Manage Up!
Techniques for Driving Cross-Team Efficiency in Grant Seeking

Presented by Abby Teare & Kelly Howard

GRANTS Plus

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About Grants Plus

Grants Plus is the nation's most trusted and experienced professional grant seeking firm.

We partner with nonprofit organizations as their trusted advisors to find grant opportunities, guide funder relationship building strategies, write compelling grant proposals, and make long-term grants gains.

Nearly $300 million raised in grants from private, corporate, and government funders

Over 16 years' experience serving nonprofits with diverse missions, locations, and sizes

Award-winning team of 30+ of the country's top fundraising professionals

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Meet Your Presenters

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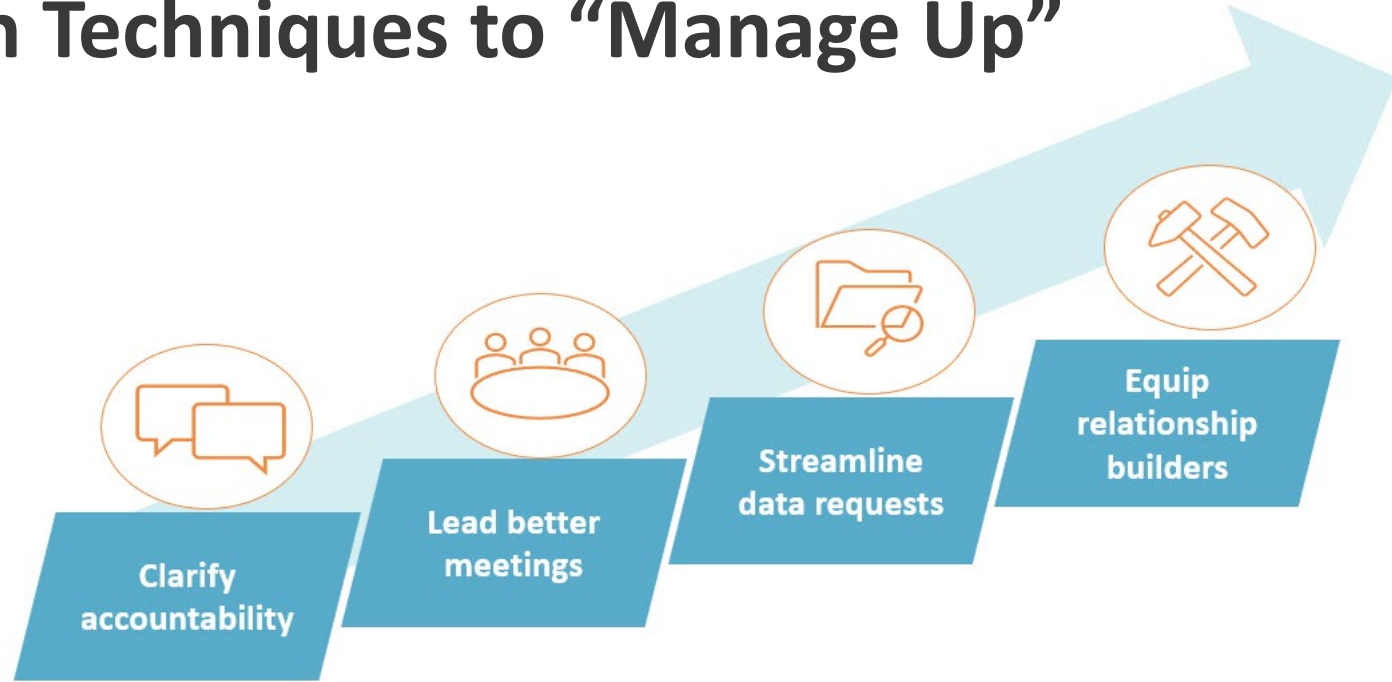blackbaud

What makes today's topic so important?

WINNING
GRANT
PROPOSALS

≠

+ Disconnected colleagues

+ Ineffective communication

+ Unreliable information

Learn Techniques to "Manage Up"

