

GRANT READINESS CHECKLIST

Below is a list of essential documents and details that are regularly required for grant applications. Review this list annually to make sure the items and details are accurate. Create documents that you do not have available.

ORGANIZATIONAL BACKGROUND

- Address, Phone, Web Address (Physical & Postal)
 - History of Organization (narrative)
 - Year Established
 - Mission, Vision & Values Statement
 - Service Area(s)
 - Target Population
 - Current Programs/Service Description
 - Number of Beneficiaries Served in Previous Year
 - Number of Staff (FT, PT, Volunteer, Intern) by Race & Gender
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TAX DOCUMENTS

- Tax Exempt Status Letter
 - IRS Form 990
 - W-9
 - SAM Registration
 - Unique Entity Identifier (formerly DUNS number)
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FINANCIAL INFORMATION

- Detailed Organizational Budget
 - Financial Statements
 - Program/Project Budgets
 - Audit (for the Most Recent 2 Years)
 - Sources of Funding
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GOVERNANCE

- Board of Directors (including affiliations, contact info, & ID numbers)
 - Organizational Chart
 - Current Strategic Plan
 - Constitution / Articles and Memorandum of Association / Trust deed
 - List & bios of Senior Management (including contact info, job titles, and ID numbers)
 - Executive Director/President/CEO Bio(s)
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PROGRAM/PROJECT INFORMATION (for Each Program/Project)

- Detailed Project/Program Descriptions
 - Year Established
 - Location Address(es) if relevant
 - Target Population
 - Number Served in Previous Year
 - M&E Framework
 - Outcomes from Previous Year
 - Staffing Structure/Org Chart(s)
 - Job Descriptions
 - Resumes/Bios of Key Staff
 - Success Story(ies)
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OTHER DOCUMENTATION

- Policies/Procedures
- MOUs
- List of Grants Received for Current Fiscal Year (Funder Names & Amounts)
- Letters of Support
- List of Collaborating Partners