

CBO Grant Readiness Quiz

Practical Assessment & Action Plan for Community Organisations

Instructions: Answer all 10 questions based on your organisation's current structure and daily operations. Tally your total points at the end to determine your Grant Readiness Tier and key development steps.

Section 1: Governance & Legal Status

1. Is your organisation legally registered with the appropriate government body?

- [A]** Yes, fully registered with an active certificate and compliant with annual filings/returns. **(3 points)**
- [B]** Registered, but our annual filings or renewals are pending or out of date. **(1 point)**
- [C]** In the process of registering, or operating as an informal community group. **(0 points)**

2. How active and independent is your Board of Directors or Advisory Committee?

- [A]** We have an active board (3–5 non-paid, non-staff members) that meets quarterly with official minutes. **(3 points)**
- [B]** We have a board on paper, but meetings are rare and mostly managed by the founder/ED. **(1 point)**
- [C]** We do not have a board of directors or advisory board yet. **(0 points)**

Section 2: Financial Management & Compliance

3. Does your organisation maintain a dedicated, active bank account?

- [A]** Yes, an official organisational bank account with dual signatories required for withdrawals. **(3 points)**
- [B]** Yes, an organisational account, but managed/controlled by a single individual. **(1 point)**
- [C]** No, we currently use personal accounts or cash on hand. **(0 points)**

4. How does your team track and record daily and monthly financial transactions?

- [A]** We use dedicated accounting software or standardised templates with receipts for every expense. **(3 points)**
- [B]** We record transactions in basic spreadsheets, but receipts are occasionally missing. **(1 point)**
- [C]** We track expenses informally or only when preparing an end-of-year summary. **(0 points)**

5. Has your organisation undergone a financial audit or formal review in the last 2 years?

- [A]** Yes, an independent external financial audit (or formal external review report). **(3 points)**
- [B]** An internal financial review has been conducted, but no external audit. **(1 point)**
- [C]** No financial audit or external review has been conducted yet. **(0 points)**

Section 3: Track Record & Impact Tracking

6. Can you provide clear, documented evidence of your past projects and impact?

- [A] Yes, we have written project reports, beneficiary data, photos, and success stories available. (3 points)
- [B] We have done great work, but data and photos are scattered across staff devices and notes. (1 point)
- [C] We are a brand-new organisation with no completed projects yet. (0 points)

7. How do you measure the impact of your community programmes?

- [A] We collect structured data (pre/post-surveys, attendance registers, qualitative feedback, M&E logs). (3 points)
- [B] We collect basic numbers (e.g., total people reached/attended) without deep impact tracking. (1 point)
- [C] We estimate our numbers based on general observation. (0 points)

Section 4: Proposal Readiness & Operations

8. Does your organisation maintain a core "Grant Vault" of foundational materials?

- [A] Yes, problem statements, theory of change, organisational profiles, and CVs are up to date. (3 points)
- [B] We have scattered materials across old proposals, but write most things from scratch. (1 point)
- [C] We do not have any pre-written organisational assets or templates. (0 points)

9. Do you have dedicated personnel to write, manage, and report on grants?

- [A] Yes, designated team members handle proposal writing, grant administration, and reporting. (3 points)
- [B] The Director/Founder handles everything alongside regular daily operations. (1 point)
- [C] We have no dedicated personnel for grant application or management. (0 points)

10. Does your organisation possess key operational policy documents?

- [A] Yes, formally adopted policies (Safeguarding, Whistleblower, Financial Management, Gender). (3 points)
- [B] We have informal guidelines or draft policies that are not yet officially adopted. (1 point)
- [C] We do not have written operational policies yet. (0 points)

Scoring & Action Breakdown (Max 30 Points)

● 24 – 30 Points: High Grant Readiness (Funding-Ready)

Your organisation has robust governance, financial discipline, and documented impact. Institutional donors consider you low-risk.

Recommended Action Steps:

- Target large institutional grantmakers, international funds, and bilateral donor agencies.
- Maintain an active central "Grant Vault" for rapid proposal turnaround.
- Focus on multi-year strategic partnership grants rather than short-term seed grants.

● 14 – 23 Points: Moderate Grant Readiness (Emerging)

Strong community presence and track record, but administrative gaps (policies, audits) may restrict major funding calls.

Recommended Action Steps:

- Formalise internal key policies (Safeguarding, Procurement, Financial Management).
- Apply for local community foundations, micro-grants, and seed funding.
- Partner as a sub-grantee or co-applicant with established NGOs to build audit history.

● 0 – 13 Points: Early-Stage / Capacity Building Phase

Your community mission is valuable, but structural and administrative setup requires strengthening before applying.

Recommended Action Steps:

- Complete legal filings, open a dual-signatory bank account, and establish an active advisory board.
- Implement basic, receipt-backed accounting tools and templates.
- Focus on community fundraising, volunteer support, and pilot projects to build documented proof.