Get Grounded With the Grant-Giving With Data Process Model

We developed a framework that incorporates the use of data during each step of giving a grant, from the pre-work to the re-work!
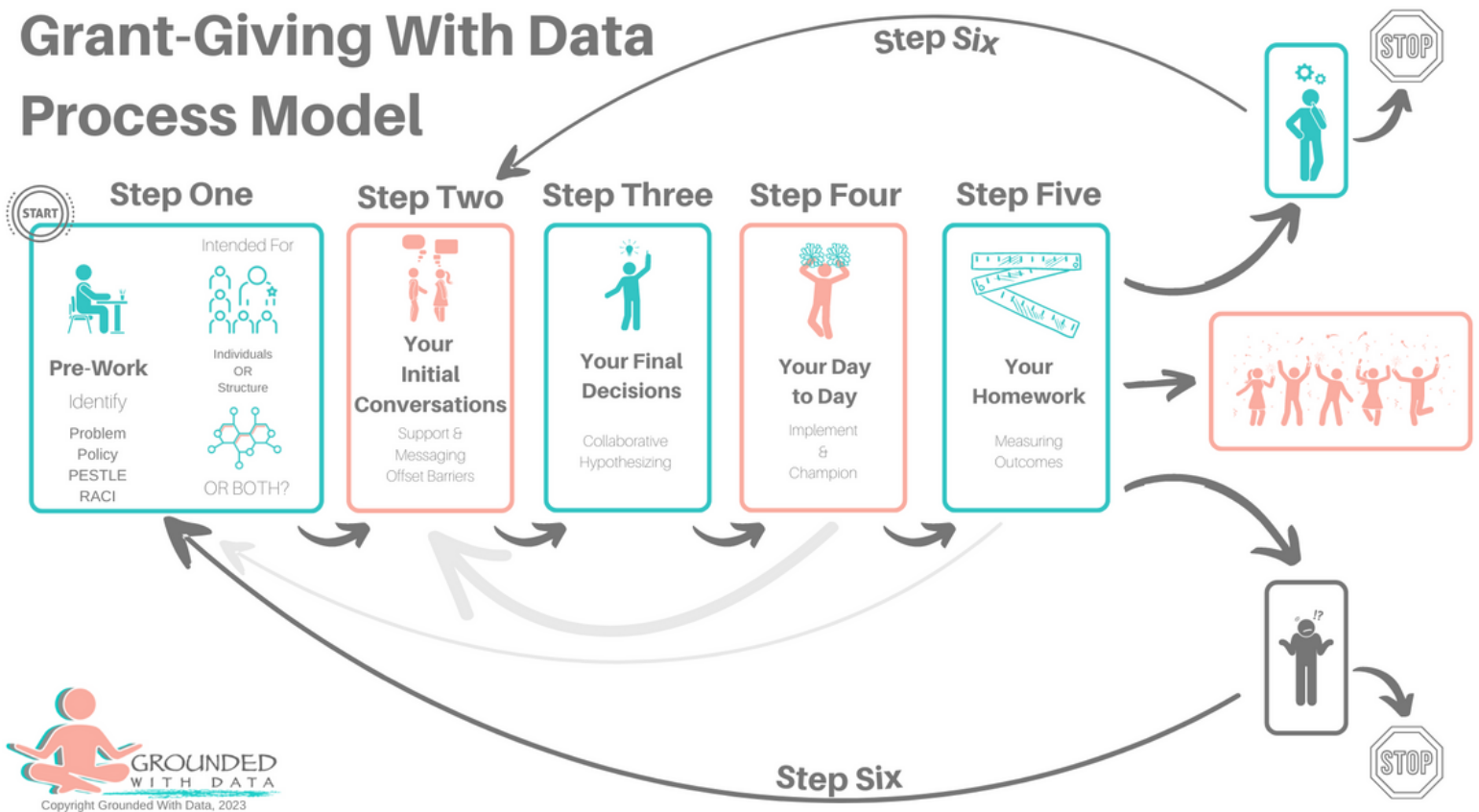
GROUNDED WITH DATA

GRANT-GIVING WITH DATA PROCESS MODEL

While working with one of our favorite foundations, we developed a framework that incorporates the use of data during each step of giving a grant, from the pre-work to the re-work!

Please note that this step-by-step process will be more work for you! But it will also be gratifying to help nonprofits use this approach when tied with trust-based philanthropy.

Grant-Giving With Data Process Model

START

Step Six

Step One
Intended For
Pre-Work
Identify
Problem
Policy
PESTLE
RACI
Individuals OR Structure
OR BOTH?

Step Two
Your Initial Conversations
Support & Messaging
Offset Barriers

Step Three
Your Final Decisions
Collaborative Hypothesizing

Step Four
Your Day to Day
Implement & Champion

Step Five
Your Homework
Measuring Outcomes

STOP

STOP

Step Six

DON'T LET OTHERS' EXCUSES BE THE CONVERSATION, BUT LET SOLUTIONS TO BARRIERS DRIVE YOUR RESOLVE!

GROUNDED WITH DATA
GRANT-GIVING WITH DATA PROCESS MODEL

STEP ONE: YOUR PRE-WORK

Identify the problem you're trying to solve with your grant. What methods have you used previously? What challenges are you likely to face?

