Checkpoint 1: Staff Capacity - Inventory the Organization

Ask each team member to record their programs for any given week and how much time it typically takes them.
Then, calculate the percentage of time they spent on this project by dividing the weekly hours spent on this project by the total weekly hours. *An example is in the first row.*

Role	Task	Hours Needed	Hours Available Per Week	% of time (Hours per tasks / weekly hours)

Review and Allocate Accordingly

Review your staff's time allocation.

- Where are there gaps, and where can tasks be consolidated?
- If you want to add a new project/program, does your staff have the capacity?
- If you need additional staff, which roles will help with your capacity?
- What expertise does your current team have?

Consider Partnerships

Many organizations need help to do it. Review your current organizational partnerships, networks, and cohorts.

- What programs, roles, or services could be expanded by partnering with another organization?
- What programs, roles, or services could your organization provide for another?

Expand or Regroup

If your staff has capacity, think about the following questions:

- Do you already have a program in mind?
  - Can any program be adapted?
  - Can any programs be expanded?
- Is there work you want to do that could be possible with additional resources?
- Could partnering with one or more organizations make a new program more feasible?

If your staff are at or over capacity, there may be better times to expand. Look into capacity grants or other resource-building funds.

Checkpoint 2: Review Your Organization's Financial Sustainability

In each row below, note the funding stream your organization currently has. Note in the rows to the right if they have a timeline, can only be spent on a specific program, or are allowed to be braided or combined in some way with another grant or funding opportunity.

Funding Stream	Timeline (If Applicable)	Program Specific Yes/No	Opportunity to Braid Funding Yes/No

Review and Consider

- Can any funds be used for administrative costs?
- Are any of your funds able to be braided?
- What will happen when any of your funding streams end?
- Identify Partnerships that will help with financial sustainability. If you add any programs, will you need supplemental funds?
- Staff capacity and financial sustainability are linked; what happens to a staff person's job when funding ends?

Consider Partnerships

Review your current organizational partnerships, networks, and cohorts.

- Identify Partnerships that will help with financial sustainability.
- Are their services that could be provided by a partnering organization to diversify financial strain to any one organization?

Expand or Regroup

- Does your organization have revenue reliability? Does your organization have the ability to earn or raise a certain level of income with a fair amount of certainty?
- Does your organization have consistent surpluses? What is your organization's ability to manage debt?

If your organization can financially add programming, begin program planning.

If your organization is relying on one grant for the entirety of a program's services and staff salaries, your organization may want to explore programming that can be sustainable. Funders do not want "one-and-done" programming for the community, participants, or staff.

Checkpoint 3: Understanding the Notice of Funding Opportunity's Administrative Requirements

Every successful program has staff in key areas, including program administration, outreach and recruitment, intake, wrap-around services, and data entry. Full-time or part-time employees of the organization, contractors, sub-contractors, or partner organizations can staff these areas. Below are the definitions of the responsibilities categorized into specific roles.

Complete the table on the next page. You are not required to have these specific roles hired; however, all responsibilities within each role must be assigned. More than one role can be assigned to a staff person.

Program Administration
Responsible for program compliance and ensuring that performance metrics are met and required reporting is done; oversees program operations, onboards staff, and monitors the performance of other program roles.

Outreach and Recruitment Coordinator
Secures a constant flow of leads for the program, conducts pre-screen assessments, ensures program applications are completed, and conducts, along with other team members, standardized interviews.

Support Service Coordinator
This role will complete the assessment, set up necessary services, and work with the Academic Support Specialist, as needed, to offer additional support if participants begin to struggle academically. They will administer barrier reduction funds to provide support services to help eligible individuals overcome financial and other barriers to participation. They will also source from outside providers and partners for other needed support services and refer participants to those services if needed.

Data Entry Coordinator
Programs can determine how their program data is entered and reported in the Illinois workNet portal. They may complete this, or it may be part of the other roles in the program. They are responsible for ensuring timely reporting of program data, including entering participant information, programmatic and service data, outcome metrics, and verifying data accuracy, among others.

Name	Responsibilities of Staff	Percent Of Time Spent Program
	Reporting	10%
	Oversees Program Operations	
	Onboards Staff	
	Monitors The Performance of Other Program Roles	
	Secures A Constant Flow of Leads For The Program	
	Conducts Pre-screen Assessments	
	Ensures Program Applications Are Completed	
	Conducts Standardized Interviews	
	Complete Assessments	
	Set Up Necessary Services	
	Work With the Academic Support Specialist	
	Administer Barrier Reduction Funds	
	Refer Participants to Outside Partners/Providers Supportive Services	
	Ensuring Timely Reporting of Program Data	
	Entering Participant Information	
	Entering Programmatic and Service Data	
	Entering Outcome Metrics	
	Verifying Data Accuracy	

Review the staff capacity you completed earlier:

- Where do you feel comfortable in staff capacity?
- Where do you see gaps in staff capacity? Do you need to hire staff?
- Do you still have the staff capacity for a grant with these general administrative requirements?
- Do you have records maintenance or accounting software in place to help manage the data of this grant?

