Volunteer Workplan

edited 11/15/2026

At a glance

The Fall 2025 draft is a solid skeleton, but it cannot go out as written: it is aimed at a funder iLRN is unlikely to reach, asks for almost five times iLRN’s annual revenue, and rests on numbers nobody has sourced yet. This pipeline gets the organization grant-ready first, finds funders that fit, then retools the draft for each one.

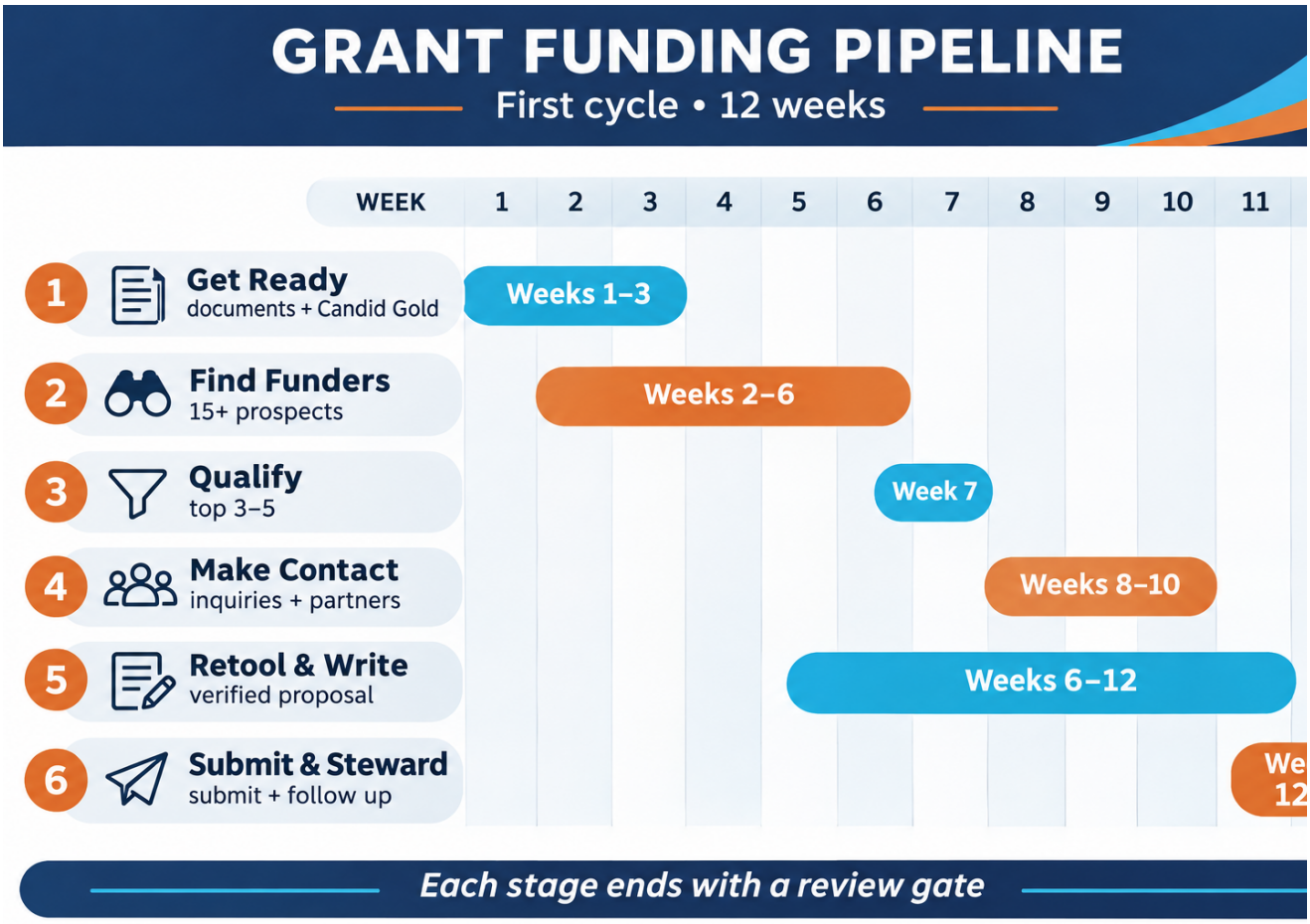
The work runs in six stages over roughly 12 weeks for the first cycle. Volunteers can start Stage 1 and Stage 2 tasks this week without waiting on anyone.

