THE STRATEGY COUNSEL

# FUNDING
# THE FUTURE

THE PRACTICAL ROADMAP TO BECOMING

**FUNDABLE • BANKABLE • CAPITAL-READY**

| BUILD | PROVE | POSITION | MATCH | APPLY | MANAGE |
| --- | --- | --- | --- | --- | --- |
| legal foundation | financial readiness | story + evidence | right capital | strong package | award + growth |

A comprehensive funding-readiness system for entrepreneurs, nonprofits, founders and purpose-driven organizations.

**INSIDE**

Funding lanes • grants • loans • CDFIs • business credit • government contracts • sponsorships • investor readiness • financial statements • document vaults • due diligence • 90-day action plan

**COMPLIMENTARY CLIENT RESOURCE**

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# Guide at a Glance

A practical sequence from legal foundation to funding stewardship.

Funding readiness is not one application. It is a system of evidence, discipline and repeatable execution.

| STEP | ROADMAP |
|---|---|
| 01 | Choose the Right Funding Strategy |
| 02 | Build the Legal & Compliance Foundation |
| 03 | Make the Financials Fundable |
| 04 | Build the Funding-Ready Document Vault |
| 05 | Build a Compelling Funding Case |
| 06 | Prove Capacity, Impact & Traction |
| 07 | Create a Funding Pipeline |
| 08 | Win More Grants |
| 09 | Use Debt Strategically |
| 10 | Build Business Credit the Right Way |
| 11 | Business Credit: What Not to Do |
| 12 | Pursue Government Contracts |
| 13 | Add Sponsorships, Partnerships & Earned Revenue |
| 14 | Prepare for Investors & Growth Capital |
| 15 | Submit, Negotiate & Survive Due Diligence |
| 16 | Manage the Money After You Win |
| 17 | 90-Day Funding Readiness Roadmap |
| 18 | Resource Directory |

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# How to Use This Guide

This is a readiness system - not a list of random grants.

The goal is to help you build an organization that can survive funder, lender, investor and procurement scrutiny - and then choose the capital that fits the job.

## Which funding lane should you pursue?

| Decision question | Direction |
|---|---|
| Do you have reliable revenue to repay debt? | If no: ask whether the work is charitable/public-benefit. If yes, debt may fit. |
| Is the work charitable / public-benefit? | Grants, philanthropy, sponsorships - or contracts/earned revenue where appropriate. |
| Is ownership dilution acceptable? | If yes and the model can scale, investor/equity capital may fit. |
| Can you deliver a defined product or service? | Contracts and earned revenue may be the strongest lane. |

**CORE PRINCIPLE**

Do not ask, 'Where can I get money?' first. Ask: 'What kind of capital fits this use, what will the provider underwrite, and what evidence must we produce?'

## The 5 questions every funding decision should answer

- What exactly will the money pay for?
- Does the money need to be repaid, restricted to a purpose, or exchanged for ownership?
- What evidence proves we can execute?
- What financial condition must be true before we apply?
- What happens after the money arrives - reporting, repayment, milestones, or investor governance?

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## Funding Readiness Snapshot

Score the organization before choosing the next funding opportunity.

Rate each area from 0 (not in place) to 2 (ready and documented). A high score does not guarantee funding; it shows how much preparation is likely needed before applying.

| READINESS AREA | SCORE |
|---|---|
| Legal standing & registrations | 0 1 2 |
| Governance / ownership records | 0 1 2 |
| Current bookkeeping & financial statements | 0 1 2 |
| Operating and use-of-funds budgets | 0 1 2 |
| Clear funding request and use of proceeds | 0 1 2 |
| Evidence of traction / impact | 0 1 2 |
| Document vault / data room | 0 1 2 |
| Qualified funding pipeline | 0 1 2 |
| Application / lender / bid package | 0 1 2 |
| Post-award controls and reporting | 0 1 2 |

**INTERPRET YOUR SCORE**

16-20: Strong foundation - focus on fit, positioning and execution.
10-15: Promising but incomplete - close the highest-risk gaps before major applications.
0-9: Build readiness first - legal, financial and documentary weaknesses may undermine otherwise strong opportunities.

