

# needs assessment

Organization Name:

Date:

CEO/Executive Director:

Community Served:

Year Founded:

Annual Revenue:

**MISSION & FOCUS AREA:**

**GRANT HISTORY:**

**PROGRAMS/ACTIVITIES:**

# grant readiness organizational docs

TAX-EXEMPTION 501C3 LETTER

BOARD OF DIRECTORS ROSTER

ORGANIZATIONAL CHART

ORGANIZATIONAL NUMBERS: EIN, UEI, DUN

MISSION, VISION, VALUES STATEMENTS

PROGRAM DESCRIPTIONS/# SERVED

EVALUATION METRICS

GUIDESTAR CLAIMED + UP-TO-DATE

# grant readiness financials

MOST RECENT 990

CURRENT W9

ORGANIZATIONAL BUDGET

P&L - YTD AND PRIOR YEAR

AUDITED FINANCIALS

PROGRAM/PROJECT BUDGET(S)

SOURCES OF FUNDING

PRIOR YEAR - TOP 5 DONORS