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Preparing to Prepare a Grant Proposal: Building the Organizational File

Use this checklist to gather information about your organization. Store the cleanest copies you can find in either an electronic file or 3-ring binder. You will use this information throughout the proposal preparation process. Once your grant proposal is ready to send, you will need to follow the funder's guidelines and include some, all, or none of this. Send EVERYTHING the funder asks for and do not send anything they do not ask for. This is a dynamic document – plan to update it annually.

The file/binder should be considered a ***high security document*** that contains personal and proprietary information**.** It should be securely stored in a locked or passworded location. Access should be limited to the Executive Director, Board President, Grant Writer, and their designees.

Nonprofit Identity Documents

_____ Employer Identification Number (EIN), usually starts with 35-

_____ DUNS Number

_____ Copy of IRS 501(c)3 Letter

_____ By-Laws Document

_____ Certificate of Incorporation

_____ Clean logo/brand image

Organizational Structure

_____ Organizational structure (org chart) and staffing structure, including volunteers

_____ Current Board of Directors list that includes names, affiliations, and contact information

_____ Job descriptions for all staff, board and volunteer positions

_____ Resumes and short biographies of managers and key staff

_____ Personnel policies and procedures

_____ Salary schedule for staff

Financial Documents

_____ Current Fiscal Year Organizational Operating Budget

_____ Most current auditor's report (as many as 4 previous years, if possible)

_____ Annual Report (at least a 2-page summary of financial condition and accomplishments)

_____ Current Funding Sources (program income, grants, contracts, donations, events, sponsors)

_____ Current Sources of In-Kind Revenue, including cash, materials, labor

_____ Grants that are pending approval for proposed projects

About Your Organization

_____ Mission, Vision and Goals of the organization/Strategic Plan. If you update these somewhere, be sure to update them everywhere, both print and digital documents

_____ Organizational history

_____ Current programs (theories of change, logic models)

_____ Descriptions of clients/constituents you serve – number, demographics, characteristics

_____ Community profile

_____ List of existing formal linkages and partnerships (describe roles)

Your Organization's Story

_____ Testimonials and reviews

_____ Current and historical photos and videos (with releases)

_____ Publicity, awards, or acknowledgements

Relevant Statistics about your Organization and the Population(s) It Serves

_____ Recent needs assessment data (within 5 years)

_____ Number of clients you serve annually (outputs)

_____ Name and number of programs you run annually (outputs)

_____ How your work has changed your client population or your community (outcomes)

_____ Contributions to the community or its citizens ($ figures, if possible)

_____ Demographics about your target population (ethnicity, gender, family structure, education levels, economic/employment data, housing data, health care data, involvement with law enforcement, criminal justice, family service agencies, any other compelling data)

Digital Access Information (Password these separately from previous items)

_____ CRM, Financial, Grant software login information

_____ Grant application and reporting portal login information for each grant – Put a note in each grant file indicating where this information is stored.

_____ Granting agency reporting portal login information

_____ Website and social media account login information

_____ E-mail account login information