



Grant Readiness Assessment Checklist

In order to be “grant ready,” organizations should have the following documents and information prepared in advance of the release of funding opportunities. This gives organizations the ability to respond quickly and for the grants process to go smoothly.

Agency Information:

- ☐ 501©3 determination letter from the IRS (and renewals and updates)
- ☐ Articles of incorporation and by-laws
- ☐ Statement of the history of the organization, including:
 - Year established
 - Mission and vision statements
 - Core values
 - Accreditations/certifications
 - Awards received
- ☐ Organization accreditation/certification documents
- ☐ Documents of awards received
- ☐ Current business plan
- ☐ Current strategic plan
- ☐ Current fund development plan
- ☐ List of Board of Directors/Trustees members and officers, their titles, affiliations, and contact information
- ☐ Minutes of Board meetings and resolutions for past year
- ☐ Volunteer information, including annual number of volunteers
- ☐ Stories/testimonials about the impact of services
- ☐ Brochures, agency publications, newsletters, annual reports
- ☐ Calendar of events
- ☐ Electronic copies of grant applications previously submitted

Staff Information:

- ☐ Current Table of Organization chart
- ☐ List of all staff and their qualifications
- ☐ List of management staff and their contact information
- ☐ Resumes of current and proposed staff
- ☐ Position descriptions of current and proposed staff

Financial Information:

- ☐ Current organization budget
- ☐ Most recent audit
- ☐ Most recent financial statement
- ☐ Current program-specific budget with budget narratives
- ☐ List of pending proposals and awarded grants

Program/Project-Specific Information:

- ☐ Statement of the geographic catchment area served by the organization
- ☐ Statement of the population(s) served by the organization, including demographics and a statement of need specific to the population(s)
- ☐ Program/project-specific logic models
- ☐ Best practice or evidence-based models used
- ☐ Evaluation plan and outcome/performance measures, by program/project
- ☐ Sample letters of support or commitment for the program/project
- ☐ Established processes for accessing relevant data, including primary data (data compiled internally by the organization) and local, statewide, and national secondary data (data accessed by an outside agency, e.g., courts data, hospital data, public health data, etc.)

For Federal Grant Readiness:

- ☐ Current Dun & Bradstreet, Data Universal Numbering System (DUNS) number
- ☐ Current System for Award Management (SAM) registration
- ☐ Current Grants.gov registration
- ☐ An approved Authorized Organization Representative (AOR) in Grants.gov
- ☐ Current eRA Commons registration (for all NIH grants)

**The information in this document has been adapted from the following: Butler Consulting's "Checklist for Success," Debbie DiVirgilio's "Is Your Organization Grant Ready?," and Samantha Dorm's "Preparing for Grants: A Get-Ready Guide and Checklist for Success."*