THE GRANTSMANSHIP CENTER

Get funding. Create change.

Winning Grants Power Pack

Jumpstart your grant success

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What is a Grant Proposal?

Grants as Advocacy, Not Just Asking

By Barbara Floersch

Most staff members in nonprofit organizations define a grant proposal as a request for money. That definition is only superficially correct. To achieve the best results for their constituents and move more surely toward their missions, nonprofits need to think of grants in a different way.

First, nonprofits must consider grants from a funder's point of view. For funders, a grant award is an investment in positive change. It's a tool they use for having an impact on issues they care about.

Next, nonprofits must consider grants from a mission-focused perspective. Since the point of a grant award is impact rather than money, the real point of a grant proposal is to rally the necessary resources to help the nonprofit fulfill its purpose. A grant is a tool nonprofits use to address important issues within their communities.

Definitions matter, and defining grant proposals accurately can help both funders and nonprofits work together more productively. A grant proposal is actually a call to action. It's a request that a funder join the nonprofit as a partner in achieving specific results. At its best, a grant proposal is a cogent, persuasive, well-supported argument for change.

This definition moves the work of grantseekers well beyond reactive dollar-chasing and into the realm of social activism. It's no longer about supporting "our organization." It's about linking arms with colleague organizations, beneficiaries, community members, and funders to embrace a mission and confront the dragons.

Focusing on the articulation of a logical argument for action also means that the document you produce when seeking grant funds can be sliced and diced and used in numerous ways. You can use the proposal to educate staff and board members so that they'll be better prepared to rally community support, engage with other organizations, and convince funders to come onboard as partners.

You can also use the proposal as the basis for editorials, blogs, presentations, and public testimony. By disseminating solid information widely you're laying the groundwork for progress. When the community understands the significance of the issue you're working on, you're more likely to get the cash, in-kind donations, and volunteers you need to do your work.

You can edit the proposal into a briefing document and share it with those who are concerned about the issue or who should be. The list may include politicians, local officials, targeted community members and colleague organizations.

Embracing grant proposal development as a form of advocacy challenges the resource development team to impose standards on its work that may be higher than those demanded by funders. This includes:

- Deeply studying the issue you're concerned about, hearing various and sometimes dissenting voices, looking at it through different lenses, and then digesting it all until you can concisely and precisely explain what concerns you, why it needs to be changed, and what's causing the situation.
- Specifically defining what changes your organization plans to achieve, the degree of change you expect, and how you'll track progress.
- Identifying the actions that have the highest likelihood of producing the desired change, documenting why you expect the approach to succeed, and committing to what your organization will deliver within a set time frame.
- Imposing accountability on yourself rather than expecting some outside watchdog to do it.
- Communicating fully and honestly with staff members, beneficiaries, board members, the community, contributors, major donors, and grantmakers.
- Claiming and celebrating successes, and acknowledging, examining and learning from failures.

A top-quality grants professional is not just a seeker of dollars, a writer, a completer of forms, a person who answers the funders' questions, or a person who regurgitates information. That professional is a rain-maker, a change-maker, and a social activist. He or she finds the sweet spot where the needs of the community, the commitment of the funders, and the mission and capacity of the nonprofit organization align.

A grant proposal is not just a request for money. It's much more than that. A grant award is not just funding. It's a tool, a means to an end, an investment in change.

Getting the Grant 101

Building a Logical Proposal

By Patty Hasselbring

The process of “getting a grant” or “writing a grant proposal” can sound mysterious, like an old family recipe with secret ingredients. For over 40 years The Grantsmanship Center has been helping people demystify this process and to understand that like a recipe, creating a compelling proposal simply requires common ingredients put together in a logical and understandable sequence using tried and true techniques.

First, let’s talk about what a grant is and is not. In most cases a grant is support that does not need to be repaid. Usually it is in the form of money, but it may be technical assistance or training. Grants are usually awarded after the submission of a written proposal. So, the “grant” is the funding or other assistance that is received as a result of a grant proposal (also referred to as an application). A grant is not the written document that we submit to a potential funding source!

Each funder sets its own eligibility criteria for grant applicants, and eligible applicants are typically nonprofit organizations or public agencies. Nonprofits are often required to be 501(c)(3) organizations under the IRS. Click here for IRS information on nonprofits. Grants to for-profit entities or to private individuals do exist; however, they are far less common.

