



## 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 (plus renewals and updates)
- ✓ Organizational materials (e.g., brochures, newsletters, articles, annual report)
- ✓ Employer Identification Number (EIN)/ tax ID #
- ✓ Data Universal Numbering System (DUNS) # and National Information Management System (NIMS) registration
- ✓ Evaluation, outcomes, performance measures, logic models
- ✓ Future funding statement for continued funding/sustainability (including list of pending proposals and/or awarded grants)
- ✓ History of organization including year established, staff data, programs, mission, vision, values/ philosophy, awards, stories/testimonials, accreditations/certifications
- ✓ Calendar of Events and Volunteer data
- ✓ List of Board of Trustees members & officers, titles, affiliations, contact info
- ✓ 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, and financial statement, state and federal filings
- ✓ Current Fund Development Plan that includes *targeted* grants and proposals
- ✓ Current Strategic Plan/ Business Plan
- ✓ Table of Organization/ Organizational flow-chart
- ✓ Current project and organizational 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 programs”)
- ✓ Mission and vision statements
- ✓ Certificate of Incorporation and Bylaws
- ✓ 990 FORM with required information re: governance and fundraising
- ✓ www.GRANTS.gov registration for all federal grants [System for Awards Management (SAM) 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](http://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](http://www.grantprofessionals.org/articles) for Fall 2008 AAGP Journal article- *Getting Your Organization Grant-Ready*