Three decisions shape everything else, and they belong to leadership:

1. **Who can commit iLRN to an application.** Name the authorized signer and confirm whether the board needs to vote before a letter of inquiry goes out.

2. **Apply alone or with a lead partner.** Several best-fit funders fund only universities or accredited institutions. A university partner or IBSTPI as lead applicant opens those doors.

3. **How big the first ask is.** A planning or convening grant in the $25,000 to $75,000 range matches iLRN’s size. The full $250,000 project becomes phase two.



Where iLRN stands today

A program officer who looks iLRN up will see a small organization with a thin public record, and some of it conflicts with the draft. Fixing the public record is the cheapest work in this pipeline and it comes first.

What the public filings show (ProPublica Nonprofit Explorer, EIN 30-1218072, Missoula, MT, all Form 990-EZ):

Fiscal year	Revenue	Expenses	Net assets
2024	$52,662	$53,766	$11,093
2023	$47,846	$53,031	$12,197
2022	$61,727	$135,935	$17,382
2021	$126,643	$143,711	$91,590
2020	$143,078	$53,180	$108,658

Four things in that record need attention before any funder sees an application:

- **The name is misspelled.** The listing reads “Immersive Learining Research Network.” Check the IRS Tax Exempt Organization Search to see whether the error is in the IRS record itself, and correct it on the next filing if so.
- **The founding date does not match.** The draft says founded in 2014. The public record shows tax-exempt status from June 2020 and a first filing for 2019. The proposal needs one sentence that explains the gap.
- **The category is off.** iLRN is classified under community improvement and capacity building, not education or research. Funders who filter by category will not find it.
- **Only one officer is listed.** The draft describes a 12-member board. The Candid profile is the place to show the full board.

Candid profile. Claiming the profile is free and takes three steps: create an account, request access to the organization by name or EIN, then fill in the profile (Candid). The 2026 Seals guide sets the levels:

Seal	What it takes	Why it matters here
Bronze	Mission, contact details, leader, address, website	Minimum for looking legitimate
Silver	At least one program with description, area and population served	Lets funders see what iLRN does
Gold	A 2024 or 2025 Form 990, 990-EZ or 990-N (an audit is not required), plus leader and board demographics, where “decline to state” is accepted	Candid advertises free Candid Premium access for small nonprofits at Gold, which is the prospect research tool volunteers need
Platinum	Goals, strategy, and at least one metric from 2025	Worth doing once the verified numbers exist

Gold is reachable now with the 2024 Form 990-EZ. Confirm the Candid Premium offer terms on Candid’s site before counting on it.

Pipeline stages

Each stage ends at a gate. Nothing moves past a gate until its output exists in the shared folder. Weeks are counted from the start of the first cycle, proposed as the week of November 16, 2026.

Stage	Weeks	What happens	Gate to pass

1. Get ready	1 to 3	Org documents gathered, Candid profile claimed and brought to Gold, signer confirmed	Document folder complete, Candid Gold published
2. Find funders	2 to 6	Volunteers research prospects in assigned lanes and write a one-page record for each	At least 15 prospect records filed
3. Qualify	7	Score every prospect on the fit rubric, pick the top three to five (see RUBRIC PAGE)	Go or no-go decision recorded for each prospect, signed off by leadership
4. Make contact	8 to 10	Short inquiry or letter of inquiry to each chosen funder, partner conversations with IBSTPI and a university	Inquiry sent, partner commitments in writing
5. Retool and write	6 to 12	Core proposal rebuilt from verified facts, then tailored per funder	Draft passes the review checklist and a cold read by someone who did not write it
6. Submit and steward	12 onward	Submission, confirmation saved, follow-up calendar, lessons logged	Tracker updated, next deadline scheduled

Stages 2 and 5 overlap on purpose. The funder-neutral core of the proposal (need, track record, project design) can be rebuilt while prospect research is still running.

Fit rubric for Stage 3. Score each item 0 to 2, and drop any prospect that scores 0 on the first item. (see RUBRIC PAGE)

1. Eligibility: iLRN, or a named partner, is an eligible applicant type.
2. Mission fit: the funder’s stated priorities match standards, credentialing, open knowledge, or learning technology.
3. Size fit: the typical grant is no more than about half of iLRN’s annual revenue, unless a partner leads.
4. Access: the funder takes unsolicited inquiries or has an open call.
5. Timing: a deadline or review window falls inside the next six months.

