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|  | Onboarding Materials Checklist |

The following checklist outlines documents and information that Hanover is seeking during the onboarding process to assist with strategic planning for grantseeking.

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|  | Background Materials | Available | Shared |
| **1** | **Strategic Plan / Annual Plan** – Plan for the entire organization and, if available, the division responsible for the Hanover relationship. |   |   |
| **2** | **Annual Report** – Prior year or prior two years, if available. |   |   |
| **3** | **List of Previous Grant Awards** – Funding agency, duration, dollar amount, and 1-3 sentence synopsis. |   |   |
| **4** | **List of Declined Proposals** – Funding agency, dollar amount, 1-3 sentence synopsis, indicate whether reviewer feedback was provided; Would like to go back at least 2 years. |   |   |
| **5** | **Existing Fundraising Materials or White Papers for Priority Projects** - Case Statements, Appeal Letters, etc. for current initiatives and projects. |   |   |
| **6** | **Primary Competitors** |   |   |
| **7** | **Primary Service Area** |   |   |
| **8** | **Long Term Project Goals and Goals for Hanover Relationship** –Background on long-term funding targets and capacity building needs. |   |   |
| **9** | **Partnerships** – Background on existing partnerships and joint initiatives with other institutions, community organizations, and businesses. |   |   |