

Grant Readiness Checklist

While most grant-making organizations may require all items on this list, some may not ask for everything. It is best to be prepared in advance.

- ☐ Organizational Background
 - ☐ History of organization (narrative)
 - ☐ Year established
 - ☐ Mission, vision, values statement
- ☐ Tax Documents
 - ☐ Tax-exempt status letter
 - ☐ 990 (Return of Organization Exempt From Income Tax)
 - ☐ W-9
- ☐ Financial Information
 - ☐ Detailed organizational budget
 - ☐ Financial statement
 - ☐ Audit
- ☐ Governance
 - ☐ Board of directors (including affiliations and contact info)
 - ☐ Organizational chart
 - ☐ Current strategic plan
- ☐ Program / Project Information
 - ☐ Detailed program/project description
 - ☐ Number served in previous year
 - ☐ Current outcome measures
- ☐ Other
 - ☐ Letters of support
 - ☐ Percentage of Board giving financially
 - ☐ Licenses, certifications (where applicable)