



Grants Strategy and Calendar Worksheets

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 proposa

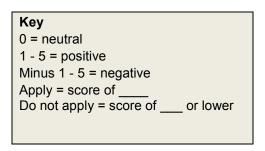
What other objective criteria do I want to consider?

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:



Ideas on how to develop our key for the matrix:

How can I further develop the Grant Decision Matrix?

Who might help with this project?

Check out Microsoft Office matrix template



Develop a Project Description Worksheet for each project

What's the name of the project/program?
Who is the lead contact person
What is the proposed project?
What needs/problem will be addressed via this project/program?
Is there any relationship between this project and any past projects?
Project budget (an estimate is fine) \$
Can you break this number down into specific categories such as personnel, equipment, travel, etc.?

Developing the key words for my research What is the geographic focus of this project? What areas of interest are we covering with this project? Is there as target population?_____ What type of support do we need?

What information can I add to this project description to make it easier to locate the right grant maker?



Identifying the right grant maker(s)

Who should I contact to discuss potential funding or who can make the contact for me at:
Local government
**are there specific departments or funds you should research?
County/borough government
**are there specific departments or funds you should research?
Federal government **are there specific departments or funds you should research?
What research tools can I use for federal research?
Grants.gov (no cost/ time consuming)
GrantStation (requires Membership/quick, easy)
Other source(s)
Who is on our vendor list that might be able to support our project?
1 (bank)
2 (insurance)

3	(utility company)
4	<u> </u>
5	<u> </u>
6	<u> </u>
7	
8	
9	
	ganizations we work or collaborate with pport this project (either in kind
Do we have natural partners t might be able to bring other f	that I should discuss this project with who unders to the table?
What research tools can I use (corporations, foundations, as religious grantmakers, etc.)?	for private funding research ssociations with grantmaking programs,
Google or other search er	ngines (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:

Creating a Script

Points I'd like to <u>always make</u> in my first conversation with a potential grant maker



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 project might I want to start with?

Are there natural partners for funding this project?

What are my ideas / thoughts for developing a strategy for funding this project?



Which projects will I weave into	my grants calendar?	
Project	Date we need the money	,
		_
		_
		_
		_
		_
		_
Will I include general operating approach?	as one of the threads in m	y overall
Yes, for this operating period	d(d	ates)
No		
Need to discuss with board / role in general operating	staff / others if grants sho	uld play a
What is my projected start date	and end dates for my Grai	nts Calendar?
Start	End	

*Note that the <u>end month</u> 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?

