



Get Organized ~ Get Funded ~ Be Sustainable

Organization: Grant Readiness Folder/Master File

Master File – Compiling and/or creating these internal documents in a binder and in digital format will lead to Legacy Residential Homes becoming “Grant Ready”:

TABS:

❖ Organizational Background

<ul style="list-style-type: none"> ▪ Address, Phone, Web Address 	<ul style="list-style-type: none"> ▪ Target Population
<ul style="list-style-type: none"> ▪ History of Organization (Executive Summary) 	<ul style="list-style-type: none"> ▪ Current Programs/Services Descriptions (narrative)
<ul style="list-style-type: none"> ▪ Year Established 	<ul style="list-style-type: none"> ▪ Number Served in Previous Year
<ul style="list-style-type: none"> ▪ Mission, Vision, & Value Statements 	<ul style="list-style-type: none"> ▪ Staff – Number of Full- and Part-time Employees OR number of partnerships/subcontractors, etc. (1099)
<ul style="list-style-type: none"> ▪ Service Area/Location Addresses/ Primary and Secondary Persons of Contact 	<ul style="list-style-type: none"> ▪ Other Pertinent information about the organization. For example, business structure/model

❖ Tax Documents

❖ Tax Exempt Staut Letter	❖ Dun & Bradstreet Number (DUNS)
❖ Form SS-4 aka EIN	❖ UEI – Unique Entity Identifier Number
❖ IRS Form 990 or 990N	❖ SAM.gov Registration
❖ 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/Organizational Chart
• Year Established	• Number Served in Previous Year	• Job Descriptions for each position.
• 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