

Grants Attachment Checklist

This checklist covers the standard documents most funders request with grant applications. Development staff should keep current versions of each in the shared Grant Attachments folder to make grant submissions faster and easier.

- ☐ IRS determination letter
- ☐ Board of Directors list (names, affiliations and terms; some funders ask for demographics)
- ☐ IRS Form 990 (most recent filing)
- ☐ Audited financial statements (most recent)
- ☐ State charitable solicitation registration
- ☐ Organizational operational budgets (for the current, immediate prior, and upcoming fiscal years, if available)
- ☐ Project/program budgets and budget narratives (for the current fiscal year for major project and program areas frequently submitted for funding)
- ☐ Mission, vision and values statement
- ☐ Organizational history / fact sheet
- ☐ Organizational chart
- ☐ Key staff bios / résumés
- ☐ Annual report
- ☐ Organizational W-9
- ☐ Organizational Theory of Change
- ☐ Organizational Logic Model
- ☐ SAM.gov registration/UEI/CAGE Code (required for some federal grants)
- ☐ Letters of support / MOUs from partnering organizations
- ☐ Strategic plan or executive summary
- ☐ Organizational policies (nondiscrimination/EEOC, conflict of interest, whistleblower, document retention, gift acceptance, and child/vulnerable population protection (for youth or elderly serving organizations))