

DO NOT MAKE CHANGES TO THIS DOCUMENT.

If you need to use it, make a copy of the document before updating anything.

Tab1: Submissions

This tab contains information on all planned submissions (reports, applications, etc.) for the calendar year.

Column A: Status

- Researching: Use this when you're researching a prospect, waiting to connect with a program officer, waiting for a grant cycle to open to learn more, etc.
- In Progress: Use this to indicate that a grant is being worked on and in process of being submitted.
- Submitted: Use this to indicate a grant is completed and submitted.
- Denied: Use this when a grant request is declined.
- Awarded: Use this when a grant is funded.
- Not Eligible: Use this to indicate when your organization does not meet funder criteria.

Column B: New/Renwal

Renewal: Select this if it's a returning funder who has awarded organization in the past.

New: Select this if this is a new prospect who has never funded the organization. Most everything in the pipeline will likely be new based on the fact that we are helping build their grants program.

Column C: Funder

List the name of the funder. When available, link to the funder's website. If no website is available, link to a grants prospecting website profile, such as [Foundation Directory](#).

Column D: Allocation

Note where funding will be focused. Funding will be allocated to GenOps or a specific program.

Column E: Ask Amount

Note how much the grant request should be in this column based on available research.

Column F: Probability

Assign the probability based on the following guidelines.

- 10%: Use this for funders with whom organization has no existing relationship, when it's unclear what the funder supports or the language is very broad (e.g. human services), and/or if the ask amount is large enough to skew projections.

- 25%: Use this for funders with whom the organization has no existing relationship, but it's at least clear that the funder supports the organization's area of work (e.g. profile or website specifically mentions mental health).
- 50%: Use this for funders with whom organization has no existing relationship, but you've been able to confirm that their work is a fit by communicating with someone from the foundation
- 75%: Use this for renewals
- 90% Use this for renewals that organization is extremely confident in

Column G: Projection

This number will auto populate based on the amounts provided in columns E & F. This number can be used to help determine how many grants will need to be submitted in order to hit their grant goal for the year.

Column H: Type of Project

Use to indicate the type of grant activity.

Column I: Due Date

This date should be the deadline to submit to the funder.

Column J: Notes

Notes related to the funder and/or application process should be added here. Notes can be logistical (e.g. submit LOI to Joe Smith at this address) or more subjective in nature (e.g. the funder has a particular interest in bi-lingual mental health due to personal connection to immigration/being first gen).

Tab 2: Do Not Apply

Move funders that organization is not eligible for to this tab. Include notes on why the organization is not eligible. Do not include funders where organization is eligible but has been denied.

Tab 3: Logins & PWs

Save all logins and passwords for organization funder portals here.