Interdisciplinary Approaches to Grantseeking and Resource Development

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GPC Competencies:
02. Knowledge of organizational development as it pertains to grant seeking.
08. Knowledge of methods and strategies that cultivate and maintain relationships between fund-seeking and recipient organizations and funders.

Abstract

Grantseeking and other types of resource development often run on parallel tracks. Through a series of original case studies, this strategy paper offers replicable examples of interdisciplinary collaborations that can amplify the grant professional's efforts, leverage complementary strengths, and potentially generate more funds.

Introduction

Grant professionals are usually not the only people in a nonprofit organization tasked with securing philanthropic resources. Other development professionals include those with subspecialties in major gifts, annual funds, special events, and planned giving, fields collectively known as "traditional fundraising" or simply "fundraising." In addition to those who focus on resource-generating activities, development personnel may also include individuals working in volunteer management and public relations.

Grant professionals and these other development professionals would seem to share common interests, but in many environments they work in isolation. The reasons for this divide may have partly to do with how incoming funds are used. Grantseeking tends to focus on finding resources for projects and programs, while individual and corporate giving is more inclined toward funds for general operations. The two sides of development also attract professionals with different skill sets and communication styles. Development leaders may wonder, however, if they could achieve more by working across disciplinary lines.

Literature abounds on intra-agency collaborations among grant professionals, consultants, program staff, evaluators, boards, and financial officers in the development of proposals and programs; see Carter (2004), Renninger, Bastuscheck and Brandolini (2007), Ingledue (2009), Leonard and Stombaugh (2014), and Scala (2015), among others. Less studied are the relationships between grant professionals and other development specialists. Huenink (2015), Jideonwo (2013), and McEnery (2004) delineate the rationale behind integrating grantseeking and fundraising functions to create a unified approach to donors. This strategy paper builds on these concepts and showcases examples of fundraising collaborations drawn from interviews conducted in 2016 and 2017. The paper also provides an outline of conditions necessary for successful collaborations as well as strategies to overcome potential pitfalls. Grant professionals may use this information to assess whether collaborative approaches are feasible for their organizations and then adapt project ideas accordingly.

Profile of Organizations Studied

The research for this strategy paper encompassed interviews with nine different organizations in the Chicago area: a historical museum, a children's museum, a hospital foundation, a public library district, a disability services organization, a scholarship organization, a women's shelter, a work readiness agency, and a private high school. Their annual fundraising goals ranged from $600,000 to $30 million, and competitive grants comprised 12% to 68% of the philanthropic dollars raised. The number of development staff ranged from two to 30 full-time positions.

General Considerations

The case studies demonstrated that the following practices and values are important to make an organization ready to undertake successful collaborations between grant professionals and other development professionals.
- Communication: the most collaborative teams in the study held regularly scheduled meetings and enjoyed ample opportunities for ad hoc dialog.
- Space: the most common office setup was cubicles or semi-shared spaces for staff. Interview subjects said that this configuration provided enough space for private contemplation while also enabling spontaneous interactions. Completely private offices and open work spaces were regarded less favorably.
- Learning: executives at the most collaborative organizations developed a culture of professional growth, often involving group memberships in professional organizations such as GPA or the Association of Fundraising Professionals (AFP).
- Expectations: collaboration cannot succeed if it is merely an "add-on" to the work that staff are already expected to do. Effective leaders set clear expectations that make interdisciplinary work part of the employee's annual goal plan.

Examples of Collaboration

Individual Giving
The concept of the donor engagement cycle—the movement from prospect identification to cultivation, solicitation, and stewardship—provides common ground between grant professionals and other fundraisers. Grant professionals and giving officers can work together on the identification and cultivation phases. At the Chicago-area historical museum in this study, the grant manager worked with the major gifts officer to research prospects and write concept

papers. She drew on her grasp of program measurement to brief the major gifts officer on service statistics prior to donor meetings. The grant manager also repurposed proposal narratives into a shorter, livelier version for the museum's annual appeal letter. In order to carve out time for this collaborative work, the grant manager cultivated help from trained interns, mostly college students who were aspiring writers or marketers.

In another example, the public library district and its 501(c)(3) supporting foundation came together for a renovation project. The library's grants manager wrote a case statement for naming rights to newly renovated study spaces, while the foundation's development manager identified major gift prospects and closed the deal.