Each funder will also have its own application process and the degree of detail required will vary. Here, we’ll talk about the basic recipe for a grant proposal, understanding that some funders may require extra or different information — special ingredients. Let’s take a look at the basic ingredients required in a typical proposal, and how to include them.

Proof that the applicant organization is strong and viable

Funders look carefully at the applicant organization’s history, leadership, and track record. Offer factual and objective descriptions of your organization’s accomplishments, including statistics and examples. Highlight achievements that will be most meaningful to the potential funder. “Season” your proposal with a quote from someone in the community who values the contributions of your organization. If your organization is new and its track record brief, look to the background of the staff and board of directors to provide credibility, and stress community partnerships to build the funder’s confidence in the new organization’s ability to achieve results.

Consider this section of the proposal as a resume for your organization – your goal is to impress the reader with the organization’s credibility and qualifications.

Compelling description of the situation your organization will address

This section of a grant proposal may be called the problem statement, statement of need, or something similar. Your discussion of the problem to be addressed lays the foundation for the program plan, and if this section is weak, so goes the rest of the proposal. A strong statement of the problem will address the following:

- **Who is affected?** What are their qualities or characteristics? How many people are affected and where do they live?
- **In what ways are they affected and to what extent?** How do you know? Be clear about this. Quantify the problem using hard data and cite your sources. Provide context about the problem to elicit the funder's empathy and create a sense of urgency. Your understanding of the target population is critical. There's a story to tell and it's your job to tell it.
- **Why is the problem significant?** Why should the funder care about what's happening? There are urgent and compelling problems all around us. Why is it important to address this situation now? If there is credible research on the subject, discuss it. It can sometimes be useful to show how the local problem compares with the state or national situation.
- **Why is the problem occurring?** Identification of the causes of the situation will lead you directly to possible solutions. Remember to ask those affected by the problem why they think it exists. Their direct experience is invaluable and can help challenge preconceived notions that you, your team, or even a potential funding partner might have about the situation. Avoid assumptions.

As you explore the problem and its causes, a helpful question to ask is: How do we know this? One final note: the situation for which your organization is seeking a grant should generally not be about your own organization. Rather, it should be about those you are proposing to serve.

Clear statement of expected program results

After you have clearly identified the situation that needs to be changed, it's time to specify the outcomes you hope the grant-funded program will achieve. Funders used lots of different terms and may call these program outcomes, objectives, or even goals. Whatever they are called, think about this: what do you expect to result from the program your organization will run? Propose outcomes that are specific, measurable, and that will be accomplished within a set time frame. If you have defined the problem well, the outcomes will follow logically.

Well thought-out plan of action!

Next, lay out how your organization will accomplish the projected outcomes. Funders may call this section methods, approach, plan of action, program plan, or something else. No matter what they call it, this is what your organization plans to do when it gets the grant. Include who, what, when, where, and how. Explain it like you would explain a program to someone who knew nothing about it.

- **Who** – Who will be in charge of getting the work done? What are their qualifications? Who will be served or affected? How many people will be involved? Are there any specific criteria for people to be involved in this project? Discuss any collaborative efforts that will be part of the program.
- **What** – What will be happening? What are the specific strategies that will be used?
- **When** – What is the timeline for activities? It's helpful to lay out a graphic timeline, whether it is a GANTT chart or a simple chart with three columns that describes who, will do what, and when.
- **Where** – Where will the work take place?
- **How** – How will the work be accomplished? What resources will be used to get the job done?

Finally, one more question to answer – Why this approach? Have others used this approach and been successful? Is this approach considered to be a best practice or a model in your field? Share your rationale. It adds credibility to your proposal if you can demonstrate that you have a broad understanding of what other organizations in your field are doing and have learned. Note: you might end up with more information in this plan than what you ultimately have room to include in the proposal. That's okay! Submit the key points, but keep all the detail in your files. It will become the program management plan, and when you are ready to implement the program you'll be glad you put the time into planning!

Plan to evaluate

Nearly every funder will ask for a description of how you will evaluate the grant-funded program. Funders want to know that their investment in your organization was a good one. This stumps a lot of people, but it doesn't have to be overwhelming. Simply put, the evaluation plan describes how your organization: (1) will measure the level to which the program is achieving the expected outcomes; and 2) will document that program activities unfolded according to plans, as well as any course corrections you're making and why.