Volunteer roles

Seven roles cover the work. One person can hold two, and the hours are estimates for the first cycle.

Role	What they own	Hours per week	Good fit for
Pipeline lead	Tracker, weekly check-in, gate decisions, link to leadership	2 to 3	Someone already coordinating volunteers
Records keeper	Org document folder, Candid profile, registrations	2 for three weeks, then 30 minutes	Detail-minded, comfortable asking the Treasurer for files
Prospect researchers (2 to 4)	One research lane each, one-page prospect records	2 to 3	Librarians and information professionals, for example the Codex Librarian group
Evidence checker	Sources every number and claim in the draft, runs the member survey if one is needed	2 to 3	Research methods background
Writer and editor	Funder-neutral core proposal, then tailored versions	3 to 4 during Stage 5	Strong plain-language writer
Budget builder	Budget by project component, in-kind volunteer value, budget narrative	2 during Stage 5	Works with the Treasurer
Partner liaison	IBSTPI, IEEE, and university conversations, letters of support	1 to 2	Board member or someone with existing relationships

A cold reader is not a standing role. For each submission, pick one volunteer who has not seen the draft and give them the funder’s guidelines and 45 minutes.

Work to do

Thirty-one tasks, grouped by stage. Each has a role and a plain test for when it is done. Tasks in Stage 1 and Stage 2 can be handed out now.

Stage 1: Get ready

Task	Role	Done when
Confirm the authorized signer and whether inquiries need a board vote	Pipeline lead	Answer is written in the tracker
Create a shared grants folder with subfolders for org documents, prospects, drafts, and submissions	Pipeline lead	Folder link is posted to volunteers
Collect the IRS determination letter, EIN, and a signed W-9	Records keeper	Files are in the folder
Collect Form 990-EZ filings for 2022, 2023, 2024, and 2025 if filed	Records keeper	PDFs are in the folder
Collect the current board list with titles and affiliations, bylaws, and conflict of interest policy	Records keeper	Files are in the folder, board list dated
Get the current-year operating budget and latest financial statement from the Treasurer	Records keeper	Files are in the folder
Check the IRS Tax Exempt Organization Search for the name spelling and category	Records keeper	Screenshot saved, correction path noted
Create a Candid account and claim the iLRN profile by EIN	Records keeper	Access approved
Complete Bronze and Silver: mission, contacts, leader, programs	Records keeper	Seal published
Complete Gold: upload the 2024 Form 990-EZ, enter leader and board demographics	Records keeper	Gold Seal published, Candid Premium access checked
Export volunteer hours from the time sheet and total them by year	Budget builder	One-page summary with totals and method

Task	Role	Done when
Start SAM.gov registration only if a federal route is chosen in Stage 3	Records keeper	Unique Entity ID issued

Stage 2: Find funders

Task	Role	Done when
Assign research lanes: national foundations, Montana and Pacific Northwest, federal and partner-led, XR industry, Korea and international	Pipeline lead	Each researcher has one lane
Adopt the one-page prospect record: funder, program, eligibility, grant range, how to apply, deadline, three recent grants, fit score, source links	Pipeline lead	Template is in the folder
Verify and extend the starting list in the next section	Prospect researchers	Each entry confirmed on the funder’s own site
Look up who funds peer organizations (AECT, ISTE, EDUCAUSE, 1EdTech, Credential Engine, Digital Promise) through their annual reports and funders’ Form 990-PF grant lists	Prospect researchers	At least 10 funder names with grant amounts
Search Candid Premium once Gold access is live for standards, credentialing, and immersive learning	Prospect researchers	Saved search exported
Set up alerts on Grants.gov and funder newsletters for the chosen lanes	Prospect researchers	Alerts confirmed
File prospect records and flag any deadline inside 60 days	Prospect researchers	15 or more records filed

Stage 3: Qualify

Task	Role	Done when
Score all prospects on the fit rubric	Prospect researchers	Scores in the tracker
Hold a go or no-go meeting and pick three to five targets	Pipeline lead	Decisions and reasons recorded
Decide the size and scope of the first ask	Pipeline lead with leadership	One-paragraph scope statement approved

Stage 4: Make contact

Task	Role	Done when
Get IBSTPI’s role confirmed in writing	Partner liaison	Letter or email on file
Approach one or two universities about leading or co-applying	Partner liaison	Named contact and a yes, no, or maybe
Request letters of support from IEEE collaborators and two member institutions	Partner liaison	Signed letters in the folder
Write a one-page inquiry for each target funder	Writer and editor	Sent by the authorized signer, date logged

