CHECKLIST

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