Grant Management

OVERVIEW | This document serves as a helpful guide to grant management for Days for Girls International leadership and staff including proposal development and submission, program implementation, and reporting.

STRATEGY | Grant proposals will be developed taking the following into consideration:
- priority setting by management team;
- service capacity of program staff; and
- stewardship of funder relationships.

GOAL | To facilitate a collaborative grant proposal submission and reporting processes.

ABBREVIATIONS
- CEO: Chief Executive Officer
- CPO: Chief Program Officer
- CDO: Chief Development Officer
- CFMO: Chief Finance Management Officer
- MT: Management Team
- DT: Devo Team
- PS: Program Staff
- BD: Board of Directors

What	Who	How
ANNUAL PRIORITY SETTING: • Operationalize organizational planning	BD, MT, DT, PS	**Establish funding priorities** • Based on BD organizational planning determine short- and long-term funding priorities • Compile and prioritize list, make available to all parties who identify grants (list below) • CPO and PT write or update prospect research form for prioritized areas/projects to be funded each year as needed and if capacity allows **Budgeting and planning** • During budget process CEO, CPO, CDO provide conservative grant renewal forecasting and prospect grant forecasting • MT development of year-long quarterly workplans to reflect budget goals, aligning with organizational plans (i.e. strategic plan or theory of change)
IDENTIFICATION: • Identify, filter, and compile	BD, MT, DT, PS	**Identification assignments** • Private foundations (BD, MT, DT, PS) • Federal grants and contracts (CEO, CPO) • Corporate foundations (BD, MT, DT, PS) • Family foundations (BD, MT, DT, PS) **Relationship and grant management** • CDO works with MT and DT to coordinate staff roles in grant proposal development along with program officer relationship management • CDO and CPO pull each other into conversation(s) at the beginning of the identification process, or at least make aware/consult with one another **Processing** • CDO and CPO filter identified opportunities • Strong opportunities processed by DT for management team qualification (if needed)
QUALIFICATION: • Qualify funders: the decision to pursue	MT, CDO, DT	**Review process** • CDO or DT (if needed) brings materials to MT meeting and facilitates discussion, using qualification questions sparks conversation and debate. MT makes decision to pursue or forgo grant opportunities.
TRACKING: • Internal development systems	DT	**Development Team Google Doc and Salesforce** • DT maintains development spreadsheet, keeping funder deadlines up-to-date for renewal, prospect, and reporting dates • DT maintains the shared development drive with all docs related to grant development, submission, and confirmation • Outlook invite sent to those involved with necessary information • DT ensure that all opportunities are up-to-date in Salesforce: funder names, program officers, contact information, materials, and other misc. grant fields • DT are default primary contacts in online applications; all password tracking happens in shared development drive
GRANT PROPOSAL DEVELOPMENT • Draft grant proposal	CEO, CDO/DT CPO/PS CFMO	**Grant proposal** • CDO or DT member takes lead to facilitate drafting narrative with support, input, and contributions from CPO and/or PS

• Budget development		**Budget** • Based on narrative and funder financial instructions, CEO, CDO, CPO work with CFMO to develop grant proposal budget utilizing both the labor cost estimate and/or budget information worksheet
GRANT PROPOSAL REVIEW & SUBMISSION	CEO, CDO/DT, CPO/PS, CFMO	**Consolidation** • CDO or DT to consolidate (if needed), edit, and send narrative to CEO and CPO and/or PS for final review. • CDO or DT coordinates throughout grant proposal development the collection of support documents and attachments. PS may help gather letters of support. **Submission** • CDO or DT to submit online and physical mailings for quality control. • Electronic copies of grant proposal sent to all those involved, including CEO, DPO, PS, and CFMO.
AWARD NOTIFICATION	CEO, CDO/DT, CPO/PS, CFMO	**Processing** • CDO/DT notifies MT and PS of funding, including celebration • Contract reviewed by CEO, CDO, CPO, and FD for signature • Final countersigned contract available to CDO/DT for processing (Salesforce/TY & Tracking excel doc, etc.) • DT to save all confirmation documents in shared development drive • CPO/PT and CDO/DT host project launch meeting to share proposal materials including report format, and determine grant relationship and program managers
CLOSING & RENEWAL	CEO, CDO/DT, CPO/PS, CFMO	**Report** • DT triggers report with support materials for narrative and fiscal report • CDO/DT works with CPO/PS to write narrative, then reviews and edits narrative • CDO/DT submit online and physical mailings for quality control • Copies of grant report sent to all those involved, including CEO, CPO/PS, and CFMO and saved in shared development drive **Cultivation and Renewal** • Throughout grant implementation, CDO/DT and CPO/PS share achievements that can be celebrated with program officer, grant relationship manager to reach out strategically • MT works to brainstorm renewal ideas • CDO/DT to coordinate meeting with program officer to help wrap up grant and negotiate renewal, sometimes at time of report submission but often prior depending on grant submission deadlines

Management Team Proposal Qualification Worksheet

*Opportunity:*_____

Step 1. Is this a mission fit to our work?

1. Does their mission align with DfG's (e.g. does it drift, is it a good fit, which program, etc.)?

    _____
    _____
    _____
    _____

Step 3. Who will do this work at DfG?

1. Current Staff?

    _____
    _____
    _____

2. Will we need to hire new staff? If so, how many? When? Is this permanent hire or temporary?

    _____
    _____
    _____

Step 2. What is our connection to this funder?

1. Are they a strong prospect? (e.g. prior funder, relationship with employee, etc.)

    _____
    _____
    _____
    _____

Step 4. What does our environment look like?

1. Are the external factors aligned to make this proposal successful? (e.g. politics, economy, partnerships, etc.)

    _____

    _____

    _____

Step 5. What resources are needed to complete this application?

1. When is the deadline and how easy is the application to process?

    _____

    _____

    _____

2. What else is going on?

    _____

    _____

    _____

3. Who should be involved? Is this enough manpower?

    _____

    _____

    _____

4. Please use the following rating system for your prospect:

    Opportunity cost:

Extremely High	Very High	High	Somewhat High	Not High
5	4	3	2	1

    Likeliness of funder to give:

Extremely Likely	Very Likely	Likely	Somewhat Likely	Not Likely
A	B	C	D	E

    FINAL RATING: _____
    * The final rating should be a number and a letter (e.g. 3A)

Prospect Research Requests

For new or expanded programming

Purpose:
Recognizing that targeted prospect research is essential for identifying funder alignment, the development department is requesting information about your program or proposed project. This will ensure that we are best positioned to support the qualifying process with strong prospects and accurate information needed to make decisions on whether to apply for funding.

Process:
1. Fill out form below
2. Email form to Kim and Sandy; cc Erin and Vic

*Please note that prospect research requests need a $25,000 minimum for consideration and reviewed prior by Vic.

Prospect Research Request Form:

Date Submitted:	**Project Start Date:**	
Program/Project:		
Primary staff involved in grant proposal development?:		
Cost Center(s):	**Single/Multi-year?:**	
# of Staff?	**FTE?**	**Total $ direct cost(s):**
Where will proposed project take place?		
Program/Project Description (500 words)		
Timeline for program/project activities:		
Identified Partners? □ **Yes** □ **No** **If yes, please list them:**		
Prior successes of program/project:		
Searchable Key Words/Phrases (development staff use only):		