Stage 5: Retool and write

Task	Role	Done when
Source or remove every statistic in the draft, using the audit below	Evidence checker	Evidence log has a source for each claim that stays
Run a short member survey if no usable survey data exists	Evidence checker	Results summarized with response count and dates
Rewrite the funder-neutral core: need, track record, project design, evaluation	Writer and editor	Core draft uses only verified facts
Rebuild the budget by project component with a narrative and in-kind volunteer value	Budget builder	Budget totals match the narrative

Task	Role	Done when
Tailor the core for each target and run the cold read	Writer and editor	Reviewer checklist signed

Stage 6: Submit and steward

Submission, confirmation, and follow-up belong to the pipeline lead. Log every outcome, including declines and any feedback, so the second cycle starts from what was learned.

Funder prospects researched so far

No open call found so far is a clean fit for iLRN applying alone at $250,000. Realistic openings include a rolling letter of inquiry to Sloan, a regional capacity grant, and a partner-led route for federal or credential-focused money. This is a starting list checked on November 15, 2026. Researchers should confirm every entry on the funder’s own site.

Funder and program	How to get in	Fit for iLRN	Verdict
Mellon Foundation, Higher Learning open call	2026 call closed February 17, 2026. Limited to accredited four-year degree-granting institutions, $250,000 to $500,000	iLRN is not an eligible applicant type	Drop
Mellon Foundation, other programs	Staff review inquiries and invite proposals. Most grants come by invitation	Public Knowledge is the closest program, and only if the project is framed around the Codex as open scholarly record	Low. Inquiry only, after the Codex gaps are fixed
Sloan Foundation, Technology program	Rolling letter of inquiry, two pages maximum, by email. A university listing reports most projects fall between $50,000 and $600,000	Program supports how scientific knowledge is produced and shared. Standards for a research field fit that language	Best near-term target. Confirm details on sloan.org

Funder and program	How to get in	Fit for iLRN	Verdict
M.J. Murdock Charitable Trust	Letter of inquiry through the grants portal. Needs three full years of history. Requests under $50,000 are discouraged. Staff and program grants step down over three years	iLRN is a Montana 501(c)(3), which the Trust prioritizes. The Trust also favors diversified funding and regional impact, and iLRN's reach is global	Medium. Take the eligibility check, and build a Montana angle before asking
ECMC Foundation	Rolling letter of inquiry online. The process takes several months	Focus is undergraduate persistence and completion. Credential training not tied to accredited academic programs is generally not funded	Low alone. Possible with a university partner
Lumina Foundation	Mostly invitation, per secondary sources. Lumina funded the Higher Learning Commission's endorsement process for short-term credential providers	Shows funder interest in credential quality. Also a comparable effort the proposal should acknowledge	Relationship route. Not yet verified on lumina.org
Spencer Foundation	Small and Large research grants are paused January through June 2027, with a new approach due in June 2027. The Conference Grants program was discontinued in January 2023	Education research funder. A standards validation study could fit the refreshed programs	Revisit in June 2027
NSF STEM Education programs	The directorate was reorganized in 2026. RITEL, which covers immersive technologies for learning at up to $900,000 over three years, last listed a November 4, 2025 deadline	Strong topic fit, but competitive only with a university principal investigator and iLRN as a partner	Partner route. Watch for the next solicitation

Funder and program	How to get in	Fit for iLRN	Verdict
NEH Digital Humanities Advancement Grants	Cancelled for fiscal year 2026	None while cancelled	Drop
Siegel Family Endowment	Invitation-based. Grants in learning, work, and infrastructure	Topic overlap on learning infrastructure	Relationship route, long term

Partners, not funders. IEEE's Learning Technology Standards Committee runs an active working group on ethically aligned educational metadata for XR, and IBSTPI is named in the draft. Both strengthen an application through letters and shared authorship. Neither pays for the work.

Leads nobody has checked yet. Walton Family Foundation, Hewlett Foundation (open education), Schmidt Sciences, XR industry programs (Meta, Unity, Epic), Montana Community Foundation, Humanities Montana, and Korean funders connected to iLRN2027 in Daegu.

Draft audit: what must change before reuse

The structure of the Fall 2025 draft can stay. Thirteen specific things cannot, and the first four are priority adjustments, as they are ill-suited to a successful application.