First, think about the projected program outcomes. How will you know when you have accomplished them? Are there benchmarks along the way that will indicate that you're headed in the right direction? Describe those benchmarks and what they will tell you about results. Describe what data will be collected and analyzed and by whom. Then describe what you will do with what you are learning. Will you be able to use those results to help guide future program development? If so, describe how that will be done. Remember that outcomes are all about results, so how will you monitor results? This is what many funders call the "outcome evaluation" plan.

Then, think about how your organization can improve the program from day one. How will the organization know whether the program approach is working? Or when revisions to the plan are warranted? Typically, some of the things that may be monitored are client participation, community support, feedback from clients, collaborators, and others, client satisfaction, and staff feedback. For example, if the plan was to conduct community forums about a particular issue, and few people attended, this would tell you something. Maybe the forums were held at the wrong time of day. Maybe people couldn't find the place. Maybe the subject was not of interest. Maybe childcare was a problem. Analysis of the situation can help you modify the approach so that it's more effective. This part of the evaluation plan is often called "process evaluation."

Plan for sustaining the program

Grants are wonderful (usually). But they are generally short-lived! What is your organization's plan for the program after the grant ends? If this is a program or service that should continue, what are your ideas for funding it? Aside from seeking more grants! Think about potential funding mechanisms that can be explored for long-term sustainability. Perhaps your organization excels at community fundraising. Maybe there is potential for contracts with government or for-profit corporations who need your service. A social enterprise might be something to explore.

In this section, also describe who else will be supporting the program. Support from other sources, whether cash or in-kind, may provide leverage for the grant. Don't forget about what your own organization will contribute, like office space, administrative support, or whatever you are able to provide.

Realistic budget

Now it's time to put dollars to the plan. How much will this cost? Be specific and account for all the ingredients in your program recipe.

Start by making a chart with four columns:

- Column 1 – **Line Items**: Use your organization's chart of accounts to list the line items that must be addressed in budgeting for the grant-funded program.
- Column 2 – **Total Program Budget**: This column shows the cost of everything that will go into the program, even if it's already covered by other sources.
- Column 3 – **Other Funding**: For each line item, show funding and the value of other resources that will be contributed from sources other than the requested grant. Be sure to include what your own organization will provide. The amounts in this column are sometimes called "matching resources," "leveraged funds," or "cost sharing."
- Column 4 – **Amount of The Requested Grant** – The difference between Column 2 and Column 3 is the requested grant amount.

Learning to use spreadsheet software well will make budget calculations faster, easier to adjust, and more accurate.

A few more points about the budget:

- Typically, grant proposals include budgets for one year time periods. If you are submitting a multi-year request, calculate each year separately and include a summary that shows the multi-year total.
- Remember you are projecting a budget. Therefore, you want to think not just about what the line items would cost today, but what will they cost when you actually incur the expense. Will salaries go up? Will benefits change?
- The value of donations should be calculated in the total program budget and then indicated in the other funding column. Value should be based on what you would actually pay in your community for that item if you had to pay cash for it.
- Be certain that there are no expenses in your budget request that are unexplained. Some funding sources will ask for a budget narrative, which gives you an opportunity to explain each item, how you calculated it, and how it is important to your proposed program.
- Check your math!

Summary

Once you've completed the budget, you've completed the body of the proposal – the main dish! Now you're ready to write a summary.

A summary is brief and may be just a few sentences. But it gives an overview of the entire proposal. And, while it is written last it almost always placed at the very beginning of a grant proposal. Since it is usually the first thing that reviewers will see, craft it with care! Pick out a key point from every section of narrative and write a sentence about it. Then, summarize the budget and how much you are requesting. That's it.

Attachments

Sometimes funders require that you send additional attachments along with your proposal. Typically requested items include brief resumes of key staff, job descriptions, letters of support or commitment from collaborating organizations, your organization's current operating budget, and a copy of your organization's 501(c)(3) letter from the Internal Revenue Service. Have these typical attachments on hand and keep them up-to-date so they're ready to go when you need them.

