



Get Organized to Get Funded

Organize the records, files, and proof your organization needs before asking for money.

THE STRATEGY COUNSEL

FUNDABLE • VISIBLE • COMPLIANT



Welcome: Why Organization Matters

Funding opportunities don't wait. When a grant portal opens, a lender requests financials, or a sponsor asks for your media kit — you have days, not weeks, to respond. Founders who are organized move faster, appear more credible, and close more opportunities.

The Hard Truth

Most founders lose funding not because they're unqualified — but because they can't produce the right documents at the right time.

What This Webinar Covers

- The 6 essential document categories every founder needs
- How to build your Founder File Cabinet
- Naming conventions, storage tips, and gap identification
- Free downloads to get you started today

Disorganization Blocks Opportunity

Every time you scramble to find a document, recreate a file, or submit incomplete paperwork, you signal risk to the people you're trying to impress. Funders, lenders, and partners are evaluating your readiness — not just your idea.

Missed Deadlines

Grant applications and loan packages have firm cutoffs. Disorganized founders miss them or submit incomplete packages.

Lost Credibility

Asking a funder to "give you a few days" to find your 990 or incorporation papers signals unreadiness.

Delayed Funding

Missing or outdated documents stall approvals, trigger follow-up requests, and push funding timelines back by weeks.

Compliance Risk

Poorly maintained records can expose your organization to audit risk, legal liability, or loss of tax-exempt status.

 Organized founders don't just look professional — they get funded faster.

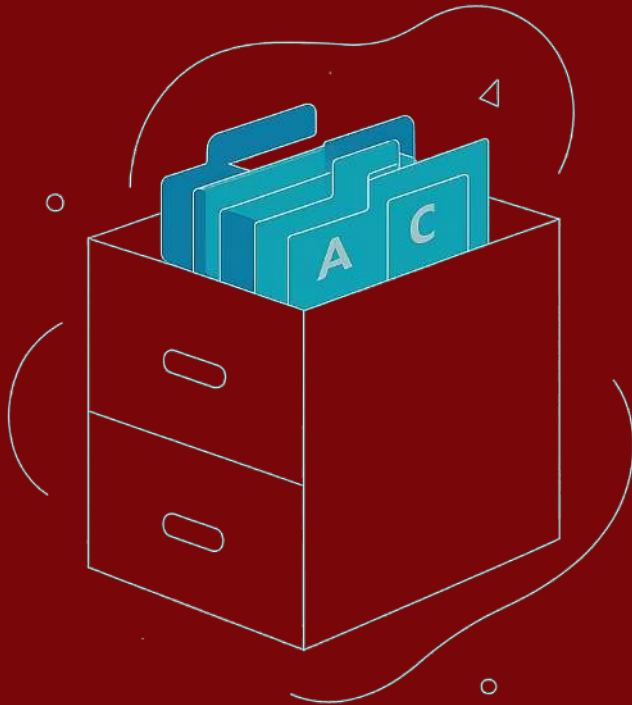
What Funders, Lenders, Sponsors & Partners May Ask For

Different funding sources require different documents – but the overlap is significant. Building one strong document system prepares you for all of them.

Grant Funders	Banks & Lenders	Sponsors	Contracts & Partners
IRS Determination Letter	2–3 Years of Financials	Media Kit / One-Pager	W-9 / EIN Verification
Articles of Incorporation	Business Plan	Audience Demographics	Certificate of Insurance
Program Descriptions	Personal Credit / Tax Returns	Logo & Brand Assets	Signed Agreements
Board List & Bylaws	Collateral Documentation	Social Proof / Testimonials	Professional References

The Founder File Cabinet Concept

Think of your document system as a **physical file cabinet with six labeled drawers**. Every drawer holds a category of records. When someone asks for a document, you open the right drawer and hand it over — no scrambling, no searching, no delay.



1

Build

Create the six folder categories for your organization

2

Populate

Gather and upload your current documents into each folder

3

Maintain

Update records annually and after every major change

4

Deploy

Share confidently when funders, lenders, or partners ask

Legal Documents

Your legal documents prove that your organization exists, is properly structured, and has the authority to operate. These are the foundation of every funding relationship.

Why It Matters

Funders and lenders need to verify your legal standing before releasing any funds. Missing legal docs can disqualify an otherwise strong application.

