

Securing Funding During Organizational Transitions

1



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About Fundraising For The Future

2

Fundraising For The Future

*Grant Writing, Philanthropic Advising,
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20+ years in the nonprofit sector



About Stephanie Sample

3

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Recent Transitions

4

- Pandemic is a period of change
- We are still experiencing economic and societal impact
- Many of us are impacted by the work in our jobs as fundraisers, leaders, directors.
- I always keep in mind that each organization is unique and guided by their own sets of values.



Your organizational culture

5

- Kind of transition
- Who is leading the org
- Your board composition
- level of risk tolerance
- existing relationships with funders
- shape of your staff
- overall health of your company.



Timing

6

- Transition systems in place
- Unavoidable turnover
- Willingness to accept change will occur
- Willingness to plan for change

“The urgent is the enemy of the important.”



Community Agreements for this conversation

7

- This is a messy topic.
- Everyone has different degrees of privilege, experience with bias and discrimination.
- Your voice matters! If you don't have a chance to weigh in, we will follow up with a survey after this presentation. Please fill it out and/or send me an email.
- Join the continued conversation in 2022



Continued conversation: June 21th 12-2 MST

8

Join the continued conversation

2 hour Transition workshop on leadership transitions and securing funding

- Workshop will include:
 - Breakout sessions
 - Q & A + dialogue
- Guest speaker: community funder
- Meet other leaders going through transitions
- If you'd like to register, you can click the link here.



The Answer Imperative- Seth Godin

9

There is no silver bullet!

“C’mon, c’mon, c’mon...”

We’re standing on one foot, impatiently waiting for the shortcut, the method, the guarantee. Skip the preamble and the analysis-what’s your take? Don’t talk to me about genre and method and history. No time for that. What are we supposed to do right now?

Perhaps the reason we’re struggling is that along the way, we forgot to focus on the questions instead. More answers are only going to insulate us from the questions we actually need to be focusing on.- Seth Godin



Poll: Agree or disagree

10

My organization has experienced development turnover in the last year.

I've seen grant seeking, grant reporting and/or funder relationships negatively impacted.



Grant Writer- Development Officer Transition

Powerful Tool for Transitions: Assessment

11

Honest Assessment:

What is the work? How Much time will it take?

Case Study: The Green Machine

An ED connects with me and asks me to take over for a development professional who just left. They asked for support for 3 months

“for approximately 15-20 hours per month”



Grant Writer- Development Officer Transition

12

Case Study continued:

I interviewed them and discovered the scope of work was 19 deliverable grant reports and grant submissions needed for C4 and C3 in the next three months will take 15-20 hours a week, a little more than a half-time position. I communicated with the leadership:

“I'm assuming that the grant writing estimate that you sent originally (15-20 hours a month) was meant to say 15-20 hours a week.”



Grant Writer- Development Officer Transition

13

Case Study continued:

These are all existing grant templates with examples from last year that will be really straightforward to compile especially with the template for our work that is provided and all the submissions and reports from last year. I don't think it would take 15-20 hours a week. -The Green Machine ED



Grant Writer- Development Officer Transition

14

Case Study: The Green Machine

How long will it take?

Two perspectives:

- 1) Each deliverable will need an average of hours to compile information, review submission guidelines, check financials, and write. Invested time will range in time from 2-3 hours to 10 hours (most likely). Some deliverables will be more complex. 95-110 hours (writer/development officer)
- 2) Each deliverable can be based on an existing template. Deliverables are created by small tweaks and edits. Each deliverable will take an hour and a half. (executive/manager)



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Transition: How Organizational Culture weighs in

15

Estimate Low in terms of work and time

- We can spread the work out among existing staff
- We can hire someone for a few hours to pick up the work
- We can let the work go until someone new comes on

A more risk prone organization. May not have expendable funds, or a leaner, more flexible staff, or a culture of picking up work when key staff leave.



Grant Writer- Development Officer Transition

16

Case Study: Red Engine

An ED connected with me and asks me to take over for a development professional who just left. They asked for grant writing support for 6-12 months. I interviewed them and discovered the scope of work was 20 deliverables in the next 12 months. This included their grant writing, grant reporting, prospecting and navigational needs. The ED hired our firm to take care of: navigation and reporting for federal grants, prospecting new funders, developing proposals for existing funders, updating grant documents. At the end of the year, they added on a End of Year Appeal.



Grant Writer- Development Officer Transition

17

Case Study: Red Engine

The organization gathered all of the documents from the exiting writer. They estimated high on their needs by estimating 20 grant deliverables for the year. We raised \$250,000 for them in 9 months including submitting several last minute invitation only proposals and reporting on federal funds. The "Add on" End of year appeal raised \$100,000.



Grant Writer- Development Officer Transition

18

Case Study: Red Engine

They focused on running programming, filling vacant positions and at the end of 9 months, they hired a full time professional.

We passed off a well organized binder of grants and reports. No reports were missed, 15+ new funders were identified and the submission plan for the year was well defined.



Transition: How Organizational Culture weighs in

19

Estimate High in terms of work and time

- We know that existing staff have full time positions
- We know that this work requires expertise and attention to detail
- We know that this area needs attention in the interim

A more fiscally conservative organization.

May have a reserve fund or money in the bank planned to cover additional expenses.



Staffing During Transition

20

Keep Grant Seeking in house:

- You are fully staffed
- Your staff is well versed in grants
- Your current grant binder is well organized
- Your financials are in good shape
- You are immediately beginning a hiring process
- You are not dependent on grants for revenue.

Benefits:

- Save money.
- Around the clock access to your team, “exempt employees”.
- No new team members or systems to integrate.



