



A Grant Hero's Journey:

Navigating the Life Cycle of a Grant from Opportunity to Impact

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Courtesy Grant Professionals Association - Nebraska Chapter
Presented 6/5/25 @ NAM Fundraising Palooza; Omaha, NE



Noelle (she/her)

For Legal Reasons

“Any opinions expressed throughout this presentation are solely those of the presenters and do not necessarily reflect those of the Grant Professionals Association.”

Grant Professionals Association

The mission of GPA is empowering grant professionals and those they serve through:

- Advocating for members and the grants profession
- Creating powerful communities and connections
- Fostering excellence in professional practice

<https://grantprofessionals.org/>

GRANTWRITER



What my friends think I do



What my mom thinks I do



What program staff think I do



What my boss thinks I do



What I think I do

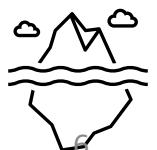


What I really do

We Do SO Much More Than Just Write!

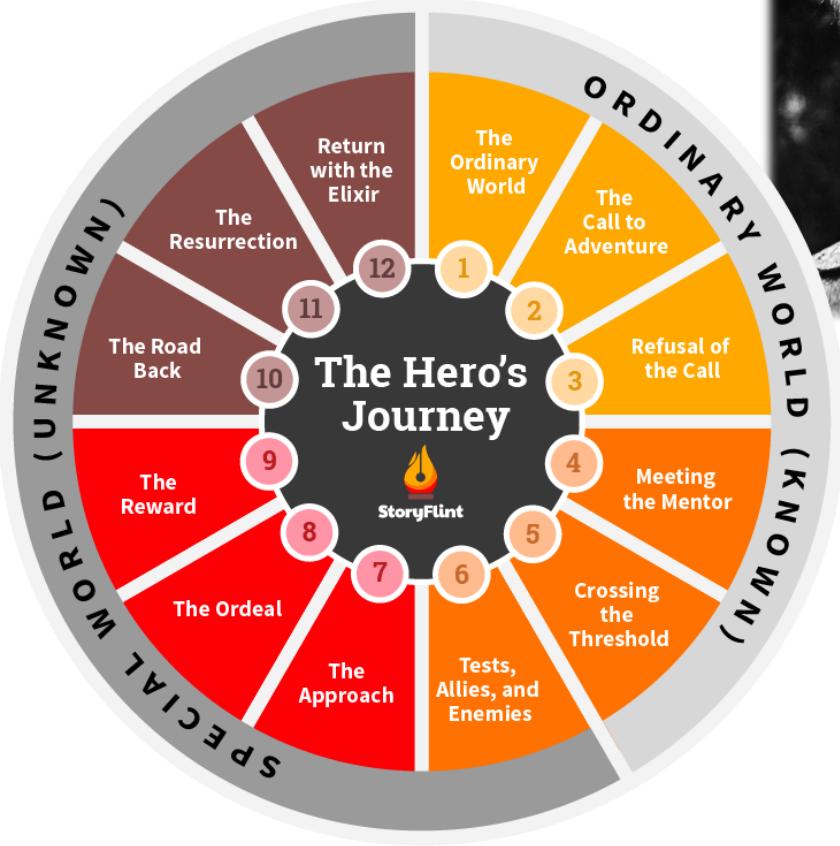
The **Grant Professional** supports the agency's mission, activities, and initiatives through the proposal writing, management, and compliance of grants and contracts from prospecting to closeout:

- **We conduct prospect research** to assure that grants and/or contracts appropriately align with the agency's strategic plan and the program or service's goals and objectives;
- We coordinate, lead, and assist members of fiscal, program, leadership, quality improvement or other teams in developing and bringing together all application or report elements for timely submissions; and
- **We closely monitor and manage grants and contracts** throughout the life cycle of the award to ensure compliance.



The (Grant) Hero's Journey

Joseph Campbell



YOU
the Grant Professional



🎵 Getting to Know YOU 🎵



What's your favorite stage of the Grant Hero's Journey?

