



Organization Documents Request Checklist

- o IRS 501c3 determination letter
- o State Charitable Solicitation License/Registration, if applicable in your state
- o Mission/vision statements and core values, if available
- o Last 2 years of financial statements (audited is preferred)
- o Current operating budget
- o Agreements, partnerships, memorandums of understanding, or other contracts relevant to grant applications
- o List of Board Members and their affiliations
- o Organization Chart
- o Past completed grant applications (funded or not funded)
- o Name, title, and resume or professional summary of top 3 paid staff, if applicable
- o EIN number and DUNS number
- o Annual report or other outcome data
- o Demographics of population served
- o Strategic plan or business plan
- o Past grant applications or other narratives related to programs/projects
- o Organization letterhead
- o Electronic signature or signature image of Executive Director (will only be used with expressed permission for addition to LOIs, etc.)
- o Signed W9

- o Most recent profit & loss statement

- o Most recent balance sheet

These are the documents most often required for grant applications. Information will be kept securely in a Google Drive file and archived 90 days after the agreement ends.

We will send an invitation to the secure Google Drive file where you can upload your documents, or you may also send them via email. If emailing, we recommend using a password-protected zip file as the email may not be secure.

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