

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

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

- | | |
|---|---|
| <input type="checkbox"/> Tax-Exempt Status Letter | <input type="checkbox"/> Unique Entity ID |
| <input type="checkbox"/> IRS Form 990 | <input type="checkbox"/> SAM Registration |
| <input type="checkbox"/> W-9 | <input type="checkbox"/> Other Registrations as Necessary |
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FINANCIAL INFORMATION

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

- | | |
|--|--|
| <input type="checkbox"/> Board of Directors (including affiliations, titles, & contact information), Board Selection Process, Terms, and Term Limits | <input type="checkbox"/> Bylaws |
| <input type="checkbox"/> Organizational Chart | <input type="checkbox"/> Executive Staff Bios |
| <input type="checkbox"/> Current Strategic Plan | <input type="checkbox"/> Board Roles/Job Descriptions |
| <input type="checkbox"/> Articles of Incorporation | <input type="checkbox"/> % of Board Giving Financially |
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PROGRAM/PROJECT INFORMATION

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

GRANT READINESS CHECKLIST

POLICIES

- | | |
|--|---|
| <input type="checkbox"/> Conflict of Interest Policy | <input type="checkbox"/> Fiscal Management Policy |
| <input type="checkbox"/> Anti-Discrimination Policy | <input type="checkbox"/> Gift Acceptance Policy |
| <input type="checkbox"/> Anti-Harassment Policy | <input type="checkbox"/> Social Media Policy |
| <input type="checkbox"/> Anti-Terrorism Policy | |
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OTHER DOCUMENTATION

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