Documents to Have Ready

- Articles of Incorporation or Organization
- IRS EIN Assignment Letter
- IRS 501(c)(3) Determination Letter (nonprofits)
- State Business License or Registration
- Bylaws or Operating Agreement
- Board Member List with contact information
- DBA / Trade Name Registration (if applicable)



Keep both digital and physical copies. Store the originals in a fireproof location and scanned PDFs in cloud storage.

Financial Documents

Financial documentation demonstrates that your organization manages money responsibly. Funders want to see where your money comes from, where it goes, and whether you're sustainable.

Tax Records

Last 2–3 years of filed tax returns (Form 990 for nonprofits; 1120 or Schedule C for businesses). Keep IRS acceptance confirmations.

Financial Statements

Income statement (P&L), balance sheet, and cash flow statement. These should be current and ideally reviewed or compiled by a CPA.

Banking Records

3–6 months of business bank statements. Some lenders require 12 months. Keep a dedicated organizational bank account — separate from personal.

Budget Documents

Current operating budget and any project-specific budgets tied to grant or funding requests. Show planned vs. actual spending.

Program or Offer Documents

Funders and sponsors need to understand exactly what you do, who you serve, and what results you produce. These documents tell your program story with clarity and evidence.



Program Descriptions

One-page summaries for each program, service, or offering. Include goals, target population, activities, and expected outcomes.



Impact Data & Reports

Statistics, metrics, and annual or program reports that demonstrate measurable outcomes. Include participant numbers and success rates.



Testimonials & Case Studies

Written or video testimonials from clients, beneficiaries, or partners. Real stories create emotional resonance and credibility.



Logic Models or Program Plans

Visual or narrative logic models showing inputs, activities, outputs, and outcomes. Commonly required for government and foundation grants.

Compliance Records

Compliance documentation proves that your organization is operating legally, ethically, and in accordance with its governing rules. These records protect you during audits and instill confidence in funders.

Nonprofit Compliance

- Annual state charitable registration renewals
- IRS Form 990 filings (last 3 years)
- Board meeting minutes (annual & special meetings)
- Conflict of interest policy (signed annually)
- Whistleblower and document retention policies

Business & Ministry Compliance

- State business registration renewals
- Professional licenses and certifications
- Certificate of Good Standing (from Secretary of State)
- HR policies and employee handbooks
- Insurance certificates (general liability, D&O, etc.)

Many founders neglect compliance records until they're asked for them. Don't wait — an expired registration or missing policy can stall a six-figure funding decision.

Brand & Visibility Documents

Sponsors, media partners, and donors want to know who you are publicly. Your brand documents communicate professionalism, reach, and relevance — and make it easy for partners to say yes.



Organization One-Pager

A clean, current summary of your mission, programs, impact, and contact info. Updated at least annually.



Sponsor & Media Kit

Your audience demographics, reach, social following, past partnerships, and sponsorship tiers in a polished PDF format.



Brand Asset Folder

High-resolution logo files (PNG, SVG), brand colors, fonts, and style guide. Sponsors and press require these for co-branding.



Digital Presence Links

Active website URL, verified social media handles, and Google Business profile. Funders will search for you before responding.

Contracts & Agreements

Every formal relationship your organization enters should be governed by a signed agreement. These documents protect you legally and signal professionalism to partners, funders, and clients.

Vendor Contracts

Agreements with suppliers, contractors, and service providers. Include scope, payment terms, and termination clauses.

MOU / Partnership Agreements

Memorandums of Understanding with partner organizations, referral agencies, and collaborators. Funders often request these as evidence of community ties.

Grant & Funding Agreements

Signed award letters, grant agreements, and loan documents. Store with the corresponding reporting requirements and deadlines.

Client / Service Agreements

Standard service contracts, engagement letters, or client agreements. Demonstrates professional operations and protects against disputes.

Maintain a contracts log that tracks parties, dates, renewal deadlines, and key terms. Never rely on memory alone.

Passwords, Accounts & Digital Assets

Your organization's digital infrastructure is part of your document readiness. If the founder is unavailable — or if the organization grows — someone else must be able to access critical systems. Disorganized digital access is a major operational risk.

1

Password Manager

Use a secure password manager (e.g., LastPass, 1Password, Bitwarden) to store all organizational login credentials. Never store passwords in a spreadsheet.

2

Account Inventory

Maintain a master list of all platforms: banking, email, social media, CRM, grant portals, and cloud storage — with login owner and recovery email.

3

Domain & Hosting Records

Document your domain registrar, web host, DNS settings, and SSL renewal dates. Losing domain access can shut down your online presence overnight.

