



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

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 DOCUMENTS

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 Year	Job Descriptions
Location Address	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 Plan	Collaborating Partners	Articles of Incorporation & By-Laws, including year established
Policies/Procedures	Contracts	
Best Practices Utilized	% of Board Giving Financially	
MOAs/MOUs	History of grants received and denied	

