

# Grant Readiness Sheet for New Nonprofit Clients

Organization Name:

Date:

## Executive Summary:

- **Mission Statement:**
  - [Insert Mission Statement]
- **Brief Overview of Organization:**
  - [Insert Overview]
- **Key Programs and Initiatives:**
  - [List of Programs/Initiatives]

## Financial Readiness:

- **Financial Statements:**
  - Current and audited financial statements are available for the last fiscal year.
  - Budget for the upcoming fiscal year is prepared and includes program and administrative expenses.
- **501(c)(3) Status:**
  - IRS tax-exempt status is obtained and up-to-date.
- **Financial Policies and Controls:**
  - Clearly documented financial policies and internal controls are in place.

## Organizational Capacity:

- **Board of Directors:**
  - Active and engaged board members with diverse skills and backgrounds.
  - Board meetings are held regularly with documented minutes.
- **Staffing:**
  - Adequate staff capacity to carry out the organization's mission and programs.

- **Volunteers and Partnerships:**
  - Established volunteer base and partnerships with other organizations, if applicable.

## **Program and Project Readiness:**

- **Program Documentation:**
  - Detailed descriptions of programs, including goals, objectives, and expected outcomes.
- **Measurable Impact:**
  - Clearly defined metrics and methods for measuring program effectiveness.
- **Success Stories/Testimonials:**
  - Documented success stories or testimonials from beneficiaries of programs.

## **Grant Research and Strategy:**

- **Targeted Funding Opportunities:**
  - Identification of potential grant opportunities aligned with the organization's mission.
- **Grant Calendar:**
  - A calendar outlining deadlines for various grant opportunities.
- **Grant Proposal Development:**
  - Ability to write compelling and well-structured grant proposals.

## **Evaluation and Reporting:**

- **Data Collection and Evaluation:**
  - Systems in place for collecting and analyzing data related to program outcomes.
- **Grant Reporting:**
  - Experience in timely and accurate reporting to grantors.

## **Communication and Marketing:**

- **Website and Online Presence:**
  - Up-to-date website with clear information about the organization's mission and programs.

- **Social Media and Outreach:**
  - Active presence on social media platforms and effective outreach strategies.
- **Newsletter or Mailing List:**
  - Regular communication with stakeholders through newsletters or mailing lists.

## **Additional Notes and Comments:**

[Insert any additional comments or recommendations]

**SMD**

*Writing & Consulting*