

COMMON GRANT APPLICATION AND FINAL REPORT TEMPLATE

Updated as of February 2023

This information is provided by Ask CMF, a technical assistance service of the Council of Michigan Foundations, for educational purposes only and does not constitute legal advice.

A common grant application is intended to be utilized by multiple foundations, minimizing the burden on nonprofit partners to complete numerous, divergent applications looking to obtain grants from multiple funders. A common grant report is similarly intended to help nonprofits save time, while assisting foundations by simplifying the process of gathering standard grant evaluation information.

The original Council of Michigan Foundations' (CMF) Common Grant Application and Final Grant Report form sample documents were developed by a committee of CMF members, including representatives of corporate foundations, community foundations and private foundations. These materials have been long-standing resources for philanthropy nationally. The original Common Grant Application has also been used as a broadly accepted sample for determining what information to include within a grant application.

As the philanthropic field has continued to transform, foundations around the country are increasingly engaging in conversation on how to reduce barriers to support, including reimagining grant applications and evaluation requirements. CMF's commitment to centering equity includes amplifying philanthropic practices that embrace a trust-based approach. Simplifying and streamlining the grantmaking process is one way of leaning into an equity-centered partnership with nonprofits.

These updated sample documents include application and reporting questions often included in foundation forms, however those interested in building common grant applications and report structures should develop materials that reflect their unique needs and the communities they serve, and with consideration of how this content may be used with electronic application and reporting software systems. These resources are not intended to be used directly by any single funder or organization and are provided for educational purposes only. (See "[Using Sample Documents](#)" below.)

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Using Sample Documents

In using this resource, it is important to keep in mind a few key tips to ensure that you choose the most useful sample documents that apply best to your organization.

- **Find sample documents that fit your organization’s size and structure:** Sample documents vary widely, depending on the organization that developed it. Try to find examples that originate from foundations that share at least some of the traits of your organization. For example, a small foundation may find using a template created for a 100+ staff foundation to be overwhelming for use by a small team.
- **Look for multiple samples:** Organization should review multiple examples of the sample document they need, whether that is a grant application, internal process document or grant report. In looking across several organizations’ versions, it becomes increasingly apparent how the writers customize the general concept to their particular needs. These variations may take the shape of different formats or language that reflect the organization’s internal values, structures, capacity or purpose.
- **Expect to make changes:** A sample document is not a one-size-fits-all template and will need to be adapted to your organization’s particular needs. Plan to draft a version (or several) with the help of staff or board members, using the samples for suggestions on language, format and structure. Also, consider having several people review the draft before finalizing it. In some cases, the final document may also need to be approved by foundation leadership or the board, so plan for additional changes that may come along during those review periods.

CMF members looking to develop or update policies and documentation related to grantmaking can access the CMF Sample Documents Hub, available at www.michiganfoundations.org/sampledocs.

Common Grant Application Template
Grant Application Cover Sheet

Date of Application: _____

Legal name of organization applying: _____
(Should be same as on IRS determination letter and as supplied on IRS Form 990)

Year Founded: _____ Current Operating Budget: \$ _____

Executive Director: _____ E-mail Address: _____

Contact person/title/email: _____
(if different from executive director):

Address *(administrative office)*: _____

City/State/Zip: _____

Phone number: (____) _____ Web address: _____

List any previous support from this funder in the last 5 years: _____

Project Name: _____

Project Start Date: _____ Project End Date: _____

Purpose of Grant *(one sentence)*: _____

Amount Requested: \$ _____ Total Project Cost: \$ _____

Geographic Area Served: _____

Signature, Chairperson, Board of Directors

Signature, Executive Director

Typed Name and Title

Typed Name and Title

Date

Date

Grant Application Narrative and Attachments

Please provide the following information in this order. Use these headings, subheadings and numbers provided in your own word processing format. Please use a size 12 standard font (i.e., Times New Roman, Calibri) with single spacing.

Note for Foundations: Prior to using this template, please customize this material to indicate the requested length of narrative responses or the narrative section in its entirety. Additionally, foundations may choose to add or remove requested sections listed below, in order to fit with the informational needs of the board, staff and/or grantmaking committee.

A. NARRATIVE

1. Executive Summary

- a. Briefly explain why your organization is requesting this grant, what outcomes you hope to achieve and how you will spend the funds if the grant is made. (250-word limit)

2. Purpose of Grant

- a. Statement of needs/problems to be addressed; description of target population and how they will benefit.
- b. Description of project goals, measurable objectives, action plans, and statements as to whether this is a new or ongoing part of the sponsoring organization.
- c. Timetable for implementation (including milestones for when elements in section 2b will be achieved).
- d. List of other partners in the project and their roles.
- e. List of similar existing projects or agencies, if any, and explain how your agency or proposal differs, and what effort will be made to work cooperatively.
- f. Description of the active involvement of constituents (both program beneficiaries and community stakeholders) in defining problems to be addressed, making policy and planning the program.
- g. Description of the qualifications of key staff and volunteers that will ensure the success of the program. List of specific staff training needs for this project.
- h. Long-term strategies for funding this project at the end of the grant period.

3. Evaluation

- a. Plans for evaluation, including how success will be defined and measured.
- b. Description of how evaluation results will be used and/or disseminated and, if appropriate, how the project will be replicated.
- c. Description of the active involvement of constituents in evaluating the program.

