GRANT READINESS TOOLKIT

STEP 01 · ASSESS

Pre-Application Readiness Guide

Assessing the Opportunity

communityfundingaccelerator.org

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SECTION I.

Introduction

The Community Funding Accelerator (CFA) supports communities in securing and deploying public funding to strengthen cradle-to-career education and workforce pathways. We help organizations assess, pursue, and implement funding opportunities that align with their goals, capacity, and long-term strategy.

How to Use This Guide

This guide is complemented by the **Grant Writing Guide** (proposal development) and the **Post-Submission Strategy Guide** (post-submission readiness and award preparation).

Use this guide to assess whether your organization is well-positioned to pursue a specific funding opportunity and, if so, identify the critical gaps it may need to address to submit a competitive application. This assessment is Step 1 of the Grant Readiness Cycle.

THE GRANT READINESS CYCLE

01 Assess
Pre-Application Readiness Guide
Guided self-assessment for organizational readiness to pursue opportunities
↑ You are here

02 Develop
Grant Writing Guide
Steps for developing and submitting successful grant proposals

03 Prepare
Post-Submission Strategy Guide
Practical framework for organizing post-submission resources and logistics

Each funding opportunity should be considered individually based on its alignment with your organization's priorities, eligibility, capacity, and competitive position. This guide focuses on how to assess potential competitiveness, including your organization's ability to present a strong case for funding. Significant areas of weakness may suggest that an opportunity is not the right fit at this time, or they may clarify what to strengthen before applying in a future cycle.

Don't miss our interactive tool!

Checkout this tool— entera specific opportunity and get a clear pursue, refine, or deprioritize decision backed by a pass/fail eligibility screen, a scored fit and competitiveness assessment, and a documented rationale with prioritized strengths and gaps ready to share with leadership or partners.

Find out more (Page 27)

SECTION II.

Scan the Funding Landscape

Before you can assess an opportunity's fit, eligibility, and competitiveness, you first need to identify opportunities to evaluate. This section explains how to identify and track potential funding sources.

Navigate the Funding Landscape

Compare funding opportunities based on their requirements, flexibility, and fit with your organization's goals and capacity.

TOOL

Funding Opportunity Assessment

Philanthropic / Foundation Funding

~15–30% success rate*

BEST SUITED FOR	KEY CONSIDERATIONS	BEFORE YOU APPLY
Planning, pilots, innovation, capacity building	Often time-limited; priorities vary by funder.	Clear goals, theory of change, sustainability considerations

QUESTIONS TO ASSESS FIT

- Does this align with our strategic priorities?
- Can we clearly demonstrate the need and potential impact?
- Is there a plan to sustain the work after funding ends?
- Do we have the staff time to build relationships with program officers?

State Funding

~25–30% success rate*

BEST SUITED FOR	KEY CONSIDERATIONS	BEFORE YOU APPLY
Program expansion, service delivery, workforce initiatives	Priorities may shift with budget and election cycles.	Alignment with state priorities, implementation plan, performance measures

QUESTIONS TO ASSESS FIT

- Does this align with current state priorities?
- Can we meet the reporting and performance requirements?
- Are we comfortable with potential shifts in priorities or funding levels?

Federal Funding

~5–20% success rate*

BEST SUITED FOR	KEY CONSIDERATIONS	BEFORE YOU APPLY
Infrastructure, systems change, large-scale implementation	Complex compliance, reporting, and financial requirements.	Strong grant management systems, partnerships, staffing, data capacity

QUESTIONS TO ASSESS FIT

- Is the opportunity worth the administrative effort?
- Do we have the systems and staffing to manage compliance?
- Can we implement at the required scale?
- Do we have partnerships to leverage, or can we build a coalition in time?

*Success rates vary significantly by program, geography, applicant type, and funder priorities. Ranges are illustrative and intended to support strategic planning, not predict funding outcomes. Source: GrantWatch.

KEY INSIGHT

The best funding opportunity is not always the largest one. Consider whether the funding aligns with your organization's goals, capacity, partnerships, and long-term strategy before applying.

Identify Priority Funders & Monitor Funding Sources

Focus on funders whose priorities align with your mission and long-term goals. Over time, this can help you anticipate opportunities and strengthen competitiveness.

Funding opportunities are released across multiple platforms and timelines. Establishing a consistent monitoring process can help your organization identify opportunities earlier and plan pursuits more strategically.

ENVIRONMENT	SOURCE	DESCRIPTION
Federal	**CFA Grant Tracker**	Our curated tracker highlighting opportunities by topic, related to education and workforce development along the cradle-to-career spectrum.
Federal	**simpler.grants.gov**	Federal discovery/search portal for grant opportunities across agencies. Note: full application submission for most opportunities still occurs through the legacy Grants.gov system while the new platform's workflow is phased in agency-by-agency.
State & Local	State agency and procurement websites	State-administered grant programs, contracts, and regional initiatives.
State & Local	Governor's office and legislative budget sites	Budget priorities, appropriations, and emerging statewide funding initiatives.
Philanthropic	**Foundation Directory**	Searchable database of private, corporate, and foundation initiatives.
Philanthropic	**GrantWatch**	Aggregated grant listings.
Philanthropic	**Candid**	Foundation research, nonprofit data, and philanthropic funding sources.

KEY INSIGHT

Do not rule out an opportunity simply because you've already requested funding for a similar idea elsewhere. If no award has been made, consider pursuing other viable options in parallel in case the original request is not funded.

SECTION III.

III Evaluating Grant Opportunities

Every funding opportunity requires a decision: **pursue it, deprioritize it, or refine the proposed concept to better align it** with both the opportunity's requirements and your organization's priorities and capacity. The goal isn't to reshape a concept just to fit a grant, but to find opportunities that are a genuine strategic fit.

Competitiveness is not assessed through a single step or criterion. It is reflected across each component of this guide, including strategic fit and positioning, the case for need, partnerships, and operational capacity. Consider these elements together. A strong application, and your capacity to prepare one, depends on the full picture, not eligibility alone.

