

# Checklist For Grant Success

Collect the following information in multiple copies (or electronic files) before proposal writing and submitting.

## Information needed for organization:

- 501 (c) (3) determination letter from the IRS (and renewals and updates)  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location: \_\_\_\_\_
- Brochures, agency publications, newsletters, Annual Report  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location: \_\_\_\_\_
- Employer Identification Number (EIN) / Tax ID #  
 Yes (EIN) \_\_\_\_\_  No \_\_\_\_\_ File/Location: \_\_\_\_\_
- Evaluation, outcomes, performance measure  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location: (It is possible for consultant to work with the organization to create an evaluation, outcomes and performance measures; however, if this work has already been done it makes the grant writing process much faster.
- Future funding statement for sustainability (including list of pending proposals and/or awarded grants)  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location: (Please list all current funding/donations
- History of organization including year established, number and qualifications of staff, programs, mission, values/ philosophy, awards, stories/testimonials, resumes, accreditations/certifications, etc.  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location: \_\_\_\_\_
- Calendar of Events  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location \_\_\_\_\_
- List of Board of Directors/ Trustees members and officers, titles, affiliations, contact info, at minimum city and state, term of service in years  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location: \_\_\_\_\_
- Volunteer data, number of volunteers and estimate of volunteer hours.  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location \_\_\_\_\_
- List of management staff and contact information  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location \_\_\_\_\_
- Map of target area and demographics of those served  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location \_\_\_\_\_

- Minutes of Board meetings and resolutions for past year  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location \_\_\_\_\_
- Most recent financial audit  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location \_\_\_\_\_
- Most recent financial statement  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File/Location: \_\_\_\_\_
- Current Fund Development Plan  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_
- Current Strategic Plan and Business Plan  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_
- Organizational Chart, show Executive Director/CEO at top and staffing structure:  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location: \_\_\_\_\_
- Current project and organization budgets with budget narratives  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_
- Recent newspaper clippings, evaluations or reviews (clip book with news coverage and press releases.)  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_
- Resumes and/or job descriptions of current and/or proposed staff  
 Yes \_\_\_\_\_ (partially completed)  No \_\_\_\_\_ File Location: \_\_\_\_\_
- Sample letters of support/ letters of commitment  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_
- Target population, demographics & needs (“best-practice models” or “evidence-based”)  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_
- Mission and vision statements  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_
- Certificate of Incorporation and Bylaws  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location: \_\_\_\_\_
- Logic Models for all programs  
 Yes \_\_\_\_\_  No \_\_\_\_\_ File Location \_\_\_\_\_

- 990 FORM information re: governance and fundraising  
(Yes \_\_\_\_\_ No \_\_\_\_\_ File Location: (Consultant can look this up.) \_\_\_\_\_)
- For each funder's application guidelines...note the format and content.  
Yes \_\_\_\_\_ No \_\_\_\_\_ File Location: (Consultant will develop this) \_\_\_\_\_