



# GRANT READINESS CHECKLIST

## ORGANIZATIONAL BACKGROUND

- Address, Phone, Web Address
- History of Organization
- Year Established
- Strong Mission, Vision, & Values Statements
- Service Area/Location Addresses/Contact Info
- Target Population
- Current Programs/Service Descriptions
- Number Served in Previous Years
- Number of FTE
- Business Planning Documents: SWOT/NOISE/SOAR Analysis (Strengths, Aspirations, Results, Obstacles, Challenges, Effectiveness)

## TAX DOCUMENTS

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

## PROGRAM/PROJECT INFO

- Detailed Program/Project Descriptions
- Year Established
- Location Address
- Contact Information
- Target Population
- Numbers Served in Previous Years
- Current Outcome Measures
- Outcomes from Previous Years
- Staffing Structure/Org Chart
- Job Descriptions
- Resumes/Bios of Key Staff
- Success Stories/Testimonies

## FINANCIAL INFORMATION

- Detailed Organizational Budget
- Financial Statement (Recent)
- Most Recent Audit
- Program/Project Budgets
- Sources of Funding
- Other/Notes

## GOVERNANCE

- Organizational Chart
- Current Strategic Plan
- Articles of Incorporation
- Executive Director/President/CEO Bio
- Executive Director/President/CEO Compensation
- Board of Directors (including affiliations and contact info)

## OTHER DOCUMENTS

- Corporate Compliance Plan
- Policies and Procedures
- Performance Improvement Plan
- Best Practices Utilized
- MOA/MOU's
- Letters of Support
- Solicitation for Funding (if applicable)
- By-Laws
- Contracts
- Collaborating Partners
- History of Grants Received/Denied
- % of Board Giving Financially
- Community Needs Assessments
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These are common items that you will need for many grant proposals. You should have all these documents filed in an easily accessible location. **Review and prepare, locate, or create those that you do not have current or available. All documents should be up to date to meet best practice standards.**