Understand the Three Possible Outcomes

A structured assessment can help maintain focus on the best opportunities, avoid taking on too much, and lower the risk of problems during implementation. The assessment points to one of three pathways:

Pursue: The proposed concept appears well-aligned with the opportunity's requirements, the organization's priorities and capacity, and the factors likely to influence competitiveness.
Refine and reassess: The proposed concept may be viable with adjustments to strengthen alignment, competitiveness, or feasibility.
Deprioritize: The proposed concept and/or the organization's capacity would require substantial, possibly unfeasible, changes to align with the opportunity.

> **KEY INSIGHT**
>
> *Organizations should not pursue every opportunity for which they are eligible. Instead, they should focus on opportunities they are well-positioned to compete for, implement effectively, and sustain over time.*

IV

SECTION IV.

Evaluating Eligibility

Solicitations typically include an eligibility section covering most requirements for the lead applicant. However, it is important to review the full solicitation to identify all program requirements. For example, some grants require specific partners or partner types, and an application may be considered incomplete without them, even if those requirements are not listed in the eligibility section.

TOOL

Eligibility Screening (Pass / Fail)

Eligibility is a pass/fail gate, which differs from a scored criterion. Resolve any 'No' or 'Unconfirmed' before investing time in the scored fit-and-competitiveness rubric. This section walks through each of the seven factors and how to confirm them with evidence rather than assumption. A "No" or "Unconfirmed" response to any item must be resolved before proceeding. If it cannot be resolved, deprioritize the opportunity.

Lead entity type & legal eligibility

☐ Yes ☐ No ☐ Unconfirmed

WHAT TO CONFIRM	ILLUSTRATIVE EXAMPLES
Your organization (or designated lead applicant) matches an eligible entity type named in the solicitation. Eligible entity types are frequently revised between cycles; do not assume eligibility carries over.	501(c)(3) nonprofit; LEA; IHE; state/local government; Tribal government/organization; formal consortium

Geographic & population eligibility

☐ Yes ☐ No ☐ Unconfirmed

WHAT TO CONFIRM	ILLUSTRATIVE EXAMPLES
Your service area, location, or population served meets the funder's geographic or demographic targeting rules. Confirm whether the requirement applies to where you're located, where you deliver services, or who you serve.	Rural or urban locale codes; designated multi-state or multi-county regions; state-specific service area limits; income or population thresholds

Cost-share / match requirements

☐ Yes ☐ No ☐ Unconfirmed

WHAT TO CONFIRM	ILLUSTRATIVE EXAMPLES
You can meet any required match (cash or in-kind) at the required ratio, and you can document where the funds come from. Federal funds generally can't be used to match other federal funds.	1:1 cash match from non-federal sources; 20% in-kind match documented at approved valuation rates; no-match waiver for tribal governments

TOOL · CONTINUED

Eligibility Screening (Pass / Fail)

Required registrations & certifications
☐ Yes ☐ No ☐ Unconfirmed

WHAT TO CONFIRM

All registrations needed to legally submit and receive funds are active, or completable before the deadline. SAM.gov registrations lapse annually; confirm this well before the application push.

ILLUSTRATIVE EXAMPLES

Active SAM.gov registration and valid UEI; active Grants.gov account; state vendor registration; program-specific state certification (e.g., certain workforce or education programs)

Required partners, endorsements, or signatories
☐ Yes ☐ No ☐ Unconfirmed

WHAT TO CONFIRM

Any mandated partner, endorsement, or designation is identified and has agreed to participate. Verbal agreement is not sufficient documentation. Single-application-per-state limits are a hard gate unrelated to individual competitiveness.

ILLUSTRATIVE EXAMPLES

Governor's endorsement or state agency concurrence; single-application-per-state coordination; MOU or letter of commitment for required partnerships

Standing / history restrictions
☐ Yes ☐ No ☐ Unconfirmed

WHAT TO CONFIRM

No prior award, sanction, or wait-out period disqualifies you. Unresolved audit findings or a high-risk designation can disqualify an otherwise-eligible applicant.

ILLUSTRATIVE EXAMPLES

SAM.gov exclusions listing; concurrent award or wait-out period restrictions; unresolved single-audit findings; high-risk designation with the relevant federal agency

Letter of Intent (varies)
☐ Yes ☐ No ☐ N/A

WHAT TO CONFIRM

If required, an LOI was submitted by the deadline, and the application content aligns with what was stated in the LOI. Treat a required LOI as an eligibility gate — a missing or late LOI typically results in disqualification.

ILLUSTRATIVE EXAMPLES

Required LOI submitted on time; application content consistent with LOI scope; LOI optional — no action needed; no LOI requirement in this NOFO

Lead Entity Type & Legal Eligibility

Confirm your organization, or the entity you'd designate as lead applicant, matches an eligible entity type named in the solicitation. Who counts as an eligible applicant often changes from one cycle to the next, so assuming eligibility carries over from a prior year's NOFO for "the same program" is a common, costly mistake.

✓ HOW TO CONFIRM IT

1. Pull the NOFO's "Eligible Applicants" section verbatim (e.g., 501(c)(3) nonprofit, LEA, IHE, state/local government, Tribal government/organization, or formal consortium). Don't rely on program summaries or past-cycle assumptions.
2. Match your organization's legal status to documentation you can produce on request: IRS determination letter, state charter or LEA designation, IHE accreditation status, or Tribal government recognition.
3. If applying as a consortium or through a fiscal sponsor, confirm the NOFO explicitly allows that structure and that the lead applicant (not just a partner) can hold the eligible status.

Geographic & Population Eligibility

Confirm your service area, location, or the population you serve meets the funder's geographic or demographic targeting rules. Solicitations define these differently (where you're located, where you deliver services, or who you serve), and treating them interchangeably is a common reason applications are later ruled ineligible.