A Few General Tips for Preparing the Grant Proposal

1. Use short sentences and paragraphs.
2. Edit, edit, edit. Get rid of excess words.
3. Write so that anyone can understand what you mean.
4. Have someone who is not familiar with your organization or the proposed program read the grant proposal. Can they understand what you are saying?
5. Use simple language. A grant proposal is not the place to dazzle others with your vast vocabulary.
6. Avoid acronyms or jargon. In fact, don't use them.
7. Make your point at the beginning of each section and at the beginning of each paragraph. This prepares the proposal for skimmers. Remember, reviewers usually have many proposals to read. They appreciate your getting to the point.
8. Include "the human face" — quotes, brief anecdotes and examples can make your proposal more readable and understandable. Remember that reviewers are human, and the more interesting we make our proposals, the more likely the readers are to read them thoroughly.

Take Time to Produce a High Quality Proposal – This Isn't Fast Food

Finally, remember that a grant proposal isn't fast food or even a ten-minute recipe. It requires careful thought and planning. The better you plan on the front end, the greater the likelihood that the program will be successful – not just in obtaining a grant, but in making a difference in the lives of others. And that's really what it's all about!

Find the Right Funders

Where's the Money?

By Patty Hasselbring and Kevin Wiberg

Once you understand your organization's mission and priorities, you're ready to begin identifying funders that might be a good fit.

Let's start with a few key points:

1. There are no shortcuts to finding the right funding source. Nothing can replace thorough research.
2. Look beyond the obvious funders to find a wider group of prospects.
3. Grantmakers can change interest areas, application processes, and staff. Always get the most up-to-date information.
4. Get strong community support before seeking funding outside your community. Local support can build a potential funder's confidence in your organization.
5. Grantmakers receive tons of requests for funding. Don't waste their time–or yours–with requests that don't align with their interests.

BE STRATEGIC

Your task is to identify all potential funders whose interests align with your organization's mission, priorities, and program plans. Sometimes you'll focus your search on grantmakers for a specific program. That's fine. But to build a grant funding program that will be most productive over time, it's best to explore the entire universe of grantmakers to find those that are the best fit for your organization.

Don't approach this task in a hit-or-miss manner. Lots of internet sites provide lists of foundations and announcements of upcoming foundation or government funding opportunities, and you may run across some promising opportunities there. But browsing free sites and responding to list-serve announcements puts you in a disorganized, reactive position that won't produce the best results. Learn about the serious research tools available then use them in a well-considered, strategic way to find appropriate funders.

There are two general types of grant funders: government and private.

GOVERNMENT GRANTMAKERS

Grantmakers exist at all levels of government, from the federal level down to the local level.

RESEARCH TOOLS FOR FEDERAL GRANTMAKERS

There are several resources available for identifying federal funding programs, and each requires that you think broadly about the terminology you use in identifying your organization's interests.

To get started, think about the problems or issues your organization is addressing and brainstorm **key words and phrases** to use in your research. For example, if your organization's work focuses on teen substance abuse, key words and phrases might include substance abuse, drug abuse, addiction, health, alcohol, drugs, youth development, adolescents, teens, drug abuse treatment, drug abuse counseling, etc.

Here are two tools for identifying federal funding.

Grants.gov (www.grants.gov) If your organization plans to apply for federal funding, it should register with Grants.gov. You can use this resource to search for grant programs, and it is also the portal through which many grant applications must be submitted. To register with Grants.gov, you will also have to register with the Central Contractor Registry (CCR). Instructions on registering with CCR can be found on the Grants.gov website. Your organization will also need a Dun & Bradstreet number (known as a D-U-N-S number). You can get one easily at fedgov.dnb.com/webform. Registration is free and does not commit your organization to making a specific application for funds.

- Read the program listing carefully. Is your organization eligible?
- Visit the relevant federal agency's website to learn all you can about the program.
- Contact the agency's designated staff member if there are important questions you can't answer from studying the CFDA or the federal agency's website.

The Grantsmanship Center (www.tgci.com) The Center's federal information database is comprehensive and user friendly. It is available by subscription to Grant Domain or through membership in the Center's Alumni Program. Among its advantages: (1) You can find information in one place, because each morning the Center researches all sites on which announcements are posted and compiles a list that includes brief information and links to all relevant URLs. (2) The Center's site archives application guidelines so that you can access last year's RFP to begin work on a grant competition that may not open for many months. (3) Because the site is user-friendly and provides quick links to all federal agencies, it's convenient and saves you time.

