

THE ULTIMATE 5-STEP GRANTS CALENDAR PLANNING GUIDE

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Introduction

Creating and maintaining a grants calendar can make a big impact on your nonprofit's grant efforts.

We created this **Ultimate 5-Step Grants Calendar Planning Guide** to help give you actionable steps you can take in formalizing your organization's grants calendar for the next twelve months (and beyond).

This tool is meant to guide you through the iterative process of creating a valuable grants calendar.

Remember: successful grant seeking starts with you having a grants system and strategy!

With this tool, you'll have **five clear steps** you can take to go from no grants calendar to a clear picture for the next 30-days, 90-days and year ahead.

- **Step #1:** Determine what's important to track
- **Step #2:** Take stock of existing relationships
- **Step #3:** Build a shortlist of opportunities
- **Step #4:** Organize your Tracker
- **Step #5:** Review & update your Tracker

This guide is meant to be used in conjunction with Instrumentl. If you haven't created your Instrumentl account, you can [start your 14-day free account here.](#)

Instrumentl brings grant prospecting, tracking and management to one place.

As you use this guide, if you need any additional help, feel free to email us at hello@instrumentl.com!

Now, let's jump into some grants calendar planning!

Step #1:

Determine what's important to track

One of the most crucial things to do when you're starting out in creating a grants calendar is **figuring out what you're going to track!**

To help you get started here, it can be useful to identify some of the most common information that is readily available from grant opportunities, as well as to consider some of the less common information that is still valuable to know before you consider pursuing an opportunity.

Looking at the following list, try to identify the **7-10 most important things** for you and your grant writing team to review:

Key Factor	Questions and Considerations
Amount of the grant	How much is the grant opportunity for? How does that factor into its prioritization relative to other opportunities you're working on?
What is the grant for	Ensuring there are enough grants being written for different programs and initiatives gives your nonprofit the most opportunities at meeting its fundraising goals
Research regarding the grant's organization	Are there previous grant recipients that are similar to yours? Project or areas the funder typically funds? Is there alignment with their mission and your nonprofit's initiatives?

Step #1:

Determine what's important to track

Key Factor	Questions and Considerations
Grant writer / point person for the proposal	Who will be working on this opportunity within your team?
Internal due dates	How is your team going to pace towards a grant opportunity? What are key dates to make sure the team hits?
Scheduled project milestones	What are the most important milestones and when are they due to happen? Consider milestones such as submission and reporting deadlines.
Team check-ins	Does your team meet every two weeks to review the status of your grant efforts? If so, these should likely be tracked or organized in some way.
Submission process	What's the process for submitting the grant? How and where do you go to apply?
Proposal status	What are the major statuses grants go through within your organization's process? Some common ones are as follows: Researching, Planned, In Progress, Submitted, Awarded, Declined, Abandoned

Step #1:

Determine what's important to track

Key Factor	Questions and Considerations
How funds will be used	Knowing how funds will be used allows for stronger identification and alignment to good fit funders, along with internal clarity on what your organization's goals are
Any existing connections	Do you have any existing relationships with key people? Does your board?
Submission date	What day did you actually submit the grant?
Outcome or amount raised	How much did you win or not win from the opportunity?

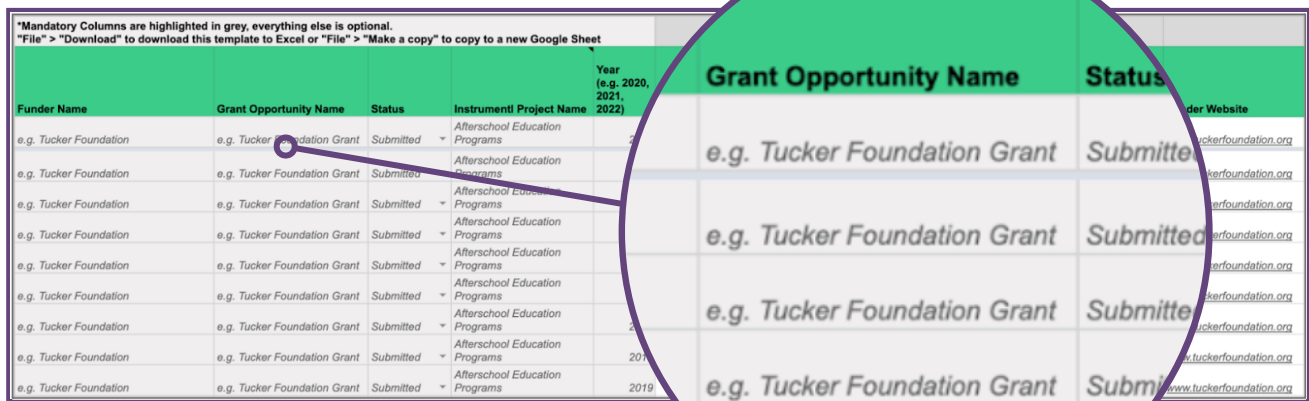
This is just a starting list of key factors! Feel free to think of your own that are important for your organization and build upon this when completing **Step #1** for your nonprofit.