Note: New programs to any funder or grant will spend more time on each activity.

Consider Partnerships

Review your current organizational partnerships, networks, and cohorts.

- Are there areas of administrative activities that can be shared with a partner?
- Could partnering with another organization allow your staff to complete these administrative requirements?

Expand or Regroup

Consider the following:

If required, administrative requirements will not overload staff capacity or programming; proceed to program planning! If you cannot partner with another organization and/or the required administrative requirements will exceed staff capacity it may not be time to expand. Look into capacity grants or other resource-building funds.

Checkpoint 4: Creating a Needs Statement

In the space provided create a needs statement associated with a grant opportunity:

Questions to consider:

- Does your area have a need or problem?
- Does your target population need or have a problem?
- Does your area have workforce needs?
- Why is this a need or problem?
- What will happen if the need or problem is not addressed?
- How do you know this information?

Examine the Data:

Data can come in many forms. For example:

- Census or other government data
- Community meetings
- Stakeholder interviews
- Surveys and Polling
- Reports your organization or others have published
- Policy details and analysis and case studies
- Requests for services your organization receives.

Checkpoint 5: Goals and Objectives

In the space provided, create a goal for a grant opportunity and then write three corresponding objectives to that goal.

In the space provided write three corresponding objectives to the goal.

Checkpoint 6: Creating the Workplan

List the major project activities in the first column. In the second column, indicate the timeliness for completion of the activities. Timeliness may be specified by the month of the project (e.g., such as month 1, month 2, etc.) or by specific dates. In the third column, indicate the staff by name and title responsible for performing the activities, and indicate the organizational affiliation of each staff person listed. The fourth column must describe the deliverable associated with the project activity.

Activity	Timeline	Responsible Staff and Role	Deliverable (Outcome)	Pivot Person

Checkpoint 7: Planning for Pivot Points

Review your plan to ensure that you have accounted for potential issues:

- If staff changes, will someone else be able to aid?
- Who will train new staff?
- Who will oversee and manage the program in the interim? If so, who?
- Are your staff members able to take time off?
- Are there multiple people with knowledge of how to manage this grant?

Grant Writing Resources

Staff Capacity Activity Resources:

- **https://www.atlassian.com/team-playbook/plays/capacity-planning**
- **https://www.runn.io/blog/capacity-planning**
- **https://bloomerang.co/blog/is-your-organization-grant-ready/**
- **https://asana.com/resources/capacity-planning#**
- **https://www.atlassian.com/software/confluence/templates/capacity-planning**

National Resources

- **Grants.gov Grants Learning Center**
- **LearnGrantWriting.org: How to Write a Grant Proposal Step by Step**
- **Grants.gov: Grant Writing Basics**
- **Grants.gov: Grants 101**
- **Candid.com: Introduction to Proposal Writing Course**
- **SAMHSA Native Connections: Creating SMART Goals**
- **Global Business Network: What If? The Art of Scenario Thinking for Nonprofits**
- GrantWatch.com: Grant Application Checklist

State Resources

- **WIOA Grants 101**
- **DCEO Grants- Illinois Department of Commerce and Economic Development**
- **Grant Preparation and GATA Overview**
- **Risk Assessment and PRA**
- **Conflict of Interest**
  - **Conflict of Interest Policy Guidance**
- **Record Retention**
  - **Monitoring and Grant Agreements**

Budget Resources

- Grant Accountability and Transparency Act (GATA) State Grantee Portal New User Guide
- 2 CFR 200 Tips
- Operating Grant Budgets
- Line Item Grant
- Indirect Costs
  - Indirect Cost Template
  - Indirect Costs and Indirect Cost Rates
- Administrative Costs vs. Programmatic Costs
- Procurement Standards
  - Procurement Information
- Budget Preparation
- Code of Federal Regulations
- Pre-Award Costs
- Remedies for Non-Compliance
- Audits

Grant Reporting Resources

- DCEO Reporting
- Periodic Financial and Performance Reports

Funding Resources

National Funding Resources

- Grants.gov
- Candid.
- Google.org
- Grantwatch.com
- USGrants.org
- US Department of Agriculture

Statewide Funding Resources

- Illinois Catalog of State Financial Assistance
- Illinois Department of Commerce
- Illinois Department of Human Services
- Illinois Secretary of State