



## 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 proposal

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:

<p><b>Key</b> 0 = neutral 1 - 5 = positive Minus 1 - 5 = negative Apply = score of ____ Do not apply = score of ____ or lower</p>
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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](#)



## Grant Research

### **Develop a Project Description Worksheet for each project**

What's the name of the project/program?

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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. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

Other businesses and organizations we work or collaborate with that might be able to support this project (either in kind contribution or cash)?

Do we have natural partners that I should 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:



## Creating a Script

Points I'd like to always make 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?



## Grants Calendar

Which projects will I weave into my grants calendar?

Project

Date we need the money

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

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?



