

Use this checklist to prepare information for grant submissions.

Documents should be available in electronic format so they are easy to share and upload.

NOTE: This is not an exhaustive list as application requirements vary. Check with your AshleyRountree grants professional for funder-specific information, or email Jenny Bowen at jbowen@ashleyroutree.com.

- 501(c)(3) IRS determination letter
- Numbers: DUNS, EIN/Tax ID, NIMS
- Most recent Form 990 with signature page
- Board of directors list with affiliations, titles
- Strategic plan
- Organizational history in paragraph format, including year established, staff data, programs, mission, vision, values/philosophy, success stories, accreditations/certifications
- Organizational materials – annual report, marketing collateral, program/services photography
- Annual operating budget
- Audited financial statements with management letter from third-party auditor for current and last fiscal years
- Ability to produce month-to-month balance sheets
- Itemized project budget, specific to the project for which you are requesting funding
- Program and service information – description of each program and service; outcomes and data (quantitative and qualitative) demonstrating success; demographics and geographic area(s) served, number served
- Performance measures and methods, logic models
- Community impact data
- Sustainability plan
- Current and past funders – name of funder, amount and year awarded
- MOUs and letters of support
- www.grants.gov registration for all federal grants (System for Awards Management [SAM] requires annual renewal; six-week lead time recommended for new registration)