The fastest path to funding is often not more applications. It is removing the reasons a strong opportunity would say no.

01

# Choose the Right Funding Strategy

Match the capital to the organization, purpose, timing, risk and repayment capacity.

## The capital stack: ways to bring money into the organization

| Lane | Examples | Best fit |
|---|---|---|
| Earned revenue | Sales • service contracts • memberships • subscriptions • licensing | Operations, growth and repeatable demand |
| Non-dilutive | Grants • sponsorships • donations • prizes • rebates | Eligible mission or program outcomes |
| Debt | Lines of credit • term loans • equipment financing • CDFI • SBA-backed loans | Uses that can support repayment |
| Equity | Founder capital • angels • strategic investors • venture capital | Scalable growth where dilution makes sense |
| Public / contract | Federal, state & local contracts • subcontracts • procurement | Defined goods/services with compliant delivery |

Capital is a tool. The strongest funding plan often combines several tools instead of depending on a single source.

## Compare the primary funding sources

| Source | Best use | What provider tests | Primary risk |
|---|---|---|---|
| Earned revenue | Operations and growth | Demand, pricing, delivery | Sales may be slower than expected |
| Grant / donation | Mission programs and eligible projects | Need, outcomes, compliance, stewardship | Restricted use; competitive |
| Sponsorship | Events, audiences, community programs | Brand alignment and visibility | Must deliver sponsor value |
| Debt | Equipment, working capital, expansion | Repayment capacity, credit, cash flow | Fixed repayment obligation |
| Equity | High-growth scalable business | Market, traction, team, return potential | Dilution and governance rights |
| Government contract | Defined goods/services | Capacity, pricing, registration, performance | Compliance and performance burden |

## Build your funding objective

**WORKSHEET**

Amount needed: $__________ Use of funds: ____________________
Needed by: __________ Primary lane: __________ Secondary lane: __________
Success milestone the money will unlock: ______________________________

**DECISION RULE**

Use grants for eligible mission outcomes, debt for needs that can generate or preserve repayment cash flow, equity for scalable growth where dilution makes sense, and contracts when you can reliably deliver a defined product or service.

02

# Build the Legal & Compliance Foundation

Funders first need confidence that the organization legally exists, is authorized to act, and can receive and manage capital.

## Entity integrity checklist

- Legal name is identical across formation documents, EIN records, bank account, contracts and applications.
- Entity is active and in good standing in its formation state.
- Registered agent, principal office and responsible-party information are current.
- EIN confirmation is retained in permanent records.
- Bylaws, operating agreement or other governing documents are signed and current.
- Board, officer, member and ownership records are current.
- Required annual reports, tax filings, licenses and registrations are current.
- Bank account is in the legal entity's name and organizational funds are not commingled with personal funds.
- Authority to borrow, apply, contract and accept awards is documented when required.
- Material contracts, insurance and intellectual property ownership are organized.

## Nonprofit readiness overlay

- IRS exemption status is confirmed; determination letter is accessible if issued.
- Form 990-series filing history is current where required.
- Board composition, minutes/consents and conflict-of-interest practices are documented.
- Programs clearly further the organization's exempt purposes.
- Restricted gifts and grant funds can be tracked separately.
- Charitable solicitation requirements are reviewed in states where fundraising occurs.

| | |
|---|---|
| **OFFICIAL RESOURCES** | IRS EIN: irs.gov/businesses/employer-identification-number<br>IRS Charities & Nonprofits: irs.gov/charities-non-profits |

03

# Make the Financials Fundable

A strong story cannot compensate for financial records that are late, inconsistent, unexplained or disconnected from the funding

