



# Improving Grant Application and Reporting

## Hosting a Project Streamline Action Workshop

### OVERVIEW:

The Project Streamline Action Workshop is a one-day, highly interactive opportunity for grantmakers to share and build knowledge about what it takes to streamline grantmaking practice.

### HOST RESPONSIBILITIES:

Host organizations engage Project Streamline Workshop Facilitators to 1) deliver the workshop and 2) advise on workshop logistics and post-workshop follow up. Host organizations are responsible for all workshop logistics, marketing the workshop, and workshop costs. In addition, host organizations are encouraged to engage the workshop participants in follow-up conversations (e.g., brown bag lunches, conference calls, webinars, or listservs) to share with each other their streamlining successes and failures, creating an ongoing peer support network.

Host responsibilities	GMN/Project Streamline Responsibilities
<ul style="list-style-type: none"> <li>• Hold at least two conversations with the workshop facilitator to review workshop content and logistics.</li> <li>• Market the workshop</li> <li>• Register participants</li> <li>• Deliver the online pre-training survey and post-training evaluation and provide results to the workshop facilitator</li> <li>• Handle logistics including securing suitable training space, providing refreshments, copying and distributing workshop materials.</li> <li>• Design a follow up plan with workshop participants to continue their streamlining conversations post-workshop.</li> <li>• Pay workshop costs (and collect associated fees or conduct fundraising as needed)</li> </ul>	<ul style="list-style-type: none"> <li>• Connect hosts with a facilitator</li> <li>• Provide the workshop content, including two online surveys: 1) pre-training to learn about participants, and 2) an evaluation immediately post-training.</li> <li>• Provide access to the Drowning/Distracted report and the Snapshot to host organizations</li> <li>• Refer prospective hosts to former hosts for references and additional information</li> <li>• Work with hosts as desired to advise on post-workshop engagement and evaluation of participants.</li> </ul>

## WORKSHOP SPECIFICS:

### PARTICIPANTS:

- Grantmakers of any type or size, including unstaffed grantmakers.
- Maximum of 27 grantmakers (in teams of 2-3); minimum of 12 grantmakers (5 or 6 teams).
- Pairs or teams of staff are very strongly preferred. Ideally, each grantmaker would send 2-3 people who represent different functions (i.e., program officer, grants manager, executive or trustee), with someone who has direct experience with its current grants application and reporting processes, and someone who has authority to move the grantmaker toward more streamlined practices. These can be one and the same, but we believe that the sustained change process embodied in streamlining will be most successful with at least two streamlining “champions” who can support each other in their change efforts.

**TIME GUIDELINES:** The workshop is designed to take seven hours, including several short breaks and a 30 minute lunch. The recommended workshop schedule is 9:00 am to 4:00 pm. A welcome period between 8:30 and 9:00 am with coffee and breakfast refreshments can ensure that participants are ready to begin when the workshop starts.

### VENUE:

- Because the day is long, a pleasant room is a big plus.
- Round tables (6-8 seats) that allow for small group work.
- Large enough to make it easy for people to move to different tables over the course of the day.
- Lunch can be provided in or outside the main room.
- Wall space to hang a number of large pieces of graphic paper.
- Venue should be somewhere that noise is tolerated.

### EQUIPMENT/AV:

- LCD projector and screen
- Two easels and flip charts
- Masking tape
- Markers of all colors (in good working order!)
- Scrap paper or pads for participants
- Nametags (not table tents, as we will move around)
- Large post-it notes
- Treats and prizes are appreciated

### FOOD:

- Breakfast snacks, coffee, tea, water, juice, etc.
- Lunch – ideally something simple, easy to pick up and not messy
- Treats – for the mid-afternoon lull

# Project Streamline Action Workshop

## Projected Cost to Host

### Paid By Host to GMN

Planning, delivery of session, and session follow-up	2,500
Consultant 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** \$3,250

### Paid Directly By Host

Photocopying/materials: 27 participants/workshop @\$10/	270
Lunch, coffee: \$30/person for 27 participants, 1 consultant, 1 host	870
Miscellaneous expenses (nametags, etc.)	150

