

THE ULTIMATE GRANTS TOOLKIT:



*Essential Worksheets, Blueprints,
and Step-By-Step Planning Guides
to Help You Build A+ Proposals –
and Great Grant-Funded Projects!*

by Maryn Boess
GrantsMagic U



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From all who go before

... for all who are to come

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INTRODUCTION

Welcome to Your Toolkit!

Welcome to (take a deep breath, it's a long title ...) *The ULTIMATE Grants Toolkit: Essential Worksheets, Blueprints, and Step-By-Step Planning Guides to Help You Build A+ Proposals – and Great Grant-Funded Projects!*

With a title like that, who needs an introduction?

Well, we do. A few words, at least ... to make sure you know everything you need to know about the resource you're holding in your hand, so you can get the very most from it.

The Disclaimer

First, the disclaimer: *The ULTIMATE Grants Toolkit* will not teach you how to write grant proposals. There's a lot you can learn through *ULTIMATE* about writing grant proposals – and I hope you will! – but that isn't its primary purpose.

Plenty of terrific books and other resources are already out there that can guide you step by step through the how-to's. Rather, *The ULTIMATE Grants Toolkit* is exactly what its name indicates: A collection of tools – planning tools, thinking tools, organizing and managing tools – that will support you in your grants success, *no matter what step-by-step process you follow*.

Let's take the tool analogy just a bit farther.

As a toolkit, *ULTIMATE* won't build your house for you. It won't tell you what kind of house you should build. It won't even tell you how to build that house.

It can – and will – provide the tools to help you *decide* what kind of house to build. It will show you how other people have built strong, exciting houses with these tools. And it will give you what you need to pull it all together, layer by layer, piece by piece. It will give you both the framework and the processes to set your own dreams into motion – to create -- by joining your imagination, passion, and good planning with the tools in this book – the house (grant-funded programs, projects, and services) of your dreams.

How to Use the Toolkit

The ULTIMATE Grants Toolkit is really two resources in one. The first is the one you're holding right now: The three-ring binder that contains the hard-copy print versions of all the planning tools and worksheets – as well as instructions and elucidations for putting them to work. The second is the collection of downloadable electronic-file versions of all the worksheets.

- **Three-Ring Binder.** The material in the three-ring binder is organized into nine separate sections, by broad topic. You'll find explanatory text at the beginning of each section. The *ULTIMATE* tools and worksheets are numbered consecutively throughout the entire *Toolkit*, to make it easier for you to identify. The *Contents* page contains a complete page-ordered index of all the worksheets, by number and by name.

You'll find many ways to make use of the hard-copy printouts of the *ULTIMATE* tools. We chose to use a three-ring binder to make it easy for you to remove any worksheet for copying, taking notes, making updates, and so on. If you purchased your own copy of *ULTIMATE*, you have the publisher's blanket permission to reproduce any worksheet for your personal or organizational (non-commercial) use. For more details on terms and conditions of usage, please see the notice on the copyright page at the front of the notebook.

- **The Downloadable Files.** All of the forms and worksheets contained in the notebook are also available to you as their own downloadable electronic file. When you purchased your *ULTIMATE*, you also received information on where to access these downloadable files. Just access the files and download them to your own computer – where you can access them any time you want. All files are in either Microsoft Word, Adobe PDF, or Excel format, depending on how the worksheets will be used.

We strongly recommend that you *copy all worksheet files directly to your own computer*. Then make a separate set of copies that you can modify without changing the original. That way you can make modifications to any file on your hard drive, and know that you always have a clean, untouched original version if you need it.

Guideposts Along the Way:



FOR YOU TO READ: When you see the **FOR YOU TO READ** icon, we are pointing you to a *Toolkit* article that will give you a fuller, deeper understanding, a richer context, and/or more detailed explanation of the tool in question and how you can use it.



GO DEEPER: When you see this **GO DEEPER** icon, we are pointing you to another resource in the *Toolkit* or elsewhere at GrantsMagic U for a different perspective, a different example, or additional deeper-dive training.



