

BLUE HERON NONPROFIT CONSULTING

Nonprofit Grant Readiness Checklist

Use this checklist to identify what you already have in place and where you may want to spend a little time before your next grant application.

Certain funders may request more or slightly different information. This isn't meant as a complete list, but as guidance toward being as ready as possible.

Administrative

1. Organization Name _____
2. Grant Contact Person _____
3. Authorized Signer _____
4. Address _____
5. Phone Number _____
6. Email Address _____
7. Website _____
8. Employer Identification Number (EIN) _____
- ☐ 9. Certificate of Insurance
10. SAM.gov / UEI Registration (federal applications only) _____
- ☐ 11. State Charitable Registration

Organization Essentials

12. Mission

13. Vision

14. Summary/History

15. Services Offered

16. Geographic Service Area

Documents

- ☐ 17. IRS Determination Letter
- ☐ 18. 990s (most recent filings)
- ☐ 19. Organizational Chart
- ☐ 20. Board of Directors List
- ☐ 21. Strategic Plan (or Business Plan)
- ☐ 22. By-Laws
- ☐ 23. Conflict of Interest Policy
- ☐ 24. Letters of Support / MOUs

Not all grants require these; check individual grant requirements before assuming you need them.

Financials

- ☐ 25. Profit & Loss Statement (most recent fiscal year)
- ☐ 26. Fiscal Year Budget (current year)
- ☐ 27. Balance Sheet
- ☐ 28. Audited Financials
- ☐ 29. Indirect Cost Rate

The rate your organization uses to charge overhead and administrative costs against grant funding. If you have a federally negotiated cost rate, make sure you have that documentation. If not, that's fine — you can use the standard indirect rate.

Project Specific

30. Goals and Objectives

31. Detailed Program Description

32. Staffing Plan

33. Impact and Outcomes

34. Key Partnerships

35. Project-Specific Budget (separate from your overall operating budget)

Checked most of these off? Good sign.

A handful of gaps? Also normal, and something to address before you apply.

Need help building a project-specific budget, or want a second set of eyes on where you stand?

Contact us →

margot.holmes@blueheronnpconsulting.com · blueheronnpconsulting.com