we afford what it requires

What board members should not do

- **Do not pressure funders.** No calls asking for a decision, and no use of a personal or business relationship to push an application
- **Do not promise outcomes.** Do not tell a funder what the program will achieve, or tell staff that a grant is certain
- **Do not bypass staff.** Do not contact a funder about an application without telling the person who manages that relationship
- **Do not ignore conflicts of interest.** If you have a tie to a funder, disclose it and follow the conflict of interest policy
- **Do not rewrite the proposal.** Give comments when asked, by the date asked

Connections map

Each board member completes this once a year. Staff decide whether and how to follow up.

Board member:

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Date:

Funder, company or agency	Person I know and their role	How I know them	Strength (strong, some, slight)	What I am willing to do	Staff follow-up

My employer has a giving or matching program (yes, no, not sure):

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10-minute board grants report

Staff or the committee chair fills this in before each meeting. Keep it to one page.

Meeting date:

Reported by:

Minutes 1 to 3: the numbers

	Number	Amount
Applications submitted since last meeting		
Awards received		
Declined		
Pending decisions		
Grant income this year against budget		

Minutes 4 to 6: what is coming

Funder	Program to be funded	Deadline	Board action needed

Minutes 7 to 8: reports and compliance

Reports due before the next meeting:

Any grant at risk (spending, results or deadlines):

Minutes 9 to 10: asks of the board

Introductions requested:

Approvals or signatures needed:

Funders to thank, and who will do it:

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Annual board grants checklist

- [ ] The board approved the annual budget, including the grant income target
- [ ] The board reviewed the list of current grants and what each requires
- [ ] Conflict of interest forms are signed by every member
- [ ] Policies that funders commonly ask for are current and board-approved
- [ ] The board list with affiliations is up to date
- [ ] Every member made a personal gift this year
- [ ] Every member completed the connections map
- [ ] The board reviewed the most recent financial statements, and the audit if there is one
- [ ] The board knows who is authorized to sign grant applications and agreements
- [ ] The board discussed what happens to programs when major grants end
- [ ] At least one member attended a site visit or funder meeting when invited
- [ ] Funders were thanked by a board member where contact is allowed

Introduction request script

Use this only after staff agree, and only if the funder welcomes contact. Replace the words in brackets. This is a request for a conversation, not for money.

Hello [name], I serve on the board of [organization], which [one sentence on what it does and for whom]. I know that [funder] supports work in [area]. Would you be open to a short conversation with our [staff role], [staff name], to learn whether our work is a fit with your guidelines? If the right route is your application process or another contact, I am glad to point them there. Thank you for considering it.

Your version:

Who I will send it to:

Staff member I told first:

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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