The Call to Adventure | Prospecting

The key to **good prospecting** is to ensure that the funding opportunity's purpose aligns with the project we are seeking to fund.



funders' email newsletters



nonprofit tax returns (990)



networking across sectors



subscription databases



membership organizations



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Meeting the Mentor | Finding Funder Matches

Consider:

- When is the application deadline?
- Does the **grant award range** meet our funding needs?
- If awarded, **when would we receive the funds?**
- Is our organization and/or program **eligible**?
- Does the **grant's funding purpose** align with the program's goals and objectives?

We Think We Found a Match!

PROSPECTING

The Grant Professional is responsible for prospecting for grant opportunities. When appropriate or applicable, **other staff may also provide leads to possible opportunities.**



OPPORTUNITY VETTING

If the opportunity includes *new or expanded programming, additional staff, or other significant changes*, a ***mutually agreed upon grant vetting process*** should be in place between the client organization and the Grant Professional to determine organizational readiness for the grant opportunity.



Are Y'all Ready for This?

ORGANIZATIONAL READINESS

- **Review each section of RFP**
 - note requirements
- **Identify community partners as appropriate**
 - **Do we need any LETTERS OF SUPPORT?**
 - If so, start connecting with folks ASAP
- **Do we have the following in place?**
 - **Support structure**
 - **Staff**
 - **Time commitment from key personnel**

Key Considerations for Grant Readiness

ORGANIZE TEAM MEMBERS & DISCUSS

- ✓ Deadlines
- ✓ Task Champions
- ✓ Program Design | Work Plan
- ✓ Research
- ✓ Guidelines
- ✓ Budget
- ✓ Point Values
- ✓ Evaluation
- ✓ Sustainability

GUARD AGAINST

A Lack Of
Time
Organization
Cooperation
Information

Tests, Allies, & Enemies *OR* Proposal Prep & Collaboration

me in a group project



MEET & DISCUSS

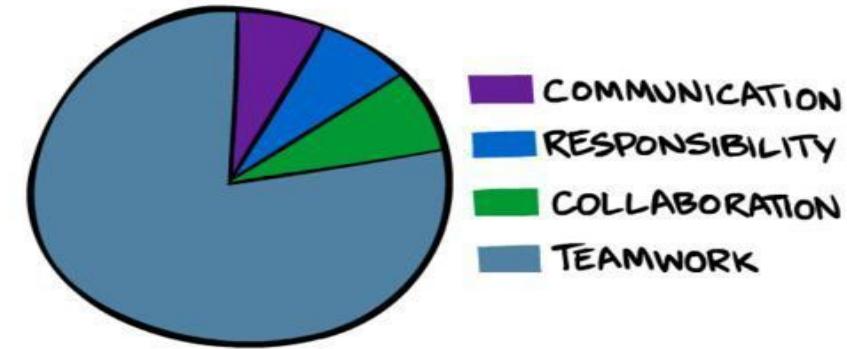
- Agree on **Case Statement**
- Discuss and agree upon **Work Plan**
- Review sample grants and/or canned copy (if available)
- Agreement of **project timeline** for meeting grant application deadline
- **Collect:**
 - Letters of Support (LOS)
 - Memorandum(a) of Understanding (MOUs)
 - Business Associate Agreements (BAAs)
 - Procurement or subcontractor bids as necessary

Tests, Allies, & Enemies *OR* Proposal Prep & Collaboration

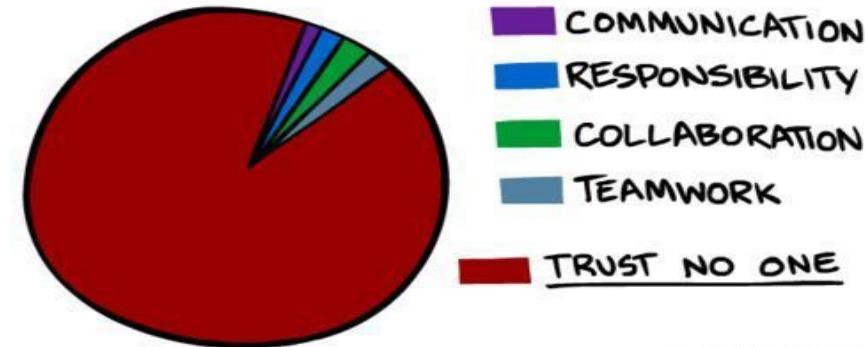
COLLECT/CREATE:

- Budget analysis and/or pro forma
- Application **narratives**
- Securing necessary **agency official signatures**
- Collect any **accompanying attachments**
- Consider the **submission method** (paper copies hand-delivered, email, online grant management platform or direct online forms, et al.)

