

Grant File Guide

A grant file is a system for gathering and maintaining information that is frequently required for grant applications and proposals. Depending on your organization, and your own work style, your “file” can be private or shared, paper or online. Whatever the form, a useful grant file should include the following:

- The mission statement of your organization, a current organizational chart, and background information on your organization, current listing of members of the Board of Directors;
- Demographics, including statistics about the racial-ethnic and socio-economic make-up of the populations and communities that your organization serves or would like to serve. Be sure to include the most recent census data available;
- Current resumes of key staff, and current resumes of consultants that you might want to include in your project (for example, a project evaluator). Keep job descriptions on file for staff you typically engage, such as case managers, social workers, performing artists, educators, or program coordinators.
- It’s also useful to keep on file any current or recent needs assessments that have been conducted in connection with any of your programs, that might be relevant for any new program you are interested in providing;
- The most recent research available supporting the type of programs your organization offers and may be interested in providing should funding become available. Include any newspaper clippings or articles about your program. These articles can be used to support information in various sections of the application, such as the statement of need or your organizational capacity;
- Draft and/or final copies of descriptions for all activities delivered to clients;
- Access to 2 or 3 years of independent financial/audit reports;
- Copies of letters of support for your organization and/or the proposed project. Even though they may need updating for the next application, it is always helpful to have samples of letters on file;
- Evaluation results that document the success of your program;
- Key contact information on organizations that may be future partners.

- Budget forms that you have used in the past, and information that is typically requested for application budgets, such as salaries for various job titles, current fringe benefit rates, and how your organization calculates administrative costs);
- Copies of current facility licenses, lease agreements, certifications, certifications, etc.,
- Basic current information on grant writing, program development; and,
- Copies of all your grant applications (funded and not funded); and funded applications of other agencies that may be useful in the development of your grant application.

The grant file is a “living” file, and should be frequently reviewed, revised and updated. With a grant file, you save valuable time and can focus on developing components of a grant application where information is needed that has not been developed.