✓ HOW TO CONFIRM IT

1. Cross-reference your service area against the specific geographic mechanism the NOFO uses: NCES locale codes (rural/urban), county designations, a named multi-state or multi-county region, or a state-specific service-area boundary.
2. For population-based thresholds (income, unemployment rate, population size), pull current data from an authoritative source named or implied by the NOFO (Census/ACS, state labor market information, or the funder's designated source) rather than internal estimates.
3. Confirm whether the requirement applies to where you're located, where you deliver services, or who you serve.

Cost-Share / Match Requirements

Confirm you can meet any required match (cash or in-kind) at the required ratio, and document where it comes from. Match documentation is a frequent source of downstream compliance problems: federal funds generally can't be used to match other federal funds, and undocumented in-kind commitments are a common audit finding.

✓ HOW TO CONFIRM IT

1. Confirm the exact match ratio and whether it must be cash, in-kind, or a blend. This is stated in the NOFO, typically under "Cost Sharing or Matching."
2. Check the statute governing any other federal programs you manage to confirm whether they can count as match, and confirm match requirements in the solicitation.
3. For cash match, identify the specific funding source and confirm its type (e.g., non-federal; some NOFOs name exceptions).
4. For in-kind match, confirm you can document it at an approved valuation rate (staff time at documented salary/fringe rates, donated space at fair market value).
5. If match funds aren't secured yet, confirm you have a realistic plan to secure them before the deadline. They must be documented in the budget – an intention to find them later isn't enough.

Required Registrations & Certifications

Confirm all registrations needed to legally submit and receive funds are active, or completable before the deadline. Registration and renewal windows can take considerable processing time; SAM.gov registrations for federal funding lapse annually, so confirm this well before the application push, not during it.

HOW TO CONFIRM IT

1. Check SAM.gov directly for active registration status and a valid Unique Entity Identifier (UEI). Don't rely on memory of a past registration.
2. Confirm a current Grants.gov account (or the relevant agency's submission portal) is active for your organization's authorized representative.
3. Check for state vendor registration or professional accreditation/licensure requirements specific to the program area (e.g., certain workforce or education programs require program-specific state certification).

Required Partners, Endorsements, or Signatories

Confirm any mandated partner, endorsement, or designation is identified and has agreed to participate. Some requirements, like single-application-per-state limits, are hard gates unrelated to your organization's individual competitiveness, and a verbal agreement to partner isn't sufficient documentation.

HOW TO CONFIRM IT

1. Check the NOFO for any required sign-off: a Governor's endorsement or designation, a designated state agency's concurrence, or a single-application-per-state limit requiring internal state-level coordination before you submit.
2. Confirm you have a written commitment (MOU or letter of commitment) for required partnerships.
3. If the NOFO limits submissions per state or region, confirm your position in that process now.

Standing / History Restrictions

Confirm no prior award, sanction, or wait-out period disqualifies you from this specific competition. Even without an active exclusion or a concurrent award, unresolved audit findings or a high-risk designation can disqualify an otherwise-eligible applicant.

HOW TO CONFIRM IT

1. Check SAM.gov's exclusions listing for your organization and any partners you'd name in the application.
2. Confirm whether you currently hold an award under the same program, or fall within an applicable wait-out period, since many NOFOs restrict concurrent or back-to-back awards.
3. Review your most recent single audit for unresolved findings (if applicable), and confirm your organization doesn't carry a high-risk designation with the relevant federal agency.

SECTION V.

Assess Fit & Competitiveness

After confirming eligibility for a specific grant opportunity, assess how well your concept and organization align with the opportunity and how competitive you are likely to be within the applicant pool.

TOOL

Fit & Competitiveness Rubric

For each criterion in the table below, select the description that best matches your situation and enter the corresponding points in the Score column. Click each criterion for additional guidance on determining whether you have strong or moderate potential, or whether an area needs further attention before deciding to proceed. The scoring legend can be found on page 14.

PART A: COMPETITIVE FIT

Criterion	3 STRONG	2 MODERATE	1 NEEDS ATTENTION	SCORE
Alignment with Required & Allowable Activities	Every core activity is explicitly named or clearly covered under the solicitation's allowable-use and/or required language.	Most core activities are clearly allowable or required; one or two would need reframing or funder confirmation.	The concept depends on activities that are ambiguous, restricted, or absent from allowable-use language, or fails to address required activities.	
Applicant Profile Fit	Funder's stated applicant profile (type, size, stage, geography, experience) closely matches us.	We generally fit the profile but differ from typical awardees in scale, stage, or experience.	Our profile diverges meaningfully from the funder's typical or intended applicant.	
Competitive Positioning	We can point to concrete, differentiating strengths (track record, unique reach, funder relationship) vs. likely competitors.	We have relevant strengths, but likely competitors may be comparable or stronger on scored criteria.	We have limited visibility into competitors, or what we know suggests we'd be a weaker applicant.	
Evidence of Need	We have specific, current data that clearly documents the problem and gap, ready to cite in an application.	We have relevant evidence, but it is dated, partial, or would need supplementing before submission.	We lack documented evidence of need and would need to gather or commission new data before applying.	
Partner Identification & Commitment	Partners are identified, have confirmed roles and commitment (MOUs, letters), and an established way of making joint decisions.	Partners are identified and generally supportive, but roles, decision-making, or formal commitments aren't finalized.	Key partners are not yet identified, engaged, or willing to formalize their role in time for submission.	

TOOL · CONTINUED

Fit & Competitiveness Rubric

PART B: STRATEGIC FIT

Strategic Priority Alignment		SCORE
3 STRONG Maps directly to a written strategic-plan goal; the organization is actively working to advance it.	**2 MODERATE** Supports a broader strategic direction, but isn't tied to a specific documented priority.	**1 NEEDS ATTENTION** Connection is indirect, or would require justifying a new, undocumented priority.

Long-Term Positioning		SCORE
3 STRONG Builds a durable capability, relationship, or asset that outlasts the grant period.	**2 MODERATE** Offers some lasting benefit, but primary value is time-limited.	**1 NEEDS ATTENTION** Appears to be a one-off with little durable benefit after the funding period.

