



Grant Checklist- Documents you should have on file!

Legal Documents:

- ✓ IRS 501(c)(3) letter of determination
- ✓ Most recent income/expense statement
- ✓ Current operating budget
- ✓ Financial audit within two years of present date
- ✓ Latest 990

Program Support:

- ✓ Mission statement, goals and objectives, brief organizational history and geographic area(s) served
- ✓ Program Initiatives
- ✓ List of Board of Directors, names and affiliations
- ✓ Current/Potential Partners
- ✓ Additional sources of income/donations with amounts listed

Organization Materials:

- ✓ Dun & Bradstreet number
- ✓ Strategic/Fundraising Plan
- ✓ Evaluations/Annual Report
- ✓ Letterhead
- ✓ By-laws

Personnel Filings:

- ✓ Names, titles of employees, and description of position
- ✓ Volunteers—numbers and roles
- ✓ Evaluations

Grant Projects

- ✓ Past grants received, amount funded and funded project description
- ✓ Past unfunded proposals

If you do not have these items, let's talk!