



# GRANT READINESS CHECKLIST

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- ☐ **Have you compiled essential pieces funders require?**
  - ☐ Mission
  - ☐ History including year organization was founded
  - ☐ List of programs offered
  - ☐ Internal Revenue Service (IRS) letter of tax determination
  - ☐ IRS Employer Identification Number (EIN)
  - ☐ Bylaws
  - ☐ Most recent organizational tax return (IRS Form 990)
  - ☐ Board-approved operating budget reflecting fiscal year start and end dates
  - ☐ Audited financial statements for last two fiscal years (in lieu of an audit, if your organization is smaller, many funders will accept a certified public accountant signing off on your statements)
  - ☐ Active System for Award Management (SAM) registration (federal grants only)
  - ☐ Unique Entity Identifier (UEI) (federal grants only)
  - ☐ Login.gov registration (federal grants only)
  
- ☐ **Have you written a needs statement for each program you'd like funded?**
  
- ☐ **Have you compiled recent, relevant data, to make your case?**
  
- ☐ **Do you have a funding wish list for each?**
  
- ☐ **Do you know how much each item on your wish list costs?**
  
- ☐ **Do you have specific goals for the programs you'd like to be funded?**
  
- ☐ **Do you know who will carry out this work?**
  
- ☐ **Have you created budgets for each program?**

- ☐ **Have you determined the specific target populations for each program?**
  - ☐ Communities
  - ☐ Ages
  - ☐ Ethnicities
  - ☐ Socio-economic status
  - ☐ Number you intend to serve
  - ☐ Any other relevant factors
- ☐ **Have you written goals, objectives, and desired outcomes for each program?**
- ☐ **Have you written an evaluation plan for each program?**
- ☐ **Have you written a sustainability plan for each program?**
- ☐ **Have you written a marketing plan for each program?**
  - ☐ How will you let those who are tapping the program know that it exists?
  - ☐ How will you celebrate/thank the funders partnering with you?
- ☐ **Do you have organizational policies that have been reviewed in the last two years?**
- ☐ **Do you have an indirect cost rate?**
- ☐ **Do you have signed memoranda of understanding with program partners?**
- ☐ **Do you have other aspects that will help you stand apart from the competition?**
  - ☐ Logo
  - ☐ Organizational strategic plan
    - ☐ Vision
    - ☐ Mission
    - ☐ Values
    - ☐ Goals
    - ☐ Objectives
    - ☐ Outcomes
    - ☐ Evaluation mechanisms
  - ☐ Logic models
    - ☐ Need
    - ☐ Resources
    - ☐ Activities

- ☐ Targets
- ☐ Indicators
- ☐ Outcomes
- ☐ Impact
- ☐ Dynamic digital presence
  - ☐ Up-to-date website with donation portal
  - ☐ Videos capturing program impact
  - ☐ Listservs
  - ☐ Social media
    - ☐ LinkedIn
    - ☐ YouTube
    - ☐ Instagram
    - ☐ Facebook
    - ☐ X
    - ☐ Bluesky
    - ☐ TikTok
- ☐ Organizational chart
  - ☐ One-pager depicting relationship of governing body and all staff
- ☐ Board of directors roster
  - ☐ Meeting frequency
  - ☐ Officers
  - ☐ Other directors
  - ☐ Names
  - ☐ Credentials
  - ☐ Affiliations
  - ☐ Contact information
- ☐ Staff roster
  - ☐ Names
  - ☐ Credentials
  - ☐ Position titles
  - ☐ Employment status
    - ☐ Volunteer
    - ☐ Part-time
    - ☐ Full-time
    - ☐ Contractor
- ☐ Partner roster
  - ☐ Name
  - ☐ Role

- ☐ Date collaboration started
- ☐ Special qualities they bring/value they offer
- ☐ Up-to-date resumes for key program staff (including partners)
- ☐ Annual report
- ☐ Letterhead
- ☐ Brochures/flyers
  - ☐ For organization as a whole
  - ☐ For program seeking funding
- ☐ **Do you belong to any grant or fundraising professional associations?**
  - ☐ [Grant Professionals Association](#)
  - ☐ [Association of Fundraising Professionals](#)
  - ☐ [National Grants Management Association](#)
  - ☐ [National Council of Nonprofits](#)
- ☐ **Do you have copies of past grant applications and reports?**
- ☐ **Do you have a summary of grants your organization has applied for over the years?**
  - ☐ Funders they were submitted to
  - ☐ Name of specific funding opportunities
  - ☐ When they were submitted
  - ☐ Amount awarded for each
  - ☐ Programs supported by each
- ☐ **Do you track non-grant awards received?**
  - ☐ Certificates of recognition for organization
  - ☐ Newspaper/magazine clippings
  - ☐ Highlights conveying how organization has helped people/animals/plants/other species