WHAT GROUP PROJECTS ARE SUPPOSED TO TEACH YOU

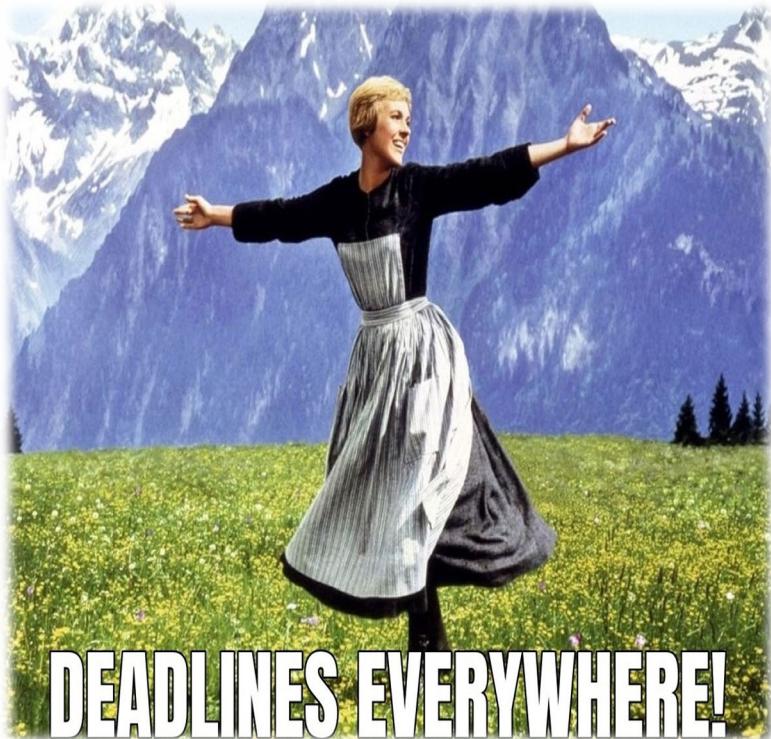


WHAT GROUP PROJECTS TAUGHT ME



endlessorigami.com

Proposal Preparation & Collaboration



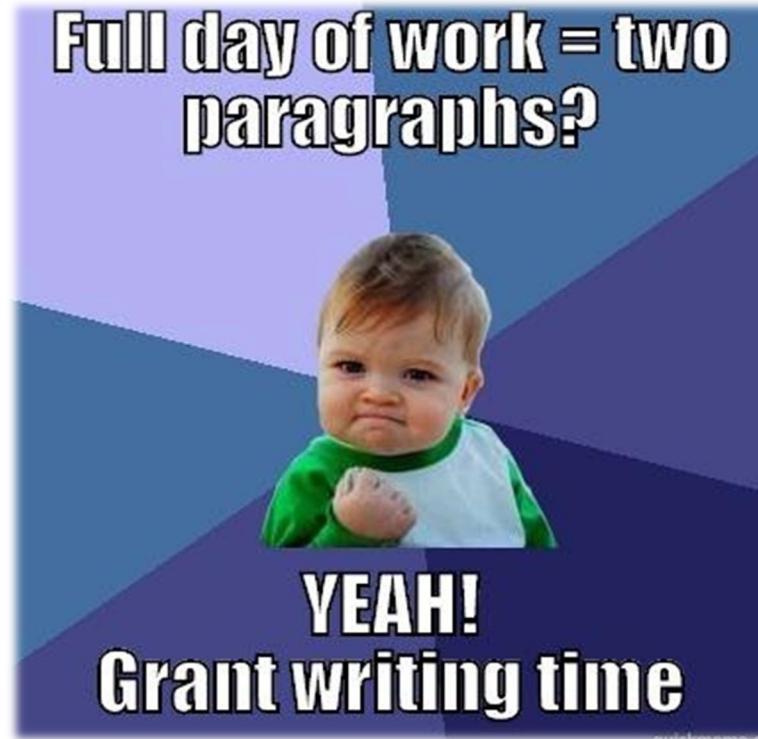
DRAFTING

Do Your Research! Be sure to have relevant, recent data that demonstrates local need and why YOUR solution is best to solve the problem

Make It Make Sense. Grant budget assumptions should be gathered and communicated with/by Finance to ensure that the budget aligns with the story you are trying to tell.

PEER EDIT & REVIEW – CROSS-CHECK FOR:

- ✓ Realistic work plan/program design/logic model/Gantt chart/project activities
- ✓ Budget/narrative congruence
- ✓ Realistic budget
- ✓ Evaluation method
- ✓ Program/Project Sustainability

