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