**Subtotal** \$1,290

**Total Workshop Cost** \$4,540

Cost per participant (for 27 participants) **\$168**

## Project Streamline Action Workshop – Sample Agenda

Time	Element/Description	Notes
PRE	<p><b>Pre-assignments</b></p> <ul style="list-style-type: none"> <li>Review the <i>Drowning in Paperwork</i> report and Snapshot (executive summary)</li> <li>Review the “Guide to Streamlining”</li> <li>Take the self-assessment (once available)</li> </ul> <p>Conduct a brief investigation. This baseline data will help to make our workshop richer and most productive for your organization. <u>It will also help you to measure your streamlining progress after the workshop.</u></p> <ol style="list-style-type: none"> <li>Create a diagram of each step in your application process. Include steps for staff as well as steps for grantees.</li> <li>Complete the <i>Identifying Your Baseline</i> worksheet</li> <li>Optional: some grantmakers have also found the following to be extremely useful: <ol style="list-style-type: none"> <li>count the number of sheets of paper that a new applicant must submit when requesting funding from you, and measure the weight of a full application;</li> <li>call 1-2 trusted grantees and ask them to: <ul style="list-style-type: none"> <li>estimate the amount of time that they spent applying for and reporting on funding from you</li> <li>tell you about an application process that they find most straightforward and helpful. What is it, and why do they prefer it?</li> </ul> </li> </ol> </li> </ol> <p>Bring your results to the workshop.</p>	
AM	<p>As participants arrive and are greeted, they are invited to post examples of their own or others’ dubious practices on the TRUE CONFESSIONS poster.</p> <p>Complete the <i>Drowning in Paperwork</i> pop quiz – already on each table.</p>	<p>Lichtenstein-style drawing of a crying woman saying: “Oh Heavens! I forgot to streamline!”</p>
9:00 30 min	<p><b>Welcome</b> <b>Introductions</b> <b>Agenda review, Goals</b></p>	<p>Introductions: name, role, organization affiliation, and what brought you to the workshop (motivations for streamlining)</p>
9:30 45 min	<p><b>Defining the need:</b> Quick review of Project Streamline findings and core recommendations</p> <p>Ask participants to think about what they have tried/learned.</p> <ol style="list-style-type: none"> <li>What has your organization done that you are most delighted about and that you’d be willing to share with others?</li> <li>What would you really like to hear more about from someone in the room?</li> </ol>	<p>PPT review of flaws in the system and core recommendations</p> <p>Report out – each participant calls out what they would like to share and what they want to learn.</p>

Time	Element/Description	Notes
10:15 60 min	<p><b>Streamlining Phases:</b> Introduce the idea of streamlining phases and Adaptive vs. Technical challenges. Ask participants to identify the phase they are currently working on.</p> <p>For each phase, participants identify (small or full group):</p> <ul style="list-style-type: none"> <li>• What needs to happen during this phase?</li> <li>• What works well? What barriers need to be overcome?</li> </ul>	<p>Discuss and then post streamlining phases chart that includes</p> <ul style="list-style-type: none"> <li>• Friction/Vision</li> <li>• Exploring need</li> <li>• Building case</li> <li>• Identifying opportunities</li> <li>• Planning change</li> <li>• Implementation</li> <li>• Assess and Refine</li> </ul>
11:15	<b>BREAK</b>	
11:25 30 min	<p><b>Force Field Analysis:</b> Identify the drivers and barriers to streamlining. Discuss underlying assumptions that support the status quo.</p>	
11:55	<b>Working Lunch – networking and peer consultations</b>	Working lunch – participants invited to discuss challenges and successes with peers.
12:30	<b>PPT: Streamlining Principles in Action</b>	PPT – introduce guidelines
12:45	<p><b>Principles in Practice</b></p> <p>Participants divide into groups by interest to discuss:</p> <ul style="list-style-type: none"> <li>• Due-diligence</li> <li>• Relieve the Burden: Budgets/financial information</li> <li>• Relieve the Burden: Online systems</li> <li>• Right-sizing</li> <li>• Communications</li> </ul> <p>40 minute breakouts (x2) and 30 minute reporting</p>	<p>Facilitated groups.</p> <ul style="list-style-type: none"> <li>• Share current practice</li> <li>• Examine own practices in light of the guidelines</li> <li>• Discuss opportunities for change</li> <li>• Make note of other ideas and questions</li> </ul>
2:35	<b>Break</b>	

Time	Element/Description	Notes
2:50	<p><b>Process review</b> Grantmaker-specific teams review their own process (using worksheet as a guide) and look for opportunities to make changes.</p> <p>Teams also make a plan-of-action, which will vary depending on where they are in the process.</p> <ul style="list-style-type: none"> <li>- How can we move to the next phase?</li> <li>- Who needs to be involved?</li> <li>- What do they need to know/do?</li> <li>- What are the next steps?</li> <li>- What are some pitfalls to avoid?</li> </ul>	
3:30	<p><b>Closing</b></p> <ul style="list-style-type: none"> <li>• Individual reflection (use <b>circle/sq/triangle worksheet</b>)</li> <li>• Commitments: individual, organization, and collective (with host)</li> <li>• Capture burning questions, expectations</li> <li>• Discuss how/if participants want to have ongoing conversations and peer support.</li> </ul>	Capture burning questions for follow-up
4:00	<b>Adjourn</b>	

