Stewardship Checklist:

So you've won (or lost) your grant.

Now What?

Much of the available information on grants tends to focus largely on how to write grant applications and how to make yourself most attractive to funders. What we rarely discuss is what to do once you obtain the grant...or once you don't.

The steps you take are incredibly important, as your ongoing relationship with funders may impact your ability to seek future or additional funding.

So what do you need to know about what happens after? Did you get the grant? Did you not? And in both cases, how do you ensure you're stewarding and cultivating the best possible relationships with funders?

There are a lot of nitty gritty details that are easy to overlook. Here are some immediate items to check off your list.

Once you get the grant:

Appreciate your team and celebrate the win

Thank your team and celebrate with your organization! This will ensure your grant writers and fundraisers feel valued as well as cultivate an environment of appreciation that will motivate them to keep scoring grants and increase satisfaction in their roles.

Say 'Thank You' to your Funder

Make sure to reach out to your grant administrator or officer to say "Thank You"!

Showing your gratitude to a funder for their contribution to your project is the best way to start your relationship off on the right foot. Make sure you give them a call. Or better yet, send a hand-written note to say thank you. It's a great way to add a personal touch and have a funder remember you.

Just a reminder, once you get the good news, it's a good idea to ensure that all your t's are crossed and your i's are dotted - that is, agreements are signed and sent back to the funder and any tax receipts or acknowledgement letters are drafted and sent. This is generally done during the thank you process as a finalization of acceptance.

PRO TIP: As a "Thank You" call is often unscheduled, be careful not to monopolize a funder's time, but rather say your thanks and ask to set up a follow-up meeting.

Review your grant proposal

A first major step is to review your original application for any foreseeable changes to your project. For example, you may have had a change in staffing capacity, or your organization's programming may have shifted from the time you initially submitted.

As it often takes months for grant applications to be approved, deviation from the original project outline can be typical. However, communicating any changes is imperative. By outlining them to your funder, you'll build a good relationship of trust from the outset.

Additionally, check on how much funding was requested for your project vs. how much was awarded. If you were awarded substantially less funding for your project than what was requested, this may also alter your project and plans. You may need to adjust your timeline or budget to align with the amount awarded, so be sure to communicate changes of this nature to your funder as well!

PRO TIP: Save program guidelines, applications, and budgets for all successful grant applications to reflect on for future opportunities.

Many grant programs change year over year, so keeping previous guidelines on hand will help you when considering the current funding you're hoping to apply for. By keeping all this information accessible in one place, you can use previous applications to gauge the potential success of the current application you're working on!

Share the good news!

Let any organizations you're working on this project with know about the funding and ensure they are aware of and prepared for the project start date and timeline. Additionally, if any organizations or companies offered you letters of support, let them know and pass along your thanks!

You can also let your community know by sharing the good news on social media. Celebrate the win with your supporters, and don't forget to tag your funder.

☐ Prepare your team

The most important part of a successful project is making sure everyone working on it is aware of the following:

TIMELINES

Check with your team and make sure everyone understands when each component of the project needs to be completed and by whom. Make sure to provide buffers in your timeline so if other priorities come up, the project won't fall behind. It is also a good idea to have regular check-ins with your project team to make sure everyone has the support they need to complete their portion on time.

EXPECTED OUTCOMES

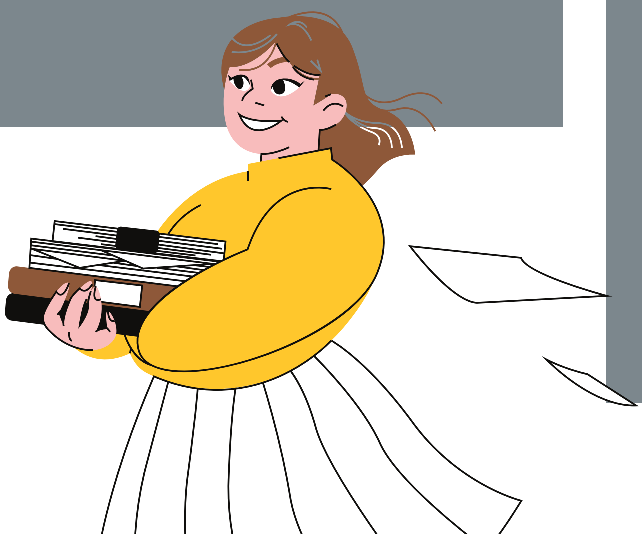
Review what the project seeks to accomplish with the funding. Because your expected outcomes are typically the basis for the grant, make sure these outcomes remain constant throughout the project. Leave space for questions and clarifications on these so that everyone is on the same page.

REPORTING REQUIREMENTS

Review available reporting requirements & assign responsibilities. If your project crosses departments, it's a good idea to have a master document to record questions and track data in one centralized location. This is also a great opportunity to collect questions from your team to address with your funder when you meet with them!

NECESSARY SUPPORTING DOCS

Along with reporting, you may have to provide supporting documents for money spent. This can include pay stubs, receipts, contracts, and other documentation for your project. Have one set location for these pieces ahead of time, so at project completion, you have everything organized in one spot. This also comes in handy in the event of an audit.



SPENDING PROCESSES

If your project has many components, it'll be helpful to outline a process for spending your grant funding. A useful strategy is having all grant spending checked by one person familiar with the eligible activities section of your grant application. This ensures all spending will be covered with the funding and avoids any costs not covered by your grant.

PRO TIP: Create a Project Tracking Spreadsheet to include information on all aspects of the grant. Include your budget, what you plan to spend your grant on, reporting questions, and checkboxes for receipts and supporting documentation! Having all this information in one tracker will help you and your team stay organized and be set up for success!