Staffing During Transition

21

Outsource Grant Seeking:

- Your staff is currently stretched.
- Little familiarity with grants outside of the ED
- Your financials are in transition
- You anticipate a gap of 4 weeks or more until you can hire and fill the position
- You are dependent on grants for revenue

Benefits:

- Outsider lens- clearing out jargon, simplifying language and refreshing language.
- Not pulled in many directions like full time staff.
- Cross pollinating across the sector.
- Knowledge of new funders, systems, approaches.



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Questions/Comments What's sticking with you?

22



Securing Funding During Executive Transition

23

But I thought this Webinar was going to tell me HOW to secure funding during transition!

*“C’mon, c’mon, c’mon...”
The Answer Imperative*

*Grant Seeking is relationship building, using words.
You cannot build and sustain funding relationships without clear communication, professionalism, and systems of organization.*



In the wake of an unexpected transition

Prioritize grant actions

24

Elements in Your Grant Seeking Transition Plan

Strategy
Calendaring
Communication
Decision Making
Systems



In the wake of an unexpected transition

Prioritize grant actions

25

Strategy

What is the total of grant requests that you have submitted this FY? What is your total budgeted goal for grant seeking?

In the next 6 months do you need any new proposals developed? If you could hone your energy into a select number of submissions, which would be top priority?



In the wake of an unexpected transition

Prioritize grant actions

26

Calendaring

Do you have grant calendars for grant submissions and grant reports established?

If yes, what are the grant deadlines for the next 90 days (reports and grants)?

If not, develop a submission map.



Securing Funding During Executive Transition

27

Communication

- Develop a High level communications plan for funders.
- In the case of a sudden departure: Board Chair/Development Director/COO/Interim communicates.
- In the case of a planned departure: Time for overlap and introduction of new leadership to existing funders.



Securing Funding During Executive Transition

28

Decision Making

Regardless of whether grant writing is handled by an existing staff member, or an external contractor, finding clarity on decision making roles is key!

Who decides which grants to pursue?

Who decides each grant's focus?

Who is tracking reporting and incoming grants?

Who is the “final eye” for signing off on grants?



In the wake of an unexpected transition

Prioritize grant actions

29

Organizational Systems

Do you have a current list of grant attachments available? audit, Annual report, current 990, current program budgets & descriptions, current staff/board list, current list of top 10 funders, objectives/outcomes for programs.

Do any of these attachments need to be updated or developed?



Executive Director Transition

30

Case Study: Business Blue

A nonprofit loses a long term executive director during the pandemic. First, the board appoints an interim executive director from the executive staff, but they already have a full time job. Then the board chair steps in as interim while an ED search is happening. The new ED stays only 3 months and makes appearances on social media, connects with funders and staff. The board chair takes the reins back when the new ED leaves. Another search is launched and an ED is hired. The incoming ED is the 5th switch of roles in approximately 6 months.



Executive Director Transition

31

What can the new leadership do for grant seeking during the transition?

Strategy: Half way through the full transition, the board had an opportunity to Pause grant seeking. Grant Seeking during extreme/ongoing transitions runs the risk of damaging relationships with funders or submitting proposals disconnected from the best interest of the organization.

Calendaring: For Business Blue, whittling down their calendar to existing funders only and reducing the number of submissions while leadership is in flux, would benefit the staff and board.



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Executive Director Transition

32

What can the new leadership do for grant seeking during the transition?

Communication: Send a professional, direct update to funders who will be impacted in the interim period.

Decision Making: Delegate a senior staff member within the organization to decide Grant focus, and review/approve grant submissions.

Systems: Conduct a systems check.



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Shoring Up Your Systems

33

Your outgoing executive's email:

Do not deactivate.

Do not delete.

Rerouting any existing grants@ email addresses that the executive was monitoring

Establish forwarding protocol for the email account to ensure communications from funders aren't being overlooked or lost.



Shoring Up Your Systems

34

Transitioning Grants.gov access for federal proposals:

If at all possible, secure your credentials to grants.gov before the outgoing ED/DD leaves.

If the credentials are lost, prioritize resetting credentials prior to a submission deadline.



Recap: Transition Principles

35

- Your organizational culture will define how you handle transitions
- Turnover is unavoidable, planning for it is necessary

There is no silver bullet!

- A powerful tool is an honest assessment of the work in order to understand what is needed and how much time it takes



Recap: Transition Planning

36

Transition Planning:

Strategy, Calendaring, Communication, Decision Making, Systems

Case Studies:

Green Machine-grossly underestimated the work and underprepared for the transition period.

Red Engine- sought support and developed a plan for the transition period.

Business Blue- sought support, but struggled to develop a comprehensive plan for an extended transition period.





Questions/Comments What's sticking with you?

37



Funder Perspectives on Funding During Transition

38

*How did 3 local funders handle funding during
The initial waves of the COVID-19 crisis?*

[Read More Here.](#)



Continued conversation: June 21th 12-2 MST

39

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- Meet other leaders going through transitions
- If you'd like to register, you can [click the link here](#).
- If you don't want to wait until the Transition Planning Workshop in June, send me a message and we'll set up a time to talk about transition.



Save The Date

40

Stephanie Sample

Southern Grants Summit: Charleston, South Carolina
July 27, 28, 29 2022

Eastern Grants Forum: Philadelphia, PA
August 18, 2022



*Stay tuned: August 31, 2022 Make Money Now! New Nonprofit Revenue Streams

41

June 3rd Launches Level UP

Join our Social Enterprise Training in August.

If you don't want to wait until or Social Enterprise in August, find me on LinkedIn and send me a message saying you're interested in chatting about transition developing unrestricted revenue streams.



Comments/Questions/Contact

42

What is your transition story? How have you weathered staffing transitions and fundraising/grant seeking?
What have you learned?

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