Step #2:

Take stock of existing relationships

Now that we have an overall idea of what your nonprofit considers important when seeking grants, we can start to backfill existing relationships we may have.

Start by making a copy of [this free grants calendar template](#).



The image shows a screenshot of a Google Sheet template for tracking grants. A circular callout highlights a specific row in the table. The table has the following columns: Funder Name, Grant Opportunity Name, Status, Instrument/Project Name, Year (e.g., 2020, 2021, 2022), Grant Opportunity Name, Status, and Funder Website. The rows contain placeholder data for the Tucker Foundation.

Funder Name	Grant Opportunity Name	Status	Instrument/Project Name	Year (e.g., 2020, 2021, 2022)	Grant Opportunity Name	Status	Funder Website
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs		e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs		e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs		e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs		e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs		e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs		e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs		e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs	2019	e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org
e.g. Tucker Foundation	e.g. Tucker Foundation Grant	Submitted	Afterschool Education Programs	2019	e.g. Tucker Foundation Grant	Submitted	tuckerfoundation.org

The goal for you is to fill in the last two to three years worth of grants efforts. In the case where you are just starting out with grants, skip to **Step #3**.

If you are using an existing tracker, convert your tracker to use this template so that you can consolidate all your grant research into the same place as your grant tracker (you'll learn how to do this in **Step #3**).

Step #3:

Build a shortlist of opportunities

At this point, we know what we're valuing most in our grants calendar, and we have a general summary of all our past efforts.

Now it's time to start **building for new opportunities, and introducing more systems** into our grants calendar.

First, [go here to create your free 14-day Instrumentl account](#) if you do not already have one.

If you already have an account, log into your account.

Once you've created your account, you'll be able to set up your first projects.

Projects are workspaces where you can maintain a saved grant search, while also tracking all the grant opportunities related to that initiative of your nonprofit.

The first thing you'll answer is where your nonprofit is based out of. You'll want to be specific here, so try to input down to the county specific level.

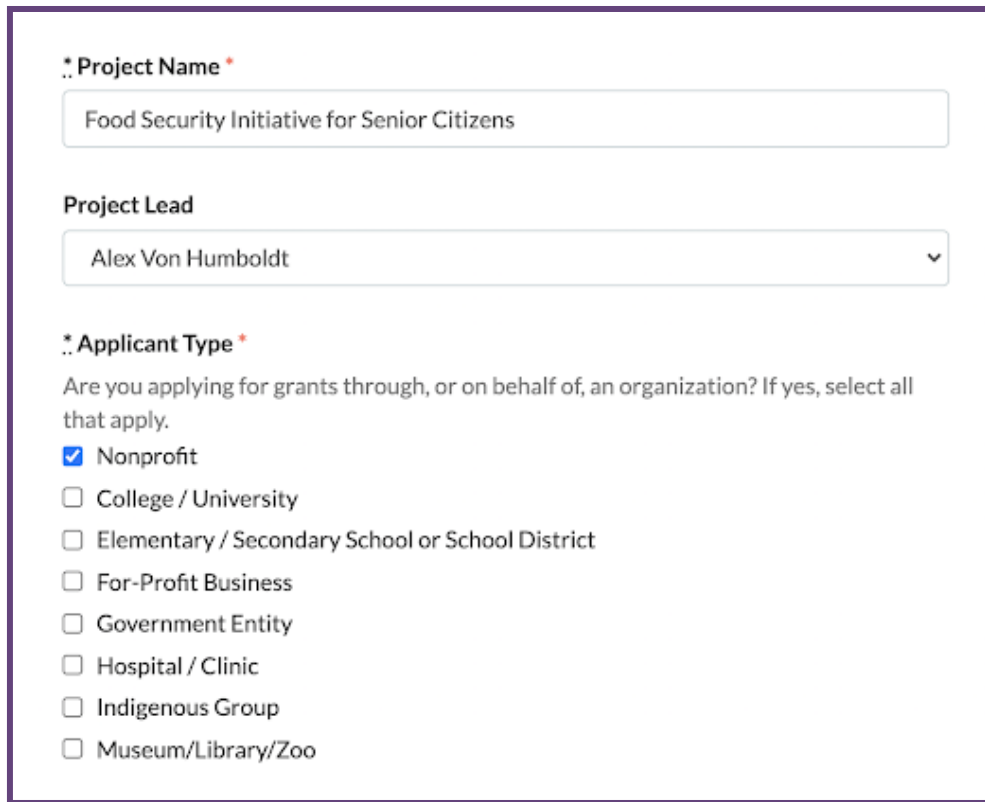
Next, you'll want to name your project.

If for example we were working on the City of Cleveland's low income senior citizens receiving hot meal deliveries, we may name our project:

Food Security Initiative for Senior Citizens.

Step #3:

Build a shortlist of opportunities



*** Project Name ***

Food Security Initiative for Senior Citizens

Project Lead

Alex Von Humboldt

*** Applicant Type ***

Are you applying for grants through, or on behalf of, an organization? If yes, select all that apply.