Where	Problem	Fix
Request amount	$250,000 is about 4.7 times 2024 revenue of $52,662, with net assets of $11,093. Reviewers will ask how an all-volunteer organization manages it	Lead with a planning or convening phase sized to iLRN, or name a partner as fiscal lead
Statement of Need	"A 2024 survey of 340 institutions found 78%, 82%, 91%" has no citation	Find the source or cut it. Replace with published literature the evidence checker can link
Community Demand	"85% interest" from member surveys and "60 to 80 participants" at pilot webinars have no source	Pull the actual survey and attendance records, or run a new survey

Where	Problem	Fix
IBSTPI	Described as a partnership with co-branded credentials. The Codex competencies book lists an IBSTPI contributor but has no pages yet	Get the commitment in writing and describe only what IBSTPI has agreed to
Budget	60% ($150,000) goes to a Virtual Accessibility Lab, which is not one of the four project components. Nothing is budgeted for IBSTPI, a badge platform, or working group time	Rebuild the budget line by line against the four components
Budget narrative	Says no funds support administration, yet $75,000 pays for coordination and facilitation. It does not say who is paid	Add a personnel plan: roles, hours, rates, and who supervises
Dates	Timeline runs January 2026 to December 2027. Goals are dated August and December 2026. Conference tracks cite iLRN 2026	Use relative months, and set iLRN2027 in Daegu as the first public milestone
Scope	Title and components are about standards and credentialing. The conclusion describes an accessibility hub	Pick standards as the spine and make accessibility one pillar of the standards
Workshops	“12 virtual workshops (2/month)” across months 4 to 18. Two a month for 15 months is 30	Choose one number and make the schedule match
Repository	Evaluation counts “20+ repository resources.” The dissemination section promises “80+ documented resources”	Reconcile to one target
Organization facts	“Hundreds” of members in one place and “500+” in another. A “three-person executive team” with two people named. Founded 2014 against a 2020 exemption date	Verify each figure and state it once

Where	Problem	Fix
Track record	The draft never mentions iLRN's own standards work	Add the FAIDS working group recommendations from the 2022 annual meeting and the Codex Professional Standards and Measures shelf
Funder language	Mellon priorities, Mellon comparison grantees, and the course header are built into the text	Move all funder-specific language into a swappable alignment section. Remove the course header

Still missing from the draft. A logic model, a timeline chart, named key personnel with short bios, letters of support, a risk section, and an evaluator. Most funders ask for some of these, and the working group roster is the easiest to start now.

Open questions for leadership

Eight answers unblock the volunteers. None needs a meeting if they can be answered in writing.

- Who signs applications, and does a letter of inquiry need a board vote?
- Is the IBSTPI relationship formal, and who is the contact?
- Where did the 340-institution survey figures come from?
- Does member survey data exist, and what are the current membership and conference attendance counts?
- What was iLRN's legal structure between 2014 and the 2020 exemption?
- Has the 2025 Form 990-EZ been filed?
- What produced the 2020 and 2021 revenue of roughly $143,000 and $127,000? Past grants or sponsorships are track record worth citing.
- Is there a university willing to lead or co-apply, and who on the board can make that introduction?

Sources

Pages consulted on November 15, 2026, some through search result extracts only. The Sloan and Lumina entries rest on secondary listings and are marked for confirmation in the prospect table.

- ProPublica Nonprofit Explorer: iLRN filings
- Candid: claim your nonprofit profile
- Candid: 2026 Seals of Transparency guide
- Mellon Foundation: 2026 Higher Learning Open Call for Concepts
- Mellon Foundation: Humanities in Place
- University of Washington CSDE: Sloan Foundation Technology Program listing
- M.J. Murdock Charitable Trust: eligibility guidelines
- ECMC Foundation: grants
- Higher Learning Commission: endorsement process announcement
- Spencer Foundation: strategic refresh FAQs
- Spencer Foundation: Conference Grants
- NSF: STEM Education programs
- NSF: RITEL
- NEH: Digital Humanities Advancement Grants
- Siegel Family Endowment: what we fund
- IEEE Learning Technology Standards Committee: working groups
- iLRN Codex: Immersive Learning Professional Competencies
- iLRN: FAIDS design standards recommendations
- Draft reviewed: “Building the Future of Immersive Learning,” C. Hardin, Fall 2025 - Originally drafted as a grant writing exercise for SJSU coursework - needs substantial rewrite to align with available grants

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