Funding Mix Balance		SCORE
3 STRONG Diversifies or balances our funding portfolio without over-concentrating risk.	**2 MODERATE** Somewhat increases reliance on one funder/type, but within a manageable range.	**1 NEEDS ATTENTION** Would create material over-reliance on one funder, or require reshaping programs to fit the grant.

Compatibility with Existing Commitments		SCORE
3 STRONG Current grants, contracts, and partner commitments continue unmodified if pursued/won.	**2 MODERATE** Some existing commitments need adjustment, but appear manageable.	**1 NEEDS ATTENTION** Pursuing/winning would likely require renegotiating or scaling back existing commitments.

Sustainability Plan		SCORE
3 STRONG We have a specific, resourced plan for continuing the work's core benefits after the funding period.	**2 MODERATE** We have a general direction for sustainability, but it is not yet specific or resourced.	**1 NEEDS ATTENTION** We have not identified how the work would continue, financially or programmatically, once the grant ends.

TOOL · CONTINUED

Fit & Competitiveness Rubric

PART C: OPERATIONAL READINESS FOR PROPOSAL DEVELOPMENT

Staffing Capacity

SCORE

3 STRONG	2 MODERATE	1 NEEDS ATTENTION
Named staff with necessary skills/availability already assigned, or hire/contract underway.	Possible but unconfirmed; staff would need to shift priorities, or hire not finalized.	No clear staffing path for proposal development or, if awarded, implementation.

Governance & Decision Authority

SCORE

3 STRONG	2 MODERATE	1 NEEDS ATTENTION
Decision-makers for strategy, budget, and program are identified, available, and confirmed engaged.	Decision-makers identified but not confirmed available, or approval process still being defined.	Unclear who holds final decision authority, or key decision-makers not yet engaged.

Timeline Feasibility

SCORE

3 STRONG	2 MODERATE	1 NEEDS ATTENTION
Remaining time comfortably covers drafting, review, partner sign-off, and submission logistics.	Tight but achievable with focused effort and no major unresolved dependencies.	Requires compressing steps that have caused problems before, or leaves no buffer for delays.

PART D: ORGANIZATIONAL CAPACITY & TRADEOFFS

Impact on Other Priorities

SCORE

3 STRONG	2 MODERATE	1 NEEDS ATTENTION
Staff time can be absorbed without reducing effort on other funded programs.	Some reallocation of staff time needed, but limited and time-bound.	Would require pulling meaningful capacity from other funded programs or priorities.

Internal & Leadership Support

SCORE

3 STRONG	2 MODERATE	1 NEEDS ATTENTION
Leadership and delivery teams (program/finance) have reviewed and support pursuing this.	General support exists, but one or more relevant teams haven't weighed in.	Support is unconfirmed, mixed, or leadership has significant unresolved concerns.

Reporting & Compliance Capacity

SCORE

3 STRONG	2 MODERATE	1 NEEDS ATTENTION
Funder's reporting frequency, data, and compliance obligations match systems already in place.	Heavier than current norm, but achievable with modest process changes.	Would exceed current systems and require significant new infrastructure.

Fit & Competitiveness Rubric

Scoring Legend

Add your scores from Parts A–D to get your Total Score, then apply the key below.

TOTAL SCORE	OUTCOME
40–48	**Pursue:** The proposed concept appears well-aligned with the opportunity's requirements, the organization's priorities and capacity, and the factors likely to influence competitiveness.
24–39	**Refine and reassess:** The proposed concept may be viable with adjustments to strengthen alignment, competitiveness, or feasibility.
16–23	**Deprioritize:** The proposed concept and/or the organization's capacity would require substantial, possibly unfeasible, changes to align with the opportunity.

☆ **Override rule:** Any criterion scored "Needs Attention" should be resolved or explicitly mitigated before proceeding, regardless of total score.

Part A: Competitive Fit

Alignment with Required & Allowable Activities

Solicitations typically separate activities you must include (required) from activities you may include (allowable). Reviewers score how well your concept covers required activities and stays within allowable-use language.

- Separate the solicitation’s activities into two lists: Required (must be included) and allowable (may be included at your discretion).
- Refer to the solicitation’s program objectives and selection criteria to understand what reviewers will be looking for.
- List every required and allowable activity your concept includes, and note whether each is clearly covered, would need reframing or funder confirmation, or is absent/restricted.
- Ensure you have evidence for each activity: Active partnerships, MOUs, staff capacity, existing projects, and capabilities.

Applicant Profile Fit

Confirm the funder's intended applicant profile (type, size, stage, geography, experience) matches your organization's. Funders often view prior performance as an indicator of future success, so demonstrating experience with similar work strengthens competitiveness.

Beyond confirming basic eligibility, compare your organization's type, size, stage, and geography against the funder's typical or intended awardee, using cues from prior awards, program summaries, or funder communications, not just the eligibility criteria. Note any areas where you diverge from that intended profile, even if you technically qualify.

Funders also weigh your readiness to implement this specific opportunity and your track record on comparable work. Assess each using the table below.

READINESS TO IMPLEMENT	WHAT TO ASSESS
"Shovel-ready" capability	Do you have the resources, relationships, and know-how to convince reviewers you're equipped to implement this concept? (For pilot/new-idea programs, a new concept is fine, but show why your organization is suited to run it.)
New capacity or offering this grant would enable	What new activities, partnerships, or scale would this allow that you can't currently do? What foundation are you building on to demonstrate readiness at that scale?
Partnership coverage for gaps	Where you lack a required capability, could an existing partnership cover it? If not, how feasible is it to secure one within the proposal timeline?
Management capacity	Do you have the management systems, personnel, and cost-share capacity to demonstrate you could manage the grant if awarded?

TRACK RECORD ON COMPARABLE WORK	WHAT TO ASSESS
Relevant experience & results	Delivery of comparable programs, initiatives, or activities with similar goals or service models.
Population familiarity	Experience serving similar populations, communities, or stakeholder groups.
Project scale	Implementation at a similar scale, complexity, or level of organization.
Prior funding	Previous grant awards of similar size, funding structure, scope, or the same funding source.