- ☒ Nonprofit
- ☐ College / University
- ☐ Elementary / Secondary School or School District
- ☐ For-Profit Business
- ☐ Government Entity
- ☐ Hospital / Clinic
- ☐ Indigenous Group
- ☐ Museum/Library/Zoo

Select who you'd like to lead the project (if you just created your Instrumentl account, it's likely going to be yourself), as well as complete the Applicant Type (you'll typically select Nonprofit here).

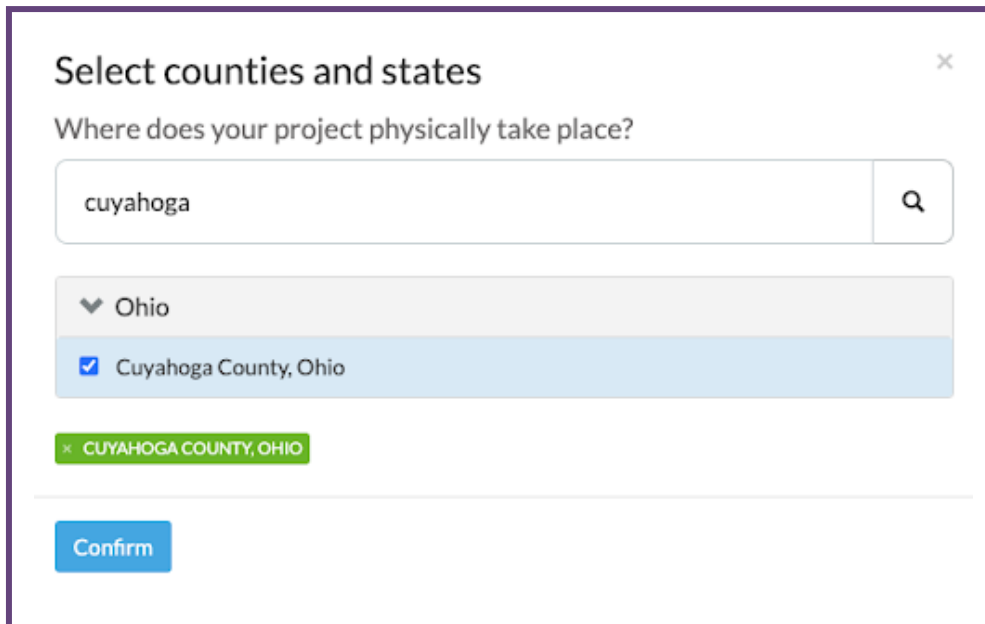
Answer whether or not you'd like to see faith-based grants.

On the next page, you'll start telling Instrumentl more about your areas of impact.

Step #3:

Build a shortlist of opportunities

For example, in this case, we may select Cuyahoga County for where our project physically takes place.



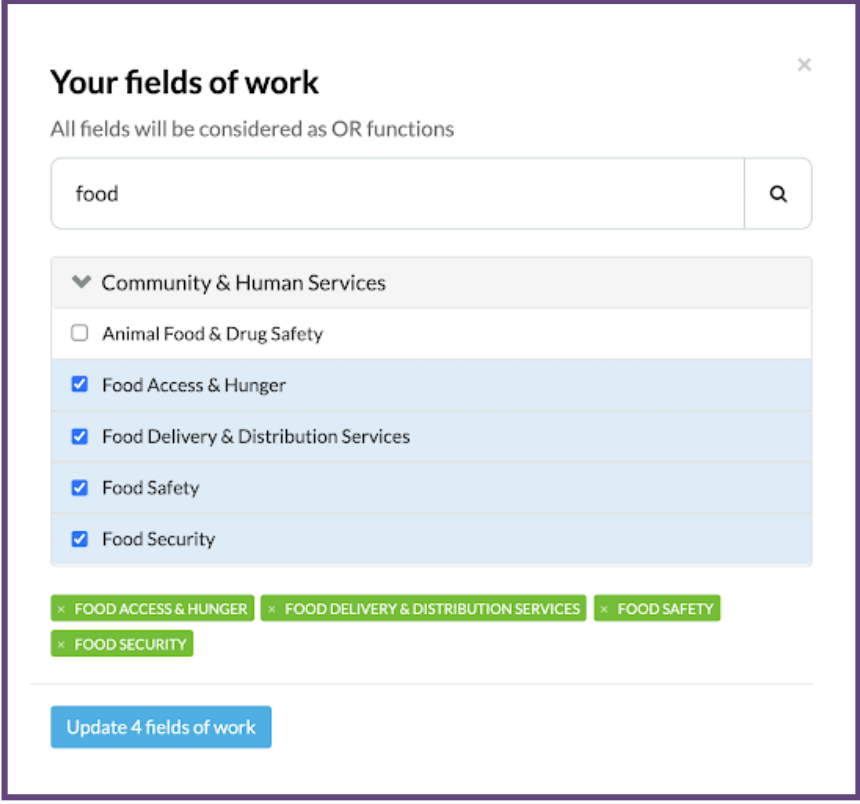
The screenshot shows a web form titled "Select counties and states" with a close button (x) in the top right corner. Below the title is the question "Where does your project physically take place?". There is a search input field containing the text "cuyahoga" and a magnifying glass icon to its right. Below the search field is a dropdown menu showing "▼ Ohio". Under the dropdown, "Cuyahoga County, Ohio" is listed with a blue checkmark and is highlighted with a light blue background. Below the list is a green pill-shaped button with a white 'x' and the text "CUYAHOGA COUNTY, OHIO". At the bottom of the form is a blue "Confirm" button.

