

## 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, and Value Statements
- Target Population
- Current Programs/Services Descriptions
- Number Served in Previous Year (overall and by program)
- Number of FTE, PTE, and Volunteers
- Other/Notes

### Tax Documents

- Tax-Exempt Status Letter
- IRS Form 990
- W-9
- Unique Entry 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 percentage of Overall Budget for Each
- Top 5 Donors from Previous Year
- Other/Notes

## Governance

- Board of Directors (including affiliations, titles, and 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
- Percentage 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

## 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/Organizational Charts
- Job Descriptions
- Resumes/Bios of Key Staff
- Success Story(ies)
- Solicitation License (where applicable)