

GRANT READINESS CHECKLIST

PURPOSE

Streamline essential documents and details that are regularly/commonly requested by grantors. Review all and prepare, locate, or create those that you do not have currently or available. All information may not be needed for all opportunities but its best practice to prepare.

ORGANIZATIONAL BACKGROUND

- | | |
|---|---|
| <input type="checkbox"/> Address, Phone, Web Address | <input type="checkbox"/> Target Population |
| <input type="checkbox"/> History of Organization (narrative) Year | <input type="checkbox"/> Current Programs/Services Descriptions |
| <input type="checkbox"/> Established | <input type="checkbox"/> Number Served in Previous Year |
| <input type="checkbox"/> Mission, Vision, & Values Statements Service | <input type="checkbox"/> Number FTE |
| <input type="checkbox"/> Area/Location Addresses/Contact Information | <input type="checkbox"/> Other/Notes |

TAX DOCUMENTS

- | | | |
|---|---|---|
| <input type="checkbox"/> Tax Exempt Status Letter | <input type="checkbox"/> Dun & Bradstreet | <input type="checkbox"/> Other Registrations as necessary |
| <input type="checkbox"/> IRS Form 990 | <input type="checkbox"/> Number (DUNS) | |
| <input type="checkbox"/> W-9 | <input type="checkbox"/> SAM Registration | |

FINANCIAL INFORMATION

- | | | |
|---|--|---|
| <input type="checkbox"/> Detailed Organizational Budget | <input type="checkbox"/> Most Recent Audit | <input type="checkbox"/> Sources of Funding |
| <input type="checkbox"/> Financial Statement (recent) | <input type="checkbox"/> Program/Project Budgets | <input type="checkbox"/> Other/Notes |

GOVERNANCE

- | | |
|--|---|
| <input type="checkbox"/> Board of Directors (including affiliations & contact information) | <input type="checkbox"/> Articles of Incorporation |
| <input type="checkbox"/> Organizational Chart | <input type="checkbox"/> Executive Director/President/CEO Bio |
| <input type="checkbox"/> Current Strategic Plan | <input type="checkbox"/> Executive Director/President/CEO |
| | <input type="checkbox"/> Compensation |

PROGRAM/PROJECT INFORMATION

- | | | |
|--|---|--|
| <input type="checkbox"/> Detailed Program/ Project Description | <input type="checkbox"/> Target Population | <input type="checkbox"/> Staffing Structure/Org Chart(s) |
| <input type="checkbox"/> Year Established | <input type="checkbox"/> Number Served in Previous Year | <input type="checkbox"/> Job Descriptions |
| <input type="checkbox"/> Location Address | <input type="checkbox"/> Current Outcome Measures | <input type="checkbox"/> Resumes/Bios of Key Staff |
| <input type="checkbox"/> Contact Information | <input type="checkbox"/> Outcomes from Previous Year | <input type="checkbox"/> Success Story |

OTHER DOCUMENTATION

- | | | |
|--|--|--|
| <input type="checkbox"/> Corporate Compliance Plan Performance | <input type="checkbox"/> Letters of Support Collaborating Partners Contracts | <input type="checkbox"/> Solicitation License (where applicable) |
| <input type="checkbox"/> Improvement Plan | <input type="checkbox"/> % of Board Giving Financially | <input type="checkbox"/> Articles of Incorporation & By-Laws, including year established |
| <input type="checkbox"/> Policies/Procedures | <input type="checkbox"/> History of grants received and denied | |
| <input type="checkbox"/> Best Practices Utilized | | |
| <input type="checkbox"/> MOAs/MOUs | | |