



Grant Readiness Checklist

General Documentation

- Basic Contact Information
- Contact Info for Executive Director
- Contact Info for Main Point of Contact
- Mission, Vision, and Values
- Target Population
- Service Area
- Organizational History
- Program Descriptions (if available)
- Staff Bios and Job Descriptions
- Board of Directors List with term of service
 - Short 1-paragraph bios
 - Some funders ask for a list of work and affiliations
- Strategic Plan
- Previous awarded applications
- Full grant portfolio of wins and losses for the last 3-5 years
- Organizational Chart
- Recent Annual Report

Tax & Registration Documents

- EIN (Employer Identification Number)
- 501(c)(3) Determination Letter
- State Registration Code (if required)
- Form W-9
- IRS Form 990
- SAMS Number
- CAGE Code



Financial Materials

- Most Recent Independent Audit
- Financial Statements (Past 3 Years)
- Current Financial Statement
 - Percentage breakdown of funding sources
- Annual Budget (Past Years)
- Current Annual Budget
- Sources of Funding
- Fiscal Sponsor Information (if applicable)

- Pitch Decks

Project-Specific Information

- Project Name
- Project Description
- Problem the Project Solves
- Partners
- Project Plan
- Program or Project Impact
 - SMART Goals
 - Milestones
 - Activities
- Program Sustainability Plan
- Evaluation and success measurements
- Team Members and Roles
- Project Location
- Project Budget and Cost
- General Idea of Activities, Labor, and Timeline

Other

- Organizational Policies (e.g., DEI, Conflict of Interest, etc.)
- Narrative Success stories
- Client quotes and organizational story bank
- Letters of Support
- Donor marketing materials