## The financial package

| Document | Why it matters | Target condition |
|---|---|---|
| P&L / Statement of Activities | Shows revenue, expenses and operating performance | Current YTD plus prior periods |
| Balance Sheet / Financial Position | Shows assets, liabilities and liquidity | Reconciled and explainable |
| Cash Flow Forecast | Shows timing of cash needs and runway | 12 months, monthly |
| Operating Budget | Shows management discipline | Approved / internally adopted |
| Project / Use-of-Funds Budget | Connects request to execution | Every dollar has a purpose |
| Debt Schedule | Shows existing obligations | Balance, rate, payment, maturity |
| Tax Returns / Form 990 | Third-party history | Filed and consistent with books |

## Three numbers every founder or executive should know

| | |
|---|---|
| **1. BREAK-EVEN** | The monthly revenue or funding level needed to cover recurring costs. |
| **2. RUNWAY** | How many months the organization can operate with available unrestricted cash at the current burn rate. |
| **3. DEBT CAPACITY** | Whether cash flow can support the proposed payment after existing obligations and a reasonable cushion. |

## Funding budget stress test

- Does every narrative activity appear in the budget?
- Do totals match everywhere in the application?
- Are payroll taxes, benefits, insurance, technology, evaluation and administration included where relevant?
- Are one-time and recurring costs separated?
- Can you explain the basis for every major line item?
- If the award is delayed, do you have enough liquidity to start?
- What happens when the grant period or borrowed funds end?

04

# Build the Funding-Ready Document Vault

A secure data room turns funding from a scramble into a repeatable operating process.

## The funding data room

| ENTITY | GOVERN | FINANCE | PROOF | DEALS | APPLY |
|---|---|---|---|---|---|
| formation + EIN | board / ownership | statements + tax | impact + traction | contracts + MOUs | applications + awards |

## Recommended folders

- 01 Formation & Good Standing
- 02 EIN / Tax / Exemption
- 03 Governance / Ownership
- 04 Banking / Financial Statements
- 05 Budgets / Forecasts / Debt
- 06 Programs / Products / Services
- 07 Leadership / Board / Resumes
- 08 Impact / Traction / Customers
- 09 Contracts / MOUs / Partnerships
- 10 Insurance / Licenses / Certifications
- 11 Funding Applications / Pitch Materials
- 12 Awards / Reporting / Closeout

## File naming standard

YYYY-MM-DD_DocumentType_EntityName_Version - Example: 2026-08-01_YTD-PandL_ABC-Foundation_Final.pdf

**CONTROL ACCESS**

Keep sensitive tax, banking, payroll, ownership and identity documents in a secure system. Share only what a specific funder or diligence process requires.

05

# Build a Compelling Funding Case

The application should connect need, solution, execution, evidence, money and measurable change in one coherent story.

## The 8-part funding narrative

| Part | Question to answer |
|---|---|
| 1. Need / opportunity | What problem or opportunity exists, for whom, and why now? |
| 2. Solution | What exactly do you do? |
| 3. Differentiation | Why is your approach credible or distinct? |
| 4. Evidence | What traction, outcomes, customers, pilots or partnerships prove execution? |
| 5. Request | How much are you seeking and for what? |
| 6. Work plan | Who will do what, by when? |
| 7. Measurement | What outputs and outcomes will be tracked? |
| 8. Sustainability | How does the work continue after this funding period? |

## Fill-in-the-blank 60-second funding story

**TEMPLATE**

We serve [WHO] by [WHAT YOU DO]. The problem/opportunity is [WHY IT MATTERS]. We have demonstrated [TRACTION/EVIDENCE]. We are seeking [$ AMOUNT] to [USE OF FUNDS]. This will allow us to [MEASURABLE RESULT] by [DATE].

## Evidence beats adjectives

- Replace 'we have strong community support' with named partners, signed MOUs, referral volume or letters.
- Replace 'we are growing quickly' with revenue, customer, participant or pipeline growth.
- Replace 'our program works' with completion, retention, outcome or evaluation data.

06

# Prove Capacity, Impact & Traction

Funders are underwriting execution. Build a record that shows you can convert resources into results.

