

PROJECT PROFILE/PLANNING WORKSHEET

Purpose

The "Project Profile/Planning Worksheet" (next page) is one of the mightiest tools available to you as a successful grantseeker. When it comes to transforming good ideas into fundable project concepts, this worksheet is the closest thing available to a magic wand. Very simply, it's designed to help you develop and keep track of good ideas for fundable projects, even before you begin your funding research. In effect, you create an "inventory" of fundable project concepts. This inventory serves three important purposes:

- First, it helps you target your funding research more effectively by allowing you to plan in advance what *kinds* of projects you'll be researching for funding.
- Second, if completed properly, it can give you a head start on actually developing a final proposal, by helping you think through the key elements of your project idea.
- Finally, project profiles can serve as mini-proposals for potential funders who like to "shop" for a project to support with your agency. (It does happen -- really!)

Using the Worksheet

The basic premise of the Project Profile Planning Worksheet is to answer six basic questions about your project or program:

1. **Who** is going to do **what**?
2. **Where**?
3. With **whom**?
4. With **what resources**?
5. To accomplish **what results**?
6. **Why** is it important?

Think through each section, and complete the requested information as clearly and concisely as possible -- limiting your responses to the space provided on the worksheet. For example, you should be able to describe your project ideas (question 1) in one sentence of no more than 50 words. You may need to do a little homework for some of the sections. Complete details will be filled in later, when you're developing your full master proposal blueprint.

Ideally, the "Project Profile/Planning Worksheet" will be completed and submitted by the person in the organization who came up with the project idea in the first place. Larger organizations especially will often have one staff person assigned as "development director" or "grants coordinator," and many, many program people who are constantly coming up with great ideas for new projects or services for which funding is necessary. The next time one of your colleagues comes to you with a great idea, hand him or her a copy of the "Project Profile/Planning Worksheet," and say: "Sounds terrific! Can you flesh that idea out a bit, so I can do some targeted funding research for you?"

PROJECT PROFILE/PLANNING WORKSHEET

1. IN ONE SENTENCE, summarize your project idea. What will you do? Where? With whom? When? And why?	<ul style="list-style-type: none"> • Save until end
2. Who are you as an organization, and what are you all about? (What is your mission or purpose?)	<ul style="list-style-type: none"> • Organization name; • Some location marker; • Some sense of history or credibility; • Some cultural ID; • Overall service purpose or mission
3. Describe the specific need or issue in your community that this proposed project will address.	<ul style="list-style-type: none"> • Why is your issue important; • Watch the jargon; • Start with a compelling statistic; • Contain the scope; • Relate to the community you serve.
4. What specific changes or outcomes do you intend to achieve in your community as a direct result of your project? What are your "success indicators"?	<ul style="list-style-type: none"> • What will be different? <i>as a result of the program</i> • Before/After • Success Indicators? • Direct Impact
5. What are the major steps you will need to take to make these changes happen?	<ul style="list-style-type: none"> • Key Deliverables • Action Plan • Systems in place • Track, report, evaluate
6. Who else has a vested interest in working with you as partners on this problem or opportunity?	<ul style="list-style-type: none"> • Partnerships; • Collaborations; • Letter of Agreement; • Fiscal Agent?
7. What information, tools, data, etc. will you use to decide whether your project succeeded?	<ul style="list-style-type: none"> • Pre/Post Tests; • Performance Measures; • Logs, Timesheets.
8. What resources will you need to accomplish these steps? (People, equipment, materials, training, supplies, services, etc.)	<ul style="list-style-type: none"> • <i>People</i> • <i>Equipment</i> • <i>Supplies/Materials</i> • <i>Other Services</i>
9. Approximate total cost:	<ul style="list-style-type: none"> • <i>Breakdown costs; Itemize; Phases; Cost per/X</i>
10. What broad categories of community needs or opportunities does your project address? (Think in terms of general labels or frames.	<ul style="list-style-type: none"> • General Labels; • Keywords; • Issue Areas; • Target Group(s)

Submitted By:

Phone:

Date

PROJECT PROFILE/PLANNING WORKSHEET

1. IN ONE SENTENCE, summarize your project idea. What will you do? Where? With whom? When? And why?

2. Who are you as an organization, and what are you all about? (What is your mission or purpose?)

3. Describe the specific need or issue in your community that this proposed project will address.

In our community, the current situation is this:

4. What specific changes or outcomes do you intend to achieve in your community as a direct result of your project? What are your "success indicators"?

We intend to achieve the following specific outcomes:

5. What are the major steps you will need to take to make these changes happen?

6. Who else has a vested interest in working with you as partners on this problem or opportunity?

7. What information, tools, data, etc. will you use to decide whether your project succeeded?

8. What resources will you need to accomplish these steps? (People, equipment, materials, training, supplies, services, etc.)

9. Approximate total cost:

10. What broad categories of community needs or opportunities does your project address? (Think in terms of general labels or frames.)

_____	_____
_____	_____
_____	_____

Submitted By:

Phone:

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Sample PPPW: Literacy Volunteers of "Our" County

PROJECT PROFILE/PLANNING WORKSHEET			
1. IN ONE SENTENCE, summarize your project idea. What will you do? Where? With whom? When? And why?		By March 200-, Literacy Volunteers of "Our" County will train 50 new reading tutors to serve the rural communities to the west, working with volunteers recruited from local churches, to reduce the waiting list for literacy training in this underserved area.	
2. Who are you as an organization, and what are you all about? (What is your mission or purpose?)		Literacy Volunteers of "Our County" is a 35-year-old, volunteer-based 501c3 nonprofit whose mission is to empower adults with the ability to read and write, in order to achieve their full potential as individuals, as employees, as parents, and as members of the community at large.	
3. Describe the specific need or issue in your community that this proposed project will address.		<i>In our community, the current situation is this:</i> According to a 2006 survey by Literacy Volunteers of America, one out of six adults cannot read or write at the basic sixth-grade level, leaving them vulnerable to problems with parenting, employment, health, safety and self-esteem. And in the rural western half of "Our County" alone there is a waiting list of 200 adults who want to learn to read.	
4. What specific changes or outcomes do you intend to achieve in your community as a direct result of your project? What are your "success indicators"?		<i>We intend to achieve the following specific outcomes:</i> 1. Train and successfully match 50 new volunteers. 2. At least 75% of students will complete 6 months of tutoring. 3. Reading skills will improve an average of 2 grade levels. 4. At least 3 significant partnerships with local churches. 5. Reduce waiting list by at least 40 individuals.	
5. What are the major steps you will need to take to make these changes happen?		1. Contract with master trainer. 2. Training logistics: Materials, location, equipment. 3. Marketing to recruit potential volunteer tutors. 4. Conduct training. 5. Match and track tutor/learner pairs for 6 months. 6. Evaluate learner progress and program success.	
6. Who else has a vested interest in working with you as partners on this problem or opportunity?		Local churches Schools Libraries Service clubs--?	
7. What information, tools, data, etc. will you use to decide whether your project succeeded?		<ul style="list-style-type: none"> ▪ Pre- and post reading evaluations of learners ▪ Training logs of volunteer tutors 	
8. What resources will you need to accomplish these steps? (People, equipment, materials, training, supplies, services, etc.)		Master trainer Training materials Audiovisual equipment Training site (+ refreshments?)	
9. Approximate total cost:		\$25,000 (\$500 per volunteer trained, matched and tracked)	
10. What broad categories of community needs or opportunities does your project address? (Think in terms of general labels or frames.)		Literacy Reading Adult education	Parenting skills Workplace skills Minority issues
			Rural Church-affiliated
Submitted By:		Phone:	Date