RESEARCHING STATE, COUNTY, AND MUNICIPAL GRANTMAKERS

State, county, and municipal grantmakers rarely have a structured, user-friendly way of letting applicants know when a grant competition will open – or even that a grant program exists. For the most part, to unearth the possibilities, grantseekers have to become detectives. A few words of advice:

1. Call the offices of government officials and ask if there is a system that makes grant application announcements available to the public. If there isn't (as is often the case), ask how you can learn about grant opportunities.
2. Visit government websites and explore the various departments to see if grant programs appear to be available.
3. Speak to elected officials about what resources might be available.

PRIVATE GRANTMAKERS

Non-governmental funders include private foundations, community foundations, corporate foundations, and federated grantmaking organizations such as United Way.

As a part of your research, look for any connections that may help your organization build a relationship with the funder's board or staff members. Establishing a relationship with a foundation prior to submitting a proposal is a basic strategy that is worth the time and effort.

RESEARCH TOOLS FOR PRIVATE FUNDERS

Like the search for government funds, the starting point for private funders is a list of key words and phrases. This list will be similar to the one you used for government funders, but expand it with words relating to the type of support you're looking for, and your type of organization. For example, if one of your organization's priorities is to reduce health-care inequities by building a free community health clinic, you might use key words and phrases such as capital support, health, health care, social justice, free clinics, health care inequity, low income, and uninsured. And you'll want to target foundations that have expressed interest in your organization's geographic service area. While there is no single, free database of information on all foundations, using the primary resources discussed here will help you conduct thorough research.

The Foundation Center (www.foundationcenter.org) This organization maintains an extensive database of foundation information that you can access through online fee-based subscription services. But they also support a nationwide network of cooperating collections – public and government libraries or nonprofit information centers that make their databases and other information available to the public at no charge. You can find the closest cooperating collection by visiting the Foundation Center website at http://foundationcenter.org/about/locations. Some general information is available for free on the website, but to conduct structured research, you'll have to use one of the paid subscription services.

Guidestar (www.guidestar.org) This organization collects information on all nonprofits in the United States and makes it available to the public. You can use basic aspects of their database for free; all you have to do is register (to dive deeper, you'll have to pay a fee). Because foundations are nonprofit organizations, when you search the Guidestar database for nonprofits by zip code, they'll show up along with your colleague nonprofits. This is a free and easy way to identify foundations within a specific geographic area.

The Grantsmanship Center (www.tgci.com) maintains a continuously updated database of information on private grantmakers. You can access it through a paid subscription to GrantDomain or as a benefit of membership in The Grantsmanship Center Alumni Program. This user-friendly database includes only funders that have staff and who accept proposals, or who occasionally issue calls for applications.

Foundation Websites are hugely helpful, but unfortunately only a small percentage of foundations actually have websites. If they do, study them. You may be able to find details on their missions and giving interests, past grants including amounts and purposes, application guidelines, names of officers and staff. Read everything on the website. The more thorough your research, the better equipped you will be to make contact with the foundation.

Foundation Tax Returns. These are called 990-PFs, are public information, and are an indispensable research tool. For researching the many foundations that don't have websites, they're absolutely essential. Guidestar.org, discussed above, is an excellent resource for accessing 990-PF tax returns. Once you complete the free (and quick) registration, you can access three years of tax returns for free. You can also access 990-PFs through The Foundation Center's Foundation Finder, a free service available on the home page.

State and Regional Directories. Organizations and publishers have developed state-level foundation directories for most states or regions. Some are in print format, some on CD, and some are free online. They can be found at Foundation Center Cooperating Collections and are often available at local libraries. Use a web search engine to look for a foundation directory for your state.

STRUCTURING A SEARCH FOR PRIVATE GRANTMAKERS

Use the available research tools to search for private grant makers that align with the mission and priorities of your organization, and that fund in the geographic region you serve. Use the key word lists you've developed, and don't limit your research only to grantmakers who are appropriate for an immediate funding need. Instead, develop a repository of information that can support your organization's work for the long-run.

Start by using a good database, and then use the 990-PF tax returns to fill in the blanks where necessary.

As you examine information on grantmakers, keep these questions in mind.

- Do they limit funding to specific geographic areas?
- Are their expressed areas of interest aligned with those of your organization?
- What's the typical grant award amount for an organization such as yours?
- Do they accept unsolicited applications? If they don't, a relationship is critical.
- Does the foundation have staff? Those who do are more approachable than the large percentage that don't.

Even the most extensive databases available do not show every grant that a funder has made, to whom, and in what amount–and that information is critical. So unless a foundation maintains a thorough website or publishes a full annual report, the only place you'll find that information is in its tax return. Information about grant awards is found in Section XV (page 10 or 11). Many foundations attach a list near the end of the 990-PF.