KEY INSIGHT

If your organization lacks direct experience with the proposed work, position your approach as an extension of a proven implementation supported by realistic goals and evidence-based practices.

Competitive Positioning

Reading the field means understanding where you realistically rank against likely competitors. A weak competitive read isn't a "no"; it identifies what to build for a future cycle.

Work through the considerations below to build a realistic competitive read: how the field has looked historically, where you stand relative to likely competitors, and what your strengths will be if you apply.

- **Prior awards:** Examine prior cycles' awards and note the types of projects funded, while reading the current notice thoroughly, as criteria can shift cycle to cycle.
- **Effort vs. award size:** Is the funding amount worth what applying, implementing, and reporting will require?

- **Priorities alignment:** Does this support work you already want to do, or would you be changing course to fit the funding?
- **Positioning & gaps:** What makes your organization well-positioned to compete, and where might you have gaps?
- **Field size & odds:** How many awards are typically made for this program (or similar)? How many applicants compete, and what does that imply about realistic odds? **Tip:** For federal grants, visit the agency's page for that program or **www.usaspending.gov**.
- **Win themes:** Before the solicitation is released, pick two or three of your strongest assets (e.g., proven outcomes, unique reach, partnership depth) and, for each, write a short statement explaining why it matters to the funder (funder priorities, NOFO goals), not just what it is. Thread these throughout the proposal and map them to the scoring criteria once released.

Evidence of Need

Confirm you have current, specific data documenting the problem you're proposing to address. Keeping a current needs assessment, organized research summaries, and any evaluation findings ready before a solicitation opens strengthens your application.

Once the problem is clearly defined, gather evidence supporting your proposed approach (MOUs, letters of commitment, data-sharing agreements, evaluation findings, and other supporting evidence). Match your evidence to the right data type for the argument you're making:

- **Demographic data:** Describe the target population or service area.
- **Outcome data:** Demonstrate urgency, performance gaps, or unmet need.
- **Comparative data:** Highlight disparities across populations or regions.
- **Labor market data:** Connect workforce needs to proposed activities.
- **Stakeholder input:** Provide community perspective and lived experience.
- **Baseline metrics:** Establish starting points for future performance measurement.
- **Environmental scans:** Identify service gaps, ecosystem challenges, or regional conditions.
- **Pilot/existing program data:** Demonstrate early results, feasibility, or proof of concept from work already underway.

Partner Identification & Commitment

Confirm your key partners have agreed to their roles and commitment in writing. Organizations that successfully pursue and implement funding typically establish partnership structures before an application is submitted.

Confirm your partnerships show:

- **Clear roles:** Responsibilities and expectations defined early.
- **Decision-making process:** A clear lead organization and decision-making structure.
- **Shared goals:** Partners aligned on goals, outcomes, and measures of success.
- **Regular communication:** Communication and data-sharing processes developed before implementation.
- **Resource alignment:** Staffing, budget management, and sustainability expectations discussed upfront.
- **Theory of change:** Long-term goals and implementation approach aligned across partners.

KEY INSIGHT

Successful partnerships are built before funding is awarded, not after. Strong partnerships establish clear roles, governance, and communication processes early, reducing implementation challenges later.

Part B: Strategic Fit

Strategic Priority Alignment

Start by defining what success looks like over the next 2–3 years and what must be true for your organization to achieve it. Name your core priorities for that period and **how they connect to the needs your work addresses.** Confirm this opportunity maps to one of those written priorities.

Long-Term Positioning

Confirm this opportunity builds a capability or relationship that outlasts the grant period. Identify what programs or services it would support and whether they build on strategies you've already committed to. Consider the staffing, infrastructure, and partnerships it would help you build: do these outlast the grant, or are they tied specifically to this award's activities?

Funding Mix Balance

Confirm this opportunity complements, rather than distorts, your current funding mix. Identify the gap between your current resources and what's needed to achieve your priorities, and confirm this opportunity's size, duration, and flexibility fit that gap rather than pulling you toward a scale or funding type you hadn't planned for.

Compatibility with Existing Commitments

Confirm this funding opportunity won't delay or require renegotiating current grants, contracts, or partner commitments. Duplication of benefits/costs and non-supplanting violations (using grant funds to cover a cost you already fund, then redirecting your own funds elsewhere) are two distinct compliance risks that can each independently disqualify an otherwise-compatible pursuit. Funders generally require their funds support new or additional activity, not substitute existing costs. Make sure to:

- Check for active grants, contracts, and partner MOUs with deliverables, exclusivity clauses, or population/geography commitments that could conflict with this opportunity's scope or timeline.

- Check for two compliance risks: Charging the same cost (or serving the same documented need) under two awards; and using the award to substitute for a cost you already fund, then reallocating displaced funds elsewhere.
- Confirm this opportunity's target population, geography, or activities don't overlap with an existing commitment in a way that would require renegotiating scope, cost allocation, or exclusivity terms.
- Flag anything that would need a current partner's or funder's sign-off before you could proceed.

Sustainability Plan

Confirm how the work will continue, financially or programmatically, once the grant ends. Funders frequently ask about programmatic sustainability (will the practice continue) and financial sustainability (will it be paid for) as distinct questions, and differs from a plan on paper that you have no real means to carry out.

- Check whether the funder requires a sustainability plan as part of the application.
- Name a plausible continuation pathway (building it into your regular budget, a revenue source that covers it, a path to follow-on funding, or making it part of standing policy or practice).
- Confirm you can address both programmatic and financial sustainability.

If no credible continuation path exists yet, treat that as a signal toward a “Needs Attention” score.

Part C: Operational Readiness for Proposal Development

Staffing Capacity

Confirm you have named staff with the skills and availability for this work, or a credible plan to get them. You don't need every position filled before applying, but you should show that responsibilities are clearly assigned and someone owns each core function.