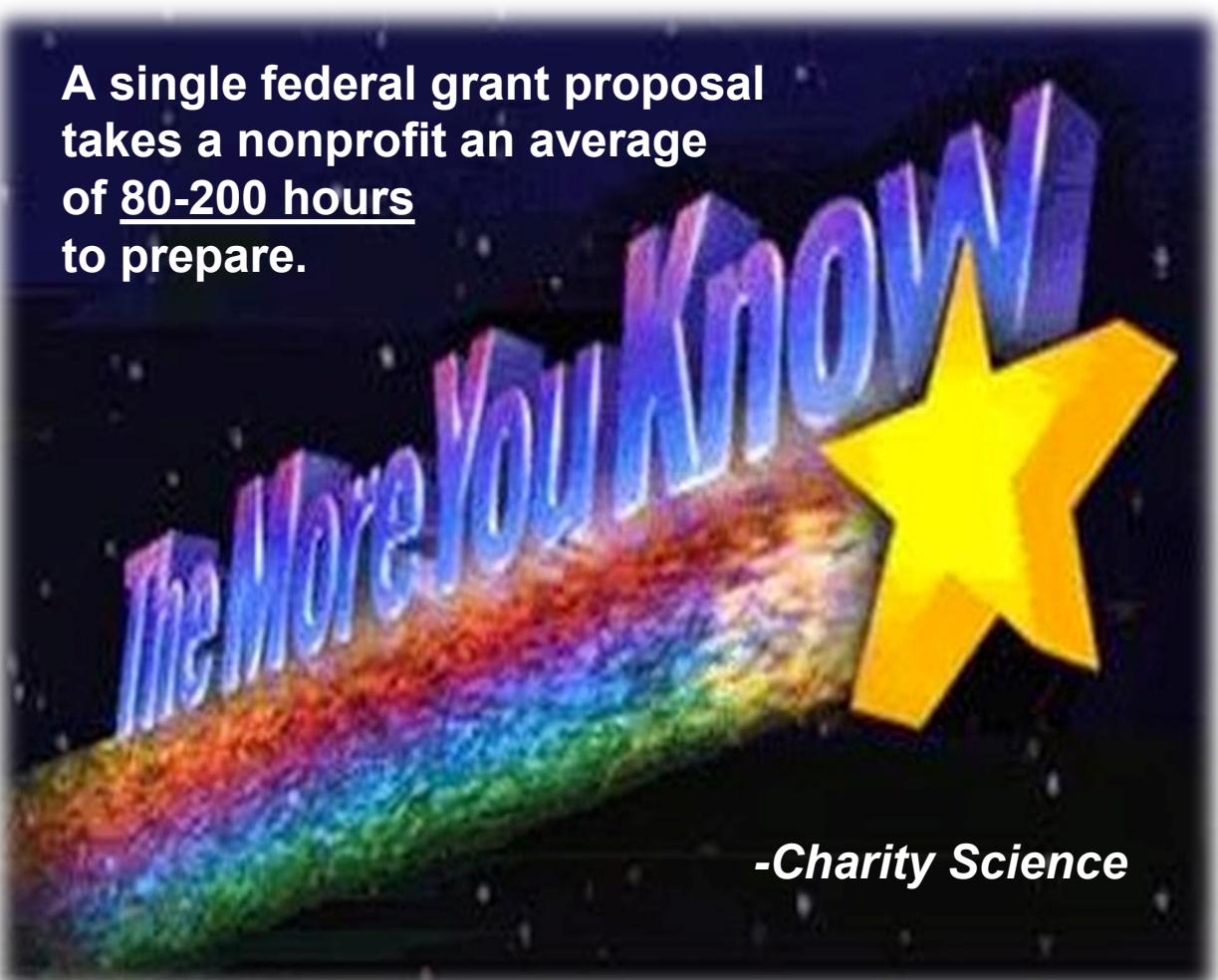


Proposal Prep & Collab

FINALIZE & SUBMIT

