

Grant Proposal Checklist – “Readiness Check”

The items listed here are either routinely or occasionally required by foundations and other funders as part of a funding proposal. Make sure you have them assembled well in advance so they are ready to go when a funding opportunity comes along.

Organizational Information

- Mission statement
- IRS letter of determination – proof of 501(c)3 status (or Fiscal Sponsor, if the funder allows)
- Organizational description - history, background, accreditations or awards
- Summary of programs & services
- Current fiscal year operating budget
- Board list – names, affiliations, addresses, phone numbers, term expiration dates, and officers
- 100% Board giving in the last 12 months
- Staff list – names & titles
- Number of full-time and part-time employees (or FTEs – full-time equivalents)
- Organizational chart
- Resumes or bios of key staff
- Number of volunteers and volunteer hours
- Number of donors/members/subscribers
- Financial audit or statement for the past two fiscal years (Form 990 filing can often be substituted, especially for smaller organizations)
- Annual report for the past two years (if available)
- Organizational brochure
- Strategic Plan (if available)
- Past two newsletters (if available)
- Signatories (name/title of the person authorized to sign the request)
- Contact information (contact person name/title and their contact information)

Program (or Project) Information

- Program description
 - Need
 - Background/history (for existing programs)
 - Population served – number of clients: for existing programs, some years of data of numbers served to show trends such as increasing demand, new client population groups, etc.; for new programs, projected number of clients; client profile – e.g., age, ethnicity, income, etc.
 - Location / geographic area you serve – community statistics, etc.
 - Description of services, methods – e.g., evidence-based? best practices? pilot approach?
 - Partnerships and collaborations (“MOUs” – Memoranda of Understanding, if needed)
 - Staffing (resumés and/or job descriptions may be required)
 - Workplan, Timeline and Activities
 - Goals and objectives (short-term and long-term)
 - Sources of funding – including grants received, grants pending (shows leverage)
 - Sustainability plan
 - Evaluation/monitoring plan
- Program budget (for current year, for proposed grant-funded year)
- Program brochure (if available)
- Press clippings about program – recent (past two years) if any
- Testimonials, client stories, examples of success, letters or quotes from clients, partners, community leaders (the human side of the numbers – the “story”)

- Letters of support
- Awards, accreditation, or other recognition, if any

Capital Requests - Special Considerations

- 25 to 50 percent of the goal already raised from lead gifts, board members (with no less than 100 percent participation on the board's part), and other key individual donors and/or from other funds identified (e.g., reserves) - some funders demand two-thirds of the goal be raised before you even approach them
- For buildings and/or renovations – detailed architectural drawings, any required permits or pending permit applications
- For small capital equipment requests – quotes from potential vendors and/or other documentation of cost estimates