

APPENDIX B

AI Grant Workflow

A step-by-step guide to using AI on a grant application, from reading the guidelines to final review. AI handles the heavy lifting on planning, drafting, and checking, while your team makes the decisions and owns every fact.

Before you start

Gather your materials. The grant guidelines and scoring rubric, your AI Brain, past applications, your budget, and your outcomes data.

Use a project. Save everything in one project in your AI tool, so every work session starts with the full context.

Use a business account. Grant materials often include financial and partner details that belong in an account the organization controls.

Plan for weeks, not hours. Use the project management prompts on the last page to keep the work on track.

Never let AI invent facts. Funders verify what you submit. Every number, outcome, name, and date must come from your records, and a person must check each one before submission.

The eight steps

1 Analyze the opportunity

Start by having AI read the guidelines so you understand exactly what the funder wants.

"Here are the guidelines for the [grant name] from [funder]: [paste or upload]. Summarize the purpose of the grant, who is eligible, the funding amount, key deadlines, required attachments, and how applications will be scored. Then tell me how well our organization fits, based on our AI Brain, and flag any eligibility questions I should confirm with the funder. Ask me any questions you need before you start."

2 Build the project plan

Turn the guidelines into a plan with every task, owner, and deadline.

"Using these guidelines, build a project plan for our application, working backward from the deadline of [date]. List every task, from gathering data and letters of support to drafting, review, and submission. Suggest an owner for each task from this team: [names and roles]. Put it in a table with columns for task, owner, due date, status, and notes. Ask me any questions you need before you start."

3 Find the gaps

Identify what you still need before you can write.

"Compare the grant requirements with the information I've given you about our organization. List everything we're missing, like data, budget details, outcomes, partner letters, or attachments. For each item, tell me why it matters for scoring and who on our team would most likely have it."

4 Outline to the scoring rubric

Organize the application around how reviewers will score it.

"Create an outline for our application that follows the funder's required sections and their scoring rubric. For each section, note the points available, what reviewers are looking for, and the key evidence we should include. Put the most heavily weighted sections first in our planning."

5 Draft section by section

Write one section at a time, and never let AI fill in facts it doesn't have.

"Draft the [section name] section using our outline, our AI Brain, and the details below: [paste details]. Write in a clear, confident voice that matches our past applications. Stay within [word or character limit]. Anywhere you don't have a fact, number, or name from me, write [NEEDS DATA] instead of making something up."

6 Play the reviewer

Have AI score your draft the way a real reviewer would.

"Act as an experienced reviewer for this grant. Score my draft against the funder's rubric, section by section, and explain your scores. Then tell me the three weakest spots in the application and exactly how to strengthen each one."

7 Revise and tighten

Use the reviewer feedback to improve the draft.

"Revise the [section name] section to address this reviewer feedback: [paste feedback]. Keep it within the word limit, keep our voice, and show me what you changed. Don't add any facts I haven't given you."

8 Final compliance and fact check

Make sure nothing is missing or inaccurate before you submit.

"Check our full application against the funder's guidelines. Confirm that every required section, attachment, and format rule is covered, and flag anything missing. Then list every fact, number, date, and name in the application so a person can verify each one against our records."

Check: a person must verify every item on this list before you submit.

Keep the project on track

Grants take many tasks over many weeks. Use these prompts to have AI help manage the project, too.

1 Status check

Get a quick picture of where the project stands.

"Here's our current project tracker: [paste]. Tell me what's done, what's behind, what's due in the next seven days, and the biggest risk to meeting our deadline."

2 End-of-session update

Keep the tracker current after every work session.

"Update our project tracker based on what we accomplished today: [paste notes]. Mark completed tasks, add any new tasks we discovered, and give me the updated table."

3 Ask for help

Draft requests for data, letters, or reviews.

"Draft a short, friendly email to [name], asking for [the item we need] by [date]. Explain why it matters for the application and make it easy to say yes."

4 Reprioritize

Adjust when the timeline gets tight.

"We're running short on time, with [number] days until the deadline. Based on our tracker and the scoring rubric, tell me which tasks matter most for our score, what we can simplify, and what we should cut if we have to."

Human checklist before you submit

- Every [NEEDS DATA] placeholder is replaced
- Every number matches your records
- Names, titles, and partner details are correct
- Dates and timelines are realistic
- Budget totals add up and match the narrative
- All required attachments are included
- Word and character limits are met
- The authorized signer has reviewed the final version



Want help putting AI to work at your chamber?

Book a free 20-minute AI Discovery Session at cgtechmavensolutions.com/ccem.

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