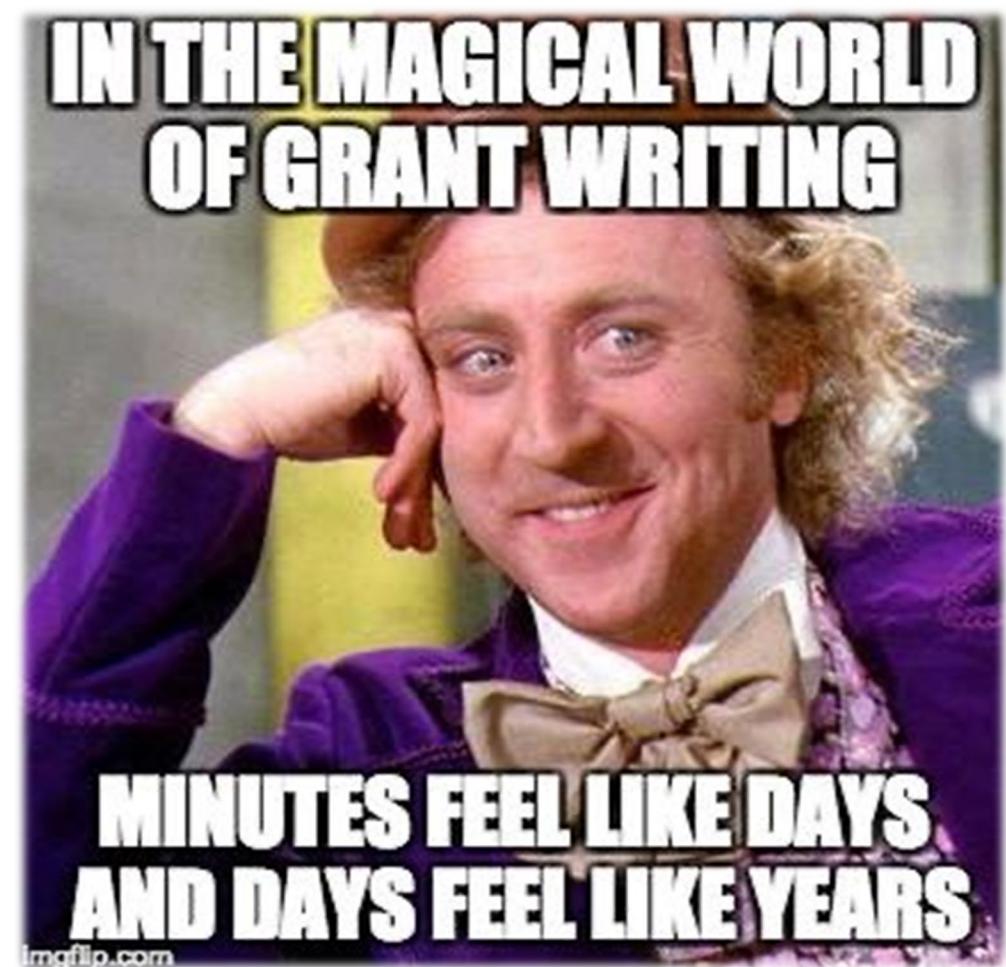
Final revisions made, double checking that:

