Steuben County Community Foundation
Nonprofit Capacity-Building Initiative

Grant Management 101

Wednesday, February 22, 2023

Presented by:
Kelly Trusty, Ph.D.

TRINE UNIVERSITY
KETNER SCHOOL OF BUSINESS

1

THANK YOU
for the
IMPORTANT WORK
you do in OUR communities!

Today's Topics

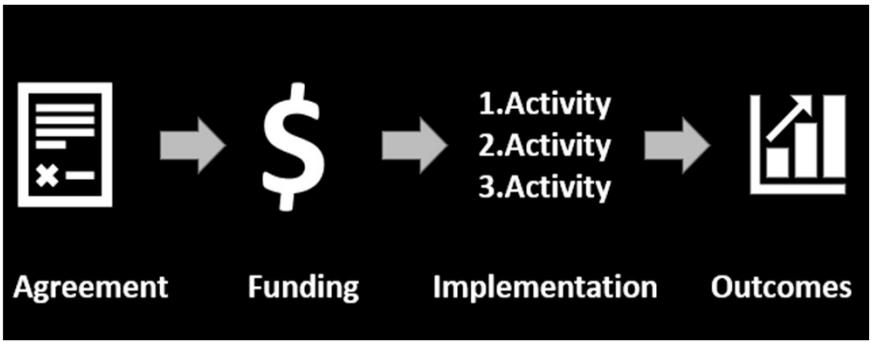
- Quick Review
- Why Grant Management?
- Who's involved in grant management?
- What is a grant management system?
- Three Phases of the Grant Process
- Q, A, and additional topics brainstorm

3

Quick Review - What is a grant?

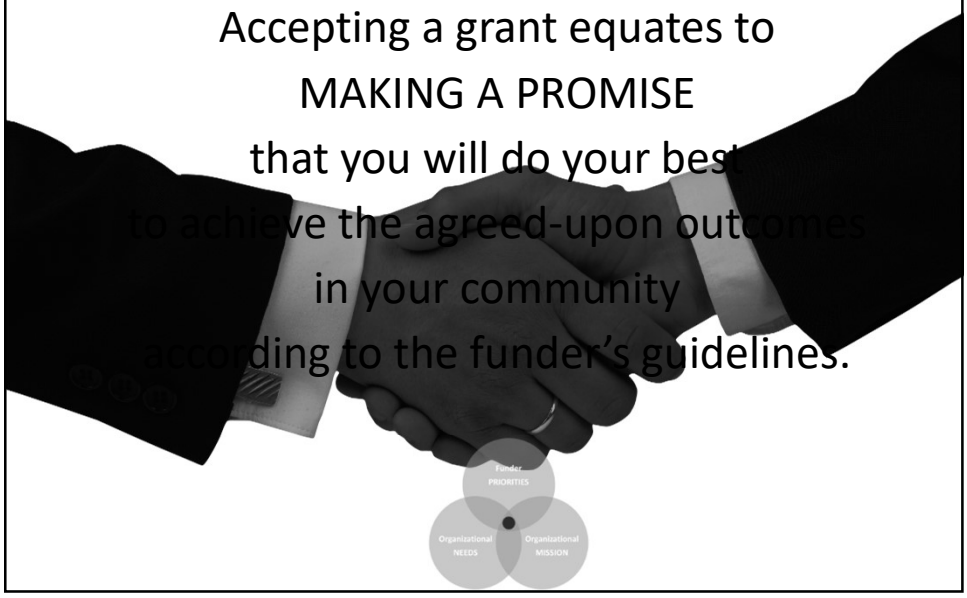
Your grant PROPOSAL is an AGREEMENT that describes how your organization's needs, capacity & resources will align with a funding organization's priorities, guidelines and money to achieve measurable outcomes.

Quick Review - What is a grant?



Quick Review - What is a grant?

Accepting a grant equates to
MAKING A PROMISE
that you will do your best
to achieve the agreed-upon outcomes
in your community
according to the funder's guidelines.

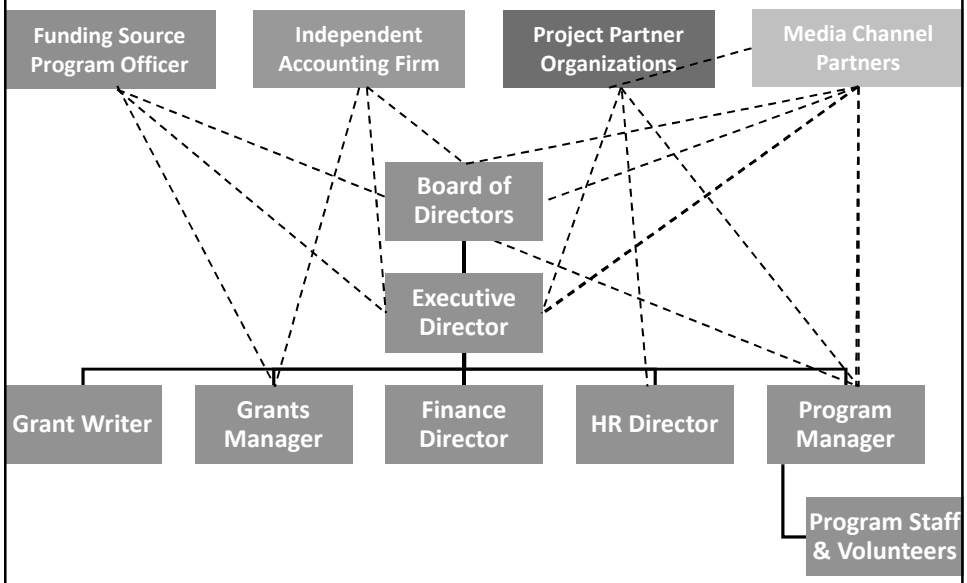


Why Grant Management?