4

Cloud Storage System

Store all critical documents in an organizational Google Drive, Dropbox, or SharePoint — not in personal accounts. Set access permissions intentionally.

What to Store in Each Folder

Use this as your master reference for populating your Founder File Cabinet. Each folder should contain current, complete, and clearly labeled files.

Folder	Key Documents	Update Frequency
Legal	Articles, EIN letter, 501(c)(3), Bylaws, Board list	As changes occur
Financial	Tax returns, P&L, Balance sheet, Bank statements, Budget	Monthly / Annually
Programs	Program descriptions, Impact data, Logic models, Testimonials	Annually / Per program
Compliance	Registrations, 990s, Board minutes, Policies, Insurance	Annually
Brand	One-pager, Media kit, Logo files, Brand guide, Social links	Annually / As needed
Contracts	Vendor, MOU, Grant agreements, Client contracts	Per agreement

How to Name & Organize Your Files

Consistent file naming is one of the highest-value, lowest-cost investments you can make in your organization. A clear naming convention eliminates confusion, saves time, and makes sharing documents effortless.

Recommended Naming Format

[OrgName]_[DocumentType]_[Year]_[Version]

Examples:

- StratCounsel_Articles_2022_Final.pdf
- StratCounsel_Form990_2023.pdf
- StratCounsel_ProgramReport_2024_v2.pdf
- StratCounsel_SponsorKit_2025.pdf

File Organization Rules

- Always use PDF format for final, signed documents
- Never use spaces in file names – use underscores or hyphens
- Label drafts clearly: _DRAFT or _v1, _v2
- Archive outdated documents in a subfolder labeled **_Archive**
- Back up everything to at least two locations (cloud + local drive)
- Review and purge outdated files every January

Common Document Gaps

These are the documents most founders discover they're missing — only after a funder or lender asks for them. Identify your gaps now, before opportunity knocks.



No IRS Determination Letter on File

Many nonprofit founders cannot locate their original 501(c)(3) letter. Request a replacement from the IRS immediately using Form 4506-A.



Outdated or Unsigned Bylaws

Bylaws that haven't been reviewed, updated, or signed by current board members raise governance red flags for foundation funders.



Missing or Unfiled Tax Returns

Lenders require 2-3 years of returns. Unfiled returns signal financial mismanagement and can disqualify you from most funding sources.



No Formal Program Descriptions

Many founders describe their work verbally but have nothing written down. Grant applications require detailed, written program narratives — not improvised descriptions.



Expired Registrations & Licenses

An expired state charitable registration or business license signals non-compliance and can instantly disqualify a funding application.

The 6 Founder File Categories – Recap

Your entire document readiness system fits into six categories. Master these six folders and you'll be prepared for virtually any funding, lending, or partnership conversation.



