

GRANTS MASTER PLAN DIRECTIONS FOR USE

I. NEEDS ASSESSMENT

- A. List needs in each category of grant (divided by tabbed pages).
- B. Prioritize those needs through an assessment of the Organization's Strengths, Weaknesses Opportunities and Threats (SWOT). *Hint: Make sure that key staff, board and volunteers have a voice in this process.*
- C. Have a single master list of priorities; consider the projects that will have the biggest impact

II. FUNDS NEEDED

- A. Determine the requirements of each potential grantor, i.e. Percentage of cash match, percentage of in-kind match
 - 1. Colored cells have drop down menus with suggestions
- B. Determine how much cash is needed for each project
- C. Determine where cash can be obtained, other than from the Organization's Operating Budget (i.e. private donors, other grantors, etc.)
- D. Determine which funding sources best fit the goal, and consider multiple sources for the same project

III. IN-KIND NEEDED

- A. Determine how much of grant can be met by in-kind
- B. By project, determine skills needed to meet in-kind (i.e. licensed electrician vs. Boy Scout troop)

GRANTS MASTER PLAN DIRECTIONS FOR USE

- C. Make a plan for how to meet in-kind match with documentation forms

IV. IDENTIFYING SOURCES

- A. Develop and keep updated a source sheet for possible grantors
- B. Look for “critical mass”- see example of Dominion Power showing up 3 times; this tells you that you may be “ripe” for a grant from them

V. Resources

A. Local Foundations

1. Community Foundations
2. Civic Foundations (i.e. Rotary)
3. Corporations that have a local/regional presence

B. Foundations of Vendors

1. i.e. Power Company
2. i.e. Feed Company

C. Local Government

D. State Government

E. Tribal Government

F. Federal Government: <http://www.grants.gov/>

G. (Look at 990s) Guidestar: <http://www.guidestar.org/Home.aspx>

H. The Foundation Center On-line (access through the PATH Center Membership by the Executive Director)

GRANTS MASTER PLAN DIRECTIONS FOR USE

- I. Philanthropy News Digest: <http://philanthropynewsdigest.org/>

VI. NOTEWORTHY

- A. Board members are your greatest source of contact with foundation funders and private donors; build a fund raising board
- B. An organization has to be able to IMPLEMENT, MANAGE, and SUSTAIN projects; take these into serious consideration prior to applying for funds
- C. Collecting data to determine needs and to set the priorities is a time consuming but ESSENTIAL part of the grant process; done well in advance of the grant application
- D. Be very careful of not over-matching grants; this can occur because of too many open grant projects, insufficient cash, and not knowing if the grant is a reimbursable grant or one that will pay the organization prior to the work on the grant
- E. There is no such thing as “free money”. You will work for every grant dollar that you receive. Make sure that you do exactly what you promise in the grant application
- F. Start small, be successful, move on from there
- G. Have a fundraising strategic plan that includes fees, donations, and grants