## Build an evidence dashboard

| Type | Business examples | Nonprofit examples |
|---|---|---|
| Demand | Leads, conversion, backlog, repeat customers | Waitlist, referrals, enrollment, partner demand |
| Performance | Revenue, gross margin, retention, delivery time | Completion, attendance, outcomes, cost per participant |
| Capacity | Staffing, systems, vendors, production | Staff, volunteers, curriculum, case management |
| Credibility | Contracts, testimonials, certifications | MOUs, letters, evaluations, board expertise |
| Sustainability | Recurring revenue, pipeline, reserves | Diversified revenue, donor retention, earned income |

## Metric design

- Output: what you delivered - e.g., 100 workshops.
- Outcome: what changed - e.g., 72% completed a credential.
- Efficiency: resources used per result - e.g., cost per participant served.
- Quality: satisfaction, error rate, on-time completion, retention.
- Growth: year-over-year revenue, clients, participants, contracts or geographic reach.

**DO NOT MANU FACTURE IMPACT**

Use only data you can support. If measurement is weak, state the baseline and build the measurement system into the funding request.

07

# Create a Funding Pipeline

Treat funding like business development: research, qualify, cultivate, apply, follow up, learn and repeat.

## Opportunity qualification scorecard

- Eligibility: we meet every mandatory requirement.
- Entity type and geography are eligible.
- Use of funds matches what we actually need.
- Award/loan size is appropriate for our scale.
- Deadline and implementation period are realistic.
- We can satisfy match/cost-share requirements, if any.
- We can demonstrate required track record or past performance.
- We can collect and report required metrics.
- The strategic value justifies the application effort.
- We understand the relationship path: cold application, introduction, lender conversation, pre-application, procurement forecast, etc.

## Pipeline tracker fields

| Source | Lane | Amount | Deadline | Fit / 10 | Owner | Next action |
|---|---|---|---|---|---|---|
| Example Foundation | Grant | $50,000 | Oct. 15 | 9 | ED | Request intro |
| CDFI lender | Debt | $100,000 | Rolling | 8 | CEO | Prepare projections |
| City procurement | Contract | $75,000 | Nov. 1 | 7 | COO | Attend pre-bid |

**PIPELINE MATH**

Do not rely on one application. Build a portfolio of high-fit opportunities at different stages while protecting staff capacity and application quality.

08

# Win More Grants

Grant success starts before the writing: eligibility, alignment, evidence, budget discipline and compliance.

## Federal grant application path

| SAM | UEI | GRANTS.GOV | SEARCH | WRITE | SUBMIT |
|---|---|---|---|---|---|
| register entity | verify identifier | create account | qualify NOFO | matrix + narrative | early + confirm |

## Grant application workflow

- Read the entire notice/RFP before drafting.
- Create a compliance matrix with every requirement, attachment, page limit and scoring factor.
- Map each proposed activity to a stated funder priority.
- Build the budget before finalizing the narrative.
- Use credible evidence to define need.
- Name who will implement each major activity.
- Define outputs, outcomes, data source and reporting frequency.
- Gather attachments early - do not leave registrations or signatures to the last day.
- Score your draft against the funder's published rubric.
- Have a second reviewer check eligibility, numbers, clarity and attachments.
- Submit early enough to correct portal or validation errors.

**OFFICIAL RESOURCES**

Grants.gov Applicant Registration: grants.gov/applicants/applicant-registration
SAM.gov Entity Registration: sam.gov/entity-registration
Candid: candid.org/candid-search/find-nonprofit-funding/

09

# Use Debt Strategically

Debt can accelerate growth when the use of funds creates or protects enough cash flow to support repayment.

