FREE CHECKLIST

Grant Readiness Checklist (Printable PDF)

A printable checklist of the documents, registrations, financial practices and program details to have in place before you apply for a grant.

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> Funders ask for many of the same things. Gathering them before you find an opportunity means you can apply without a scramble. Tick what you have, and note who will get the rest. Not every item applies to every organization or funder.

Organization

Organization name:

Checklist completed by:

Date:

Legal status and governing documents

- [ ] Proof of legal status, such as articles of incorporation
- [ ] Tax-exempt determination letter, or a fiscal sponsorship agreement
- [ ] Employer identification number on file
- [ ] Current bylaws
- [ ] Current list of board members with their affiliations
- [ ] Any state registrations your organization needs to operate and raise funds

Financial records and practices

- [ ] Current year operating budget, approved by the board
- [ ] Most recent year-end financial statements
- [ ] Most recent audit or independent financial review, if you have one
- [ ] Most recent annual tax return filed with the tax agency
- [ ] A bookkeeping system that can track a grant's income and spending separately
- [ ] Board review of financial statements on a regular schedule
- [ ] Written financial policies, including who approves spending

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Policies

- [ ] Conflict of interest policy
- [ ] Nondiscrimination policy
- [ ] Record retention policy
- [ ] Whistleblower policy
- [ ] A written policy on staff use of AI tools, if staff use them

Program and evidence

- [ ] A written description of the program you want funded
- [ ] Evidence of the need, with sources and years
- [ ] Clear goals and measurable objectives
- [ ] A way to measure results, and someone responsible for it
- [ ] A project budget
- [ ] Results from past work that you can document

People and capacity

- [ ] A named person who will manage the grant and its reporting
- [ ] Job descriptions or resumes for key staff
- [ ] Partners identified, with what each will do
- [ ] Enough staff time to write the application and run the project

Standard text ready to reuse

- [ ] Mission statement
- [ ] Short organization history
- [ ] One-paragraph description of each program
- [ ] Description of who you serve and where

If you plan to apply for federal grants

Federal applications need registrations that take time, so start early. Confirm the current steps and timing on the official government sites.

- [ ] Active registration in the federal System for Award Management, which provides your Unique Entity ID
- [ ] An account on the federal grants portal, with the right roles assigned to staff
- [ ] Any agency-specific system accounts the program requires
- [ ] Capacity to meet federal financial management and reporting requirements

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What to do about the gaps

Missing item	Who will get it	By when

Notes:

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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