FREE WORKSHEET

Grant Pipeline Strategy Worksheet (Free PDF)

A fillable worksheet for planning a year of grant seeking: revenue goal, renewals, funder mix, team capacity, prospects by stage and a quarterly calendar.

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> A grant pipeline is the set of funders you hold, expect to renew and plan to approach, laid out across the year. This worksheet helps you set a goal and check it against what your team can realistically prepare. A pipeline goal is a plan, not a forecast of awards: no funder is obliged to fund you, and nothing here predicts what you will receive. Each funder's own guidelines and deadlines come first.

Plan details

Organization:

Plan year (start and end dates):

Prepared by:

Date:

1. Annual grant revenue goal

Total operating budget for the plan year:

Amount we plan to raise from grants:

Grant revenue last year, from our own records:

What the grant revenue will pay for (programs, positions, general operations):

Why this goal is reasonable, based on our own history:

Treat the goal as a working target. Do not put grants that are not yet awarded into the budget as confirmed income.

2. Current funders and renewals

List every grant you hold now or held last year. Copy end dates and renewal rules from each award letter or the funder's guidelines.

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Funder	Program funded	Amount	Grant end date	Can we reapply (yes, no, after a break)	Next deadline	Report due	Owner

3. Funder mix by type

Fill in your own numbers. There is no single correct mix. The point is to see how much rests on one funder or one type.

Funder type	Number of current funders	Amount this year	Share of grant revenue	Amount we plan for next year
Federal government				
State and local government				
Private and family foundations				
Community foundations				
Corporate giving				
Other				
Total				

Our largest single funder, and its share of grant revenue:

What we would do if that grant were not renewed:

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4. Capacity

Use your own estimates, based on applications you have prepared before. Hours differ widely between a short letter and a full government application.

Application type	Our estimate of hours per application	Number we plan this year	Total hours
Renewal to a current funder			
Letter of inquiry			
New foundation or corporate proposal			
New government application			
Reports to current funders			
Total			

People who work on grants, and the hours each can give in the year:

Total hours available:

If the hours planned are more than the hours available, cut applications, add help or lower the goal. Write the decision here.

Decision:

5. Prospect pipeline by stage

Move each prospect one stage at a time. A prospect with no next step is not in the pipeline.

Stage	What it means
Identified	Found, not yet researched
Researched	Guidelines read; fit and eligibility checked
Contact made	Conversation, inquiry or introduction has happened
Decision to apply	Go or no-go decided and recorded
In preparation	Application being written
Submitted	Waiting for a decision
Decided	Awarded or declined, with feedback noted

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Prospect funder	Type	Stage	Amount we plan to request	Deadline	Next step and owner

6. Quarterly calendar

Quarter	Applications and renewals due	Reports due	Research and funder contact	Review meeting date
Quarter 1				
Quarter 2				
Quarter 3				
Quarter 4				

7. Review checklist

Run this check each quarter.

- [ ] Every current grant has an end date, a renewal answer and an owner
- [ ] No report deadline falls in the same week as a major application without a plan
- [ ] The hours planned fit the hours available
- [ ] Every prospect has a stage, a next step and an owner
- [ ] Each new application had a go or no-go decision before work started
- [ ] No pending grant is counted in the budget as confirmed income
- [ ] We know our largest funder's share and have a plan if it ends
- [ ] Declined applications have feedback requested and noted
- [ ] Leadership and finance staff have seen this plan

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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