



The Grantmaker's Checklist for Small Biz

Use this checklist to compile all the necessary business records, documentation, and items necessary to stay prepared to apply for grants year round

Category	Items	Resource
Legal Documentation	Licenses, permits and incorporation documents	State Licensing
	IRS EIN Letter/Number	IRS
	Required Industry Certifications and Trainings	Govt or Industry Institution
	Liability Insurance	Founder/Business Records
	State Issued Certificate of Good Standing	Govt or Industry Institution
Business Plan	All Elements Specified by the Grantmaker	Grantmakers' Website
	Executive Summary	DSRC One-Page Business Plan, One-Page Operations Plan and DSRC Pricing Template
	Ownership and Management Description	
	Current and Future Operations Strategy	
	Sales, Profits, and Projections Description	
	Market Analysis	
	Marketing Plan	
Active Marketing	Appendix w/ Verifiable Supplemental Documentation	Founder/Business Records
	Social Media Links	
Business Financials and Proof of Operations	Website(s) and Landing Page(s)	DSRC Comprehensive Business Activity Workbook
	Active Business Bank Account	
	3-Years of Monthly Balance Sheets	
	3-Years of Profit and Loss Statements	
Financial Projections	3-Years of Federal and State Tax Returns	Founder/Business Records
	Sources and Uses Budget/Startup Costs Budget	
	Revenue Assumptions	
	Expense Assumptions	
	1-Year Monthly Financial Projections	
Commercial Property Information for Existing and Aspiring Brick and Mortar Businesses	5-Year Annual Financial Projections	DSRC Comprehensive Financial Projections Template
	Purchase Agreement, Lease, or Letter of Intent	
	Commercial Property, Location, and/or Site Photos	
Proposals for Professional Services (for applications with related costs)	Professional Quotes for Construction/Engineering	DSRC Retail Readiness Guide: Part I: Retail Leasing and Part II: Commercial Construction
	Scope(s) of Work for Professional Services	
Personal and Professional Information	Proposals and Quotes for Business Services	DSRC Professional Services Guide
	Founders, Owners, and Management Team Resumes	
Branding	Management Team Certifications and Licenses	Founder/Business Records
	Product Photos	
Branding	Logos and/or Branding Plans	Founder/Business Records