

Grant Readiness Checklist



Purpose

This document includes all of the items that your organization may need to submit with grant applications. You should have these items in an easily accessible location, and you should create and/or update the items in this list that you do not have current or available.

Organizational Background

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

Tax Document

Tax Exempt Status Letter	Dun & Bradstreet Number (DUNS)
IRS Form 990	SAM Registration
W-9	Other Registrations as necessary

Financial Information

Detailed Organizational Budget	Program/Project Budgets
Financial Statement (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 Director/President/CEO Compensation

Program/Project Information

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

Other Documentation

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