

NATA Legislative Grant Program Checklist

**2019-2020**

The following checklist must be completed and submitted with your application. Incomplete applications will be returned for more information. If you need assistance or clarification, please contact your NATA GAC Representative.

|  |  |  |
| --- | --- | --- |
| **REQUIREMENT** | **NOTES** | **COMPLETE** |
| 1. Did you utilize the most recent Grant Application Forms? | All grant applications must be submitted on the current application forms. Those applications that are not submitted on these forms will be returned to the state GAC Chair for correction and re-submission. |  |
| 1. Did you identify the person to whom checks will be sent? | Checks will be sent to the person identified on the application. |  |
| 1. Did you specify a grant amount? | Fill in this blank on page 1 of the application |  |
| **SECTION 1- DEMOGRAPHIC INFORMATION** |  |  |
| 1. Is your state incorporated as a 501(c)(6)? | Grants are not available to 501(c)(3) corporations as they are charities and have limited ability to lobby. |  |
| 4a. Did you attach a copy of the letter from the IRS confirming your tax status? |  |  |
| 4b. Date of application for 501(c)(6) incorporation. | ***ONLY FOR THOSE WHO HAVE NOT YET ACQUIRED A 501(C) (6) STATUS, BUT ARE GOING THROUGH THE PROCESS.***  Please make sure to note on your application if you are in the process of attaining a 501(c)(6) status. The NATA can review your application and award grant funds to those states that are in the process of acquiring a 501(c)(6) status. However, the release of those funds will be contingent upon the state providing proof of their 501 status prior to the June deadline. |  |
| 1. Did you indicate the EIN (Employee Identification Number)? |  |  |
| 1. Did you identify the state officers requested on the application? |  |  |
| **REQUIREMENT** | **NOTES** | **COMPLETE** |
| 1. Has the state created and appointed a GA Committee? | Having a committee ensures a succession and shares the workload. Different people are needed for different jobs; there’s a need for every talent: organizational, public speaking, writing, etc. |  |
| 1. Has the state designated a GA Chair? | Having broad member participation is important and NATA encourages a designated GA chair separate from any other office. |  |
| 1. Have you identified the lobbyist with contact information? |  |  |
| 1. Have you attached lobbyist’s contract? |  |  |
| 1. Is there an identified decision-making process to guide the lobbyist? | Generally, the lobbyist should take direction from one person, and that person should be available 24/7 during the legislative cycle. That is usually the GAC Chair acting with direction from the Board of Directors. |  |
| 1. Did you identify the number of members in your association and your associations SAAC Classification | This information will assist the committee members in determining that portion of your associations anticipated revenue that will come directly from NATA dues allocation. |  |
| **SECTION 2- PURPOSE AND WORKPLAN** | Detailed explanation of the reason for a grant; thoroughly explain your strategic plan and anticipated outcome, including strengths and challenges. |  |
| 1. Did you explain the issue and its history? | It is important to explain your intent and how the time is right, especially if this is the first time a grant has been requested for this issue. Is the association proactive or in a defensive posture? |  |
| 1. Have you created and described your legislative strategy? | Be sure to include all activities for which legislative grant funding is sought. Make sure this matches the information on the financial worksheet. |  |
| 1. Has opposition/support been identified? | Who is it? Have you met with them? |  |
| 1. Did you describe how members have been or will be mobilized in support of this effort? | Key to success is marshalling the ATs in support of your efforts. Explain how you are doing that. |  |
| SECTION 3- DRAFT LANGUANGE |  |  |
| 1. Have you attached draft language (if appropriate?) |  |  |
| **SECTION 4- LEGISLATIVE GRANT FINANCIAL WORKSHEET** |  |  |
| 1. Did you state your association’s annual budget for all activities? | You should include all activities cost budgeted for the upcoming year. If you do not have a formal budgeting process, please provide an estimate of the Associations anticipated or average annual revenue and expenditures. |  |
| **REQUIREMENT** | **NOTES** | **COMPLETE** |
| 1. Have you specified anticipated spending on legislative activities? | Expenses (anticipated or actual) specific to legislative activities must be provided and itemized as specifically as possible. A list has been provided of typical activities allowable under the grant procedures. You do not have to undertake all of these activities, and you may list other expenses not included. Grant funds may not be used for consultants in addition to a lobbyist, or attendance at NATA meetings including Capitol Hill Day or iLEAD. |  |
| 1. Have you included your savings balance? | If a portion of savings is reserved or restricted for specific uses (e.g., for scholarships), please include both the total amount in savings and the amount that is restricted.  ***If you identify an amount that is restricted, please make sure to provide the reason that those funds are restricted in line 7 of the budget worksheet. Failure to provide this information will result in your application being returned with a request for that information. For example- scholarships, etc.*** |  |
| 1. Have you provided the information requested in line 18 of the budget worksheet, if applicable? |  |  |
| 1. Have you reviewed the items in Appendix A (Discretionary Grant Application) and the expense worksheet (tab 2 of the financial worksheet), and understand the items that will be needed to obtain grant funds? | All required documentation (expenses, receipts, attendee’s, etc.) must be submitted by June 1st, 2020. If you have questions, please contact your District GAC Representative or Deanna Kuykendall at the NATA offices (972-532-8803). |  |
| **OTHER IMPORTANT ISSUES** |  |  |
| 22. Has your State GAC Representative provided the information requested in the bi-annual reports to the NATA GAC Representative? | Information provided in these reports is essential for the NATA Office and NATA GAC Committee to keep abreast of the issues facing each state and the stakeholders residing within these states. |  |