

GRANT READINESS CHECKLIST



PURPOSE

Streamline essential documents and details that are commonly requested by grantors. Use this checklist to determine which items the organization needs to: locate, review, revise, or create.

ORGANIZATIONAL BACKGROUND

- Address, Phone, Web Address
 - History of Organization (narrative)
 - Year Established
 - Mission, Vision, & Values Statements
 - Service Area/Location Addresses/
Contact Information
 - Target Population
 - Current Programs/Services Descriptions
 - Number Served in Previous Year
(overall and by program)
 - Number FTE, PTE, and Volunteers
 - Other/Notes
-

TAX DOCUMENTS

- Tax-Exempt Status Letter
 - IRS Form 990
 - W-9
 - Unique Entity ID
 - SAM Registration
 - Other Registrations as Necessary
-

FINANCIAL INFORMATION

- Detailed Organizational Budget
(current year and previous year)
 - YTD P&L Statement (recent)
 - Most Recent Audit, Review, or Compilation Report
 - Program/Project Budgets
 - Sources of Funding and % of
Overall Budget for Each
 - Top 5 Donors from Previous Year
 - Other/Notes
-

GOVERNANCE

- Board of Directors (including affiliations,
titles, & contact information), Board
Selection Process, Terms, and Term Limits
 - Organizational Chart
 - Current Strategic Plan
 - Articles of Incorporation
 - Bylaws
 - Executive Staff Bios
 - Board Roles/Job Descriptions
 - % of Board Giving Financially
-

PROGRAM/PROJECT INFORMATION

- Detailed Program/Project Description(s)
- Year Established
- Location Address
- Contact Information
- Target Population
- Number Served in Previous Year
- SMART Goals for Grant Period
- Outcomes from Previous Year
Received and Denied
- Partnership Agreements

GRANT READINESS CHECKLIST



POLICIES

- Conflict of Interest Policy
- Anti-Discrimination Policy
- Anti-Harassment Policy
- Anti-Terrorism Policy
- Fiscal Management Policy
- Gift Acceptance Policy
- Social Media Policy

OTHER DOCUMENTATION

- Letters of Support
- List of Collaborating Partners
- Contracts, Sub-Contract Agreements
- Staffing Structure/Org Chart(s)
- Job Descriptions
- Resumes/Bios of Key Staff
- Success Story(ies)
- Solicitation License (where applicable)