

GRANT READINESS CHECKLIST



Business Name

PURPOSE

Streamline essential documents and details that are commonly requested by grantors. This checklist is what we currently need to complete your portfolio for the grant services we offer. The more information you provide the more opportunities for grants we may find

BUSINESS BACKGROUND

- Address, Phone, Web Address
 - History of Business (narrative)
 - Year Established
 - Mission, Vision, & Values Statements
 - Current Programs/Services Descriptions
 - Number Full/Part Time Employee, and Volunteers
-

TAX DOCUMENTS

- NC Documents
 - IRS Form 941
 - W-9/EIN Letter
 - Unique Entity ID
 - SAM Registration/DUN
-

FINANCIAL INFORMATION

- Detailed Business Budget (current year and previous year)
 - YTD P&L Statement (recent)
 - Program/Project Budgets
 - Financial Summary
-

GOVERNANCE

- Organizational Chart
 - Operation Agreement
 - Articles of Incorporation
 - Conflict of Interest Policy
 - Anti-Discrimination Policy
 - Anti-Harassment Policy
 - Anti-Terrorism Policy
 - Executive Staff Bios
 - Roles/Job Descriptions
 - Contract, Sub-Contract Agreements
 - Fiscal Management Policy
 - Gift Acceptance Policy
 - Social Media Policy
-

PROGRAM/PROJECT INFORMATION

- Detailed Program/Project Description(s)
- Contact Information
- Program /Project Budgets