Document ownership and accountability across your core operational domains, with the lead organization responsible for coordination and oversight. Confirm your organization can maintain continuity through:

- **Defined roles:** Responsibilities assigned to a role or job title (e.g., "Program manager oversees reporting"), at the position level rather than the individual level.
- **Documented workflows:** Written procedures for budgeting, reporting, data collection, and partner coordination.
- **Shared access to information:** Key documents, timelines, and reporting tools in accessible, centralized systems.
- **Distributed knowledge:** More than one staff member understands each critical function.
- **Leveraged coalition:** A clear plan for how partners can sustain activities if staffing changes occur within the lead organization.

Governance & Decision Authority

Confirm who has final decision-making authority for strategy, budget, and program, and that they're available to participate in proposal development or at least sign off on key decisions. Before pursuing funding, define who has authority to make strategic, programmatic, financial, operational, and communications decisions:

DECISION TYPE	EXAMPLE DECISIONS	TYPICAL OWNER
Strategic	Whether to pursue the opportunity; acceptable level of financial or reputational risk; entering formal partnerships; committing organizational resources	Executive Leadership and Governing Body (those accountable for organizational strategy and risk)
Program	Target population, service model, partner roles, staffing approach, outcome measures, and implementation strategy	Lead Applicant / Program Lead (those responsible for designing and delivering the proposed work)
Financial	Budget allocations, matching fund commitments, indirect cost rates, subcontractor budgets, and major spending approvals	Authorized Official / Finance Lead (those accountable for financial oversight and compliance)
Operational	Project timelines, hiring plans, reporting workflows, data collection processes, and vendor coordination	Project Manager / Implementation Lead (those responsible for day-to-day execution)
Communications	Public announcements, stakeholder engagement, branding, media responses, and partner communications	Executive Leadership and Communications Leads (those responsible for external messaging and stakeholder relationships)

Timeline Feasibility

Confirm the time remaining comfortably covers drafting, review, partner sign-off, and submission logistics. Some dependencies can't be sped up — **SAM.gov/registration** lead time (see Section IV), board approval cycles, a finance office's sign-off schedule.

- **Work backward from the deadline:** Block out time for drafting, internal review, partner sign-off, budget finalization, and any required authorized-official signature, then check what's actually left for writing.

- **Confirm partner sign-off isn't a last-minute assumption:** If MOUs, letters of commitment, or budget concurrence are needed, confirm partners can turn those around in your timeline.
- **Check for hard administrative dependencies:** SAM.gov/registration lead time, board approval cycles, or finance sign-off schedules.

If the timeline is tight, decide now whether to scale down scope, request more internal support, or treat this as a "Needs Attention" signal.

Part D: Organizational Capacity & Tradeoffs

Impact on Other Priorities
Confirm you can take on this grant without pulling capacity from other funded work. Larger grants require significant time to apply for, manage, and report on, while for smaller grants (roughly under $500K), the administrative effort may outweigh the funding. Estimate the expected effort relative to the award size.

GRANT SIZE	ESTIMATED APPLICATION EFFORT	TYPICAL ADMINISTRATIVE COST
Small (up to $500K)	20–40 hours	15–40% of the award. Reporting, audits, and compliance can consume a significant share of smaller awards.
Medium ($500K– $1.5M)	40–120 hours	10–25% of the award. May be partly offset via indirect cost recovery, though reporting/evaluation demands remain substantial.
Large / Federal ($1.5M+)	120–300+ hours	12–30% of the award. Often requires dedicated project management, oversight, data reporting, and compliance infrastructure; may require external evaluation.

Scale your judgment to the award: lighter for small, low-risk opportunities; full rubric for significant ones. Then confirm you can absorb demands that extend beyond the award period:

- **Cash flow:** Can you front expenses for 30–90+ days under a reimbursement-based model?
- **Compliance & reporting:** Do you have ongoing administrative capacity for recurring reports, oversight, and monitoring?
- **Data & evaluation:** Can you support required data collection, performance tracking, and potential third-party evaluation?
- **Audit readiness:** Are your internal controls and documentation sufficient to support audits and monitoring reviews?

KEY INSIGHT

Strong implementation capacity includes the financial ability to sustain operations during reimbursement delays.

Internal & Leadership Support

Confirm leadership and relevant teams have reviewed and endorsed pursuing this opportunity. Leadership needs a realistic picture of the odds, workload, and obligations involved before formally weighing in, not a summary after the fact, so raise these points up front rather than assuming leadership agrees. Before pursuing funding, confirm leadership understands each of the following:

- **Realistic success rates:** Competitive federal opportunities often see ~5–20% award rates.
- **Staffing & workload expectations:** Proposal development and implementation demands should be clearly understood.
- **Pipeline vs. secured revenue:** Potential awards should not be treated as guaranteed funding.
- **Organizational learning:** Unsuccessful applications still build competitiveness, relationships, proposal refinement, and lessons learned.
- **Long-term commitments:** Future staffing, compliance, and sustainability obligations should be acknowledged early.

> **KEY INSIGHT**
> *When leadership is clear-eyed about the odds and workload, organizations avoid taking on more than they can handle.*

Reporting & Compliance Capacity

Confirm your current systems already meet this funder's reporting and compliance demands. Funders expect you to show you can manage the money responsibly. Data and reporting systems don't need to be complex, but must be reliable enough to meet requirements. For federal funding, awareness of 2 CFR 200 (Uniform Guidance) is critical. You don't need to master it before applying, but organizations that can't meet its requirements (cost accounting principles, procurement, etc.) may face significant implementation and compliance challenges if awarded.

Assess your existing systems across financial management, data and reporting, and federal funding considerations, then confirm your administrative readiness separately.

FINANCIAL MANAGEMENT & COMPLIANCE	WHAT TO CONFIRM
Accounting systems	Funds tracked separately by project and budget category
Procurement	Documented purchasing/contracting processes exist
Expenditure oversight	Approval process for spending and budget monitoring
Financial reporting	Reports generated accurately and consistently
Recordkeeping	Documentation supports audits and financial reviews

DATA & REPORTING CAPACITY	WHAT TO CONFIRM
Data collection	Can track required program, outcome, and participant data
Data quality	Maintained consistently
Data protection	Sensitive information protected appropriately
Reporting	Produced efficiently
Evaluation	Can support performance measurement

FEDERAL FUNDING CONSIDERATIONS	WHAT TO CONFIRM
Fund tracking	Separate by award and budget category
Cost documentation	Federal cost/documentation requirements applied
Procurement	Competitive standards followed
Recordkeeping	Sufficient for monitoring/audit

VI

SECTION VI.

