

MCOC Grant Writing 101: Grant Readiness & Preparation Checklist



Use this checklist before you start writing. It helps you gather documents, confirm capacity, and avoid last-minute surprises. Create a tailored checklist that aligns with the specific grants you are applying for, noting that not all grants require the same information or items. Customize your submission accordingly for different grant opportunities.

1) Governance & Core Organizational Documents

Confirm you can prove who you are, how you're governed, and that you can responsibly accept public funds.

Checklist item	Status	Notes / Owner / Due date
Articles of incorporation/organization documents (current)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Bylaws/governance policies (current) + board meeting cadence	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Current board roster + officer list (with terms)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Conflict of interest policy (and disclosures, if used)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Organizational chart / key staff roles	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
UEI, SAM.gov, and portal access confirmed (Grants.gov / MT WebGrants, as applicable)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

2) Financial Readiness (Financials, Audit Status, Fiscal Systems)

Most grants expect financial documentation and sound management systems.

Checklist item	Status	Notes / Owner / Due date
Most recent organizational budget (and project budget estimate, if available)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Most recent financial statements (P&L / Balance Sheet / Cash flow, if available)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Audit/review/compilation status (and most recent report, if applicable)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
IRS documentation (e.g., 990s) or equivalent filings (as applicable)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Accounting system supports grant tracking (separate codes/cost centers)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

Timekeeping supports grant-funded labor (timesheets/allocation method)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Procurement process documented (purchases, bids/quotes, vendor selection)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

3) Policies & Compliance Basics

Policies reduce risk and improve competitiveness.

Checklist item	Status	Notes / Owner / Due date
Procurement policy (thresholds, documentation, conflicts)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Travel policy (if travel is anticipated)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Record retention policy/documentation storage plan	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Subaward / contractor basics (if you will pass funds or hire vendors)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
If working with contractors, do you have a procurement policy (if it is required)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Data privacy/confidentiality practices (if working with individuals or businesses)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

4) Program Data, Metrics, and Service Area Information

Data is your credibility—especially for reviewers who don't know your community.

Checklist item	Status	Notes / Owner / Due date
Clear service area description (counties/communities/tribal areas) + map if possible	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Baseline numbers (members served, households, units, miles, businesses, etc.)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Outcome metrics you can track (quarterly/annual) + who will track them	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Need evidence (local statistics, community plans, assessments) with sources	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Existing strategic plan / business plan / feasibility study (if applicable)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

5) Partnerships, MOUs, and Letters of Support

Secure partner commitments early—roles must match the narrative and budget.

Checklist item	Status	Notes / Owner / Due date
Partner list with clear roles (who does what, when, and with what resources)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Determine documentation needed: Letter of Support vs MOU vs subaward agreement	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Draft partner letter templates prepared (to make it easy to respond)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Letters of support requested with a firm due date (include specific commitments)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
MOUs/agreements drafted for key partners (if required)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

6) Staffing Capacity & Time Allocation

Ethical applications reflect real capacity to implement and report.

Checklist item	Status	Notes / Owner / Due date
Project lead identified (delivery + coordination)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Finance/grants admin identified (drawdowns, tracking, compliance reporting)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Data/reporting owner identified (performance measures, documentation)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Time allocation estimate completed (writing, implementation, reporting)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Back-up coverage identified (vacations, turnover, continuity plan)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

7) Prior Planning, Readiness, and Timeline

Many competitive grants prioritize ‘ready’ projects or clearly staged workplans.

Checklist item	Status	Notes / Owner / Due date
Project scope clearly defined (what’s in/out) + draft workplan	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Readiness evidence (planning milestones, designs, permits, site control) as applicable	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

Realistic project schedule fits grant period and procurement requirements	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Risk list started (what could delay the project and how you'll mitigate)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

8) Administrative Requirements & Cash-Flow (Reimbursement Reality)

Many programs reimburse costs after you spend them—plan for cash-flow and documentation.

Checklist item	Status	Notes / Owner / Due date
Understand reimbursement timing and whether you can float costs	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Plan for documentation required to request reimbursement (invoices, payroll, match records)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Confirm whether admin costs are allowed and whether there is a cap (e.g., % limit)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Confirm whether indirect costs are allowed (de minimis or negotiated rate)	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	
Match plan documented (cash vs in-kind) + method to track and avoid double-dipping	☐ Ready ☐ In progress ☐ Needs work ☐ N/A	

Ready to Write? Final Decision

If major items above aren't ready, consider a planning grant or a readiness period before implementation funding.

Decision	Notes
☐ Ready now (apply this cycle)	
☐ Ready with fixes (apply if gaps can be closed quickly)	
☐ Not ready (pause and build readiness)	
☐ Pursue a planning grant first	