- ✓ All questions/requirements are answered/addressed appropriately
- ✓ All signatures obtained
- ✓ All required components completed
- ✓ Not over page limits and/or character and/or word limits
- ✓ Attachments included
- ✓ **SUBMIT PRIOR TO DEADLINE** – allow ourselves enough time to address any unforeseen troubleshooting items that may arise



The Campbellian Ordeal...(Now We Wait)

- ✓ Find the timeline expectations and communicate them to stakeholders
- ✓ Add decision deadlines to your calendar
- ✓ When decisions do not arrive within 7 days of communicated deadline, feel free to reach out to funder: *“I’m calling/writing to find out the status of our application.”*
- ✓ Focus on other things

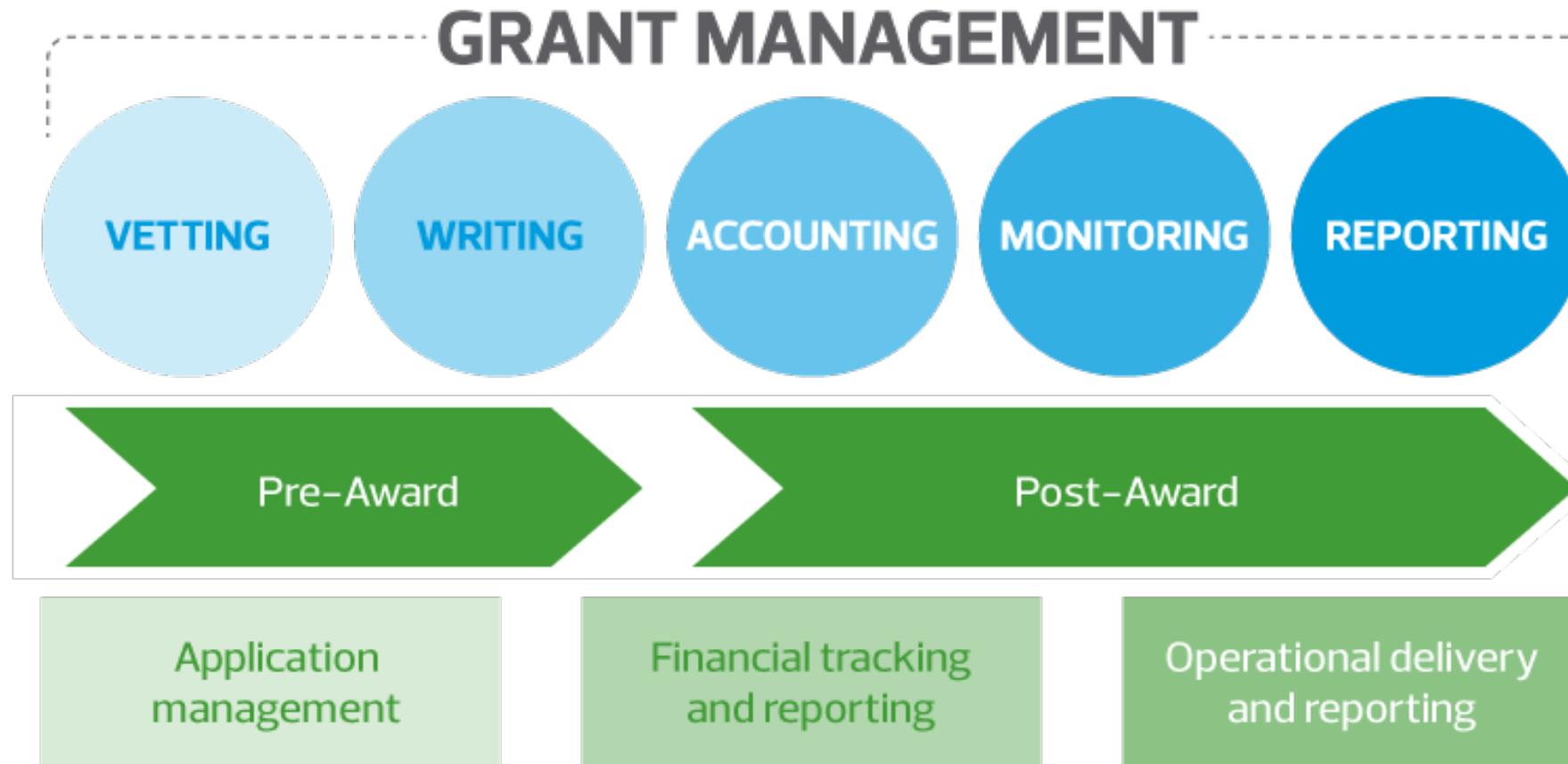


THE REWARD! | Grant Management & Compliance

IF AWARDED...

- ✓ **Carry out program as specified** in the proposal
- ✓ If total amount of award is different than what was requested, a budget revision that includes expenditure adjustments in accordance with program adjustments is often required
- ✓ **Fulfill all reporting requirements**
- ✓ Ensure a clear understanding of what the grant agreement requires for the project by holding a **Compliance Planning and Checklist meeting** as soon as possible
- ✓ Discuss and assign who will be doing what tracking of measurable outcomes, outputs, expenditures, and billings
- ✓ **Be transparent** with the funder about changing needs, challenges, or concerns throughout the grant period.
 - ✓ **Funders are our partners in delivering our programs, projects, and services. Keep them in the loop if/when changes arise.**
- ✓ **Communication is key** to being a **good steward** of philanthropic funds!