1. Legal

Formation, registration, and governing documents



2. Financial

Tax returns, statements, budgets, and banking records



3. Programs

Descriptions, impact data, logic models, and testimonials



4. Compliance

Registrations, filings, policies, and insurance records



5. Brand

Media kit, one-pager, logo files, and digital presence



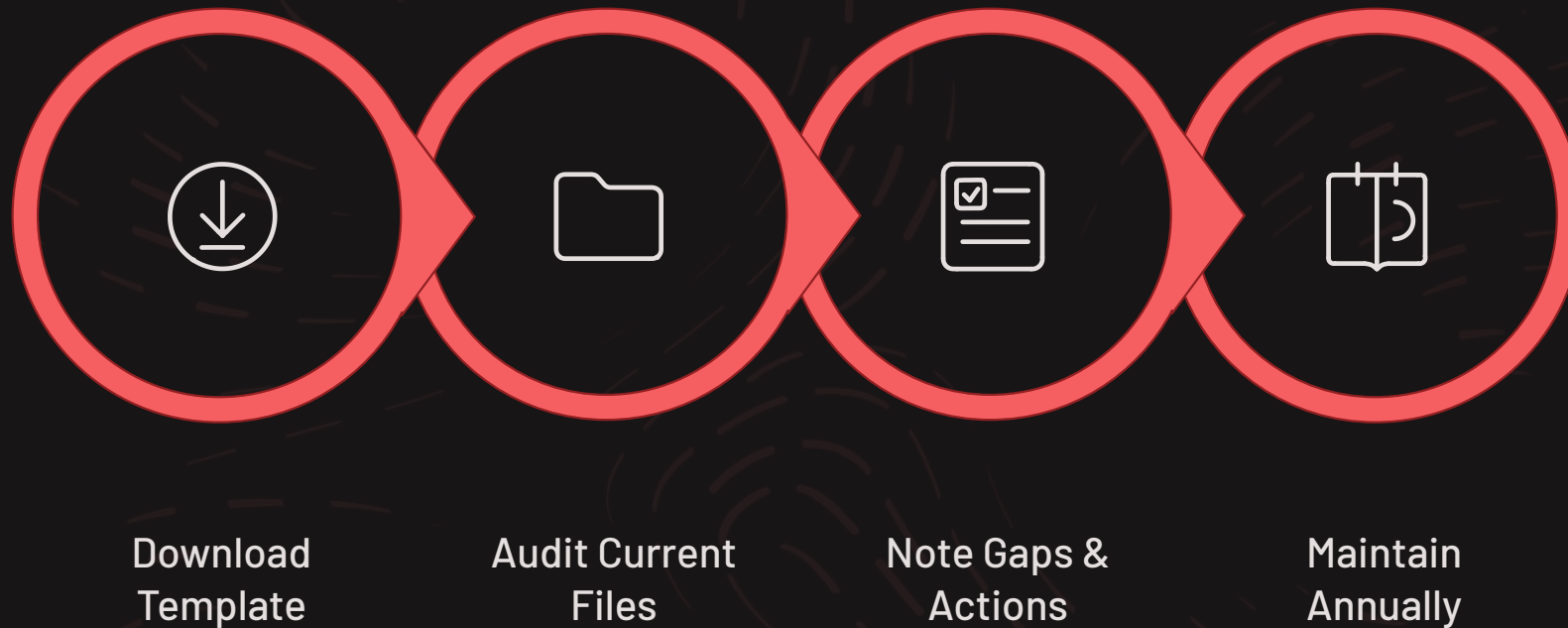
6. Contracts

Vendor, MOU, grant, and client agreements

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Founder File Cabinet Index – Walkthrough

The Founder File Cabinet Index is your master document inventory. Use it to track what you have, what's missing, and when each document was last updated. Think of it as the table of contents for your entire organization.



What the Index Tracks

- Document name and category
- Current status (Have It / Missing / Expired)
- File location (cloud folder path or physical location)
- Last updated date and next review date

Pro Tip

Assign a **Document Manager** role in your organization – even if it's you for now. This person is responsible for keeping the Index current and ensuring nothing expires unnoticed.

Download Included: Founder File Cabinet Index

Webinar attendees receive the **Founder File Cabinet Index** — a ready-to-use spreadsheet template that gives you a complete inventory system for all six document categories.

What's Inside

- Pre-filled document list for all 6 categories
- Status tracking columns: Have It / Missing / Expired
- File location field for cloud or physical storage
- Last updated and next review date columns

How to Use It

- Complete your initial audit in one sitting (30–60 min)
- Highlight gaps in red and assign deadlines
- Share with your board, operations lead, or consultant
- Review and update every January and after major events

File Format

- Available as a Google Sheets template (copy to your Drive)
- Also available as an Excel .xlsx download
- Fully editable and brandable for your organization
- Instructions tab included for first-time setup

Download Included: Document Folder Checklist

The **Document Folder Checklist** is your quick-start audit tool — a printable, single-page checklist organized by all six Founder File Categories. Check off what you have, flag what's missing, and get to work.

What Makes This Checklist Different

Most document checklists are generic. This one is built specifically for nonprofit founders, small business owners, ministry leaders, and consultants who need to be funder-ready — not just "organized in general."

Every item on the list maps directly to what funders, lenders, sponsors, and partners commonly request.

Checklist Highlights

- 75+ documents across 6 categories
- Priority markers for high-demand documents
- Status checkboxes:  Have It |  Need to Create |  Missing
- Notes column for file location or action items
- Printable PDF + fillable digital version

Use this checklist to complete your first document audit in under an hour.

Ready to Get Funded? Let's Make It Official.

You now have the framework. The next step is taking action — and you don't have to do it alone. The Strategy Counsel offers personalized document audit sessions and a full founder readiness program designed to get you organized, visible, and fundable.



Book a Document Audit

Work 1:1 with a Strategy Counsel consultant to review your current documents, identify gaps, and build a 30-day action plan to get fund-ready.



Join The Fundable Founder Series

A structured, multi-session program covering document readiness, grant strategy, funder positioning, and compliance — built for founders who are serious about getting funded.

Organized founders move faster when opportunity appears.

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