Institutional Giving
Development professionals can also collaborate when evaluating institutional prospects such as foundations, corporations, and government agencies. For example, the children's museum employed a giving manager who oversaw a portfolio of individual donors, as well as a grant manager responsible for foundation and government funding. With corporate prospects, the pair would determine funder interest and divide work accordingly: the giving manager wrote exhibit sponsorship proposals and stewarded recognition efforts, while the grant manager wrote proposals for the museum's educational programs. Their ongoing dialog ensured that each person's professional strengths were deployed in the way most likely to achieve a successful outcome for their organization's annual fundraising goal of about $2.5 million.

Interdisciplinary dialogs of this nature can arise in larger venues as well. One of the organizations studied is a $30 million per year charitable foundation that supports a multi-billion-dollar hospital system. The foundation's grants director regularly talks with major gifts officers at 12 hospitals. When an industry group contacted a doctor about a funding opportunity for cancer treatment, the doctor told his local gift officer, who sent word to the grants director. The grants office put together the proposal and won a substantial award. On another occasion, the foundation's corporate relations officer told the grants director that a vendor was interested in supporting programs. The grants team identified a need, wrote a proposal for a mobile dental program, and received a multi-year grant.

Volunteer Engagement
Development involves the cultivation of donors. Volunteers are donors who give the currency of time rather than money. For this reason the management of volunteers often falls to an agency's development team and offers another opportunity for grant professionals and traditional fundraising professionals to collaborate.

Effective volunteer engagement requires support from top administration and a thoughtful alignment of organizational needs with volunteer interests (Ellis, 2010; Taproot Foundation, 2012). Robust volunteer involvement can even enhance an organization's grant competitiveness, as it demonstrates program sustainability and community buy-in. Volunteer hours can sometimes be counted as matching funds for a grant. While it is common to see volunteers on boards or in program support roles, grant professionals can also integrate them into grantseeking and grant stewardship activities.

When seeking pro bono partners, nonprofits should prioritize the employees of companies that have giving programs tied to volunteer engagement. At the organizations in this case study, grant-related volunteer projects ran the gamut from one-day, hands-on opportunities requiring a general skill set to long-term engagements that made use of volunteers' special expertise.

Some examples include the following:

● At the disability services agency, the grants director invited a financial services company to give matching funds for a foundation grant to build a children's playground. The company also provided volunteers to assemble the equipment. The playground ribbon-cutting garnered positive media coverage, and the company continued to support the charity with monetary gifts and employee time. The company's ongoing volunteer engagement was thus a form of grant stewardship.

● A transportation company reached out to the nonprofit that provides scholarships for low-income students, proposing an employee service day at one of their partner schools. Some participants later volunteered to tutor students. The company grew its commitment and became a financial patron of the school. The scholarship organization's grant professional stewarded this evolving relationship by writing reports on the impact of the company's commitment.

● The volunteer manager at the women's shelter worked with the community engagement officer at an insurance company to place volunteer groups at its housing facilities and resale shop. The company also sent pro bono human resources staff to help the shelter write its volunteer manual. The shelter's grant proposal writer cited this volunteer participation in successful proposals to the company's charitable giving program.

● The children's museum receives grant funds from a technology business that also gives its engineers release time to mentor children in science education programs. To avoid straining the museum's capacity, participation is capped at 20 volunteers at one time.

Public Relations
In some nonprofits, communications are also part of development. Grant professionals in the case studies worked with public relations (PR) staff in a number of ways.

● At several charities, grant professionals had a hand in drafting the annual report, which repurposed stories and statistics from that year's grant proposals. In turn, the grant professionals took inspiration from stories that others wrote for the annual report and used them in grant narratives.

● Some organizations announced grant awards via press releases and social media. Publicity can serve as a form of grant stewardship (as well as enhance job security for the grant professional).

● At the public library, the grants manager collaborated with the PR department to write "library of the year" awards that usually did not include a financial prize but did have a payout in prestige, which in turn positioned the library to win grants.

● On a similar note, the grant professional at the women's shelter wrote nominations for "volunteer of the year" awards to recognize corporate volunteers who had also helped secure grants, and she even trained a volunteer to write award applications on behalf of others.

Program Services
The most fully realized cross-disciplinary relationships between grant professionals and other resource development professionals took place in environments where front-line program services were similarly integrated.

● The employment services nonprofit engaged with an entertainment company in multiple ways: the company made grants to the organization from its corporate foundation, hired graduates of the program as paid employees, sponsored a fundraising gala, and sent skilled volunteers to hold mock job interviews with program participants.

● The private high school serves low-income, college-bound youth and covers costs with tuition, scholarships, fundraising, and a corporate work-study program that is a hub

for multifaceted relationships with funders. For example, a major bank gave grant funds, placed a director on the school's board, hired students for work-study and graduates for full-time jobs, and sent its employees to volunteer as college and career mentors. The school's director of corporate and foundation relations scheduled volunteer projects for bank employees as part of his grant stewardship plan. Volunteer management was part of this grant professional's written job description and performance expectations.

