

Nonprofit Readiness Checklist

Use this checklist to assess your organization's readiness for funding and grant applications.

Organizational Setup

- EIN obtained and active.
- Board of Directors established and bylaws approved.
- Mission and vision clearly defined.
- Conflict of interest policy adopted.

Compliance Readiness

- IRS 501(c)(3) determination letter received (if applicable).
- UEI and SAM.gov registration active.
- Annual filings up to date with state and IRS.
- Grant and program policies documented.

Financial Basics

- Bank account established under organization's name.
- Budget created for the fiscal year.
- Financial records and reporting system in place.
- Internal controls and spending approval process implemented.

Capacity & Documentation

- Key staff and volunteers identified.
- Programs and outcomes documented.
- Partnerships or collaborations listed.
- Strategic plan drafted or in progress.