



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 (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

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|----------------------------|-------------------------------------|
| ❖ 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

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

❖ Governance

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

❖ Program/Project Information

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|--|----------------------------------|---|
| • Detailed Program/Project Description | • Target Population | • Staffing Structure/Organizational 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>) – State Attorney General's Office |
| • 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 |