



Grant Readiness Assessment Checklist

GRKY's Grant Readiness Assessment is designed to provide a snapshot of your organization's grant readiness. It highlights strengths you can build on and points to areas where extra attention will strengthen your ability to seek and manage grants successfully. It's not a test - it's a guide to help you plan.

You don't need every detail in place to use this tool. The questions are meant to spark reflection and give you a clearer picture of where you are today. At the end, you'll see your results placed in one of three ranges (Novice, Intermediate, Advanced), with suggestions to help you move forward.

What You'll Need

Before you begin, here's a quick checklist of information that will make answering easier. You won't upload any files; the tool simply asks about your policies, practices, and systems. Having those details in mind will help you navigate the questions smoothly. You don't need to have everything perfect to get started, and you can revisit the tool anytime.

1. Intro & Organizational Basics

- Year founded and legal status (nonprofit, municipality, fiscal sponsor, etc.)
- Mission and vision statements
- Description of who you serve (population, geography, community)
- Staff size (full-time and part-time) and volunteers
- Leadership team roles (executive director, board chair, mayor, etc.)
- Your own role/title in the organization
- Basic contact information

2. Prior Grant Experience

- Whether you've applied for or received grants before
- List of prior awarded grants (if available)
- Timing of most recent grant award
- Experience with managing grant funds and reporting

3. Organizational Capacity

- Current staff count (FT/PT)
- Leadership team description (experienced, developing, or limited)
- Dedicated grant writing staff or team (yes/no/partial)
- Volunteer involvement in grant or program work
- Systems/software for tracking outcomes and data
- Capacity for communication and decision-making
- Community engagement and partnerships



4. Foundational Documents

- Mission, vision, and goal statements (current and accessible)
- Strategic plan (written and current)
- Annual report (if available)
- Organizational chart
- Program descriptions and impact summaries
- Founding documents: Articles of Incorporation, Bylaws, ordinances (if municipality)

5. Governance & Policies

- Current organizational chart
- Current board roster with names and affiliations (or local officials if municipality)
- Conflict of interest policy
- HR-related policies (employee handbook, nondiscrimination, whistleblower, etc.)
- Financial management policy
- Risk management policy

6. Registrations & Certifications

- Full legal name of your organization (per state records or founding docs)
- Employer Identification Number (EIN)
- IRS determination letter (501(c)(3) or equivalent)
- State charitable registration (if required)
- Kentucky eClearinghouse Login (if applicable)
- SAM.gov registration (if applicable)
- UEI number and Grants.gov account (if applicable)
- Any municipal or state-level identifiers

7. Financial Readiness

- Current total annual operating budget
- Approximate % of revenue from grants
- Accounting system/software in use
- Ability to track restricted vs. unrestricted funds
- Most recent financial statements (balance sheet, income statement)
- Budget versus actual reports
- Cash flow management practices
- Audit or financial review
- Internal financial controls (segregation of duties, approvals, etc.)
- Financial policies and procedures manual

Reminder: *It's not about perfection; many organizations are still building capacity in these areas. Think of this as a warm-up: it shows where you're strong and where you might want to grow.*