As you move along in your research, analyze what you're finding and strategize about how you can use it. Do you see grantmaking trends? Can you find connections with foundation officers or staff members? The more you know about a foundation, the better prepared you are to talk to its staff and board members and, ultimately, to submit a proposal.

Managing Your Grant

Nuts, Bolts, Coffee

By Barbara Floersch

Everyone is elated! All the planning and research paid off and your organization has been awarded its first grant. Whether it's a $500,000 grant from the US government or a $10,000 grant from a private foundation, now's the time to lay essential groundwork to ensure grant funds will be spent and accounted for as required and that program obligations will be met. Welcome to the world of grants management.

The Initial Paperwork

As you might imagine, government grants come with more red tape than foundation or corporate grants. For government grants, your top executive officer or board chairperson must usually sign and return a documents accepting the grant award and agreeing to reporting and fund draw-down requirements, as well as any other special requirements that have been attached to the funding. This is strictly a business transaction—there's no need to send along a warm letter of appreciation. Be sure to return paperwork by the required deadline.

Corporations and foundations sometimes require that officers sign a letter accepting the grant award, but often they don't—a check simply arrives in the mail with a letter of congratulations laying out the expected reporting requirements. If you're expected to return a signed acceptance document, do so promptly and be sure to include a letter expressing appreciation, acknowledging any reporting requirements, and inviting the funder for a visit. While this is a business transaction, it's also a starting point for building an ongoing relationship of trust, commitment, and support.

Establish both an electronic and hard-copy file for each grant your organization receives. Since so much business done electronically, be sure that e-documents and emails are organized for easy access–and be sure electronic documents are backed-up in case of a failure in technology. Place copies of signed grant documents in a hard-copy file, and keep the file updated with subsequent correspondence related to the grant. When an e-document is of particular importance, print it out and file it here as well.

Put the Financial House in Order

To establish your organization's ability to receive and manage grants, it's necessary to establish adequate accounting practices and systems.

A primary concept in grants management is that each specific grant award should be accounted for as an "independent cost center." This means that all income from a grant and expenditures from that grant are accounted for as a distinct, separate category within your accounting system. This is a basic protection against co-mingling all funding into one big pot and losing track of what money paid for what expenditure. Using an "independent cost center" approach helps to ensure that grant funds are spent for the intended purpose and can be fully accounted for at all times.

While this article can't provide a basic overview of bookkeeping or accounting, the strength and clarity of your organization's fiscal systems will play heavily into the ability to manage grants. If a strong accounting system is not in place, and if there's not an expert on staff, seek guidance from someone who knows what they're doing.

A few of the most basic, most critical rules include:

- Only expend funds as laid out in the approved grant budget
- Never use funds from a grant for items not included in the grant budget or for purposes other than described in the grant narrative
- If the original budget requires amendment in order to support the purpose of the grant, contact the funder to get permission before making changes
- Support every expenditure with adequate documentation
- Use a system of checks and balances so that no one person is solely in charge of the money (i.e., dual sign-offs on expenditure requests and checks).
- Keep receipts, documentation, and monthly financial statements well organized and accessible
- Monitor grant expenditures monthly to ensure that over-spending or
- under-spending can be addressed before the end of the grant period

If your organization doesn't have a high-quality accounting software package, get one or retain an experienced bookkeeping firm. Strong financial management is essential to the health of your organization and there's no way to manage grants effectively if the fiscal house isn't in order.

Review the Grant Proposal
In the euphoria of receiving grant funds, staff members can forget to review the grant proposal to refresh their memory on the specifics laid out in the narrative and this can lead to problems. It is not unusual for three to nine months to pass between submission of a proposal and receipt of an award. Nobody's memory is that good.

Upon receipt of an award, call a meeting of the executive, fiscal, and program staff who will be involved and review the grant document to ensure a common understanding of exactly what is must be done. If the grant included a thorough Methods Section with a detailed time-line assigning responsibility for major tasks, that will be extremely helpful. If the proposal didn't include that, now's a good time to hammer out those details. By reviewing the proposal thoroughly and making sure all elements are implemented as planned, you'll be laying the groundwork for success and avoiding major problems that are inevitable when grant implementation drifts off course from the original plan.