NEXT STEPS: When you see this **NEXT STEPS** icon, we are pointing you toward the next *Toolkit* resource – or the next process – to help you put your current tool to work and move you forward on your journey.

About the Contents

Over the years, my grants training team members and I have had the privilege of working with literally thousands of nonprofits, schools, tribal agencies, churches, government programs, and other community-service organizations across the country – helping them to learn and practice the principles of mission-centered grantmanship, and to tap their full potential for success as grantseeking organizations.

Our grants-related curriculum runs the gamut from beginners' basics through the highest levels of expertise and specialization. (You can check it all out at Go.GrantsMagic.org.)

Again and again, workshop participants have expressed deep gratitude for the planning tools and worksheets we incorporate into our workshop handouts. It's not unusual for us to hear a comment such as: "It was worth the entire registration fee, just to have that one worksheet [*whichever it might be*]."

So it wasn't surprising that, not long after our grants training began to really grow in the mid-2000s, we began hearing two questions again and again:

- "When will you publish a book that includes all of the your workshop resources?" and
- "Why don't you make all of the grants planning tools from your workshops available in electronic form?"

The ULTIMATE Grants Toolkit - first published in 2006 and significantly updated in 2019 - is our answer to both questions.

- The first 8 section are adapted directly from our collection of workshops and trainings on the fundamentals of mission-first grantsmanship, plus in-depth resources in areas of special interest. (And by the way, all the tools were originally developed by my training team members and I for use in our own practice, with our own clients and communities – so you can be assured that each tool has been tried, tested, tweaked, and proven sturdy and reliable in the trenches.)
- As a group, grant practitioners are remarkably creative, diligent, and passionately committed to excellence in the way we serve our causes, our organizations, and our communities. That means there's a lot of great thinking going on about how to do exactly that – and we're proud to say that *The ULTIMATE Grants Toolkit* draws on some of that great thinking from our colleagues across the country. We invited other grant practitioners to share with us their own favorite grants-related planning and management tools – and the stellar results are showcased in our section titled "Contributors' Gallery: Resources from the Grants Community."
- Finally, the "ultimate" designation notwithstanding, we are by no means under the illusion that this is the final or definitive resource on the subject of good grantsmanship. The last section, "Updates & Additional Resources: Make Sure We Can Reach You!," gives *The ULTIMATE Grants Toolkit* on-the-go growing room. Make sure to register your *ULTIMATE* purchase with us at GrantsMagic U (Go.GrantsMagic.org/ToolkitReg) so we can keep you posted on updates, related trainings, new resources, and other goodies connected with your *ULTIMATE* book.

Special Thanks to the Alliance of Arizona Nonprofits

The fact that you are holding this copy of *The ULTIMATE Grants Toolkit* right now is due in large part to the vision and leadership of the Alliance of Arizona Nonprofits, who partnered with me in 2008 to assume publication of the *Toolkit* as my training business was undergoing a major transition.

We have continued as partners ever since. And in fact, it was my colleagues at the Alliance who early in 2019 broached the idea of the first major update to the *Toolkit* since its initial publication. It was a project I was thrilled to dive into – taking full advantage of technology advances to create an even more robust, user-friendly and – I hope! – bright and magical resource to support you in your grants journey.

Please don't hesitate to get in touch with the good people at the Alliance of Arizona Nonprofits to share your own note of appreciation, or comments or feedback on the *Toolkit*. You can reach them at:

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Let Us Hear from You!

Let us hear from you. Tell us what you think of *The ULTIMATE Grants Toolkit*, what you like, what you think needs to be fixed or could be done better. Send us your own favorite grants-related resources – perhaps for a future edition. Please visit us at Go.GrantsMagic.org to tap into a whole magical community of learning and practice around building our collective grants success. If you'd like to bring *The ULTIMATE Grants Toolkit's* concepts to life for your own community, I'd be delighted to talk with you about how you can host or sponsor a GrantsMagic U virtual workshop from our ongoing curriculum.

Believe me when I say this:

Your success matters to me. It really does.

Because what you do matters to the world ... now more than ever.

Wishing you much magic, my friend, and – as always - happy and abundantly successful grantseeking!



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