4. Budget Narrative/Justification

- a. Grant budget. Use the [Grant Budget Format](#) that follows, if appropriate.
- b. A plan (on a separate sheet) that shows how each budget item relates to the project and how the budgeted amount was calculated.
- c. List of amounts requested of other foundations, corporations and other funding sources to which this proposal has been submitted.
- d. List of priority items in the proposed budget, in the event that we are unable to meet your full request.

5. Organization Information

- a. Brief summary of organization's history.

- b. Brief statement of organization’s mission and goals.
- c. Description of current programs, activities and accomplishments.
- d. Organizational chart, including board, staff and volunteer involvement.

B. ATTACHMENTS

- 1. A copy of the current IRS determination letter indicating 501(c)(3) tax-exempt status.
- 2. List of Board of Directors with affiliations.
- 3. Finances:
 - a. Organization’s current annual operating budget, including expenses and revenue.
 - b. Most recent annual financial statement (independently audited, if available; otherwise, attach Form 990).
- 4. Letters of support to verify project need and collaboration with other organizations. (Optional – *May be required if partners are critical to project implementation.*)
- 5. Annual report, if available.

Grant Budget Format

Below is a listing of standard budget items. Please provide the project budget in this format and in this order.

A. Organizational fiscal year: _____

B. Time period this budget covers: _____

C. For a CAPITAL request, add relevant expense categories (i.e., architectural fees, land/building purchase, construction costs and campaign expenses) as additional rows within the standard budget format (below).

D. **Expenses:** Include a **description and the total amount** for each of the following budget categories, in this order:

	<i>Amount Requested from Funder</i>	<i>Total Project Expenses</i>
Salaries		
Payroll Taxes		
Fringe Benefits		
Consultants and Professional Fees		
Insurance		
Travel		
Equipment		
Supplies		
Printing and Copying		
Telephone and Internet		

Postage and Delivery		
Rent		
Utilities		
Maintenance		
Evaluation		
Marketing		
Other (specify):		
Total:		

E. **Revenue:** Include a **description and the total amount** for each of the following budget categories, in this order; please indicate which sources of revenue are committed and which are pending.

	Committed	Pending
Grants/Contracts/Contributions		
• Local Government		
• State Government		
• Federal Government		
• Foundations (Itemize)		
• Corporations (Itemize)		
• Individuals		
• Other (specify):		
Earned Income		
• Events		
• Publications and Products		
Membership Income		
In-Kind Support		
Other (specify):		
Total Revenue:		

Final Grant Report Template
Grant Report Form Cover Sheet

Date of Report: _____

Legal name of organization applying: _____
(Should be same as on IRS determination letter and as supplied on IRS Form 990)

Executive Director: _____ E-mail Address: _____

Contact person/title/email: _____
(if different from executive director):

Address *(administrative office)*: _____

City/State/Zip: _____

Phone number: (____) _____ Web address: _____

Project Name: _____

Project Start Date: _____ Project End Date: _____

Purpose of Grant *(one sentence)*: _____

Amount of Grant Awarded: \$ _____

Have there been any changes to your organization's IRS 501(c)(3) not-for-profit status since your request for this grant? *(yes or no)*: _____ If yes, please explain: _____

Dates covered by this report: _____ to _____.

Check one: This is an interim report This is a final report

Signature, Executive Director

Typed Name and Title

Date

Final Grant Report Narrative and Attachments

Narrative — Two to five pages.

A. Results

1. List the original goals and objectives of the grant and tell how they were met during this reporting period. Describe current status on meeting any special terms of this grant (e.g. challenges, contingencies, etc.).
2. If possible, explain results in outcome-based terms. For example, what difference did this grant make in your community and for the population you are serving?
3. Variance from original project plans often occurs. In what ways did the actual project vary from your initial plans? Describe how and why.
4. Describe any unanticipated benefits or challenges encountered with this project.
5. Describe how collaborative/cooperative efforts with individuals and organizations involved in planning, implementing, funding and/or evaluating this project/grant affected outcomes.

B. Lessons Learned

1. What are the most important outcomes and lessons learned from this project?
2. What recommendations would you make to the Foundation or to other project directors working in this area?
3. If you were to undertake this project again, would you do anything differently? If yes, please explain.
4. What other did the organization learn from this project?

C. Future Plans

1. What is your vision of this project over the next three years? Include plans and rationale for ongoing funding, expansion, replication or termination.

D. Communications

1. Provide an impact story that helps explain the success of the project.
2. Attach any printed material relating to the funded project: press or news items, brochures, letters of support, photographs, etc.

Financials

- A.** Using the [budget](#) from the original application, provide detailed expenses and income for the project for this period. Provide narrative on any variances from the original projected budget.
- B.** Include a complete, detailed accounting of how the specific grant dollars from this grant were spent.

ABOUT ASK CMF

These sample documents have been lightly edited and reformatted from their original versions by Brittany Kienker, Ph.D., Knowledge Insights Expert in Residence for the Council of Michigan Foundations (CMF). CMF members can find answers to their most pressing questions through CMF's Knowledge Insights division, including Ask CMF, the Knowledge Center and the Sample Documents Hub. Ask CMF is a free service to CMF members, available through the "Ask CMF" link on the CMF homepage or by visiting <https://www.michiganfoundations.org/practice/ask-cmf>.

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