

# Streamlining and Advocating for Change



## THE GRANTS MANAGEMENT PROCESS



# Today's Featured Presenters



- **Nancy Burd**, President, The Burd Group
- **Jennifer Leith**, Executive Director, The Douty Foundation and Director of Grantmaking, WOMEN'S WAY
- **Meridian Napoli**, Director, Grants Data & Operations, The Comcast Foundation
- **Jennifer Pedroni**, Vice President of Administration, North Penn Community Health Foundation
- **Daphne Rowe**, Executive Director 1675 Foundation and Executive Director, Allen Hilles Fund

# Morning Agenda



- **9:00-9:20**      **Welcome & Introductions**
- **9:20-12:15**      **Session 1: Practices & Techniques to Streamline Grantmaking**
- 9:20-9:55      Contextual Overview
- 9:55-10:55      Panel discussion: Jennifer Leith, Jennifer Pedroni, and Daphne Rowe
- 10:55-11:10      Break
- 11:10-11:50      Group Breakouts
- 11:50-12:15      Report out/Collective Reflections
- **12:15-1:00**      **Lunch**

# Afternoon Agenda



- **1:00-3:00**      **Session 2: Strategic Implementation**
- 1:00-1:15      Contextual Overview
- 1:15-1:45      Member Stories & Case Studies with Jennifer Pedroni and Meridian Napoli
- 1:45-2:40      Group Discussion Of Key Challenges
- 2:45-3:00      Wrap-Up: Group Discussion of Action Steps
- **3:00**      **Adjourn**

# Introduction



- **Your Name, Organization & Role**
- **On a scale of 1 to 5, please tell us how far along you are in streamlining at your organization:**
  1. Thinking About It
  2. Studying our Practices
  3. Developed a List of Goals
  4. Made some changes, but not yet achieved our goals
  5. Achieved our stated goals and beginning to think about new goals

# Goal of the Research



- 1 Identify the flaws in the current application, monitoring, and reporting practices of grantmakers,
- 2 Develop recommended principles, resources, and tools to help grantmakers address those flaws, and
- 3 Support grantmaker efforts to change.

*Drowning in Paperwork, Distracted from Purpose*

# 10 Flaws In The System



1. Enormous variability among grant requirements
2. Requirements that aren't right sized
3. Insufficient Net Grants
4. Outsourced Burdens
5. Trust Undermined
6. Reports on the Shelf
7. Fundraising Gymnastics
8. Due Diligence Redundancy
9. Application Strategies (Double-edged Sword)
10. Time Drain for Grantmakers Too

# 4 Key Principles To Drive Change



1. Taking a fresh look at application and reporting requirements to ask for only what is needed to make decisions.
1. Right-sizing application and reporting requirements to make them appropriate to the size and type of grant and prior relationship with the grant seeker.
3. Reducing the burden on grant seekers by simplifying budget requirements, using effective online grantmaking, and accepting existing materials.
4. Providing clear and straightforward communications about grantmaking.



# Panel Discussion



- **Facilitated Discussion of Streamlining Principles**
  - with Jennifer Leith, Jennifer Pedroni, & Daphne Rowe
- **Followed by Q & A**

# Break Out Discussion



**MORNING**

# Questions to Consider for Reflection and Discussion



## Discussion Questions for you each to identify (20 m)

1. What streamlining activities are currently taking place in your organization?
2. What are some of the priority streamlining activities you would like to see implemented within your organization”?
3. Who would need to be involved in making these changes?
  - ✦ Internally – board, other staff, etc.
  - ✦ Externally – vendors, partners, grantees
4. What barriers to implementation do you anticipate?

## Discuss Together and Document (20 m)

1. What are shared successes with streamlining/increasing efficiency?
2. What are shared priorities for moving forward?
3. What are shared barriers?

# Report Out and Collective Reflections



- **Each group will report the shared successes, priorities, and barriers (15 mins)**
- **Collective discussion of key trends, feedback, reactions to trends, etc. (10 mins)**



# LUNCH



# Strategic Implementation



**STORIES OF IMPLEMENTATION BY  
JENNIFER PEDRONI AND MERIDIAN NAPOLI**

**FOLLOWED BY  
Q&A SESSION**

# Break Out Discussion



**AFTERNOON**

## Group discussion of key challenges to implementation (40 minutes)



- How will the role of the Grants Manager change as a result of implementing new practices? How has the Grants Manager's role already changed (from once being thought of as an administrator to now being thought of as a specialist?)
- Length of time required for change to occur (always longer than you want/think)
- How do I engage leadership (whether it's the ED of the organization or Board leadership)?
- How do I communicate with and engage grantees and external stakeholders? How will this impact their work? How might this change our current relationship?



# Report Out



- **Key takeaways from each topic**

# Call to Action



- **What does the region need to help advance the most important streamlining actions; what can we do collectively?**
- **Potential areas to explore:**
  - More training/education (specific areas for deeper dig, role for DVG?)
  - Advocacy/voice in grantmaking community
  - Increased interaction/communication among grants managers/program officers, etc. (role for DVG, GMN?)
  - Other?

# Thank you!



- To you... for your participation, ideas and attention
- To our presenters...for their preparation and willingness to share
- To Delaware Valley Grantmakers...for sponsoring this important conversation
- To the Delaware Valley Chapter of the Grants Managers Network for their partnership in this program



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