



CHECKLIST FOR SUCCESS©

Collect the following documents and keep multiple hard and electronic copies available to ensure grant-readiness!

- ✓ 501 (c) (3) determination letter from the IRS (and renewals and updates)
- ✓ Brochures, agency publications, newsletters, Annual Report
- ✓ Employer Identification Number (EIN)/ tax ID #
- ✓ Data Universal Numbering System (DUNS) # and National Information Management System (NIMS) registration
- ✓ Evaluation, outcomes, performance measures
- ✓ Future funding statement for sustainability (including list of pending proposals and/or awarded grants)
- ✓ History of organization including year established, number and qualifications of staff, programs, mission, values/ philosophy, awards, stories/testimonials, accreditations/certifications
- ✓ Calendar of Events
- ✓ List of Board of Directors/ Trustees members and officers, titles, affiliations, contact info
- ✓ Volunteer data
- ✓ List of management staff and contact information
- ✓ Map of target area and demographics of those served
- ✓ Minutes of Board meetings and resolutions for past year
- ✓ Most recent audit
- ✓ Most recent financial statement
- ✓ Current Fund Development Plan
- ✓ Current Strategic Plan and Business Plan
- ✓ Table of Organization/ flow-chart
- ✓ Current project and organization budgets with budget narratives
- ✓ Recent newspaper clippings, evaluations or reviews
- ✓ Resumes and/or job descriptions of current and/or proposed staff
- ✓ Sample letters of support/commitment
- ✓ Target population, demographics & needs (“best-practice models” or “evidence-based”)
- ✓ Mission and vision statements
- ✓ Certificate of Incorporation and Bylaws
- ✓ Logic Models for programs
- ✓ NEW 990 FORM information re: governance and fundraising (effective 5-09; www.IRS.gov/eo)
- ✓ WWW.GRANTS.GOV registration for all federal grants (Central Contractor Registration needs renewed annually)

EACH FUNDER'S APPLICATION GUIDELINES NOTE THE FORMAT AND CONTENT.

REMEMBER THE GOLDEN RULE: WHOEVER HAS THE GOLD MAKES THE RULES.

lgb: 11-12-07 revised per AAGP's “Capitalizing as a Consultant”; www.Butler-Consulting.com; 11-04 copyright; and combined with materials from Andrew Grumet, Esq., in “A Toolbox to Answer the Grant-Maker's “Accountability Questions”; revised 1-09; www.grantprofessionals.org/articles for Fall 2008 AAGP Journal article- *Getting Your Organization Grant-Ready*