

Grants Strategy &

Calendar Worksheets

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# Grant Decision Matrix

What program will I use to build my matrix?

What might be our specific criteria?

Check those that apply to your organization and add new ideas!

### Subjective criteria:

* Relationship with grant maker
* Compliments grant maker’s objectives
* Compliments my organization’s mission
* Likelihood of award / how competitive are we
* Competition for award
* Do we have enough time to write the proposal

What other subjective criteria do I want to consider?

### Objective criteria:

* Meet eligibility requirements
* My organization serves the target community
* My organization serves the target population
* Do we have or can we obtain expertise in the subject area
* Do we have the fiscal expertise to manage an award of this size
* If matching funds are required, can we make the match
* Will the award cover our administrative/ indirect costs
* Is this enough money to do what needs to be done
* Are required collaborations in place
* Can we secure the required agreements, letters of support, etc.
* Can we meet the evaluation requirements
* Do we have support of the board/staff to make application

What other objective criteria do I wish to consider?

### Designing the key

Your key may look something like this:

 Matrix Key

 0 = Neutral

 1 to 5 = Positive

 -1 to -5 = Negative

 Do not apply = scores of X or lower

* What are my initial thoughts on how to develop our key?
* What do I need to do to further develop the Matrix?
* Who might help with this project?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Will I use Excel, Google doc spreadsheet, or some other spreadsheet program?

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Grant Research

### Project Description Worksheet

* What is the name of the project/program?
* Who is the lead contact person?
* What is the proposed project?
* What needs/problem will this project/program address?
* What is the project budget (an estimate is fine)?
* Are there specific brand names for any product or equipment I may need?

### Developing the key words for my research

* What is the geographic focus of this project?
* Does the geographic focus area require further discussion? \_\_ Yes \_\_ No
* If the expanded geographic area suggests any collaborative partners, who might they be?

1.

2.

3.

4.

5.

Others?

* What **areas of interest** are we covering with this project?

|  |  |
| --- | --- |
| **Obvious** | **Less Apparent** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

* Who makes up the **target population**?
* What **type of support** do we need for this project?

Here are a few examples of types of support. You can get a full list of types of support on the GrantStation home page under SEARCH TERMS.

Advocacy

Capacity Building

Collaborations/Partnerships

Equipment Funding

General Support

Matching Grants

Project/Program Support

* What information can I add to this project description to make my grant research more productive?

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# Identifying the right grant maker(s)

* Who should I contact to discuss potential funding, or who can make the contact for me within:
* Local government
* County/borough government
* Federal government

*\*\*Are there specific departments or funds I should research?*

* What research tools can I use for federal research?
* Grants.gov (no cost/ time consuming)
* GrantStation (requires Membership/quick, easy)
* Who is on our organization’s vendor list that might be able to support our project?
1. *(Bank)*
2. *(Insurance company)*
3. *(Utility company)*
4.
5.
* Which other businesses/organizations that we work/collaborate with might be able to support this project (either in kind contribution or cash)?
* Which natural partners should we discuss this project with, who might be able to bring other funders to the table?
* What research tools can I use for private funding research (corporations, foundations, associations with grantmaking programs, religious grantmakers, etc.)?
* Google or other search engines (no cost/ time consuming)
* GrantStation (requires Membership/quick, easy/ covers foundations, corporations, religious grantmakers, and associations)
* Library (on line database access / no cost / time consuming)
* Other online research tools
* Additional thoughts and ideas:

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# Creating a Script

Points I would like to make in my first conversation with a potential grant maker:

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# Grant Strategy

*Strategy is an elaborate plan of action.*

*Effective strategy relies on in-depth research and an understanding of the grantmakers intentions.*

*Strategies evolve and change over time.*

*With the right strategic grants approach in place, your tasks gain more clarity allowing for sound decision-making.*

* What are my ideas / thoughts for developing a strategy for funding this project?
* What other projects that need funding might I want to include in an overall strategic approach for the rest of 2016, and throughout 2017?

1.

2.

3.

4.

* Will there be a general operating budget shortfall in 2017?
* Yes (if so, how much?)
* No
* Unsure

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Grants Calendar

* Which projects will I weave into my grants calendar?

|  |  |
| --- | --- |
| **Project** | **Date Money Needed** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

* Will I include general operating as one of the threads in my overall approach?
* Yes, for this operating period (dates)
* No
* Need to discuss with board / staff / others if grants should play a role in general operating
* What is my projected start date and end dates for my Grants Calendar?

Start:

End:

*\*Note that the end month for the overall Calendar is always evolving, but for the initial planning stage try determine a cut- off month and let the Calendar grow as you develop new sources and flesh out your overall strategy.*

Some of your end dates will actually be determined because of a deadline that will affect the project. For example, let’s say you want to build that trail we discussed earlier? Then you have a ‘building season’, which guides the timing of the grant awards (money in the door).

What are my thoughts/ ideas for developing my organization’s Grants Calendar?

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*
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*
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