

7 Habits of Excellent Work with Grantees

Incorporating the Seven Habits When You are Making a Grant

Proposal Invitation Email: Make sure your invitation email explains how you will use the materials the (prospective) grantee prepares; your decision criteria, process, and timeline; and our commitment to understanding and funding true costs.

Communicate Strategy and Goals: Clearly and consistently share the strategy in which you are making this grant — verbally, by email, in your proposal template. You can link to the description of your strategy on the website rather than rewrite.

Show Curiosity: Take time to get to know your grantee contacts on a personal level and also to understand how the work you're funding fits into their organization overall.

Discuss Results: Discuss explicitly and make an agreed upon plan for how the grantee will measure results from the grant.

Project Budgets & True Costs: Make sure the grant covers the full/true cost of the project (or your share of it), which includes their overhead rate.

Once the Grant Is Made: Send an email (and discuss by phone or in-person if appropriate) that clarifies and confirms your hopes and expectations for the grant period. Include things like how often you would like to check in with the grantee, when and what the renewal process will be (if applicable), and any other baseline details or expectations that are important to you. You might want to develop one or a few templates for this email to make it more efficient to send.



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Grantee Checkin Reminders

In addition to discussing the grant and ongoing work, allow time in your check-in meeting agenda to **do introductions or catch up with the people on the call** as well. Ask questions and show curiosity about the whole organization.

Use one or more of the “**curiosity questions**” in the next tab (and send them ahead of time if you think that would help). Ahead of a check-in meeting, consider reviewing grantees’ recent proposals and reports to the foundation, as well as any blog posts, reports, news, websites, and/or social media. If you can’t review these things ahead of time, you could ask what’s new in these areas during the check-in.

Communicate about our strategy and goals: Consider whether and how you want to use the check-in call to reiterate the strategy within which the grantee has funding, share updates, or confirm their understanding of the strategy.

Measuring results: Consider if the check-in is a good opportunity to touch base on how they are measuring results and/or if they have any current indicators of how things are going.

Remember **Habit 7: Listen as much as you talk!**



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Potential Questions to Ask During Grantee Check-Ins

Tell me about (the organization's) work beyond A, B, and/or C that we support.

I read the strategic plan you included in the proposal. Which parts are you most focused on? Anything keeping you up at night?

What things about your work are you most proud of?

I know your organization does several things including A, B, and C. I'd love to hear more about those.

Has anything happened in the last year that has shifted how you think about your programs or strategies?

How would you describe your organization's core values? How are these realized in practice?

How is the earned-revenue part of your organization doing?

Tell me about your board. How does the board work with you (or the staff generally)?

What are the biggest challenges facing your organization right now?

Can we talk about your organizational structure? I'd love to get a better sense of how the work I'm familiar with fits within the larger whole.

Do you have other GOS funders? What parts of your work do your largest funders support? I'd love to learn more about how you work with them.



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Monthly Habit Tracker

Research shows that as you're trying to build a new habit, it can be useful to make a check mark every day that you "do" the habit. Use this habit tracker to set one to three goals for the month of habits you want to build, and then make a check mark on the tracker below on the days you succeed.

(Note: Extra copies of this tracker are available in the Seven Habits folder on Box.)

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
<input type="checkbox"/> <input type="radio"/>				
<input type="checkbox"/> <input type="radio"/>				
<input type="checkbox"/> <input type="radio"/>				
<input type="checkbox"/> <input type="radio"/>				
<input type="checkbox"/> <input type="radio"/>				

Set Your Intentions

Goals:

- 1.
- 2.
- 3.

Distractions/Barriers:

- 1.
- 2.
- 3.

Reflect on Your Progress

Goals:

- 1.
- 2.
- 3.

Distractions/Barriers:

- 1.
- 2.
- 3.



More information about the Seven Habits of Excellent Work with Grantees is available at hewlett.org

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