FREE TEMPLATE

Grant Writer Contract Template and Client Packet (PDF)

A client onboarding packet for freelance grant writers: a plain-language service agreement outline, a client intake questionnaire and a kickoff checklist.

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> This packet is a plain-language outline for an agreement between a grant writer and a client, with an intake questionnaire and a kickoff checklist. It is not legal advice and it is not a finished contract. Laws differ by place, so have a lawyer licensed where the parties work review your agreement before anyone signs.

Part 1. Service agreement outline

1. Parties

Grant writer (name or business name):

Client (legal name of organization):

Client contact and role:

Date of agreement:

2. Scope and deliverables

List exactly what the writer will produce. Name the funder and the opportunity where known.

Funder and opportunity:

Deliverables (for example: narrative draft, final narrative, budget justification, assembled attachments):

Number of review rounds included:

Who submits the application:

3. What is excluded

Work outside the scope is not included unless both parties agree in writing.

- [ ] Finding or researching other funders
- [ ] Building the budget figures (the client supplies them)
- [ ] Registering the client in funder or government systems
- [ ] Program design or evaluation design
- [ ] Reports after an award
- [ ] Other: write it below

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Other exclusions:

4. Timeline

Milestone	Owner	Date
Client delivers information and documents		
First draft to client		
Client comments returned		
Final draft to client		
Client approval		
Submission		
Funder deadline		

5. Client responsibilities

- [ ] Provide accurate information, data and documents by the dates above
- [ ] Name one person who gives consolidated comments and final approval
- [ ] Review and approve all content before submission
- [ ] Confirm that every statement in the application is true
- [ ] Keep registrations and system access current

The parties agree that late information from the client may move the dates or make the deadline unreachable.

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6. Fee

The fee pays for the work. It is owed whether or not the application is funded.

- ☐ Flat fee for the scope above
- ☐ Hourly rate, with an estimate of hours

Flat fee amount, or hourly rate and estimated hours:

Rate for work outside the scope:

Expenses the client will reimburse, if any:

This template does not include commission, a percentage of the award or pay that depends on winning. Professional codes of ethics in fundraising and grant writing treat that kind of pay as unethical. Do not assume the fee can be charged to the grant. Check the funder's rules on what costs are allowed.

7. Payment schedule

Payment	Amount	Due
On signing		
On delivery of first draft		
On delivery of final draft		

Invoice terms and how payment is made:

8. Confidentiality

Each party keeps the other's non-public information confidential and uses it only for this work. State any exceptions, such as information that must be disclosed by law.

Exceptions or special handling:

9. Ownership of materials

State who owns the finished application, and whether the writer may reuse general methods and non-confidential language. A common arrangement is that the client owns the final deliverables once paid in full.

What the parties agree:

May the writer name the client as a past client:

10. No guarantee of funding

The writer does not promise that any application will be funded. Funding decisions are made by the funder. The writer agrees to do the work with care and to follow the funder's instructions.

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11. Independent contractor

State that the writer is an independent contractor and not an employee, if that is the case. Ask your lawyer how the rules where you work apply.

12. Ending the agreement

Notice required to end the agreement:

What is owed if it ends early (for example, payment for work done to that date):

What each party returns or hands over:

13. Other terms to raise with your lawyer

- [ ] Limits on liability
- [ ] How disputes will be resolved, and which place's law applies
- [ ] How the agreement can be changed
- [ ] Taxes, insurance and any registration the writer or client needs

Signatures

Grant writer signature and date:

Client signature, name, title and date:

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Part 2. Client intake questionnaire

Organization legal name:

Mission in one or two sentences:

Tax status, and fiscal sponsor if any:

Year founded:

Annual budget and main sources of income:

Program to be funded:

Who it serves and where:

Results you can document so far:

Amount needed and for what period:

Funders already approached for this program, and results:

Who will approve drafts:

Who will supply budget figures:

Who will submit, and do they have system access:

Documents available now:

- [ ] Tax-exemption letter or equivalent
- [ ] Board list
- [ ] Current organizational budget
- [ ] Most recent financial statements or audit
- [ ] Program budget
- [ ] Key staff resumes or biographies

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- [ ] Past proposals and reports
- [ ] Evaluation data or results
- [ ] Letters of support or partner agreements

Anything a funder might ask about (leadership change, deficit, past grant problem):

Part 3. Kickoff checklist

- [ ] Agreement reviewed by a lawyer and signed by both parties
- [ ] First payment received
- [ ] Funder's full instructions read by both parties
- [ ] Eligibility confirmed against the funder's rules
- [ ] Client registrations and system access confirmed
- [ ] Intake questionnaire complete
- [ ] Documents received and filed
- [ ] One client contact named for comments and approval
- [ ] Timeline agreed, with dates in both calendars
- [ ] Shared folder and file naming agreed
- [ ] Budget owner identified
- [ ] Letters of support requested
- [ ] Next check-in scheduled

> **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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