

# GRANT READINESS CHECKLIST

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## 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.

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## 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/<br>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                       |  |

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## 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) |