## Debt decision tree

| Question | If YES | If NO |
|---|---|---|
| Will the use of funds generate or preserve cash flow? | Continue diligence | Grant/equity/revenue may fit better |
| Can projected cash flow support payment plus cushion? | Review terms | Reduce amount or fix economics |
| Are books, taxes and bank records current? | Package application | Clean financials first |
| Is the need short-term and revolving? | Consider line of credit | Consider term/equipment financing |
| Is collateral/equity contribution required? | Document availability | Seek products with different structure |

## Loan package checklist

- Loan amount and use of proceeds.
- Business plan or lender narrative.
- YTD and historical financial statements.
- 12-24 month projections with assumptions.
- Business and personal tax returns if requested.
- Business debt schedule.
- Ownership information and management resumes.
- Bank statements.
- Collateral schedule if relevant.
- Explanation of credit issues, unusual losses or one-time events.
- Repayment source and contingency plan.

**RESOURCES**

SBA Loans / Lender Match: sba.gov/funding-programs/loans
CDFI Fund: cdfifund.gov

10

# Build Business Credit the Right Way

Business credit is not a shortcut to cash. It is a record of how the business meets obligations, supported by consistent identity,

## Business credit ladder - build the file before you need the money

| | |
|---|---|
| 1 IDENTITY | legal entity + EIN |
| 2 SEPARATION | banking + bookkeeping |
| 3 REPORTING | verify business credit files |
| 4 TRADE HISTORY | commercially appropriate reporting |
| 5 PAYMENT DISCIPLINE | pay on time + protect cash flow |
| 6 BANKABILITY | revenue + statements + capacity |

## Business credit foundation checklist

- Form and maintain the business entity appropriately.
- Obtain the EIN directly from the IRS and keep confirmation.
- Use a dedicated business bank account in the legal name.
- Keep business identity information consistent across state, IRS, bank, vendors and credit files.
- Use a dedicated business phone/email/address appropriate for the business.
- Check whether the business has an existing commercial credit file.
- Correct inaccurate business identity information.
- Use credit only for legitimate business purposes and only when repayment is affordable.
- Ask vendors/lenders whether and where payment history is reported; not all accounts report.
- Pay obligations on time and monitor cash flow.
- Keep utilization and total debt at levels the business can support.
- Build revenue, profitability and liquidity - credit scores do not replace repayment capacity.

11

# Business Credit: What Not to Do

Protect the business from expensive shortcuts and misinformation.

- Do not buy unnecessary vendor accounts simply to create 'tradelines.'
- Do not assume an EIN eliminates personal guarantees; many products still consider owner credit or require guarantees.
- Do not stack multiple high-cost products without modeling total payment burden.
- Do not misstate revenue, time in business, ownership, address or intended use of proceeds.
- Do not pay for an EIN - the IRS issues it free.

**RESOURCES**

Experian Business Credit: experian.com/small-business/establish-business-credit
IRS EIN: irs.gov/businesses/employer-identification-number

12

# Pursue Government Contracts

Government contracting is earned revenue: the agency buys a defined good or service and expects compliant performance.

## Contracting readiness roadmap

| DEFINE | REGISTER | PACKAGE | TARGET | BID | PERFORM |
|---|---|---|---|---|---|
| what you sell | SAM / identifiers | capability statement | buying agencies | price + comply | document results |

## Capability statement essentials

- Core competencies - exactly what you deliver.
- Differentiators - why your company is a strong choice.
- Past performance - relevant clients, projects and outcomes.
- Company data - legal name, UEI/CAGE when applicable, NAICS codes, contact.
- Certifications - only those actually held.
- Contract vehicles / geographic capacity where relevant.

## Bid / no-bid screen

- Can we meet every mandatory requirement?
- Can we perform on schedule with current or obtainable capacity?
- Can we price competitively and still make an acceptable margin?
- Do we have relevant past performance or a teaming strategy?
- Can we satisfy insurance, bonding, cybersecurity or reporting terms?

**RESOURCES**

SAM.gov: sam.gov
MBDA Business Centers: mbda.gov/business-resources/business-centers

13

# Add Sponsorships, Partnerships & Earned Revenue

Diversification makes organizations less dependent on a single grant, lender or donor.