THE REWARD! | Grant Management & Compliance

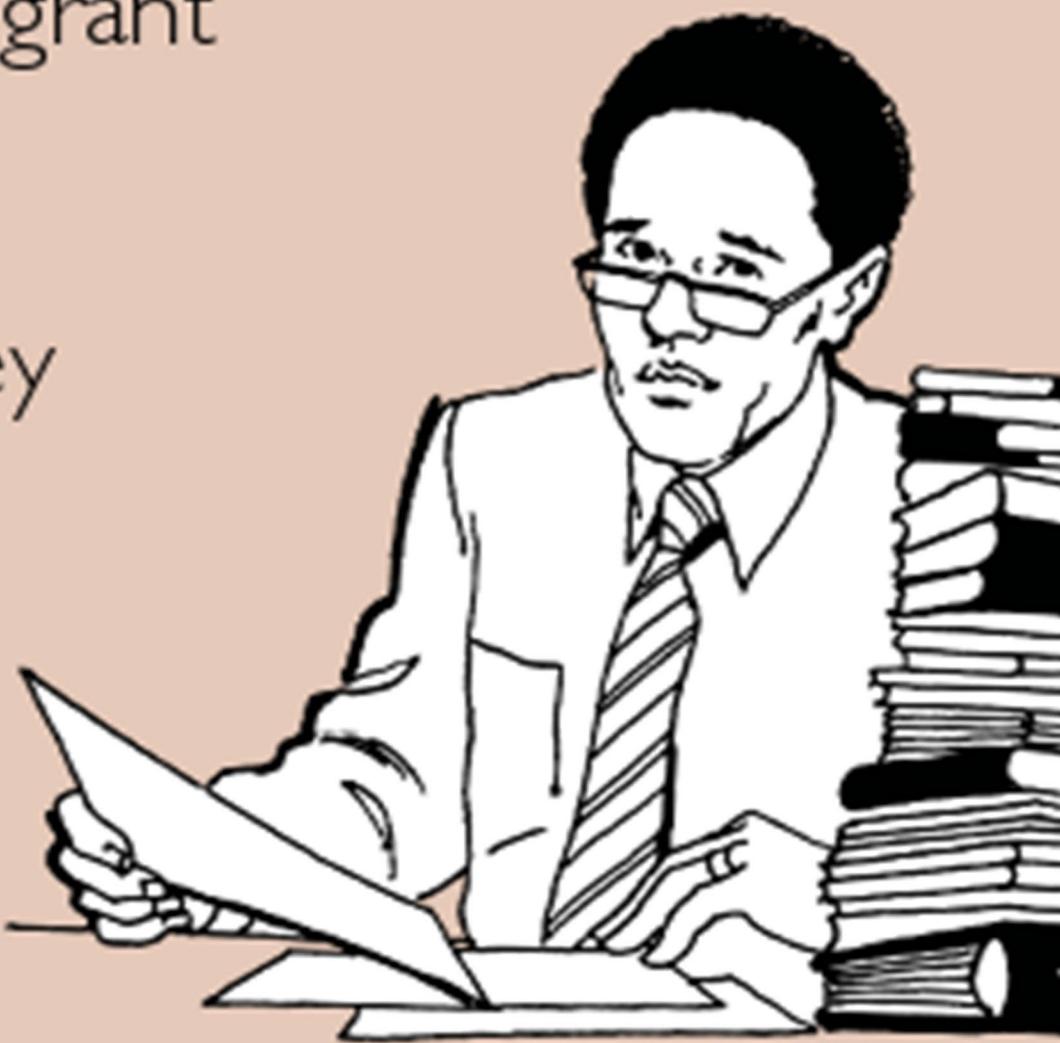


GRANT HACK:
Holding regularly scheduled Fiscal Grant Management meetings (FGMs) ensures communication, accountability, and due diligence of all reporting requirements.

- ***The proposal is the easy part!*** Most grant work is properly managing the grant dollars and reporting.

How to thank a grant writer?

Spend the money
exactly as
described in
the proposal!



someecards
user card

THE REWARD! | Grant Management & Compliance

As grant recipients, we agree to:

- ✓ Spend down the funds in accordance with the **activities and budgets as stated and approved in the proposal and the fully executed grant agreement.**
- ✓ Adhere to all **agency policies and procedures.**
- ✓ Utilize **donor stewardship best practices**
- ✓ Abide by and exercise **generally accepted accounting principles (GAAP)**
- ✓ If federal funds, ensure compliance of all guidance per **2 CFR Part 200**, as published by the Office of Management and Budget (OMB), which contains the codification of general and permanent rules for managing federal grant funds and entering into federal agreements.



The Road Back | Grant Renewals & Closeouts

All good things must come to an end...

- ✓ Successful closeout determines our eligibility for renewals and future awards
- ✓ Closeout tasks typically include:
 - ✓ Final Technical/Progress Report
 - ✓ Final Financial Report
