



# Documentation Checklist

Name of Organization: \_\_\_\_\_

## **Requests less than or equal to \$1,000.00:**

- Contact information of the organization including the physical address.
- Taxpayer identification number of the organization.
- Internal Revenue Service tax exemption letter 501(c) 3.
- Actual dollar amount requested by the organization.
- The intended use of proceeds of the contribution including expected results from program or project.

## **Requests greater than \$1,000.00:**

- Actual dollar amount requested by the organization.
- The intended use of the proceeds of the contribution, including expected measurable results from the program or project.
- Description of the organization including the mission or vision statement and the organization's benefit to the community and targeted clients.
- A brief history of the organization including current programs offered and program objectives and accomplishments.
- The geographic areas that the organization and its programs serve.
- Most recent audited financial statement.
- List of officers and directors of the organization.
- Internal Revenue Service Form 990
- Taxpayer identification number of the organization.
- Internal Revenue Service tax exemption letter 501(C)3.
- Annual budget of the organization including projected income and expenses.
- List of major donors