

GRANT READINESS CHECKLIST

TNM Social Services Consulting, LLC.



Organization name

Completed by

Date

Streamline documents and details commonly requested by grantors. Mark what you need to locate, review, revise, or create; check Ready when an item is current and available. Multiple selections are allowed.

ORGANIZATIONAL BACKGROUND

Document / information	Locate	Review	Revise	Create	Ready
Address, phone, and website	☐	☐	☐	☐	☐
History of organization (narrative)	☐	☐	☐	☐	☐
Year established	☐	☐	☐	☐	☐
Mission, vision, and values statements	☐	☐	☐	☐	☐
Service area, location addresses, and contact information	☐	☐	☐	☐	☐
Current programs/services descriptions	☐	☐	☐	☐	☐
Number served in previous year: overall and by program	☐	☐	☐	☐	☐
Number of full-time staff, part-time staff, and volunteers	☐	☐	☐	☐	☐

TAX DOCUMENTS & REGISTRATIONS

Document / information	Locate	Review	Revise	Create	Ready
Tax-exempt status letter	☐	☐	☐	☐	☐
IRS Form 990	☐	☐	☐	☐	☐
W-9	☐	☐	☐	☐	☐
Unique Entity ID (UEI)	☐	☐	☐	☐	☐
SAM registration	☐	☐	☐	☐	☐
Other registrations as necessary	☐	☐	☐	☐	☐

Other / notes / next steps

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FINANCIAL INFORMATION

Document / information	Locate	Review	Revise	Create	Ready
Detailed organizational budgets: current and previous year	☐	☐	☐	☐	☐
Recent year-to-date profit and loss statement	☐	☐	☐	☐	☐
Most recent audit, review, or compilation report	☐	☐	☐	☐	☐
Program/project budgets	☐	☐	☐	☐	☐
Sources of funding and percentage of overall budget for each	☐	☐	☐	☐	☐
Top five donors from previous year	☐	☐	☐	☐	☐

GOVERNANCE

Document / information	Locate	Review	Revise	Create	Ready
Board roster: affiliations, titles, and contact information	☐	☐	☐	☐	☐
Board selection process, terms, and term limits	☐	☐	☐	☐	☐
Organizational chart	☐	☐	☐	☐	☐
Current strategic plan	☐	☐	☐	☐	☐
Articles of incorporation	☐	☐	☐	☐	☐
Bylaws	☐	☐	☐	☐	☐
Executive staff biographies	☐	☐	☐	☐	☐
Board roles/job descriptions	☐	☐	☐	☐	☐
Percentage of board members giving financially	☐	☐	☐	☐	☐

Other / notes / next steps

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PROGRAM/PROJECT INFORMATION

Document / information	Locate	Review	Revise	Create	Ready
Detailed program/project descriptions	☐	☐	☐	☐	☐
Year established	☐	☐	☐	☐	☐
Location address	☐	☐	☐	☐	☐
Contact information	☐	☐	☐	☐	☐
Target population	☐	☐	☐	☐	☐
Number served in previous year	☐	☐	☐	☐	☐
SMART goals for grant period	☐	☐	☐	☐	☐
Outcomes from previous year	☐	☐	☐	☐	☐
Grant applications received and denied	☐	☐	☐	☐	☐
Partnership agreements	☐	☐	☐	☐	☐

Other / notes / next steps

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POLICIES

Document / information	Locate	Review	Revise	Create	Ready
Conflict of interest policy	☐	☐	☐	☐	☐
Anti-discrimination policy	☐	☐	☐	☐	☐
Anti-harassment policy	☐	☐	☐	☐	☐
Anti-terrorism policy	☐	☐	☐	☐	☐
Fiscal management policy	☐	☐	☐	☐	☐
Gift acceptance policy	☐	☐	☐	☐	☐
Social media policy	☐	☐	☐	☐	☐

OTHER DOCUMENTATION

Document / information	Locate	Review	Revise	Create	Ready
Letters of support	☐	☐	☐	☐	☐
List of collaborating partners	☐	☐	☐	☐	☐
Contracts and subcontract agreements	☐	☐	☐	☐	☐
Staffing structure/organizational charts	☐	☐	☐	☐	☐
Job descriptions	☐	☐	☐	☐	☐
Resumes/biographies of key staff	☐	☐	☐	☐	☐
Success stories	☐	☐	☐	☐	☐
Solicitation license, where applicable	☐	☐	☐	☐	☐

Other / notes / next steps