



“Grant Ready” Checklist

This checklist is used to determine if an organization has key items of information available that are required to be submitted with most grant applications. This list is not comprehensive but it does include the majority of items that must be gathered or prepared as a routine part of the grant writing process.

Organizational Background

Documentation of Legal Structure – 501(c)(3), public school, government-operated programs and services (i.e. library, first responders, parks and recreation)

Articles of Incorporation and By-laws (for nonprofits)

Address – mailing address for nonprofit headquarters, which may differ from primary location(s) where services are provided

Website and Social Media – Portal with current information about your organization; indication of social media platforms used and level of activity

Mission Statement, Guiding Principles/Values and Vision – formal statements that express the purpose for the organization and its approach to fulfilling its mission

Program Information

List and description of programs and services provided

History of program effectiveness and impact

Demographics of client population (this may vary per program)

Number of people served

Number of FTE paid staff (include details regarding full-time or part-time status)

Collaborators and Partners – list of groups and organizations that work closely with your organization

Organizational Overview – Brief history of the organization, description of programs and services, target population(s), total number of clients served currently and in prior year, and number of personnel (staff and volunteers)

Financial Information

Most recently filed IRS Form 990 or 990EZ

Financial Statements (Income Statement and Balance Sheet are most commonly required)

Annual Audit – typically required of organizations with annual budgets of at least \$500,000; there are a limited number of funders that do not require smaller organizations to have an annual audit

Annual Organizational Budget (Some funders may request budgets for the previous 2 to 3 years)

Program Budget (if grant request is for a specific program)

Governance

List of active board members (contact information and professional affiliation)

Articles of Incorporation

Current strategic plan (or business plan)

Board meeting schedule

Minimum personal giving requirement for board members

Organizational Chart

Bios of board members, CEO/Executive Director and key staff