 - ✓ Closeout Certification Forms
- ✓ Report requirements, questions, and format typically are provided by the funders
- ✓ Keep a close eye on the end of that grant cycle and the report deadline!
- ✓ And spend the grant \$\$\$ before then!



The Resurrection | Grant Renewals & Closeouts

✓ Why are closeouts necessary?

- ✓ Successful closeout shows our agency and services are dependable
- ✓ Shows that we are fiscally responsible
- ✓ Shows that we comply with our contracts
- ✓ Timeliness of closeouts are a “Key Performance Indicator” by funders, especially federal
- ✓ In short, we do what we say we’ll do, and funders love that!
- ✓ Closeouts also keep our services in top shape
- ✓ Constant evaluation means we’re constantly improving
- ✓ Also gives us data/verbiage for new grant applications



Return with the Elixir | Grant Closeouts

A successful grant closeout starts when you first get awarded the grant.

- ✓ Review expenses periodically to ensure:
 - ✓ Budget has not been exceeded
 - ✓ Expenditures are allocable, allowable, and reasonable
 - ✓ Unallowable or excess expenses are removed
 - ✓ Cost share is met and recorded
 - ✓ Invoices are being saved and shared w/ Grants Team
- ✓ If an extension is necessary to ensure full compliance, alert the Grants Team immediately!
- ✓ Funders appreciate extension requests to be submitted well in advance of the end of the grant cycle
- ✓ The sooner, the better



QUESTIONS?

EASY FORMULA

