**Organization Name**

# PURPOSE

Streamline essential documents and details that are commonly requested by grantors. Use this checklist to determine which items the organization needs to: locate, review, revise, or create.

# ORGANIZATIONAL BACKGROUND

Logo

Description automatically generated

* Address, Phone, Web Address
* History of Organization (narrative)
* Year Established
* Mission, Vision, & Values Statements
* Service Area/Location Addresses/ Contact Information

# TAX DOCUMENTS

* Tax-Exempt Status Letter
* IRS Form 990
* W-9

# FINANCIAL INFORMATION

* Detailed Organizational Budget (current year and previous year)
* YTD P&L Statement (recent)
* Most Recent Audit, Review, or Compilation Report
* Program/Project Budgets

# GOVERNANCE

* Board of Directors (including affiliations, titles, & contact information), Board Selection Process, Terms, and Term Limits
* Organizational Chart
* Current Strategic Plan
* Articles of Incorporation

# PROGRAM/PROJECT INFORMATION

* Detailed Program/Project Description(s)
* Year Established
* Location Address
* Contact Information
* Target Population
* Target Population
* Current Programs/Services Descriptions
* Number Served in Previous Year (overall and by program)
* Number FTE, PTE, and Volunteers
* Other/Notes
* Unique Entity ID
* SAM Registration
* Other Registrations as Necessary
* Sources of Funding and % of Overall Budget for Each
* Top 5 Donors from Previous Year
* Other/Notes
* Bylaws
* Executive Staff Bios
* Board Roles/Job Descriptions
* % of Board Giving Financially
* Number Served in Previous Year ɡ SMART Goals for Grant Period ɡ Outcomes from Previous Year

Received and Denied

* Partnership Agreements

**Organization Name**

# POLICIES

* Conflict of Interest Policy ɡ Anti-Discrimination Policy ɡ Anti-Harassment Policy
* Anti-Terrorism Policy

# OTHER DOCUMENTATION

* Letters of Support
* List of Collaborating Partners
* Contracts, Sub-Contract Agreements
* Staffing Structure/Org Chart(s)
* Fiscal Management Policy
* Gift Acceptance Policy
* Social Media Policy
* Job Descriptions
* Resumes/Bios of Key Staff
* Success Story(ies)
* Solicitation License (where applicable)