

## GRANT PREPARATION TOOL KIT

Compile these documents in a central electronic file. They will be complete and ready to go for your next grant application. Then, once a year, update the documents, especially licenses, tax documents, and financial documents.

Completion Date: \_\_\_\_\_

Review Date: \_\_\_\_\_

### **ORGANIZATIONAL BACKGROUND - Create a Word Doc for this information, keep headings**

- o Address, Phone, Web Address
- o History of Organization (narrative)
- o Year Established
- o Mission, Vision, & Values Statements
- o Service Area/Location Addresses/Contact Information
- o Target Population
- o Current Programs/Services Descriptions
- o Number Served in Previous Year
- o Number FTE
- o Annual Report – filed with the state
- o Annual Report – Marketing collateral
- o Social Media channels and handles
- o Other/Notes

### **TAX DOCUMENTS**

- o Tax Exempt Status Letter
- o IRS Form 990
- o W-9
- o Dun & Bradstreet Number (DUNS)
- o UEI Number
- o Solicitation License
- o Other Registrations as necessary

### **FINANCIAL INFORMATION**

- o Detailed Organizational Budget
- o Financial Statement (recent)
- o Most Recent Audit
- o Program/Project Budgets
- o Sources of Funding
- o Other/Notes

### **GOVERNANCE**

- o Board of Directors (including affiliations & contact information)
- o Organizational Chart
- o Current Strategic Plan

## Articles of Incorporation

- o Executive Director/President/CEO Bio
- o o Executive Director/President/CEO Compensation
- o By-Laws, including the year, established
- o Percentage of Board Annual Giving

## **PROGRAM/PROJECT INFORMATION**

- o Detailed Program/Project Description
- o All Location Addresses
- o Contact Information
- o Target Population
- o Number Served in Previous Year
- o Current Outcome Measures
- o Outcomes from the Previous Year
- o Staffing Structure/Org Chart(s)
- o Job Descriptions
- o Resumes/Bios of Key Staff
- o Success Story
- o Flyers, Brochures, Reports, White Papers, Presentations
- o Videos

## **GRANT INFORMATION & RESOURCES**

- o History of Grants by the number: applied, approved, awarded, declined, rejected, abandoned
- o History of Grants by the amount: requested, approved, received, reimbursed
- o Past Grant Applications by types: general operating, program, marketing, capital, other
- o Answers to Standard Grant Questions
- o Standard Grant Portal websites, Logins, and passwords
- o Grant Writing Assignment Template
- o Grant tracking system: Excel, GEMS, other
- o Current grant writing pipeline
- o Sam.gov
- o Login.gov
- o Grants.gov

## **OTHER DOCUMENTATION**

- o Corporate Compliance Plan
- o Performance Improvement Plan
- o Policies/Procedures
- o Best Practices Utilized
- o MOAs/MOUs
- o Letters of Support
- o Collaborating Partners
- o Contracts