

# GRANT READINESS CHECKLIST



Organization Name

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## 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.

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## ORGANIZATIONAL BACKGROUND

- Address, Phone, Web Address
  - History of Organization (narrative)
  - Year Established
  - Mission, Vision, & Values Statements
  - Service Area/Location Addresses/  
Contact Information
  - Target Population
  - Current Programs/Services Descriptions
  - Number Served in Previous Year  
(overall and by program)
  - Number FTE, PTE, and Volunteers
  - Other/Notes
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## TAX DOCUMENTS

- Tax-Exempt Status Letter
  - IRS Form 990
  - W-9
  - Unique Entity ID
  - SAM Registration
  - Other Registrations as Necessary
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## 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
  - Sources of Funding and % of  
Overall Budget for Each
  - Top 5 Donors from Previous Year
  - Other/Notes
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## GOVERNANCE

- Board of Directors (including affiliations,  
titles, & contact information), Board  
Selection Process, Terms, and Term Limits
  - Organizational Chart
  - Current Strategic Plan
  - Articles of Incorporation
  - Bylaws
  - Executive Staff Bios
  - Board Roles/Job Descriptions
  - % of Board Giving Financially
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## PROGRAM/PROJECT INFORMATION

- Detailed Program/Project Description(s)
- Year Established
- Location Address
- Contact Information
- Target Population
- Number Served in Previous Year
- SMART Goals for Grant Period
- Outcomes from Previous Year  
Received and Denied
- Partnership Agreements

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## POLICIES

- Conflict of Interest Policy
  - Anti-Discrimination Policy
  - Anti-Harassment Policy
  - Anti-Terrorism Policy
  - Fiscal Management Policy
  - Gift Acceptance Policy
  - Social Media Policy
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## OTHER DOCUMENTATION

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