

RANDI HILLESØ

5850 21st Street N, #H-1
St. Petersburg, FL 33714

randi.hilleso@scorevolunteer.org
206-909-2420

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Non-Profit Fundraising/Grant Readiness Information/Data Checklist

Financials & Documentation:

- Organizational Budgets: Current projected budget, previous 2 years' actuals
- Project budgets – for each of organizational program activities
- Most recent completed fiscal year's tax return – 990
- 501(c)3 IRS determination letter
- Florida charitable organization/sponsor registration – FL Dept of Ag & Consumer Services
- Florida nonprofit sales tax exemption certificate – Florida Dept of Revenue
- % of budget for services delivered vs overhead/operating
- List of major donors with \$ amounts
- Donor lists
- Board list with affiliations

Organizational & Program Information:

- Mission statement
- Organizational history – include history of key programs
- Bios of leadership/key staff
- Program descriptions – detailed – who will benefit and how
- Demographics – detailed information on your audience/constituency – who you serve
- Explanation of who you serve and why is it important? What is your special focus?
- Needs defined: how much do you need and how will it be used? What makes you different?
- Fundraising programs – individual, sponsorships, corporate, foundation, government, events

Donor Base:

- Who is your donor? Define who they are and where else they contribute
- How will you reach them? How will you retain them?

Evaluation:

- How will you know if you are successful?
- What methods do you employ to measure success?
- Include general organizational evaluation/measurements and individual programs

Communication & Documentation:

- Digital: website, social media, email communications
- Powerpoint or video presentations
- Flyers/brochures – in digital pdf form
- Testimonials/stories
- Photo documentation