Once we've completed this, we'll select some fields of work related to what our work entails.

Step #3:

Build a shortlist of opportunities

The easiest place to start is trying out a **keyword like “food”**:



The screenshot shows a web interface titled "Your fields of work" with a close button (X) in the top right corner. Below the title, it states "All fields will be considered as OR functions". There is a search bar containing the word "food" and a magnifying glass icon. Below the search bar, there is a section titled "Community & Human Services" with a dropdown arrow. Under this section, there are four checkboxes, each with a label: "Animal Food & Drug Safety" (unchecked), "Food Access & Hunger" (checked), "Food Delivery & Distribution Services" (checked), "Food Safety" (checked), and "Food Security" (checked). Below these checkboxes, there are four green tags with white text and a close button (X): "FOOD ACCESS & HUNGER", "FOOD DELIVERY & DISTRIBUTION SERVICES", "FOOD SAFETY", and "FOOD SECURITY". At the bottom of the interface, there is a blue button labeled "Update 4 fields of work".

And then, you may select a few fields of work around community such as:

- Community Services
- Senior Services
- Minority Services

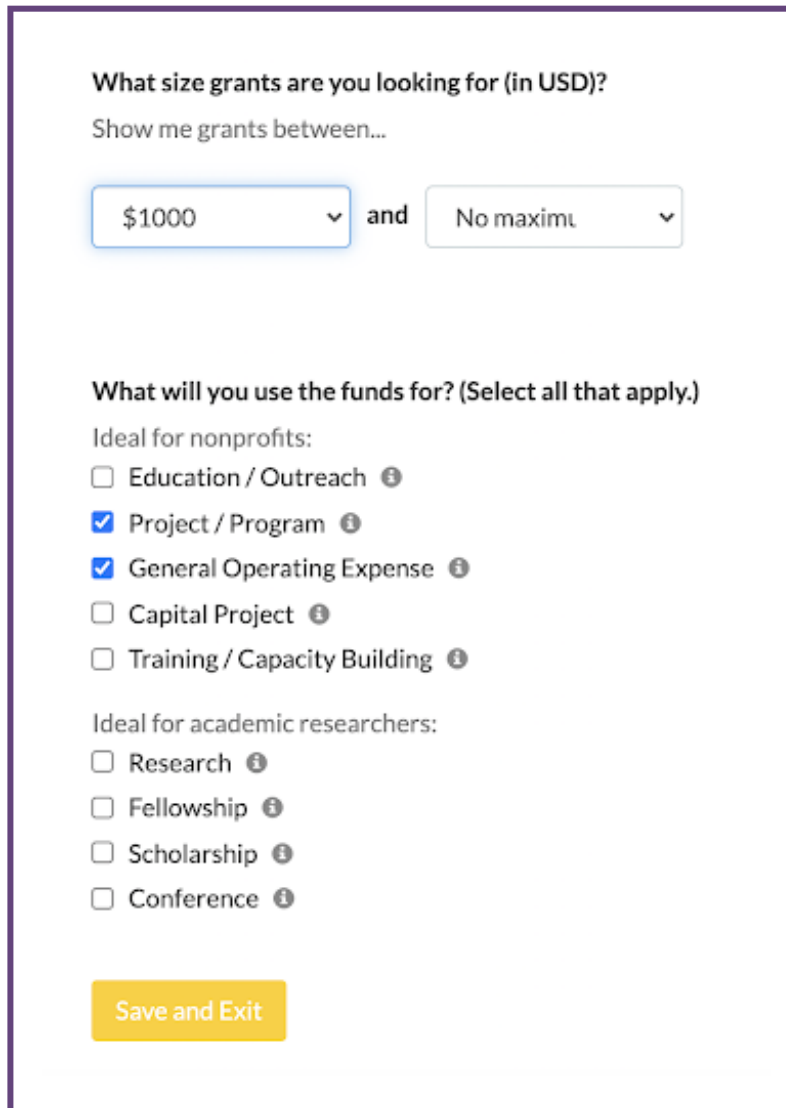
When selecting fields of work, we recommend **selecting at least three** and being as specific as possible.

Step #3:

Build a shortlist of opportunities

The last step to creating our project is setting **what size grants** we want to see as well as what our funds will be used for.

Because our grant writing team may be smaller, we set a minimum grant size of \$1K:



What size grants are you looking for (in USD)?
Show me grants between...

\$1000 ▼ and No maximum ▼

What will you use the funds for? (Select all that apply.)

