SOC RESOURCE GUIDE

# Before You Commit

## 12 Questions to Assess Your Organization's Readiness for Funding, Contracts, and Growth

A Practical Readiness Guide for Business and Nonprofit Leaders

FOUR DIMENSIONS OF READINESS

| | |
|---|---|
| **Strategic Alignment**<br>Three readiness questions | **Financial Readiness**<br>Three readiness questions |
| **Operational Capacity**<br>Three readiness questions | **Accountability & Sustainability**<br>Three readiness questions |

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# A Better Starting Point for Important Decisions

A new contract, grant, partnership, or expansion can support an organization's goals. It can also introduce financial obligations, staffing pressures, reporting requirements, and responsibilities that are easy to underestimate before work begins.

This guide is designed to help leaders ask practical questions before making a significant commitment. It reflects an operational perspective: whether an opportunity can be delivered responsibly matters as much as whether it can be obtained.

Use the questions with the people who will be responsible for finance, operations, program delivery, and oversight. You do not need perfect answers. You do need a clear understanding of what has been verified, what requires attention, and who is responsible for the next decision.

## How to Use This Guide

- Review the 12 questions across four areas.
- Mark each area Ready, Needs Attention, or Not Yet Reviewed.
- Identify the evidence that supports your response rather than relying only on confidence.
- Choose up to three priorities and assign actions for the next 30 days.
- If you are considering public contracting, use SOC's Government Contracting Navigator for a more focused assessment.

A readiness assessment supports informed decisions. It does not certify eligibility, compliance, financial stability, or an organization's ability to perform a particular contract. Verify the requirements applicable to each opportunity.

# Strategic Alignment

Is the opportunity consistent with the organization's priorities and decision making capacity?

## 1. Does the opportunity advance a clearly defined organizational goal?

**What to consider:** Consider whether the work contributes to an approved priority, defined customer or community need, or measurable organizational result.

**Evidence to review:** Strategic plan; business plan; board or leadership priorities; projected outcomes.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 2. Do leaders agree on the intended outcomes and responsibilities?

**What to consider:** Identify who is making the decision, who will lead delivery, who approves commitments, and what success means.

**Evidence to review:** Decision record; responsibility chart; governance approvals; delivery milestones.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 3. Have we considered what accepting this commitment may require us to postpone or stop?

**What to consider:** Time, money, and management attention are limited. Identify the work that may compete with this opportunity.

**Evidence to review:** Current commitments; staffing schedules; project portfolio; capacity constraints.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

Review the supporting evidence before marking any item Ready.

# Financial Readiness

Can the organization manage the real cost and timing of the commitment?

## 4. Do we understand the full cost of the proposed work?

**What to consider:** Include staff time, benefits, vendors, technology, insurance, administration, reporting, and any required match or unreimbursed costs.

**Evidence to review:** Cost model; staffing budget; vendor estimates; overhead assumptions.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 5. Can we manage cash flow if revenue or reimbursement is delayed?

**What to consider:** Review when money must be spent, when payment is expected, and what financial resources are actually available in the meantime.

**Evidence to review:** 13 week cash flow projection; payment terms; receivables aging; available unrestricted resources.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 6. Have we identified restrictions and financial obligations that could create exposure?

**What to consider:** Review allowable costs, reporting deadlines, indirect cost treatment, audit requirements, and repayment or performance obligations.

**Evidence to review:** Solicitation or agreement; grant conditions; finance policies; insurance and audit requirements.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

Review the supporting evidence before marking any item Ready.

# Operational Capacity

Do people, processes, and information systems support reliable delivery?

## 7. Do we have sufficient staffing, skills, and leadership capacity?

**What to consider:** Assess the work that must occur after award or launch, including supervision, recruitment, training, and continuity when personnel change.

**Evidence to review:** Staffing plan; skills inventory; vacancies; training and succession plans.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 8. Are critical procedures and decision authority documented?

**What to consider:** Identify the steps employees must follow and the decisions that require manager, executive, or board approval.

**Evidence to review:** Written workflows; operating procedures; delegations of authority; escalation protocols.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 9. Can we measure performance and produce reliable reports?

**What to consider:** Determine whether data will be collected consistently, reviewed regularly, and used to address delivery problems promptly.

**Evidence to review:** Metrics definitions; reporting calendar; data systems; quality control procedures.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

Review the supporting evidence before marking any item Ready.

# Accountability and Sustainability

Can the organization meet expectations, manage risk, and sustain results?