Next Steps

This guide helps you decide where to focus your organization's limited time and resources. Even strong grant applications aren't always funded, but applying can strengthen your strategy and improve future proposals.

For opportunities you choose to pursue, continue to CFA's Grant Writing Guide for structured proposal development guidance. After submission, use the Post-Submission Strategy Guide to prepare for activities between submission and award notification. Whether or not you pursue this opportunity, maintain the practices below on an ongoing basis, since they make future opportunities easier to pursue.

- Track renewal dates and expiration timelines
- Designate backup administrative contacts
- Confirm organizational information regularly
- Test portal access at the start of application development, well before deadlines
- Maintain secure access credentials (see table below for typical set-up times)

PLATFORM	PURPOSE	TYPICAL SET-UP TIME
SAM.gov	Federal entity registration required for many federal opportunities	1–3+ weeks
Grants.gov	Federal application submission portal	Depends on active SAM.gov registration
State Vendor Systems	Registration systems required for state-funded opportunities	Varies by state
Foundation Portals	Submission systems for philanthropic applications	Varies 1–7 days
Agency-Specific Portals	Program-specific application or reporting platforms	Varies by agency

How CFA Can Help

The Community Funding Accelerator (CFA) works with organizations, coalitions, and public agencies across the grant lifecycle, from early opportunity assessment through implementation readiness. We offer strategic guidance, structured tools, and, for a select set of opportunities, hands-on technical assistance.
communityfundingaccelerator.org

GLOSSARY

Key Terms

Definitions of terminology used throughout this guide, with particular relevance to organizations new to the federal and competitive grant process. Terms are listed alphabetically across both pages.

501(c)(3)
A nonprofit organization recognized by the IRS as tax-exempt for charitable, educational, religious, or other qualifying purposes. A common eligible applicant type for philanthropic and many federal grants. IRS determination letters are routinely requested as documentation.

Allowable costs
Expenses the funder permits to be charged to a grant. Costs not listed as allowable must be covered by other funds. Allowability is distinct from reasonableness or allocability — a cost can be reasonable but still unallowable under a specific award.

Authorized Organizational Representative (AOR)
The individual with legal authority to submit grant applications and enter into agreements on behalf of an organization. A registered AOR is required for Grants.gov federal submissions. AOR registration is tied to SAM.gov and must be kept current.

Budget narrative
A written explanation accompanying the grant budget that justifies each line item, links costs to proposed activities, and demonstrates cost-effectiveness. Required by most funders. Reviewers use it to assess whether the budget is realistic, allowable, and aligned with the proposed work.

Cost-share / Match
Non-grant funds (cash or in-kind) an applicant must contribute alongside grant dollars. The required ratio, allowable sources, and documentation standards vary by award. Federal funds generally cannot be used to match other federal funds.

Drawdown
The process by which a grantee requests and receives payment from awarded grant funds, typically through a federal payment portal such as ASAP (Automated Standard Application for Payments). Schedules and advance payment rules vary by award and agency.

Duplication of benefits
Charging the same cost or serving the same documented need under two separate awards simultaneously. A compliance violation that can trigger repayment requirements, disqualification, or audit findings.

Fiscal sponsor
An eligible organization that receives and administers grant funds on behalf of an entity that does not independently meet eligibility

High-risk designation
A federal agency classification applied to grantees with prior compliance, financial management, or performance concerns. High-risk organizations may face enhanced reporting requirements or be disqualified from certain competitions, even without an active exclusion in SAM.gov.

IHE (Institution of Higher Education)
A postsecondary institution meeting Title IV eligibility requirements — typically accredited colleges, universities, and community colleges. A common eligible applicant type for research, workforce, and postsecondary grants. Confirm applicability in the specific NOFO rather than assuming it applies.

Indirect costs (IDC)
Administrative and overhead costs not directly attributable to a specific project — facilities, shared staff, IT, and similar expenses. Covered through a negotiated indirect cost rate or a de minimis rate (typically 10% of Modified Total Direct Costs).

LEA (Local Education Agency)
A public board of education or other public authority that provides administrative control over public elementary or secondary schools in a state. A common eligible applicant type for K–12 and education-focused federal grants.

Letter of Intent (LOI)
A preliminary notice submitted before a full application, indicating intent to apply. When required, a missing or late LOI is typically treated as a disqualifying eligibility failure — not a scored deficiency. Check the NOFO for LOI deadlines separate from the application deadline.

Memorandum of Understanding (MOU)
A formal written agreement between two or more organizations defining roles, responsibilities, and commitments. Many funders require MOUs as documentation of partnership arrangements. Verbal commitments are not sufficient and should not be treated as equivalent.

MTDC (Modified Total Direct Costs)
The base amount used to calculate indirect cost recovery under many federal awards. Includes salaries, fringe benefits, materials, and the first $25,000 of each subcontract, but excludes capital equipment, patient care, tuition, and subcontract amounts above $25,000.

GLOSSARY (CONTINUED)

Key Terms

NOFO (Notice of Funding Opportunity)
The official document announcing a grant competition. Describes eligibility requirements, allowable activities, application instructions, and selection criteria. Equivalent to an RFP or RFA in other funding contexts. Always read the current cycle's NOFO — requirements shift between years.

Non-supplanting
A federal requirement prohibiting grant funds from replacing existing organizational funding. Grants must support new or additional activity. Using grant funds for an existing cost, then redirecting freed funds elsewhere, is inadvertent supplanting — a common audit finding.

Pass/fail gate
A threshold eligibility requirement that must be met in full. Unlike scored criteria, pass/fail factors are binary — failure on any single factor typically results in disqualification regardless of other application strengths.