Ideal for nonprofits:

- ☐ Education / Outreach ⓘ
- ☒ Project / Program ⓘ
- ☒ General Operating Expense ⓘ
- ☐ Capital Project ⓘ
- ☐ Training / Capacity Building ⓘ

Ideal for academic researchers:

- ☐ Research ⓘ
- ☐ Fellowship ⓘ
- ☐ Scholarship ⓘ
- ☐ Conference ⓘ

Save and Exit

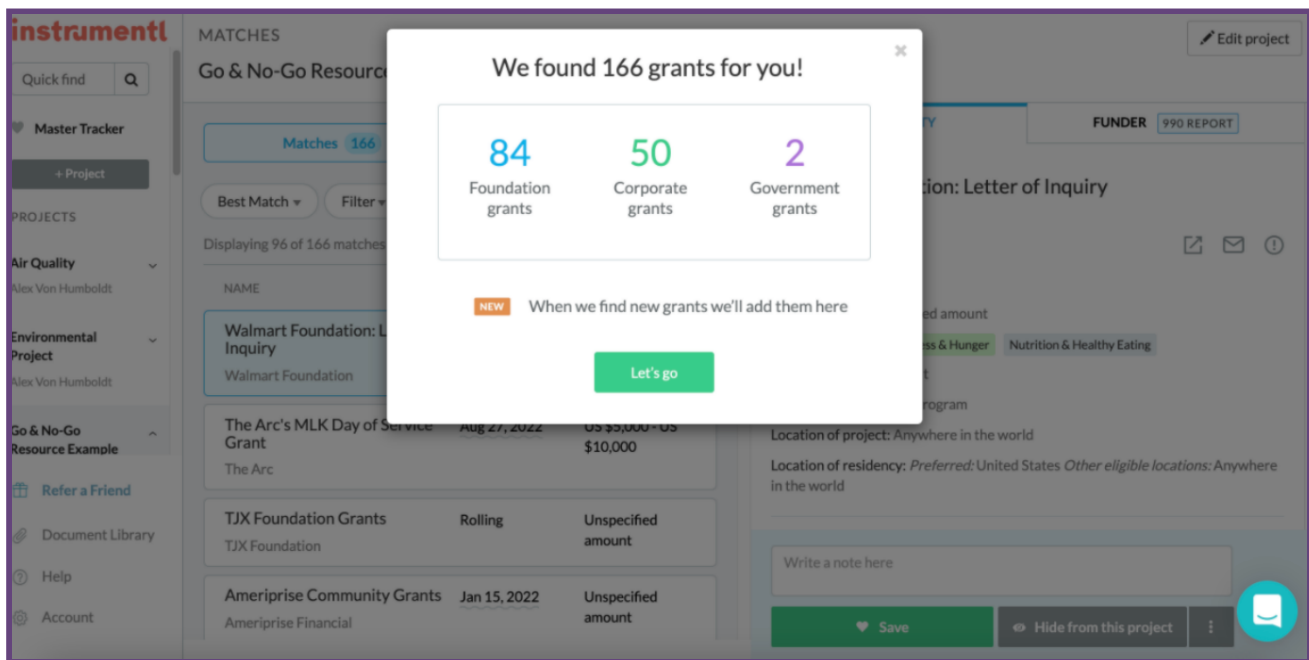
Step #3:

Build a shortlist of opportunities

We've also selected **Project / Program and General Operating Expense** as our program is most likely to fall into these two types of grants.

From here, click “**Save and Exit**” and let Instrumentl do the work for you in curating a shortlist of good fit opportunities. Wait for the results to render, then begin reviewing your Opportunity Matches.

From our example, we just found **166 active opportunities!**



Step #3:

Build a shortlist of opportunities

The next goal in **Step #3** is to save at least **three new opportunities** to the status of **Researching**.

To get to this goal, here are a few questions to ask yourself about the funder:

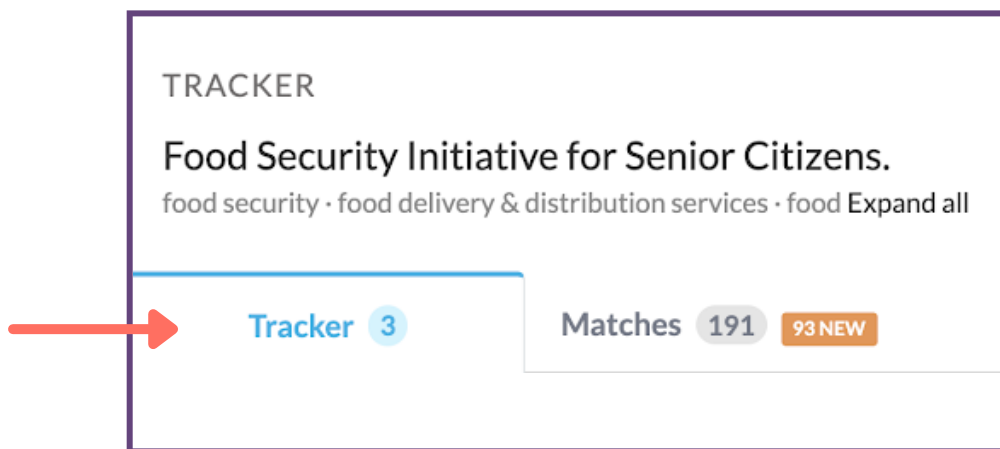
- **What's the grantmaker's mission and does it align to our initiatives?**
 - If you have to stretch your imagination to see how things align here, it's likely not a good fit.
- **Do we meet the eligibility requirements of the opportunity?**
 - Try to avoid investing time on opportunities you do not meet the requirements of. It simply wastes both your team and the grantmaker team's time.
- **Is there a history of funding organizations similar to ours?**
 - Reviewing the 990 data, are you able to identify at least three organizations similar to yours?
 - Is there a pattern you can recognize of this funder funding organizations similar to yours or in your geographic region?
- **Can we meet all the requirements?**
 - Does your team have the capacity to meet all the reporting requirements?
 - Generally as a rule of thumb, if the application is a tedious process, the reporting process will be too.

