



GRANT READINESS

checklist

ORGANIZATIONAL BACKGROUND

- Address, Phone, Web Address
- History of Organization
- Year Established
- Clear & Concise Mission, Vision & Values Statements
- Target Population
- Current Programs/Service Descriptions
- Number Served in Previous Years
- Number of Employees, Resumes, and Credentials
- Business Planning Documents: SWOT/NOISE/SOAR Analysis (strengths, aspirations, results, obstacles, challenges, effectiveness)

FINANCIALS

- Detailed Organizational Budget
- Income Statement (recent)
- Most recent audit
- Program/Project Budgets
- Sources of Funding
- In-Kind Donation Info
- Projected Costs
- Due Diligence
- Budget Justifications
- Balance Sheet

PROGRAM INFO

- Detailed Program/Project Descriptions
- Year Established/Credibility
- Location(s)
- Contact Information
- Target Population
- Numbers Served in Previous Years
- Current Outcome Measures
- Outcomes from Previous Years
- Staffing Structure/Organizational Chart
- Job Descriptions for Staff
- Resumes/Bios for Staff and Board Members
- A Diverse Board of Directors (one that represents who you serve)
- Success Stories/Testimonials

TAX DOCS

- Tax Exempt Status Letter
- IRS Form990s
- W-9
- Unique Entity Identifier (UEI)
- SAM Registration
- Good Standing

PROGRAM/PROJECT INFO

- Community Needs Assessment
- MOU/MOA (formal partnership agreements)
- Current Best-Practice Models (in place at this time)

GOVERNANCE

- Up-to-date Strategic Plan
- Articles of Incorporation
- Bios for Staff/Board Members
- Policies & Procedures
- Compliance Plan
- Current Grant Funds/Contracts
- By-Laws
- Performance Improvement Plan
- Logic Model
- Detailed Business Plan