Period of performance
The official start-to-end timeframe of a grant award during which funds may be obligated and spent. Costs incurred before the start date or after the end date are generally unallowable unless a no-cost extension has been approved in advance.

Program officer
The funder staff member responsible for managing a grant program — reviewing applications, answering questions, and monitoring active awards. Engaging a program officer before a solicitation is released can provide valuable context on funder priorities that isn't captured in the NOFO itself.

Reimbursement-based funding
A payment structure in which the grantee advances its own funds to cover grant expenses, then submits documentation to receive reimbursement. Requires sufficient organizational cash flow to cover 30–90+ day payment cycles without disrupting operations.

SAM.gov (System for Award Management)
The federal government's primary registration portal for entities seeking federal awards. Active registration and a valid UEI are required to apply for or receive most federal grants. Registration lapses annually — confirm status at the start of each application cycle, not on deadline week.

Selection criteria
The weighted categories reviewers use to score applications — typically covering alignment with program objectives, quality of the proposed approach, organizational capacity, and evaluation plan. Review selection criteria before drafting: structure your narrative to address each scored element directly.

Single audit
An independent annual audit required of any organization that expends $750,000 or more in federal funds in a single fiscal year. Governed by 2 CFR 200 Subpart F. Unresolved single-audit findings can affect future eligibility or trigger a high-risk designation.

Subrecipient
An entity that receives a portion of federal award funds from a prime recipient to carry out part of the federally funded program. Subrecipients are subject to federal compliance requirements and must be monitored by the prime recipient — distinct from contractors, who provide goods or services for a fee.

Theory of change
A logic model connecting proposed activities to expected short- and long-term outcomes. Used in applications to demonstrate that the proposed approach is grounded in evidence and will plausibly produce the intended results at the proposed scale.

Tribal government / organization
A federally recognized Tribal government or Tribally controlled organization authorized to apply for and receive federal grants. Specifically named as an eligible applicant type in many federal NOFOs, and may have distinct compliance requirements or match waivers not available to other applicants.

UEI (Unique Entity Identifier)
A 12-character alphanumeric identifier assigned through SAM.gov, required for federal grant applications. Replaced the DUNS number system in April 2022. Tied directly to SAM.gov registration — a lapsed registration can affect UEI active status.

Uniform Guidance (2 CFR 200)
Federal regulations governing administrative requirements, cost principles, and audit standards for federal awards. Key provisions cover cost allowability, procurement, recordkeeping, subrecipient management, and single audit requirements. Familiarity is essential before receiving federal funding.

Win themes
An organization's two or three strongest competitive differentiators, identified before a solicitation is released and woven consistently throughout the proposal narrative. Effective win themes connect organizational strengths directly to funder priorities and scoring criteria — not just to what the applicant does well.

REFERENCE

What to Get Right Early

The errors below appear repeatedly across first-time and experienced applicants alike. Most are avoidable with early attention — none require specialized expertise to prevent.

Assuming eligibility carries over from a prior cycle

Eligible applicant types, geographic restrictions, and partner requirements change between cycles. An organization eligible last year may not qualify this year.

→ Always read the current NOFO. Never rely on a prior year's eligibility section.

Treating a verbal partner commitment as sufficient

A partner who has "agreed in principle" is not confirmed. Funders expect written MOUs or letters defining roles before submission.

→ Secure written commitments early. A verbal agreement is not documentation.

Waiting until deadline week to check SAM.gov

SAM.gov registrations lapse annually and renewals take 1–3+ weeks. A lapsed registration on deadline day cannot be expedited.

→ Confirm active SAM.gov registration at the start of every application cycle.

Confusing allowable with required activities

Missing a required activity scores poorly or disqualifies — regardless of how strong the concept is otherwise.

→ Make two separate lists. Confirm every required activity is explicitly addressed.

Reading only the eligibility section of the NOFO

Eligibility requirements appear across multiple sections — budget rules, partner provisions, LOI deadlines. Reading only the "Eligibility" heading misses disqualifying requirements.

→ Read the full NOFO. Flag eligibility-relevant language wherever it appears.

Pursuing every opportunity you're eligible for

Eligibility is the floor, not the ceiling. Applying without assessing fit, competitiveness, or capacity produces weaker applications and unsustainable commitments.

→ Use the fit and competitiveness rubric. Prioritize opportunities you can pursue well.

Writing the narrative before reading the scoring criteria

Reviewers score against published selection criteria, not general quality. A compelling narrative that doesn't map to the criteria will score below one that does.

→ Read scoring criteria before drafting. Structure each section around what reviewers score.

Using grant funds to replace existing costs (supplanting)

Using award funds for a cost you already fund — then redirecting freed dollars — is supplanting, even if unintentional. Grants must support new or additional activity.

→ Review your existing budget before writing the grant budget. Flag potential duplicates.

Leaving sustainability as an afterthought

"We will seek additional funding" is not a sustainability plan. Applications without a specific, resourced continuation path score lower and raise red flags.

→ Identify a continuation pathway before applying. No credible path is a signal to reassess.

Underestimating the burden of federal awards

Federal grants require cost accounting, procurement compliance, subrecipient monitoring, and audit readiness. Organizations unprepared for these demands face implementation crises after award.

→ Assess compliance capacity honestly before pursuing large federal awards (see Part D).

INTERACTIVE TOOL

Pre-Application Readiness Assessment

Enter a specific funding opportunity and work through two stages: a pass/fail eligibility screen that surfaces any hard disqualifiers early, then a scored Part A–D assessment of your fit and competitiveness against the opportunity. The tool produces a clear pursue, refine, or deprioritize decision — along with a competitive-positioning read, a readiness and track-record profile, and a documented rationale with prioritized strengths and gaps ready to share with leadership or partners.

Open the interactive tool

COMMUNITY FUNDING ACCELERATOR

GRANT READINESS TOOLKIT

Supporting communities across the full grant lifecycle — from opportunity assessment through implementation readiness.

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