Clarify accountability

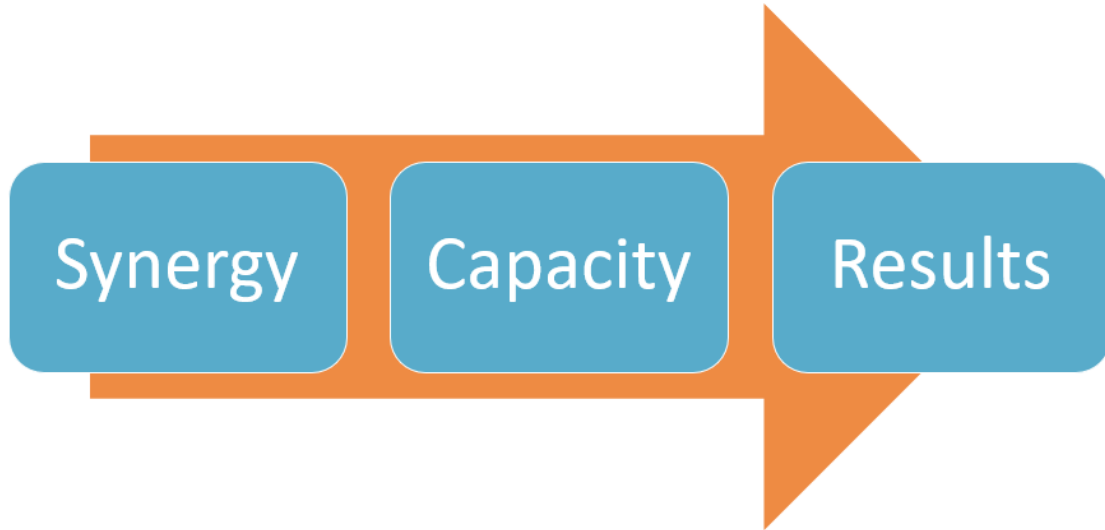Lead better meetings

Streamline data requests

Equip relationship builders

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Technique #1: Clarify Accountability

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Simple, Direct, Respectful Communication

What is the most important message?

Who is the message being communicated to?

How should the message be shared?

SDR in Practice

Dear Greg,

The proposal to XYZ Foundation is due this Friday. I haven't received your edits to the draft so I can finalize for the proposal submission. Can you update me on when to expect them? Alternatively, I can schedule a meeting to walk through your feedback verbally. What works best with your schedule?

The ARCI Accountability Framework

ARCI Accountability in Action

Project: Meet XYZ Foundation
proposal deadline

ACCOUNTABLE: Your grant writer is accountable to make sure the proposal comes together on time.

RESPONSIBLE: Program staff is gathering client input/stories and synthesizing data for the proposal.

CONSULTED: CFO is approving budget and Executive Director is reviewing/approving final draft.

INFORMED: Program Director will be updated when the proposal is submitted.

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Technique #2: Lead Better Meetings

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Tools for Successful Meetings

THE RIGHT ATTENDEES

DETAILED NOTES

MEETING AGENDA

MEETING FOLLOW UP

A Successful Meeting in Action

Goal: Confirm proposal projects for the coming month

✢ Attendees
  ✢ Executive Director
  ✢ Chief Development Officer
  ✢ Grant Writer/Manager
✢ Agenda items:
  ✢ Review proposal calendar
  ✢ Review cultivation pipeline
  ✢ Confirm proposal projects
✢ Next steps:
  ✢ Follow up with program staff

Technique #3: Streamline Data Requests

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Data & Information Request

✦ Efficient method for collecting information

✦ Simple and direct

✦ Identifies accountabilities

✦ Outlines timelines/deadlines

Outlining the Data Request

✤ Review application guidelines
✤ Identify what information you already have
   ✤ What information is missing?
✤ Outline the information needed
   ✤ Who has the information you need?
✤ Develop the data request
   ✤ Simplify questions
   ✤ Identify who is responsible
   ✤ Set a (reasonable) deadline

Sample: Data and Information Request

I logged into the application portal to preview the application. Here is an outline of the information I need you to provide for this request.

Programmatic and request questions (Chris):

1. How many people will the project serve in a 12-month period?
2. What are the 2-3 primary goals of the project?
3. How will you know the project is successful?
4. How much do you want to request (up to $20,000)?

Organizational and budget questions (Andrea):

1. How many full-time, part-time, volunteers, and others (interns, Vistas, AmeriCorp, etc.) do you have? Please provide the breakdown for each category.
2. How would you describe the organization's current financial condition? Do you foresee any financial challenges in the future?
3. Please provide a copy of your current operating budget (the most recent we have on file is FY21).
4. Please provide a copy of your most recent audited financial statements (the most recent we have on file is FY20).

Please provide this information by **Monday, November 7th**. The application is due on Monday, November 14th.

Proposal Development

Having good, comprehensive data and information from the start leads to proposals that are:

- ✟ Complete
- ✟ Error-free
- ✟ Clear and logical
- ✟ Engaging
- ✟ Persuasive and compelling
- ✟ Inclusive of voices/conditions
- ✟ Tailored to the funder

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Technique #4: Equip Relationship Builders

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Create a Pulse & Practice for Strategy Support

Establish routines to set relationship builders up for success
- ✢Identify connections
- ✢Get clear on alignment
- ✢Develop talking points
- ✢Capture conversation outcomes
- ✢Document next steps

Stewardship

We know that successful stewardship:
- Communicates gratitude
- Builds trust
- Enhances understanding of impact

  Together, all of these *deepen funder relationships*

Use tools that help you leverage stewardship opportunities

- Stewardship planner

Key Takeaways to Manage Up

Deploy simple, direct, respectful communication to drive outcomes and set clear workflows and accountabilities using the ARCI framework.

Lead meetings that support goals, reinforce staff accountabilities, and uphold project timelines.

Introduce a data request tool to streamline information collection.

Build a consistent practice that equips relationship builders to cultivate funders.

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