



Improving Grant Application and Reporting

Hosting the Introduction to Project Streamline Session

OVERVIEW:

The Introduction to Project Streamline Session is a 1-3 hour interactive session providing an overview of Project Streamline. Attendees will learn about the impact that current application and reporting practices have on grantseekers and grantmakers and participate in discussions regarding ways to streamline grantmaking.

HOST RESPONSIBILITIES:

Host organizations will engage a Project Streamline Presenter to present the session. Host organizations are responsible for all session logistics, marketing the session, and session costs.

Host Responsibilities	GMN/Project Streamline Responsibilities
<ul style="list-style-type: none">• Contact presenter and schedule session• Work with the presenter to finalize session length and logistics• Market the session• Register participants• Handle logistics including securing suitable space and providing refreshments, if needed• Pay session costs (and collect associated fees or conduct fundraising, as needed)	<ul style="list-style-type: none">• Provide host with list of qualified presenters• Provide session materials to the host organization which are copies of the <i>Drowning in Paperwork Distracted From Purpose</i> report and a one-page snapshot of the report findings

SESSION SPECIFICS:

PARTICIPANTS:

- The session can be presented to either grantmakers or grantseekers or it can be a presented as a joint session to both grantmakers and grantseekers.
- Grantmakers of any type or size, including unstaffed grantmakers.
- Grantseekers of any type or size.
- Ideally the session should have 20-40 participants. Maximum of 70 attendees and minimum of 15.

TIME GUIDELINES: The session is designed to take 1 ½ hours. It can be shortened by cutting some of the interactive exercises or extended to 3 hours by adding a presentation by a grantseeker and additional time for breakout discussions.

VENUE:

- Round tables (6-8 seats) that allow for small group work.

EQUIPMENT/AV:

- LCD projector and screen

FOOD:

- Coffee, tea, water, juice, etc.

MATERIALS:

- Hard copies of Drowning/Distracted report and Snapshots for everyone
- Discussion Guide

BUDGET:

Paid By Host to Presenter

Presenter Fee (host to negotiate directly with presenter)	Ranges from \$500-\$1,000 depending on length of session and any customization for audience	
Presenter travel expenses (Varies, depending on distance but will generally include airfare, 1 night hotel, and other travel/incidentals. Only actual expenses will be billed.)		750

Subtotal		\$1,250-\$1,750
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Paid Directly By Host

Miscellaneous expenses (nametags, room costs, A/V, etc.)		150
Drinks, coffee, tea, etc.		100

Subtotal		\$250
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Total Workshop Cost		\$1,500-\$2,000
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***Are you drowning in paperwork and distracted from purpose?
How about your grantees?***

Session Description: Most grantmakers take their responsibilities to support nonprofit and other public-serving organizations seriously, and spend considerable time thinking about how they can be most effective. Stories of highly productive, warm, and mutually satisfying partnerships between organizations and their funders abound. Yet the grantmaking process is rife with inefficiencies, and these inefficiencies mean that everyone is wasting time and money that could be devoted to accomplishing missions. Project Streamline's report, *Drowning in Paperwork, Distracted from Purpose* examines the impact of grant application and reporting requirements and makes recommendations for how these practices can be streamlined.

During this interactive session, participants will learn about Project Streamline, provide input from their own experience, and consider recommendations for improving grant application and reporting practices.

Participants will receive:

- Copies of *Drowning in Paperwork, Distracted from Purpose*
- A greater understanding of the impact that current application and reporting practice have on grantseekers and grantmakers
- In-depth discussion of streamlining practices that have worked in other foundations and regions

Comments and Testimonials about Project Streamline and *Drowning in Paperwork*:

“It’s a terrific report. If implemented by large numbers of foundations, its recommendations would transform the state of relations between foundations and their recipient organizations.”

- Joel Fleishman, Professor of Law and Public Policy Sciences at Duke University and author of *The Foundation: A Great American Secret*.

I have discussed the publication with my grant writer and can confirm the findings and recommendations are “right on”.

- Hazel F. Richards, CFRE, Fund Development Program Director, Banner Alzheimer's Foundation, Phoenix, Arizona

“I read the executive summary this morning and then had to read the full report this afternoon. It is going to be the perfect tool I needed to move my co-workers. I just needed the formal research to build the support for what I have been saying. Thank you for your time and thoughtfulness.”

- Julie Walther, Senior Program Officer, The Brinson Foundation, Chicago, Illinois

“For years I’ve wished that we could get good, honest feedback from grantees about our grantmaking process, but it is not easy to get. Even grantees with whom we have established, close relationships are not likely to express criticism about our requirements, process, or performance...I found that the report made me reconsider the way we ask questions and communicate with applicants.”

- Victoria Kovar, Cooper Foundation, Lincoln, Nebraska

Project Streamline is a project of the Grants Managers Network, in partnership with the Council on Foundations, the Forum of Regional Associations of Grantmakers, Association of Small Foundations, the Foundation Center, Grantmakers for Effective Organizations, Association of Fundraising Professionals, and National Council of Nonprofits. Learn more at www.projectstreamline.org