

## **CHECKLIST FOR SUCCESS**

Collect the following information in multiple copies before it's time for proposal writing and submission. When you receive a Request for Proposals (RFP) on Monday that is due Friday, you can be "grant-ready" and make the deadline!

- ✓ 501 (c) (3) determination letter from the IRS
- ✓ Annual Report
- ✓ Brochures
- ✓ EIN/tax ID #
- ✓ Data UNS # and National Information Management System (NIMS) registration
- ✓ Evaluation/outcomes/performance measures
- ✓ Future funding statement for continuation funding (including list of pending proposals and/or awarded grants)
- ✓ History of organization including year established, number and qualifications of staff, programs, mission/philosophy, awards, stories/testimonials, accreditations/certifications
- ✓ Calendar of Events
- ✓ List of Board of Directors/ Trustees members, titles and affiliations, contact information
- ✓ List of officers and contact information
- ✓ List of management and contact information
- ✓ Map of target area
- ✓ Minutes of Board meetings and resolutions for past year
- ✓ Most recent audit
- ✓ Most recent financial statement and 990 Form & state filings
- ✓ Newsletters
- ✓ Current Strategic/Business Plan
- ✓ Organizational structure flow-chart
- ✓ Current project and organization budgets and budget narratives
- ✓ Recent newsletter articles, newspaper clippings, evaluations or reviews
- ✓ Resumes and/or job descriptions of current and/or proposed staff
- ✓ Sample letters of support/commitment & fax cover for letters of support
- ✓ Target population demographics and needs (research-based or evidence-based)
- ✓ Mission statement
- ✓ Certificate of Incorporation
- ✓ Bylaws
- ✓ Logic Models for programs
- ✓ NEW 990 FORM information re: governance and fundraising (effective 5-09; [www.irs.gov/eo](http://www.irs.gov/eo))
- ✓ WWW.GRANTS.GOV registration for all federal grants

EACH FUNDER'S APPLICATION GUIDELINES NOTE THE FORMAT AND CONTENT.

**REMEMBER THE GOLDEN RULE: WHOEVER HAS THE GOLD MAKES THE RULES.**

lgb: 11-12-07 revised per AAGP's "Capitalizing as a Consultant"; [www.Butler-Consulting.com](http://www.Butler-Consulting.com); 11-04 copyright; and combined with materials from Andrew Grumet, Esq., in "A Toolbox to Answer the Grant-Maker's "Accountability Questions"