## 10. Have we reviewed applicable compliance and contractual requirements?

**What to consider:** Identify relevant laws, procurement terms, licensing, records retention, privacy, and monitoring obligations. Seek qualified advice where necessary.

**Evidence to review:** Official solicitation; draft agreement; licenses; compliance register; legal or specialist review.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 11. Does the appropriate governing authority have enough information for oversight?

**What to consider:** Clarify which decisions belong with management and which require board, ownership, or governmental authorization.

**Evidence to review:** Board materials; approval matrix; conflict disclosures; oversight schedule.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

## 12. Do we have a practical risk, evaluation, and sustainability plan?

**What to consider:** Decide how issues will be detected, who will respond, and what happens if revenue, staffing, demand, or partner commitments change.

**Evidence to review:** Risk register; evaluation plan; scenario analysis; contingency and transition plans.

Status: ☐ Ready | ☐ Needs Attention | ☐ Not Yet Reviewed

Review the supporting evidence before marking any item Ready.

SELF-ASSESSMENT

# Readiness Worksheet

For each question, select one status and record the most important evidence or gap. “Ready” means you have a reasonable basis for that judgment, not just confidence.

| # | Readiness Question | Status | Evidence or Gap |
|---|---|---|---|
| 1 | Does the opportunity advance a clearly defined organizational goal? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 2 | Do leaders agree on the intended outcomes and responsibilities? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 3 | Have we considered what accepting this commitment may require us to postpone or stop? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 4 | Do we understand the full cost of the proposed work? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 5 | Can we manage cash flow if revenue or reimbursement is delayed? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 6 | Have we identified restrictions and financial obligations that could create exposure? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 7 | Do we have sufficient staffing, skills, and leadership capacity? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 8 | Are critical procedures and decision authority documented? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 9 | Can we measure performance and produce reliable reports? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 10 | Have we reviewed applicable compliance and contractual requirements? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 11 | Does the appropriate governing authority have enough information for oversight? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |
| 12 | Do we have a practical risk, evaluation, and sustainability plan? | ☐ 1 ☐ 2 ☐ 3 | _____ _____ |

**1 = Ready  2 = Needs Attention  3 = Not Yet Reviewed**

If several items need attention, prioritize those that could prevent performance, cause financial harm, or violate an obligation. Do not calculate an overall “readiness score” from these answers.

# Your Next Step for Public Contracting

The questions in this guide apply to many funding and growth decisions. If your organization is preparing to pursue a local, county, or state government contract, the next step is to examine contracting requirements more closely.

SOC's free Government Contracting Navigator offers two pathways: organizational readiness and review of a specific published government opportunity. It helps you identify questions to verify against an official solicitation. It does not determine legal eligibility or guarantee that pursuing a contract is appropriate.

> **Use the Free Government Contracting Navigator**
> strategicopconsulting.com/government-contracting-navigator/

## 30 Day Action Plan

Choose no more than three issues that would materially affect a decision or the ability to deliver the work. Keep actions specific and assign accountability.

| # | Priority / issue | Next action and evidence | Responsible person | Target date |
|---|---|---|---|---|
| 1 | _____ | _____ | _____ | _____ |
| 2 | _____ | _____ | _____ | _____ |
| 3 | _____ | _____ | _____ | _____ |

## Decision Checkpoint

- Proceed only with documented assumptions and an accountable delivery plan.
- Proceed after resolving identified gaps and obtaining required approvals.
- Pause or decline the opportunity if obligations exceed available capacity or risk tolerance.

AN INVITATION TO TAKE THE NEXT STEP

# When Outside Support May Help

A completed guide or Navigator assessment may identify issues that require deeper work. Strategic Operations Consulting, LLC supports organizations with operational assessments, financial and sustainability planning, fund development and proposal preparation, workforce systems, implementation planning, and governance or stakeholder alignment.

SOC can help leaders assess the underlying issues, set priorities, and develop a practical scope of work. An introductory conversation is not a promise of funding, an award, or a particular business outcome.

## Discuss Your Organization's Priorities With SOC

strategicopconsulting.com/contact/

## About This Resource

Prepared by Strategic Operations Consulting, LLC, a founder led advisory firm drawing on experience in private sector operations, nonprofit executive leadership, public governance, workforce systems, and institutional collaboration. References to founder experience are not representations that every initiative was performed as an SOC client engagement.

## Important Information

Educational planning resource. Not legal, accounting, procurement, or financial advice. Requirements vary by jurisdiction, funder, and solicitation. Use official materials and appropriate qualified professionals for consequential decisions. No information entered in a printed copy is sent to SOC.

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