



Spring 2024

Get Organized ~ Get Funded ~ Be Sustainable

## Organization:

Master File – Compiling and/or creating these internal documents in a binder and in digital format will lead to the nonprofit organization coming “Grant Ready” and in a position to apply for funding:

### TABS:

#### ❖ Organizational Background

|   |   |
|---|---|
| ▪ Address, Phone, Web Address   | ▪ Target Population   |
| ▪ History of Organization<br>(Executive Summary)                            | ▪ Current Programs/Services Descriptions (narrative)  |
| ▪ Year Established  | ▪ Number Served in Previous Year  |
| ▪ Mission, Vision, & Value Statements                                       | ▪ Staff – Number of Full- and Part-time Employees OR number of partnerships/subcontractors, etc. (1099) |
| ▪ Service Area/Location Addresses/ Primary and Secondary Persons of Contact | ▪ Other Pertinent information about the organization. For example, business structure/model             |

#### ❖ Tax Documents

|                            |                                     |
|----------------------------|-------------------------------------|
| ❖ Tax Exempt Status Letter | ❖ Dun & Bradstreet Number (DUNS)    |
| ❖ IRS Form 990 or 990N     | ❖ SAM.gov Registration with UEI #   |
| ❖ W-9                      | ❖ Other Registrations as applicable |

## ❖ Financial Information

|                                  |                           |
|----------------------------------|---------------------------|
| • Detailed Organizational Budget | • Program/Project Budgets |
| • Financial Statements (recent)  | • Sources of Funding      |
| • Most Recent Audit              | • Other/Notes             |

## ❖ Governance

|   |   |
|---|---|
| • Board of Directors (including affiliations & contact information) | • Articles of Incorporation                   |
| • Organizational Chart  | • Executive Director/President/CEO Bio        |
| • Current Strategic Plan  | • Executive Direct/President/CEO Compensation |

## ❖ Program/Project Information

|  |                                  |   |
|--|----------------------------------|---|
| • Detailed Program/Project Description | • Target Population              | • Staffing Structure/Organization Chart |
| • Year Established                     | • Number Served in Previous Year | • Job Descriptions                      |
| • Location Address                     | • Current Outcome Measures       | • Resumes/Bios of Key Staff             |
| • Contact Information                  | • Outcomes from Previous Year    | • Success Story                         |

## ❖ Other Organization Documentation

|  |   |   |
|--|---|---|
| • Corporate Compliance Plan  | • Letters of Support                                    | • Solicitation License ( <i>where applicable</i> ) – <i>State Attorney General's Office</i> |
| • Performance Improvement Plan   | • Collaborating Partners ( <i>MOUs and Agreements</i> ) | • Articles of Incorporation & Bylaws  |
| • Policies and Procedures ( <i>Even the Board of Directors should have Policies and Procedures</i> ) | • Contracts and Agreements                              | • % of Board Giving Financially – <i>The Board's Giving Plan or "Get-Give" Policy</i>       |
| • History of Grants Received and Denied  | • Current Grant Funding Calendar                        | • Licenses, Certifications, and Accreditations  |