- Build TRUST and CONFIDENCE with the funder
- Comply with reporting requirements
- Avoid complications/penalties
- Avoid “frenzy” frustration
- Improve grant-seeking strategy
- Nurture relationships inside and outside your organization.

What Types of Grants Need Management?

Who is Involved in Grant Management?



What is a Grant Management System?

- Coordinates personnel & responsibilities
- Organizes funder information
- Organizes grant history
- Tracks prospects and active grants
- Monitors progress and reporting deadlines
- Supports a grant document library
- ***Sometimes*** integrates w/CRM and Accounting

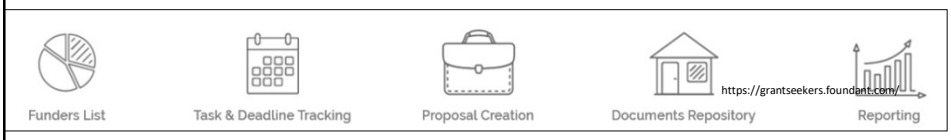
Choosing and Setting Up the System

smartsheet
$25/user/mo

Submit.com
$145/mo

GOOD GRANTS
$139/mo

FOUNDANT for Grantseekers
GRANTHUB
$75/mo



https://grantseekers.foundant.com/

These are just a few suggestions of grants management systems, for information purposes only. Carefully consider whether you need stand-alone software, or if you can do the same work with tools you already have!

11

Choosing and Setting Up the System – Grassroots Tech

TRACKING
EXCEL Spreadsheets

Grant tracking worksheet for "big picture" of all grants applied for and in-process. (See sample)

Workbook for each grant project with individual sheets for:
- List of reporting dates
- Program data collection
- Volunteer hours
- Media coverage

DOCUMENT LIBRARY
Google Docs or
other cloud storage
"Google for Nonprofits"
(sign up @ techsoup.com)

- File system for each grant
  - Grant application and supporting docs.
  - Award letter
  - Award agreement
  - Program documentation
  - Testimonials
  - Evaluation data
  - Media coverage
- Share access as appropriate to staff and partners

COMMUNICATION
E-mail listserv/group
Shared calendar
File sharing

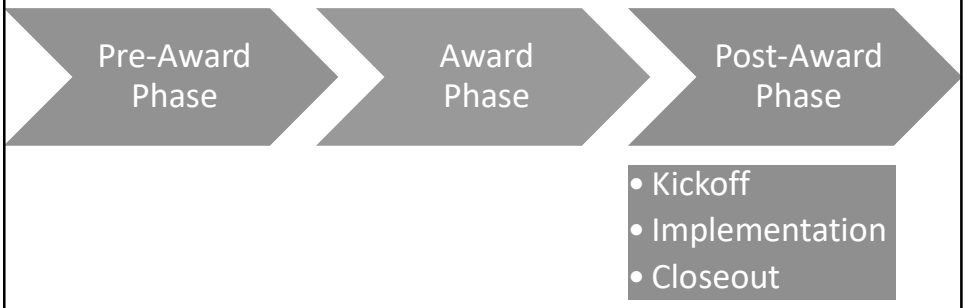
Consider
Team Mgmt software:

Basecamp
Slack
Asana
Gsuite

FINANCIAL MGMT
QuickBooks
Zoho

12

Three Phases of the Grant Process



Phase 1: Pre-Award Phase

- Search for opportunities – KNOW the timeline
- Review organizational capacity: Can we do it?
- Register on grant portals EARLY
- Get BOARD APPROVAL to pursue the grant
- Complete and submit the grant application
- Wait patiently. Some funder timelines are fluid
- Receive award notification from funder

Phase 2: Award Phase

- Read the ENTIRE award packet/file, note important dates and deliverables
- Sign grant agreement, make a copy and return to funder
- Make copies of ALL award documents and file
- Set up cost center in financial management system
- Set up direct deposit with bank
- Announce the award, make copies of all media and file

Phase 3A: Post-Award Kickoff

- Internal kickoff meeting - create work plan and calendar, review terms and conditions
- Partner Org kickoff meeting - create work plan, calendar, communication protocols, review terms and conditions
- Deploy EVALUATION PLAN: program outputs, outcomes, lessons & challenges, financial, in-kind, media
- Follow up regularly with internal and external teams

Phase 3B: Post-Award Implementation

- Report internally on progress: program outputs, outcomes, lessons & challenges, financial, in-kind, media
- Report performance to funder using required format (register on portal early)
- Make change requests using required format
- Welcome funder program officer for visits

Phase 3C: Post-Award Closeout

- File for extension if allowed
- Submit final report and complete closeout procedures
- Celebrate and share your successes
- File all media and program outcome data to use to support future proposals

What is grant management?

19

Keys to Successful Grant Management

- Begin management BEFORE you get the grant
- Put mission first – grants support strategy, they don't drive it
- Ensure support of senior leadership
- Use the grant process to build success stories

- Comply with all funder requirements – ask if you're not sure
- Understand allowable costs
- Carefully compute and report indirect costs
- Fully understand relationships and nurture them
- Clearly define roles and responsibilities
- Document EVERYTHING, organize well, and retain as required
- Establish and document accounting controls and audit procedures
- Follow cash management requirements
- Report ON TIME and accurately.
- Do what you said you would do.
- If things go awry, contact the funder right away

- Celebrate successes widely
- Learn from projects that don't go well
- Keep at it! You're doing amazing work.

20

Additional Questions?
Additional Topics?

21

THANK YOU
for the
IMPORTANT WORK
you do in OUR communities!

Kelly Trusty
kelly.trusty@gmail.com
260-243-0261