

Worksheet #1

Developing Partnerships



Your task:

- Brainstorm a list of people/organizations that currently support the work you do.
- Brainstorm another list of people who may be supporters or collaborators in the future.
- Identify those with whom you will (or could) work on this project.
- At what point should you invite their involvement?
- What type of involvement are you inviting?



Current Supporters:

- _____
- _____
- _____
- _____
- _____
- _____

Future Supporters/Partners

- _____
- _____
- _____
- _____
- _____
- _____

Worksheet # 2

Assessing the Situation



Your task:

- Draw a community map



Participants – who is it for?	What is currently happening?
Partners	How is it happening?
Funders	Strengths
Resources	Interests
Context	Needs

Worksheet #3: Project Vision



Your task:

- Draw or describe your vision for your project/community
- Jot down answers for the following questions:

If this were successful, what could happen?

Who would benefit?

How do you know this is in their best interest?

Why is it important to move in this direction?

Why should financial resources be invested into this?

With these answers in mind, write out a one-sentence vision statement:

Worksheet #4: Goals and Objectives



Your task:

- Write goals and objectives based on your community map and vision



One goal: To

One to three objectives:

To

To

To

Worksheet #4 continued



Now, answer the following questions:

Outline a clear relationship between the objective and the ideas, problems, and need that have been identified as priority areas?

What crucial part of the program or project does your objective focus on?

Is the objective practical and doable? Why or why not?

Is the objective attainable? In what timeframe?

Is the objective meaningful and understandable?

Is the objective measurable?

Worksheet #5: Timeframe/Resource Map



Your task: identifying activities, timeframes and resources

- Choose one of your objectives. Using the worksheet:
 - Brainstorm a list of activities for that objective.
 - Write out a list of processes, tools, events and actions that you will implement within this program.
 - Develop a timeline for implementing these items.
 - List the resources (human, financial, organizational, community) that you need to enable you to achieve your objective.



Objective:

We could meet this objective by doing the following activities:

We could do the above activities using the following tools, events, or actions:

Worksheet #5 continued



Timeline:	
Date:	Action:
Resources: (Human, financial, organizational, community....)	

Worksheet #6

Identifying Intended Results



Your task:

- With the objective you worked on during the last task, use the following table to list the potential results, as follows

Objective to:			
Potential Results			
During Program	Immediately After	Short Term	Long Term

Worksheet #7 - Evaluation Plan Worksheet

1 Engage Stakeholders

Who should be involved in evaluation?

How might they be engaged?

2 Focus the evaluation

Are we evaluating an entire program or portions thereof?

Who will use the evaluation?

How will they use it?

What questions will the evaluation seek to answer?

What are the indicators or evidence that will show the answers?

When should this data be collected?

3 Collect data

What sources of information will you use?

- Existing information
- People
- Pictorial records and observations
- other: _____

What data collection method(s) will you use?

- survey
- document review
- interview
- testimonials
- observation
- expert panel
- group tech
- simulated problems or situations
- case study
- journal, log, diary
- tests
- unobtrusive measures
- photos, vid
- other

What's needed to record the information?

When will you collect data for each method you've chosen?

Method	Before	During	After

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4 Analyze and interpret

How will the data be analyzed?

Data analysis methods:

Who's responsible:

5 Use the information

How will the evaluation be communicated and shared?

To whom	When	Where	How to present

Any next steps?

Organization name: _____

Project Title Project Dates	Total project budget									
	Cash expenses	In-Kind Contributions								
INCOME:										
Funds requested from funder 1										
Funds requested from funder 2										
Contributions from My Literacy Org										
Other Income Source (describe)										
Other Contributions (describe)										
TOTAL INCOME:										
EXPENSES:			Expenses for training events we want to hold		Expenses for the directory we wish to create		Expenses for improving our book collection		General Administrative Expenses	
			Cash Expenses	In-Kind Contribution	Cash Expenses	In-Kind Contribution	Cash Expenses	In-Kind Contribution	Cash Expenses	In-Kind Contribution
Committee meeting expenses										
Staff travel										
Contractee tavel										
Committee travel										
Participant/trainee travel										
Conference & workshop expenses										
Professional development expenses										
Contracts and/or honoraria										
Advertising										
Rent										
Equipment rental & service										
Phone/fax/internet										
Postage & shipping expenses										
Office supplies										
Printing/desktop/photocopying										
Resources & training material expenses										
Organizational memberships										
Bank charges & fees										
Insurance										
Audit expenses										
Payroll & admin expenses										
Other (describe)										
Other (describe)										
Other (describe)										
Other (describe)										
TOTAL EXPENSES:										

Revenue less Expenses (short)/Over

Worksheet #9 - Budget Summary

(Transfer figures from your detailed budget worksheet)

Expenditures:

Item	Total cost of the item	LESS revenue (including the contribution of your organization and other sources of revenue)		EQUALS total amount of your request	For Department Use Only
		cash	in-kind		
Salaries - project staff	\$	\$	\$	\$	
Benefits - project staff					
Honoraria/professional fees					
Travel - participant/student					
Travel - project staff / management / volunteers					
Travel - contractors					
General project costs (e.g. Publicity, printing, facilities, materials, communications)					
Other					
Total	\$	\$	\$	\$	

Revenue:

How much of your revenue is guaranteed? (list by source, include in-kind support)	Cash	In-kind
Source #1		
Source # 2		
Source #3		
Source #4		
How much of your revenue is potential? (List by source, include in-kind support)		
Source #1		
Source #2		
Source #3		
Source #4		
Total (this amount should be the same as your organization's total revenue in the table above)		

Name of organization:

Proposed budget for dates of _____ to _____

REVENUE:	
Operating revenue	
Sponsorship	
Memberships	
Fundraising events	
In-kind contributions	
_____ agency (amount requested)	
REVENUE TOTAL:	

EXPENSE:	
Travel - directly related to project; # of sites visited x number of trips	
Board/committee (what portion of the board/committee meetings can be assigned to this project?) # of members x average travel costs per.	
Staff	
Childcare	
Publicity/advertising	
Phone/fax/internet	
Salary/benefits - months x salary and benefits for each position	
Honoraria/contracts	
Professional development - training related to project	
Postage - # of pieces x number of mailings x estimated cost per mailing	
Office supplies	
Printing/desktop	
Resources - books, etc.	
Printing and distribution of project resources	
In-kind contribution (should match revenue entry)	
Other - audit, insurance, etc.	
EXPENSES TOTAL	

TOTAL SURPLUS (LOSS):