Step #4:

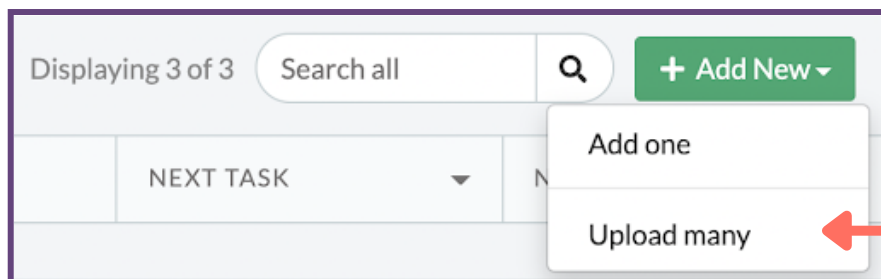
Organize your Tracker

Now that we've got **(a) a backlog of opportunities we've previously worked on** and **(b) a shortlist of new opportunities**, we're ready to put it all together into our Tracker.

To do so, navigate to the Tracker Tab of your Instrumentl project.

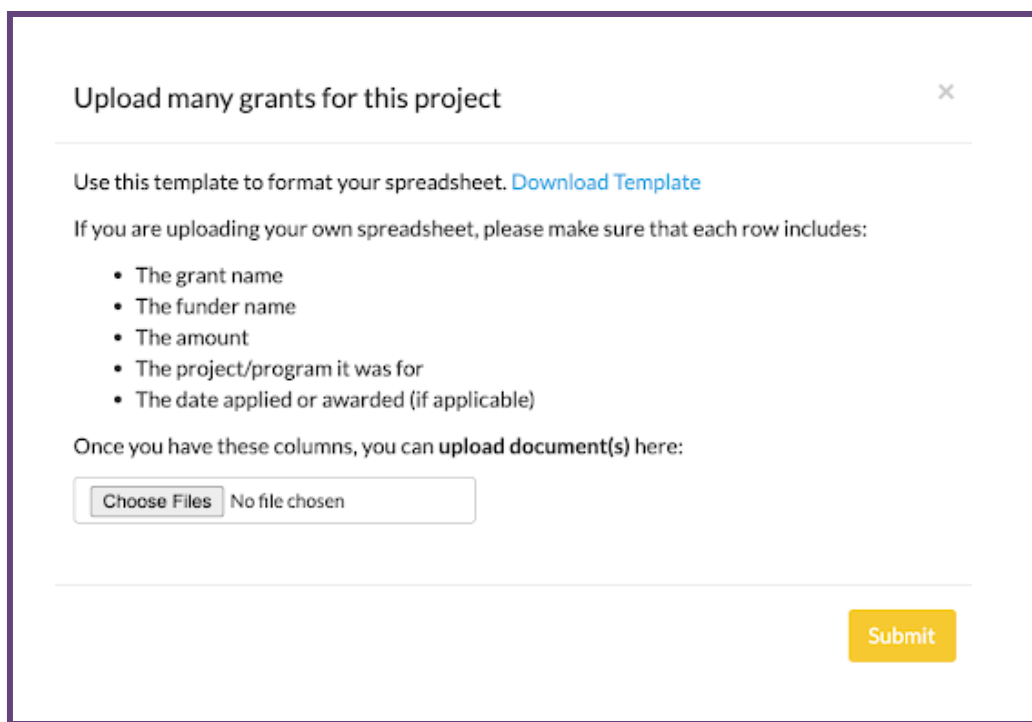


On the right-hand side, click Add New → Upload Many:



Step #4:

Organize your Tracker



The screenshot shows a modal dialog box titled "Upload many grants for this project" with a close button (X) in the top right corner. The dialog contains the following text and elements:

- Text: "Use this template to format your spreadsheet. [Download Template](#)"
- Text: "If you are uploading your own spreadsheet, please make sure that each row includes:"
- List of requirements:
 - The grant name
 - The funder name
 - The amount
 - The project/program it was for
 - The date applied or awarded (if applicable)
- Text: "Once you have these columns, you can **upload document(s)** here:"
- File upload area: A button labeled "Choose Files" next to a text box that says "No file chosen".
- Submit button: A yellow button labeled "Submit" in the bottom right corner.

