

Proposal Application Appendix Checklist

Checklist (X = complete)	Component	Description	This should be updated...	When was the last update?
	Mission/vision	It is important to concisely communicate what your organization does and its reason for existence. Grant-making organizations use missions/visions as a quick initial assessment of the many grant proposals they receive.	Rarely	
	Goals/objectives	Include the goals and objectives associated with this grant proposal, but also other relevant organizational goals and objectives.	Every proposal	
	Strategic plan	Your strategic plan indicates your organization's plan for the future. It also communicates necessary activities and evaluation tools associated with the plan.	Rarely	
	Organizational chart	The structure and operations of your organization are easily communicated in an organizational chart. Additionally, this document can demonstrate the interaction with and involvement of the organization's board.	After hirings	
	Key staff information	Bios should be one to two paragraphs long. If someone on your staff has a strong academic background (Ph.D. for instance), include their curriculum vitae. Be prepared to include demographic information for your staff.	After hirings	
	Board membership and structure	Include necessary contact information and explain the structure of your board. What are the different positions on the board? What functions do they serve? How are they integrated into the organization? Some federal grants also require you to disclose the affiliations and demographic information (e.g. education level, race/ethnicity) of your board members.	Regularly	
	Letters of recommendation and/or support	Strong letters help your organization establish credibility, demonstrate success and represent support for your project. Consider requesting letters of recommendation from the following resources: current partners, executive directors from other successful programs in the community and elected officials (these can be especially helpful).	Regularly	

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	Press releases	Disseminating information through media sources increases your audience. It can be very beneficial for your organization to write a press release when something noteworthy happens.	Regularly	
	Recent news clips	Similar to press releases, news clips offer your potential funder a look into your organization via the news media. Collect five to ten articles that highlight your organization (preferably current stories).	Regularly	
	Annual report	Annual reports function as a yearly organizational summary. They typically focus on financial information, but programmatic and budgeting narratives are especially valuable. If your organization produces an annual report, include it in your grant proposal. If your organization does not produce an annual report, you should consider beginning to do so. The process of creating annual reports, along with the documents themselves, improves accountability and transparency.	Yearly	
	Audits	Including audits (internal and/or external) in your grant proposal appendix is recommended. Audits reinforce your organization's transparency and accountability.	Yearly	
	Evaluations	If anyone (internal or external) has ever completed an evaluation of your organization or specific projects, the evaluation documents should be included in your grant proposal appendix. These are great references when it comes time to composing your grant proposal.	Yearly	

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	Financial statements	According to the SEC , there are three basic financial statements applicable to nonprofits: balance sheets, income statements and cash flow statements. Income statements summarize revenues and expenditures, balance sheets summarize assets and liabilities and cash flow statements address only the most liquid assets. You should also consider including income and expense reports from the last fiscal year as well as your current and projected operating budgets with expenses to date.	Yearly	
	501(c)3 documentation	Many grants are available only to 501(c)3 classified organizations. Including this document in your proposal appendix is paramount.	Rarely	
	Partner agreements			
	Memos of understanding (MOUs)	Often times, organizations work together to implement a program funded by a single grant because they might not have the capacity to completely implement a program individually. MOUs spell out how organizations will interact and offer proof that they have agreed to work together for a common cause.	Rarely	
	Fact sheet	A fact sheet includes the basic information about the proposed project, including the purpose, components and objectives. It should include summaries of all participating organizations, including your own.	Every proposal	
	Relevant graphics	Complicated relationships, funding structures and programmatic approaches can often be communicated best through graphic representation. A well-developed graphic can make it easier for potential funders to understand your grant application and the related information.	Every proposal	

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	Templates	Including templates in a “Cheesebook” will simplify and streamline preparations for future grant proposals. Possible templates include any documentation listed above (e.g. letters of recommendation, financial statements, MOUs, timelines) and any other documents deemed essential by members of the organization.	Rarely	