

# CHECKLIST

YEAR: \_\_\_\_\_

## LOGIN INFORMATION

Username: \_\_\_\_\_ Password: \_\_\_\_\_

## QUALIFYING / PRIMARY PURPOSE

- 1. Compliance Statement & (if applicable) Identified Barriers Statement
- 2. Mission Statement
- 3a. Articles of Incorporation (not applicable for agencies of local government)
- 3b. Bylaws
- 3c. Board Meeting Minutes
- 4. Activities List (use template provided in Eligibility Directions)

## TAX STATUS

- 5. IRS Letter of Determination (nonprofits) OR Official Resolution (local governments)

## ORGANIZATIONAL AND FINANCIAL CAPACITY

### Nonprofit Financials

- 6a. Mostly Recently Filed 990-EZ or 990 per IRS requirements. Include all schedules and 990-T, if applicable.
- 6b. Financials (Profit & Loss and Balance Sheet) for Most Recently Completed Fiscal Year. *(Based on organization size, see page 7 of Eligibility Directions for requirements).*
- 6c. Financials (Profit & Loss and Balance Sheet) for Current Year-to-Date vs. Current Fiscal Year Budget

### Agency of Local Government Financials

- 6a. Statement of Activities (Profit & Loss) for Most Recently Completed Fiscal Year (MRCFY).
- 6b. Statement of Activities (Profit & Loss) for Current Year-to-Date vs. Current Fiscal Year Budget
- 6c. Documentation of any related governmental entity and/or foundation that provides in-kind or other support to the organization, if applicable.

- 7. Board of Directors List
- 8. Staff List

## NONDISCRIMINATION

- 9. Nondiscrimination statement and date of adoption