These rich, evolving relationships represent the fullest possibilities of what grant professionals, other fundraisers, and executive leadership can accomplish when they work together to get the most impact out of a funder.

Challenges to Collaboration: Problems and Solutions

The study also identified several common barriers to collaborative fundraising as well as potential solutions that resource development professionals may employ.

Time Management
Volunteers do not represent "free" labor. Salaried staff are sometimes dismayed when they realize that managing volunteers requires an investment of time that they think will impede the rest of their work. With thoughtful planning, however, organizations can make this investment pay dividends. The historical museum in this study runs a summer internship program in partnership with an umbrella coalition that gives the college students modest stipends. These part-time interns work not only with curators but also with the museum's grant manager and marketing director. During the rest of the year, the museum's human resources department recruits unpaid student interns through online postings.

Organizations that sponsor academic and clinical internships are well suited to place interns in resource development as well. Many front-line nonprofit service providers have to write their own grant proposals, and interning with a seasoned grant professional could be a learning experience for the student as well as a boon to the organization's development program. For instance, the women's shelter in this study assigned psychology and social work interns to spend a few hours a week helping the agency's grant professional research funding prospects and local demographics. Unpaid staff—when properly recruited, trained, and supervised—can add value to a grants program and give paid staff the time to undertake bold, innovative projects.

Information Exchange
In order to work collaboratively and avoid the tendency to hoard information, development professionals need a common data platform. References such as *A Consumer's Guide to Low-Cost Donor Management Systems* (Idealware & NTEN, 2017) can help organizations choose appropriate technological solutions. Regardless of the product chosen, staff and volunteers must use the system consistently and correctly, and management must hold them accountable for data transparency.

Performance Objectives
The most significant barrier to collaborative fundraising may be the fear that dedicating time to a shared project will prevent a grant professional from getting his or her "own job" done. This concern must be addressed in each development team member's work expectations. For example, a grant professional's annual performance measurements might require him or her to produce 30 grant proposals and win $300,000 in grants, as well as write two major gift proposals that lead to gifts of $50,000. Some organizations motivate collaboration by awarding bonuses for the attainment of collective fundraising goals; for example, all members of the development team at the historical museum received a bonus after they successfully closed a capital campaign. Individual incentives can co-exist with group incentives: a development professional might qualify for a salary increase based on individual performance but will only receive a bonus if the team goals are met.

Contrary to widespread belief, performance incentives are allowed under the GPA Code of Ethics, Article 18: "Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accordance with prevailing practices within the members' own organizations and are not based on a percentage of grant monies." (AFP's Code of Ethics has a similar provision.) Though incentives are still uncommon in the development field, a body of evidence suggests that they may improve employee retention, increase dollars raised to a greater degree than performance metrics alone, and—if they are based on overall organizational performance—promote cohesion and collaboration (Marts & Lundy, 2016; Campbell & Co., 2015).

The case studies of the nine Chicago nonprofits, though limited in scope, were consistent with these research findings. It is perhaps significant that the two organizations with the most highly developed bonus programs—the employment services organization and the scholarship agency—were founded by businessmen-philanthropists. Under these nonprofit "profit sharing" plans, it is possible for one department to underperform relative to others and still receive a bonus. In confidential interviews, employees of the two charities stated that their dedication to mission was strong enough that the prospect of disparate rewards had no negative effect on morale.

Leadership
Strong leadership is important to sustain this collective vision. Even in organizations with disinterested leadership, however, collaboration-minded professionals can still exert their influence by modeling ethical behavior, communicating openly, and educating colleagues about their field of expertise (Stombaugh, 2017). Grant professionals may consider giving presentations at staff meetings about the grants cycle, outcomes measurement, prospect research, and other topics that may seem mysterious to non-specialists. These efforts can not only improve the status of the grants professional but also plant seeds of interest for future collaborations.

Conclusion

Grant professionals who would like to explore interdisciplinary collaborations should first assess their organizations' readiness for collaboration. They may then cultivate tools and systems that foster creative dialog, using examples like those cited here as inspiration for projects that fit their missions. This cross-disciplinary mindset is relevant to grant professionals who now work (or one day may work) in diversified fundraising shops; who provide strategic consulting to organizations that could benefit from a multi-pronged development strategy; or who aspire to become directors of development or other executive leaders and thus need a broad view of organizational advancement.

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