## Ways to bring in funding without giving up ownership

| Method | How it works | Best preparation |
|---|---|---|
| Corporate sponsorship | Company pays for audience/community/brand alignment | Sponsor deck, audience data, benefits, fulfillment plan |
| Membership / subscription | Recurring payment for access, content or service | Clear recurring value and retention plan |
| Fee-for-service | Organization sells expertise or program delivery | Pricing, scope, contracts, delivery capacity |
| Licensing | Others pay to use IP, curriculum, content or brand | Ownership, license terms, quality control |
| Events / training | Tickets, cohorts, workshops, conferences | Demand, pricing, marketing, margin model |
| Strategic partnership | Partner funds or co-delivers initiative | Shared goals, roles, budget, MOU/contract |
| Purchase orders / contracts | Customer commits to buy defined output | Capacity, working capital, terms |

## Sponsorship value equation

**SPONSOR ASKS**

Who will we reach? Why does that audience matter? What visibility or activation will the sponsor receive? What community or business outcome is created? How will we prove delivery?

## Revenue diversification test

- No single source creates unacceptable concentration risk.
- Recurring revenue is distinguished from one-time revenue.
- Restricted grant money is not treated as unrestricted operating cash.
- Pricing covers direct delivery plus a fair share of overhead.
- Partnerships have written roles, ownership, payment and reporting terms.

14

# Prepare for Investors & Growth Capital

Equity capital can support high-growth businesses, but the founder exchanges ownership and often governance rights for capital.

## Investor readiness checklist

- Clear market problem and target customer.
- Large enough market and credible growth path.
- Product/service differentiation.
- Traction: revenue, users, contracts, pilots or retention.
- Unit economics and gross margin understood.
- Customer acquisition assumptions supported.
- Cap table is accurate.
- Intellectual property ownership is clear.
- Financial model shows how capital changes milestones.
- Raise amount is tied to specific milestones and runway.
- Data room is organized.
- Founder understands dilution, liquidation preferences, board rights and information rights before signing.

## Use-of-funds milestone map

| Capital use | Example milestone | Evidence after deployment |
|---|---|---|
| Sales hires | Build repeatable pipeline | Qualified pipeline + closed revenue |
| Technology | Launch product version | Usage + retention + reliability |
| Equipment | Increase production capacity | Units, margin, delivery time |
| Market expansion | Enter 2 new regions | Customers + revenue by region |

**INVESTOR WARNING**

Equity is not 'free money.' The economic and governance cost can be substantial. Obtain appropriate legal and tax advice before issuing ownership interests.

15

# Submit, Negotiate & Survive Due Diligence

A strong application can still fail if documents contradict one another, diligence questions cannot be answered, or terms are

## Three-review submission system

| Review | Questions |
|---|---|
| Eligibility | Are we allowed to apply? Are registrations active? Are all mandatory conditions met? |
| Substance | Is the case persuasive, evidence-based, measurable and financially coherent? |
| Technical | Are limits, attachments, signatures, file formats, dates and portal requirements correct? |

## Due diligence room

- Formation and ownership/governance records.
- Tax filings and good-standing evidence.
- Financial statements and bank records requested.
- Material contracts, leases and debt.
- Insurance and licenses.
- Intellectual property ownership.
- Litigation/regulatory disclosures when required.
- Customer concentration / major funder concentration.
- Management resumes and organizational chart.
- Policies, internal controls and award-management procedures.

## Terms to slow down and read

- Grant restrictions, match requirements, clawbacks and reporting.
- Loan rate, fees, amortization, maturity, collateral, covenants and guarantees.
- Investor dilution, voting, board, liquidation and information rights.
- Contract indemnity, insurance, termination, payment timing and performance standards.

16

# Manage the Money After You Win

Fundability includes stewardship. Build the controls before the award, loan or contract hits the bank account.