P.E.S.T.L.E is a strategic tool to define opportunities and challenges upfront. It also helps you gauge the "will" for adoption upfront. PESTLE stands for Political, Environmental, Social, Technological, Legal, Economic

Will is the likelihood of support or adoption across the various PESTLE arenas in contrast to opposing interests. Taken together, you can assess what the overall will is for your initiative. The higher the general will, the greater the ease of implementation. (Nerdy side note: You can also make PESTLE the columns in your analysis and your SWOT the rows... you'll find exciting combinations, and no stone will be left unturned!)

These upfront details will help you build solutions for problems before they occur.

R.A.C.I. is an excellent tool to identify key stakeholders and their roles in your grant-giving up front. RACI means:

- Who is Responsible for the execution of the grant?
- Who is Accountable for showing the grant's impact?
- Who needs to be Consulted on handling the grant?
- Who needs to be Informed about the grant?

Knowing the needs and interests will help to inform your future conversations.

Next, you need to identify who you intend to help with your grant – the individuals (the people you want to serve) or the structural (the people who support the people you want to serve).

An example of structure could be that rather than directly supporting students' health and wellbeing, you support the teacher and nurses at the school who directly impact those students.

It would be best to consider the barriers you might hit as you navigate your grant-giving process. Barriers could be different stakeholders saying, "We've always done it this way," "We don't have time," or "If we ignore it, it will just go away." Be ready to offset each barrier with a counterargument!

DO YOU THINK JUST THIS STEP SOUNDS DAUNTING? THEN CLICK HERE TO CHECK OUT HOW WE'VE HELPED OTHER FOUNDATIONS COLLECT THE INFORMATION THEY NEEDED THROUGH OUR ABCD TO GAP ANALYSIS.
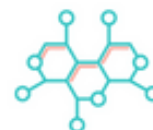
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GRANT-GIVING WITH DATA PROCESS MODEL

STEP TWO: YOUR INITIAL CONVERSATIONS

Your initial conversations with stakeholders are critical. You are gathering information and trying to gain support while identifying and offsetting barriers. Learning what a nonprofit wants to use the grant money for is necessary.

Conversations with nonprofits should emphasize support and clear messaging. Learning from them first about their needs supports the notion of trust-based philanthropy. In trust-based philanthropy, you also need to understand how they track their numbers, regardless of how you might want them, so that you can ease their reporting burden.

Step Two

Your
Initial
Conversations

Support &
Messaging
Offset Barriers

STEP THREE: YOUR FINAL DECISIONS

Now it's time to make a collaborative hypothesis. A hypothesis is your guess on what the outcome of giving the grant to the nonprofit will be.

Understanding their goals and picking a Key Performance Indicator (KPI) to tie to the hypotheses gives you a direction to guide your future conversations by talking about the Micro Metrics that make up that KPI.

What is a KPI or Micro Metric? Read **this** and then come back to finish reading about the rest of the steps.

Want help with getting your nonprofits on the same page with KPIs and Micro Metrics? We can host a workshop where we help them identify their own.

Step Three

Your Final
Decisions

Collaborative
Hypothesizing

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Or you can also send them this, to get started.

STEP FOUR: YOUR DAY-TO-DAY

While they implement, you act as their champion and counselor. If you're giving to many nonprofits, you'll be having conversations with them about what is working and what isn't, what they're doing to find success, and what their lessons learned are. You can then be a conduit for sharing what everyone has learned and championing best practices.

These learnings may help you evolve your support and messaging and offset new barriers.

Step Four

Your Day to Day

Implement & Champion

STEP FIVE: YOUR HOMEWORK

Once the grant cycle is close to completion, you are now trying to understand what worked and what didn't go as planned. What did you learn during this process? Is what you've learned supporting or evolving your pre-work for next time?

When you started creating your hypotheses, you chose the nonprofit because it greatly impacted a large group of people or had high-quality touchpoints with a smaller group. It's important to remember that when you are reviewing whether the grant was "successful," you keep this intention in mind.
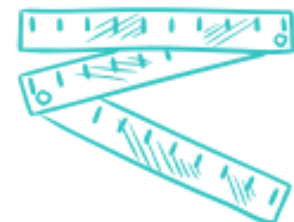
Step Five

Your Homework

Measuring Outcomes

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STEP SIX: YOUR RE-WORK

Congratulations! Your grant was a success!

What's next? Please do it again! Aim for sustainability! Find others to do it for, too! Amend your pre-work and start making more hypotheses.

Hmm, maybe it worked?

Now what? Success in the nonprofit world is an interpretive art. It combines qualitative stories and quantitative metrics like KPIs and Micro Metrics. Could you go back and revisit the barriers that you considered? There may be a few more that, if addressed, would lead to greater success next time. What unexpected roadblocks included processes or personnel? Turn that into an opportunity to train and coach.

Despite your best efforts, things did not go according to plan.

Evaluate your process if the initiative didn't work due to an epic crash and burn or a mild failure. There were likely many things you learned that could help you in the future with either a repeat of this initiative or new initiatives. A decision still needs to be made. You either end the grant engagement or go back to the beginning and reevaluate your PESTLE and RACI. Something may have been missed.

WRAPPING THIS UP

As you can see, each step has evaluation baked in. But again, it's not just about the quantitative metrics; it's also about the qualitative side. Leveraging qualitative and quantitative data and making them work together tells a complete story. You'll need hard, unshakeable facts, but the personal account or personal journey that stakeholders can identify with makes it all worth the effort.