



## KEY GRANT COMPONENTS CHECKLIST

The following is a checklist of information and documents that may be requested or will play a role in constructing a strong grant proposal.

It will be helpful to CBG for you to provide all of the items listed on this checklist in order to expedite the grant writing process. CBG will assist you in gathering/developing these items.

### **Organizational Culture and Reason for Existence**

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- Mission Statement
- Vision Statement
- Values Statement
- Case Statement
- Strategic Plan
- Financial Development Plan
- Other Applicable Plans
- Overview of Program or Service - What are you seeking grant dollars for and why is it important. Also, what impact has this program already made or can make if successfully implemented along with any data to prove the impact.
- Funding Priorities – What are the most crucial items that need to be funded in order to create success with your program or organization.

### **Leadership, Staff and Stakeholders**

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- Founding Members
- Board of Directors – Name, Title, Contact, Years of Service, Occupation, Community (Town of Group) Represented
- Key Personnel – Resumes
- Professional Services – Attorneys, CPAs and Consultants
- Other Stakeholders or Players – Name, Contact, Role, Expertise/Competencies, etc...
- Organizational Chart

### **Program/Project Specific:**

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- Detailed summary of accomplishments from the subject program/project (program or project we are procuring grant funding for). If non-existent, solid statistics to show anticipated impact.

## Documents and Other Information:

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- IRS Letter of Determination
- Most Recent IRS 990
- Most Recent Financial Audit
- Organization Operating Budget
- Program Budget (If requesting funding for a specific program or service.)
- Board Bylaws
- Personnel Policies and Procedures
- Dunn and Bradstreet (DUNS) Number and Membership Information
- System for Awards Management (SAM) Membership Information
- Online Grant Application Credentials (i.e. Authorized Representatives, Point of Contact, Username, Password, etc...)
- List of Funding Sources for 3 Years with Percentage or Actual Dollar Allocations (if Operating Budget does not itemize)