Upload the template you previously completed.

Then, sit tight as the Instrumentl team imports your Tracker for you later.

Once your Tracker is imported in, focus on completing the following (in this specific order):

- **Standardize notes on the opportunities you've shortlisted**
 - For example, you may want to identify which opportunities in your Tracker are high-potential vs. speculative or more opportunistic

Step #4:

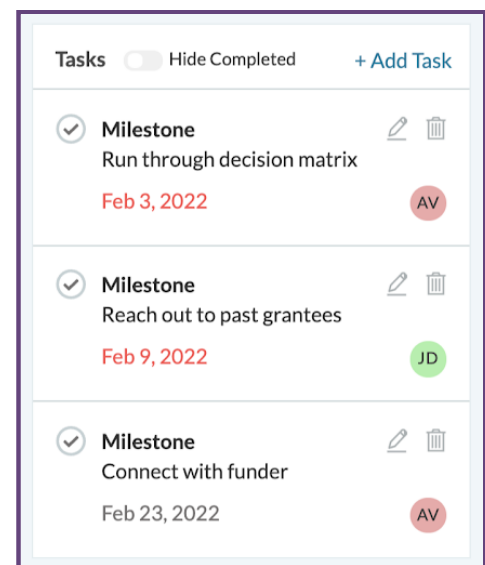
Organize your Tracker

- **Take stock of rolling vs. hard deadlines**

- Understand when the most important deadlines will be coming up for the next 30, 60, and 90 days
- Instrumentl helps you here with automated reminders whenever a deadline is coming up

- **Create tasks for each grant opportunity**

- Here are a few example tasks you can create:
 - Run through decision matrix
 - Reach out to past grantees
 - Connect with funder
 - Proofread final proposal
 - Submit proposal
 - Complete reporting

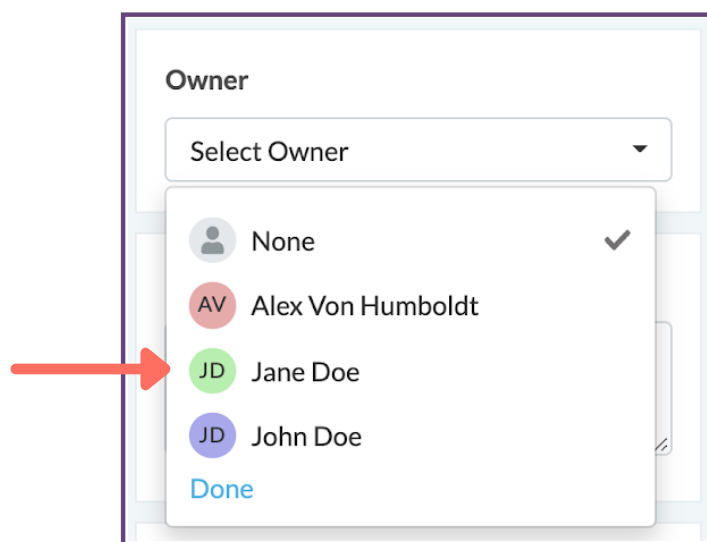


Step #4:

Organize your Tracker

- **Assign who is owning what**

- You can use the “Owner” feature for this - just click into the opportunity and it will show up on the right hand side of the opportunity



NAME	OWNER
August 2022	
Dermody Properties Foundation Grant Dermody Properties Foundation	JD
January 2023	
Big Lots Foundation Grants Big Lots Foundation	JD
Rolling Grants	
SFF COVID-19 Emergency Response Fund The San Francisco Foundation	JD

Step #4:

Organize your Tracker

- **Here are three ideas for how to use the Notes section:**

- Identifying grant potential:
 - [High Chance]
 - [Medium Chance]
 - [Low Chance]
- Highlighting key info:
 - Quote from grantmaker's mission
 - Lots of similar past grantees
 - Important statistics supporting fit
- Anything that promotes collaboration:
 - Sync this Friday here
 - Can you review this by 3/15?
 - Let's get board feedback here

Step #4: Organize your Tracker

Below, you'll see two examples of how your Notes section may look when implementing these ideas into your Instrumentl Tracker:

The screenshot shows the Instrumentl Tracker interface. A magnifying glass highlights the 'NOTES' section for a project. The notes are organized into a table with columns for 'AMOUNT', 'NEXT TASK', and 'NOTES'. The notes are categorized by chance level: High Chance (green dot), Medium Chance (yellow dot), and Low Chance (red dot).

AMOUNT	NEXT TASK	NOTES
\$5,000	Waiting to hear from opportunity	[High Chance] "focus on the arts, education, and the family"
\$500 - \$3k	Review past grant proposals	[High Chance] "focus on the arts, education, and the family"
Unspecified amount	Milestone - 08/28/2021: Go through decision matrix	[Medium Chance] "Providing affordable, stable housing."
\$5k - \$10k	Milestone - 01/24/2022: Ask initial questions to fund...	[Low Chance] "racial bias, worker protection, homelessness and..."

