

## Handout 3-3: Create Your Project Notebook

Develop a Project Notebook before you begin writing your grant application. The notebook should be updated constantly with new information and resources. Suggested notebook tabs and information categories to include in the tabbed sections are provided.

### ORGANIZATIONAL DESCRIPTION AND CONTEXT

- Mission
- Values
- Organizational chart
- Board of Directors/Advisory Board information
- Board of Directors/Advisory Board meeting minutes
- Committee lists
- Meeting minutes
- Certifications
- Facility location/information
- Recent contact information (phone, fax, e-mail)
- Outreach process and methods
- Newspaper articles
- Flyers
- Client contact information
- Agency presentations and materials
- Community contacts
- Partnerships
- Stakeholder information
- Service agencies
- Community groups
- Key community liaisons
- Community meeting minutes
- Key community partners

### PROBLEM/NEEDS STATEMENT

- Local statistics and census data
- Noted gaps in services
- Data specific to your target group
- Letters from partnering groups
- Testimonial letters from clients served

## PROJECT APPROACH

- Sample consent forms
- Specific, measurable, achievable, realistic, and time-limited objectives
- Outcome objectives
- Process objectives
- Product objectives
- Consumer focus group reports
- Cultural competence materials
- Consumer recruitment and retention plans

## PROJECT MANAGEMENT

- Organizational structure
- Job descriptions
- Resumes of key management personnel
- Resumes of key staff relevant to the project
- Staff-to-client ratio information
- Cost of program
- Monthly accounts
- Recent audits
- Facility licensing and ADA compliance
- Accounting processes and procedures

## PROJECT EVALUATION

- Evaluation methodology
- Background articles and data on accomplishments
- Relevant articles about the population you serve
- Articles that describe your evaluation methods and performance measures
- Articles that mirror the type of services you provide
- Newspaper articles
- Statistical information on numbers served
- Evaluation and assessment tools
- Data to support the need for project services
- Statistical information on outcomes
- Contact information for potential evaluators in your community (i.e., at a nearby college or university) if you do not have evaluation expertise in your agency