



## Grant Checklist for Fiscal Clients

One benefit of the fiscal sponsorship program is that fiscal clients are able to seek grants that are available to 501c3 nonprofit organizations. In order to do that, fiscal clients need to follow P&TC procedures, including the checklist below. Please reach out to [fiscal@parksandtrails.org](mailto:fiscal@parksandtrails.org) with any questions or concerns.

<b>Prospecting</b>
<input type="checkbox"/> Identify project and find grant opportunity that matches project/mission. (You are encouraged to pursue grants that support your group’s mission as a whole, rather than a specific project.)
<b>Application</b>
<input type="checkbox"/> Fill out <a href="#">P&amp;TC’s grant form</a> to obtain permission to apply for grant. <input type="checkbox"/> Wait to receive permission to apply or notification of any conflicts from P&TC. <input type="checkbox"/> Clearly identify P&TC as your fiscal sponsor on the grant application. <input type="checkbox"/> Submit the application to the granting organization and share it with P&TC.
<b>Notification/Award</b>
<input type="checkbox"/> Share award decision/letter with P&TC. <input type="checkbox"/> Share grant contract and/or other pertinent documents with P&TC. <input type="checkbox"/> Ensure grant dollars are deposited directly into fiscal client’s account held by P&TC.
<b>Implementation</b>
<input type="checkbox"/> Implement project, keeping P&TC in the loop with progress and any major concerns in your group’s ability to carry out the project. <input type="checkbox"/> Ensure expenditures associated with grant are indicated as so on the expenditure request form. <input type="checkbox"/> Keep records of expenditures associated with the grant.
<b>Reporting/Closing Out</b>
<input type="checkbox"/> Submit any required reports to the grantor and share reports with P&TC. <input type="checkbox"/> Notify P&TC when the project is complete and the grant is closed out.