## Award / capital management checklist

- Read and summarize the final agreement before funds are used.
- Create accounting classes/codes for restricted projects or contracts.
- Calendar milestones, reporting dates, payment dates and renewals.
- Assign one accountable owner for financial and performance reporting.
- Maintain receipts, invoices, time records and contracts required by the agreement.
- Reconcile project spending to the approved budget monthly.
- Track outputs/outcomes while the work is happening, not at the end.
- Seek approval before material scope or budget changes when required.
- Monitor debt covenants and cash flow.
- Report problems early rather than hiding delays.
- Complete final reporting, closeout and document retention.

**STEWARDSHIP PRINCIPLE**

The next funding decision is often influenced by how well you managed the last one. Clean reporting, timely communication and documented results become future credibility.

17

# 90-Day Funding Readiness Roadmap

Turn this guide into a disciplined sprint that produces a funding-ready organization and a live pipeline.

| Days | Focus | Key outputs |
|---|---|---|
| 1-15 | Legal + compliance | Good standing, EIN/tax records, governance/ownership, bank, compliance calendar |
| 16-30 | Financial cleanup | Reconciled books, statements, operating budget, cash flow, debt schedule |
| 31-45 | Funding package | One-pager, case for funding, resumes, capability statement, use-of-funds budget |
| 46-60 | Evidence | Impact dashboard, traction, contracts, MOUs, testimonials/letters where appropriate |
| 61-75 | Pipeline | 20-30 researched prospects; ranked shortlist; relationship and application calendar |
| 76-90 | Execution | 2-5 high-fit submissions/conversations; lender package; procurement targets; follow-up system |

## Weekly operating rhythm

| Day | Funding discipline |
|---|---|
| Monday | Financials, compliance and data room |
| Tuesday | Research and qualification |
| Wednesday | Narratives, budgets and application production |
| Thursday | Funder, lender, sponsor, partner and agency relationship-building |
| Friday | Submit, follow up, update tracker, document lessons learned |

## Your next 10 actions

1. ________________________________________
2. ________________________________________
3. ________________________________________
4. ________________________________________
5. ________________________________________
6. ________________________________________
7. ________________________________________
8. ________________________________________
9. ________________________________________
10. ________________________________________

18

# Resource Directory

Use official sources first. Requirements change; always verify the current rules on the governing program website.

| Resource | Purpose |
|---|---|
| U.S. Small Business Administration - Funding Programs | sba.gov/funding-programs - funding overview, including loans and other small-business resources. |
| SBA Loans / Lender Match | sba.gov/funding-programs/loans - explore SBA-backed loan programs and participating lenders. |
| Internal Revenue Service - EIN | irs.gov/businesses/employer-identification-number - official EIN guidance and free application. |
| IRS Charities & Nonprofits | irs.gov/charities-non-profits - federal tax-exempt organization guidance. |
| SAM.gov | sam.gov - federal entity registration, contract opportunities and award information. |
| Grants.gov | grants.gov/applicants/applicant-registration/ - federal grant applicant registration and guidance. |
| Candid | candid.org/candid-search/find-nonprofit-funding/ - nonprofit/foundation research and grant prospecting. |
| CDFI Fund | cdfifund.gov - Treasury resources and databases for Community Development Financial Institutions. |
| MBDA Business Centers | mbda.gov/business-resources/business-centers - capital, contracting, markets and capacity support. |
| Experian Business Credit | experian.com/small-business/establish-business-credit - commercial credit education and business credit file resources. |

**IMPORTANT**

This guide is educational and strategic. It does not guarantee funding, approval, eligibility, tax treatment or a legal outcome. Requirements vary by funder, lender, investor, program and jurisdiction. Verify current requirements and obtain appropriate legal, tax, accounting or financial advice for your circumstances.

# READY TO MOVE FROM FUNDING SEARCH TO FUNDING READINESS?

Use this guide as your operating roadmap: strengthen the foundation, organize the evidence, choose the right capital, build a qualified pipeline, and execute with discipline.

| | |
|---|---|
| **THE STRATEGY COUNSEL** | Fundable. Visible. Compliant. |