Understand Rules and Regulations

The Grantsmanship Center is working with our Senior Grants Management Consultant, Henry Flood, to publish a series of in-depth articles on grants management. While all grants management requires checks, balances, documentation, fiscal controls, and the like, there is no doubt that grants from government agencies are especially demanding.

If you have received a grant from a federal government agency, be sure you study that agency's rules and regulations regarding grants, and that you also study the Office of Management and Budget (OMB) Circular that specifies the administrative rules regarding grants to an organization such as yours (i.e., nonprofit organization, hospital, educational institution, municipality). If the agency doesn't provide you with a grants management document or booklet, ask if they have one and if so, get it. OMB Circulars can be found at www.whitehouse.gov/omb/circulars.

If you don't understand something, figure out who can provide you with accurate information and call them. If you are overwhelmed, retain a consultant to determine exactly what you need to do and to help you get the necessary systems set up.

Schedule Reports

Almost all grants require that financial and program progress reports be submitted according to a schedule. With the hectic work pace that often accompanies receipt of a grant award, it's critical to establish a system for recording when reports are due and then reminding responsible staff of upcoming deadlines. If staff members realize that reports are due within a week, or are past due, it's not possible to do a high-quality job and poor or late reporting will damage your organization's credibility with the funder.

Even if a funder does not demand reports, provide them. It's good business practice, enhances credibility, and helps to build a solid relationship with the funder. You can establish your own reporting calendar in this situation, but take it seriously and make sure you provide information at the six and twelve month points at a minimum. If you've never done a grant report, and the funder hasn't provided a format, include the following information:

1. **Financial overview**: explain the grant's status including income, expenditures by line-item, and funds remaining
2. **Program implementation**: Update the funder on was originally planned and what has been accomplished to date
3. **Program Outcomes**: The best evaluation plans measure program results as the grant work progresses, rather than at the end of the period of grant support. Provide the funder with information on evaluation activities and on the degree to which the program is producing the results that were expected.
4. **Change of Plans**: If an alteration of the planned approach is needed to achieve the best outcomes, explain what you need to change and why. If the alternation is major or will result in budget changes, you'll need to request a meeting or phone call with the funder.

5. **Challenges, Successes, and Lessons**: If your organization has encountered specific challenges in implementing the program, or has had great success in some area, let the funder know. And if there are lessons that have been learned that will inform the future work of your organization, explain that as well.
6. **Attachments**: Attaching pictures, news clips, letters from the people benefitting from the program, or other relevant information can bring the report alive and engage the funder more deeply. Don't overdo it, and don't do it at all if the funder asks you not to.

Reports, like any other important documents must pass up a chain of command for sign-offs before being submitted. When establishing the reporting calendar, schedule in time for submission of drafts to supervisors, draft revisions, and final sign-off.

An Outlook or other electronic calendar can be used to schedule reports and remind staff members of deadlines, and a master reporting calendar can be established on a spreadsheet. Just be sure that someone is minding that shop.

Don't Forget Partner Organizations

Most grant proposals include some sort of collaboration with other organizations. These partnerships are usually critical to implementing a program and sometimes involve the sharing of grant funds through subcontracts. When the funded proposal includes partnerships with other organizations, it's critical to make a strong start together and avoid misunderstandings. To accomplish that:

1. Immediately inform partner organizations that your organization has been awarded the grant.
2. Provide partner groups with a copy of the grant proposal, or at least with that portion of the proposal that spells out their involvement program implementation
3. If your organization will be sharing grant funds with other organizations, draft contracts regarding the sub-grant relationships and provide your partners with copies for review and discussion. While contracts will be specific for each partner organization, at a minimum each should spell out agreements concerning:
    - The amount of funds to be provided, and the payment schedule (funds should be provided incrementally in response to deliverables)
    - Reports required and deadlines
    - Services to be delivered and timeline
    - Consequences of non-compliance with contract agreements
4. Hold a meeting of partners to celebrate the grant award, to review each organization's role, to agree on reporting deadlines, and to finalize start-up plans. Be sure the discussions are recorded.

Announce it to the Community

A grant award increases your organization's capacity to serve the community and shows that funders are willing to invest in its work. Some funders request that their grant contributions be announced to the public, but even when they don't, it's a good idea. Let the public know what's happening, highlight your organization's commitment to the cause, and publicly thank your funder for the support. It's a good investment in community relations, and funder relations, and may even help build future support for what you're doing.