



Basic Organization Information To Keep Updated:

Organization Legal Name:

Doing Business As:

Main Office Address, City, State, Zip:

Additional Site/Program Office Address(es):

Main Application Contact:

Phone:

Fax:

Email:

Website:

Social Media Accounts:

Twitter:

Facebook:

Google+:

Pinterest:

Other:

EIN #:

DUNS #:



Please answer yes or no to the questions below. A score is not assigned for the responses. Rather, as a self-assessment, tool, analyzing the current status of your organizations policies and practices in comparison to best practices is meant to serve as a discussion guide for your organization.

1. What donor management software do you utilize?

Does your donor management software have an integrated grant management component?

If no, do you have grant management software?

If yes, which software?

If yes, is more than one staff person trained in accessing and utilizing the software?

2. Do you have a grant team in place?

If yes, which staff positions are part of the team?

If yes, how often does the team meet?

3. Do you have grant seeking policies in place?

If yes, are they updated annually?

4. Do you have grant funder relationship policies in place?

If yes, are they updated annually?

5. Do you have grant management policies in place?

If yes, are they updated annually?

6. Do you have a social media plan and/or policy in place?

If yes, are they updated annually?

If yes, does the plan and/or policy include interaction and recognition of grant funders?



Please gather and upload the following electronic versions of these documents into both a hard copy and electronic folder for your organization for quick access during grant applications.

- Current strategic plan
- 501(c)(3) letter
- Articles of Incorporation
- 990 (past two years)
- Financial audit (past two years)
- Board Roster w/ contact information, terms, and affiliations
- Operating budget (current year)
- Chart of staff salary and benefits for use in grant application budgets.
- List of current grants (funder, amount, and grant award period)
- List of previous funded and denied grants (At least past two years)
- SAM.gov registration information
- Recent Annual Report
- Organization Chart