Project Worksheet Instructions

Before we begin researching grant makers, it is important to step back and determine what your organization is doing (or proposes to do) and why. This will help us research funders aligned with your projects/programs. We can do this by creating Project Worksheets. Creating one for each project/program that needs funding will keep us organized since different grant makers may be interested in funding different aspects of your work.

For example, you might create a Project for general operating support, another for capacity building, and one for each project or program your organization offers or wants to offer. When we find funders we can then assign them to the related Project(s).

These Projects are for internal dialogue and discussion within your organization, so they do not need to be polished. Rather, they provide a systematic way to clarify your funding needs so that our research is more focused.

Below is information to help you fill out a Project worksheet.

Project Details
Title - This is a brief descriptive name for the Project.

Description - Write a high-level explanation of what the funding is for. The purpose of this is to focus your research.

Statement of Need - Describe the current condition or status of the geographic area and the target population. What are the challenges/problems you will be addressing? Who will you serve? Why should the funder invest in this project? This component helps to determine the key terms you will use when you do your research.

Budget - Include as much detail as you can, such as specific line items and equipment or services. Make note of any brands that you are interested in purchasing, as those companies may have donation or discount programs.

Geographic Scope - Share the countries, states, and/or provinces that are impacted by this project.

Geographic Focus - Narrow the geographic scope by identifying which counties, cities, or neighborhoods you will serve.

Search Terms - Once you have drafted the worksheet, identify the terms we will use in our research. Take the time to review the definitions in Grant Station's "Glossary of Terms" pdf to align your project with the terms used by funders. You will submit the search terms in the following areas:

> **Areas of Interest – Use the Provided Area of Interest Option List -** These terms represent the areas that grant makers fund. Select those that best describe your work. Some will be obvious. For example, a food bank would select "Hunger/FoodBanks" under "Social Services and Issues." However, they could also consider selecting"Healthy Eating/Nutrition" under "Health/Wellness," or "Food Access/Food Security" under"Social Services and Issues."

Target Populations – Use the Provided Target Populations Option List - If your work focuses on a particular group or groups of people, make note of those target groups.

Types of Support – Use the Provided Types of Support Options List - Indicate the nature of the support you are seeking. Do you need general operating support? Project support? Capital funds? Equipment?

Other Keywords - If you have a very specific term that describes your work, and you do not see it in the search terms glossary, make note of it. For example, if you are working on the opioid crisis, you will not see the word “opioid” in the glossary. You can locate funders who specifically mention opioids by using “opioid” in the keyword search function. However, you would have seen "Substance Use Disorder" when reviewing the Areas of Interest, so you should use that instead of a keyword, since there will be funders interested in your work that might not use the word "opioid" in their description.

Take some time to develop these worksheets intentionally. Sometimes grantseekers skip this step and end up going back to create worksheets in order to get clarity for their research. This step of the process can ultimately save you time and make our research more effective.