My School Year Resolutions

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A new idea was brought to my attention the other day – that of “school year resolutions.” Similar to New Year’s Resolutions, school year resolutions are meant to be a goal setting period, only now tied to the school year instead of the calendar year. I’m always one to grab hold of a quiet moment to type brainstorms into Evernote, jot ideas for articles into a small spiral notebook out of my laptop bag, or spend time doing a weekly goal check in to ensure my task list is directly linked to those goals. So as I pondered my colleagues comment about her upcoming school year resolutions I began to question a few points:

1 – Have I been missing out on a mid-year goal setting trend for years?!?

2 – How can I adopt this idea of a mid-year resolution period to do a goal check in against my professional New Year’s Resolutions?

I’ve previously written about the “Habits of a Successful Grant Professional” and as I paused to reflect on the 7 months completed thus far this year, I can say with certainty that I have stuck to those habits and made a few additions/modifications to strengthen those habits along the way. I could also see how following those habits had helped keep me in-line with achieving my personal business goals for DH Leonard Consulting as well as professional development goals for myself.

I decided then to shift my focus to looking at how our clients were doing on their goals and if a mid-year check-up on their grant-related goals was in order. While we help our clients keep track of their in-process work and their awards toward their revenue goals, there is so much else that goes in to true grant seeking success. I went on to outline how we could do that for each client, I think we’ve hit on something that hopefully you can apply to each of your nonprofit organizations as a mid-year grant check-in as well.

Mid-Year Grant Check-Up

It is time to assess how you are doing mid-year for your grant seeking goals, and to provide yourself some time to set some new short-term goals and corrective action plans before reaching the end of the calendar year. I recommend that you ask yourself the following questions:

1. How do your grant awards received to date compare to a pro-rated amount for the year? Are you halfway through the year, but ninety percent to your budget for the year based on awards? Or are you half way through the year, but only twenty five percent to your budget for the year based on awards?

2. How are you progressing on grant awards that are expense reimbursement based? Are you on target for your budget plan? Or are you requesting an appropriate average number of units for reimbursement each month so that you don’t end up with a service gap or unmet units?

3. Are you meeting with other members of your team (whether formally called a grant team or not) to assess the different aspects of your grant seeking and management strategies? Are your colleagues leaving you oddly alone in order to “just do it” i.e. - write as many applications as possible? Are they updating you as individual program priorities for funding shift over the course of the year?
4. Are you continually conducting grant research and forecasting for new potential grant funding opportunities in order to be proactive in your grant seeking process? Are you maintaining your proactive grant seeking calendar? Or are you letting your research and grant planning calendar get a bit dusty between budgeting processes?

5. Are you remembering to connect with your grant funders between required reports and renewal applications in order to nurture your funder relationships? Are you connecting with your funders on social media? Are you sharing success stories of the funded program with your funders? Are you inviting your funders to special events during the year or hosting a site visit for your funders?

There can be numerous other factors for grant seeking performance and success that you consider at the mid-year or partial-year review, but the five core issues outlined above are a great start. Taking the time out of your busy day to reflect on the progress toward your annual grant seeking goals both in grant revenue received/committed and also process related will no doubt strengthen your year end results.