- [ ] **Prepare for Grant Reporting**

When preparing for reporting, following the steps in the previous section will ensure your team has a good foundation for success. In conjunction with this, double-check you have the following information before starting your report:

Where to submit your reports?

Many funders have an online portal to submit reports. Ensure you have access to it and have taken a look ahead of crafting the first report. If there is no portal, make sure you and your team understand who to submit your reports to.

Is there a reporting template?

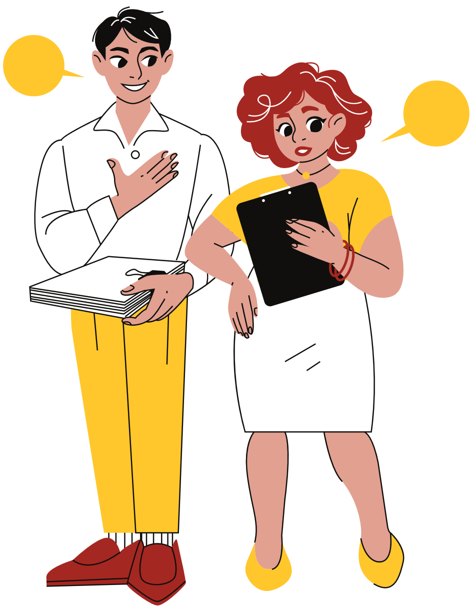
Most funders will have a template available or even a fillable form on their portal. Review these and ask your funder about the types of responses they're looking for if you're unclear. The name of the game is providing all the necessary information and not wasting anyone's time on revisions. If there isn't a template, be sure you understand what type of information they need from you!

PRO TIP: Do you need to complete multiple reports without a template to fall back on? You can always make your own. This will build consistency for your team and your funders. In the long run, this can also save time reviewing your reporting requirements between reports.

Deadlines

The easiest way to strain a relationship with a funder is through late reporting. Make sure you and your team know exactly when and what is due and schedule check-ins ahead of time. Try creating a shared calendar specifically for grant activities, especially if you have multiple grants running at the same time.

☐ Meet with your funder before the project begins!



Once you've obtained grant funding, you and your grant officer will be working closely together, and will likely be regularly communicating throughout your project. So now that you have your ducks in a row, schedule some time to connect with them to review any changes to the project and tackle any issues you foresee. Together, you'll walk through proposed solutions as well as any specific reporting requirements. View this kick-off meeting as an opportunity to address all questions from yourself and your team so you can hit the ground running. This will also signal to your funder that you are organized, prepared, and taking this opportunity seriously.

But what do you do when you DON'T get the grant?

Trust us, it happens.

Not receiving funding can be a frustrating experience, even for the most experienced fundraisers and grant writers. The time spent on applications can feel wasted and lead to a demotivating experience. It is important to note that grant rejections are very common and normal, and a great place to improve your understanding of the types of projects or applications grant funders are looking for!

Show gratitude to your team and discuss where they felt the application had weaknesses and strengths

Often funders will send a rejection letter, and while sometimes it literally says "No, sorry," sometimes there is helpful information to be considered. Take some time to review your rejected application with your team and get feedback on whether they felt there were any weaknesses. For example, were there document requirements that were difficult to navigate, or very specific guidelines that were overlooked?

Not all applications will be the right fit for every grant program, so taking time to explore this with your team will help you improve your chances moving forward. Start by reviewing some of the [main reasons grants are rejected].

PRO TIP: It's also important to assess the workload/time spent on applications like this. If your grant writer did not have adequate capacity or access to internal resources to get the application together, it's good to voice that feedback before starting on your next application.

Request feedback from the funder on your application

Once you've reviewed your application internally, schedule some time to chat with the funder to determine why they felt you weren't the right fit for the funding. There can be many factors at play - lack of documentation, clarity, or even simply not following application guidelines. Be sure to also thank them for their time and consideration, and ask if or when they'll be issuing the next call for proposals.

PRO TIP: The most common reason organizations receive a 'No' is because they haven't followed the guidelines. Double check you are not making this mistake and you'll increase your chances of getting the grant.

☐ Document, document, document

If you plan on re-applying, place all your documents in one easy-to-find place. This should include the original guidelines, your original application, staff feedback on the application, as well as feedback from the funder. This way, at the next call for proposals, you'll already have all the relevant information on hand along with improvements to be made!

☐ Subscribe to the funder's email list and add key dates to your calendar

Many foundations have email lists you can subscribe to for alerts on upcoming deadlines or requests for proposals. If your grant program of choice already has a date for reopening their applications, add this date and a "Start Application" reminder to your calendar. Staying organized is imperative for grant applications, especially if you are applying for more than one.

☐ If possible, review accepted applications

Some funders publish lists of accepted applications on their websites for each of their programs. For example, the Canada Media Fund lists all their funded projects by year on their website. It is always helpful to review the funder's accepted projects to gain a better understanding of what they're looking for. It may be as simple as fine-tuning your application, but it also may signal that your project wasn't properly aligned with their interests, in which case, back to the drawing board!

You can also reference fundraising research platforms like Grant Connect to see what organizations the funder has given to in the past, including grant amounts and other key details.

In essence, the best way to maintain a good relationship with funders is two-fold: The first is clear and targeted communication, and the second is organization. Taking the time to ensure that your communications and applications are appropriate, timely and well aligned with what a funder is looking for will always put you ahead, and this comes from a place of research and preparation.

If you've recently been turned down for a grant, don't worry at all, the grant space is always evolving and a project that may not have been a good fit for one program, could be a star project for another.