The screenshot shows the Instrumentl Tracker interface. A magnifying glass highlights the 'NOTES' section for a project. The notes are organized into a table with columns for 'AMOUNT', 'NEXT TASK', and 'NOTES'. The notes are categorized by chance level: High Chance (green dot), Medium Chance (yellow dot), and Low Chance (red dot).

AMOUNT	NEXT TASK	NOTES
\$0	0 opportunities	"proud to support hundreds of organizations that are working tire..."
Approximately \$7k	Decision - 02/01/2022	"Basic necessities: We support nonprofits that provide food for t..."
\$2k - \$11k		"Basic necessities: We support nonprofits that provide food for L..."
Up to \$15k		"food for the hungry"

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Step #4:

Organize your Tracker

Things should be shaping up now!

The last steps for you to take in **Step #4** is settling on your **standard operating procedure (SOP) for grants**.

It's helpful here to answer the following questions:

- **Who** within our nonprofit is involved in the grants process?
- **What** do we need to do to ensure our grant proposals are successful?
- **Where** do we need to store key information about our grants?
- **When** do we need to aim to have proposals sent out to funders?
- **Why** is it important for us to maintain a grants calendar?
- **How** do we intend to keep up with our grants calendar?

If all of this has been a lot to start out, try prioritizing just two or three of the most important things to organize in your Tracker first.

For example, maybe you just want to track deadlines and tasks first.

Then, later on as you get more comfortable, you can add in Notes and Owners.

The most important thing for you (and your team) to do is ensure the grants calendar you are creating is **valuable** and will be used by everyone involved in the grants process!

Step #5:

Review & update your Tracker

Phew! We've come a long way. Now we're in the final step, which is simply reviewing and updating our Tracker as we continue working towards our grant goals.

To do this, we recommend settling on a team cadence.

Decide with your team whether you'd like to review your grants calendar daily, weekly, bi-weekly, or monthly.

Try not to review it less than once a month, as many opportunities can change and doing so may mean you'll miss an important deadline.

Whatever cadence your team settles on, commit to the cadence. Set calendar holds with your team to set aside this time to review the grants calendar.

Extra tip: make sure to factor in reporting requirements and timelines for renewing grants – teams often don't do this and then get stressed out!

Also, **download CSV or PDF reports at least once a month** from your Instrumentl account.

This allows you to build a library of snapshots of where your grants were at any point in time, making it easier for new folks joining your team to learn the ins and outs of your nonprofit's grants calendar along with ensuring your team is learning and growing from where it started.

The final step of all of this work we've put in is incorporating reflection time.

Step #5:

Review & update your Tracker

The final step of all of this work we've put in is incorporating reflection time.

Quarterly, bi-annually or at the end of the year, get your grants team together to ask each other the tough questions around your process and grants calendar.

Here are a few starter reflection questions to ask:

- What was most helpful about our Tracker?
 - **Why we ask this:** If our grants calendar is not helpful, we need to rework it.
- What were the 2-3 things we wished we had on our Tracker?
 - **Why we ask this:** Grants calendars are an iterative process. We should be improving our team's Tracker regularly.
- How can we incorporate these in going forward?
 - **Why we ask this:** As mentioned, reflection is the basis of growing. We want to ensure our grant teams feel heard and that we're all improving together.
- What caused the most stress to us when it came to grants?
 - **Why we ask this:** This may help you identify things that are really missing from your Tracker today.
- What wasn't useful about our Tracker?
 - **Why we ask this:** As important as it is to add things that are missing, there may be things that are extra and can be removed altogether.

Step #5:

Review & update your Tracker

- Can we remove it?
 - **Why we ask this:** See prior explanation!
- Did we actually follow our team SOP?
 - **Why we ask this:** If we're not using our grants calendar as intended, it's time to rethink and refocus on how we can more effectively stick to our agreed upon standard operating procedures.
- Why or why not?
 - **Why we ask this:** See prior explanation!

Wrapping Up the Ultimate 5-Step Grants Calendar Planning Guide

Hopefully from this planning guide, you feel more confident in your ability to create a meaningful grants calendar for your nonprofit.

If you found this resource helpful, here are a few more things we want to leave you with:

- **[Bookmark our blog:](#)** check out the Instrumentl blog for in-depth guides and free resources, including our grant workshop replays. New content is added every week.
- **[Free grant writing classes:](#)** Instrumentl hosts regular learning opportunities for nonprofit professionals to hone their grant writing skills. We hope you'll join us for our next one. [You can RSVP here.](#)
- **[The Ultimate Go vs. No-Go Grant RFP Evaluation Tool:](#)** If you enjoyed this freebie, you'll also love this one. It digs into key questions to ask yourself when evaluating funders for fit.

Feel free to pass along this grants calendar planning guide to a friend or colleague you think may benefit from it.

Lastly, if you haven't already, [create a 14-day Instrumentl](#) account to get personalized grant recommendations for your nonprofit.