

Grant Application Checklist

If you are interested in applying for a grant, the following documents and files are essential to have on hand. Keep an updated electronic copy so that it is easily accessible for you and your grant writer.

Confused? Overwhelmed? If you are not sure where to start, please feel free to contact Jennifer Hudson Allen at jalLEN@dallascatholic.org for assistance.

1. IRS 501 (c) (3) number
2. Detailed organization budget for three years
 - a. Include the current year, the past year, and the upcoming year's budget if you are writing the grant in January or beyond.
 - b. If you are writing the grant prior to January, then the current year and two previous years would be sufficient.
3. Overview of organization budget (one page)
 - a. This should be a basic snapshot of your financial health so that donors can see quickly that you have need and you have a handle on your finances
4. Detailed budget for your project or grant request
 - a. This should be quite informative, including the amount of money you already have raised to support the project
5. Audited financials
 - a. You should have three years minimum of audited financials.
 - b. These should be electronic and the final copies.
6. School board members, Organization Advisory Board and/or Finance Council
 - a. This should include names and addresses of all members, as well as their term of service to the board.
 - b. If possible, include the demographic makeup of your board (gender, ethnicity, etc.).
7. IRS 990 form
 - a. If you do not have one, please have a statement signed by your CFO or Director of Finance stating why you do not need one.
8. Your entry in *The Official Catholic Directory* handbook.
 - a. Scan in the page (with page number visible) that identifies you as part of the Catholic Diocese.
9. Previous grants received
 - a. Name, date, and amount of grant received
 - b. Reason for receiving the grant
 - c. Date follow-up paperwork was filed
10. Organization bylaws
11. Organization articles of incorporation (if applicable)

12. W9 paperwork

13. Administrative chart of organization

14. Demographics (updated regularly) of students – applicable to schools

- a. Gender
- b. Ethnicity
- c. Catholic v. non-Catholic
- d. Try and be as specific as possible here

15. Demographics of faculty – applicable to schools

- a. Gender
- b. Ethnicity
- c. Religious preference
- d. Full time, part time, and volunteer numbers
- e. Degree levels (BA, graduate degrees)
- f. Religious and non-religious personnel

16. One page history of the organization