



GRANT READINESS CHECKLIST

PURPOSE

Items you will need for many grant proposals that you should have in an easily accessible location. Review all and prepare, locate, or create those that you do not have current or available.

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 |
| <input type="checkbox"/> Mission, Vision, & Values Statements | <input type="checkbox"/> Number FTE |
| <input type="checkbox"/> Service Area/Location Addresses/Contact Information | <input type="checkbox"/> Other/Notes |

TAX DOCUMENTS

- | | |
|---|---|
| <input type="checkbox"/> Tax Exempt Status Letter | <input type="checkbox"/> Dun & Bradstreet Number (DUNS) |
| <input type="checkbox"/> IRS Form 990 | <input type="checkbox"/> SAM Registration |
| <input type="checkbox"/> W-9 | <input type="checkbox"/> Other Registrations as necessary |

FINANCIAL INFORMATION

- | | |
|---|--|
| <input type="checkbox"/> Detailed Organizational Budget | <input type="checkbox"/> Program/Project Budgets |
| <input type="checkbox"/> Financial Statement (recent) | <input type="checkbox"/> Sources of Funding |
| <input type="checkbox"/> Most Recent Audit | <input type="checkbox"/> Other/Notes |

GOVERNANCE

- | | |
|--|--|
| <input type="checkbox"/> Board of Directors (including affiliations & contact information) | <input type="checkbox"/> Articles of Incorporation |
| <input type="checkbox"/> Organizational Chart | <input type="checkbox"/> Executive Director/President/CEO Bio |
| <input type="checkbox"/> Current Strategic Plan | <input type="checkbox"/> Executive Director/President/CEO Compensation |

PROGRAM/PROJECT INFORMATION

- | | | |
|---|---|--|
| <input type="checkbox"/> Detailed Program/Project Description | <input type="checkbox"/> Target Population | <input type="checkbox"/> Staffing Structure/Org Chart(s) |
| <input type="checkbox"/> Year Established | <input type="checkbox"/> Number Served in Previous Year | <input type="checkbox"/> Job Descriptions |
| <input type="checkbox"/> Location Address | <input type="checkbox"/> Current Outcome Measures | <input type="checkbox"/> Resumes/Bios of Key Staff |
| <input type="checkbox"/> Contact Information | <input type="checkbox"/> Outcomes from Previous Year | <input type="checkbox"/> Success Story |

OTHER DOCUMENTATION

- | | | |
|---|--|--|
| <input type="checkbox"/> Corporate Compliance Plan | <input type="checkbox"/> Letters of Support | <input type="checkbox"/> Solicitation License (where applicable) |
| <input type="checkbox"/> Performance Improvement Plan | <input type="checkbox"/> Collaborating Partners | <input type="checkbox"/> Articles of Incorporation & By-Laws, including year established |
| <input type="checkbox"/> Policies/Procedures | <input type="checkbox"/> Contracts | |
| <input type="checkbox"/> Best Practices Utilized | <input type="checkbox"/> % of Board Giving Financially | |
| <input type="checkbox"/> MOAs/MOUs | <input type="checkbox"/> History of grants received and denied | |