**MATERIALS:**

- Identifying your Baseline Pre-work
- Hard copies of “Drowning” and snapshots for everyone
- Streamlining Phases
- Guide to Streamlining
- Worksheets for PROCESS REVIEW
- Goals: worksheet for teams
- Closing reflections organizer
- Reflection sheet

## SAMPLE MARKETING TEXT (LONG)

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*Are you drowning in paperwork and distracted from purpose?  
How about your grantees?*

Join us for an interactive and fast-paced Project Streamline workshop to explore concrete ways to reduce the costs of your grant application and reporting practices to both your organization and to your grantee.

### WHO SHOULD ATTEND:

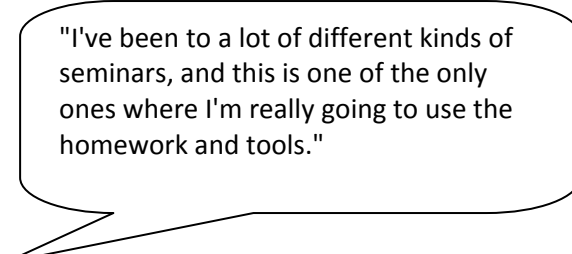
This dynamic workshop is designed for grantmakers of any type or size. Grantmakers in the midst of a streamlining process as well as those just beginning to consider improving their practices can both benefit from the workshop. Because streamlining requires both policy and process change, we recommend attending this workshop in teams of at least two . A team should include someone with decision-making authority (executive staff or trustee) and someone who will be responsible for implementing streamlining decisions (grants manager, program officer, etc.).

### ATTENDEES AT THIS WORKSHOP WILL:

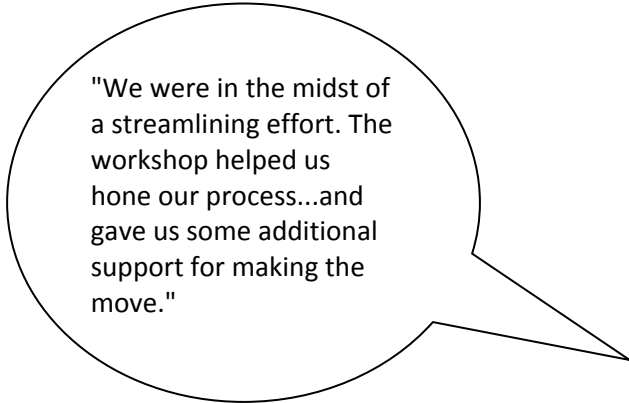
- Revisit assumptions about what kind of information is necessary for effective and responsible grantmaking;
- Share past streamlining experiences;
- Learn how to assess and rethink application and reporting systems that place an unnecessary burden on grantmakers and grantees;
- Identify barriers to streamlining and how they might be overcome;
- Create an action plan for making concrete changes to current practices.

### PAST PARTICIPANTS PARTICULARLY APPRECIATED:

Action-oriented and customized focus. Participants left the workshop with a better understanding of their current practices and a customized plan for next steps, allowing them to take immediate action.



"I've been to a lot of different kinds of seminars, and this is one of the only ones where I'm really going to use the homework and tools."



"We were in the midst of a streamlining effort. The workshop helped us hone our process...and gave us some additional support for making the move."

Peer learning. The workshop enhanced knowledge and networks, identified local philanthropic practices, and highlighted resources that have worked well for others.

Dedicated time. The workshop presented an opportunity for grantmakers to step back from their day-to-day responsibilities and strengthen their commitment to streamlining, eliciting deeper buy-in for change from team members.

If you have questions or would like to talk to us about attending as an individual (or in a team of more than three), please contact: **xxxx**

**Workshop Details:**

When: **[Date]**, 8:30am – 4:00pm

Where: **[Location]**

Cost: **[Details]**

**Workshop Facilitators – Short Bios:**

Jessica Bearman is the founder of Bearman Consulting. She researched and wrote *Drowning in Paperwork, Distracted from Purpose: Challenges and Opportunities in Grant Application and Reporting*, a study of grantmakers' application and reporting practices. Jessica is the former deputy director of New Ventures in Philanthropy.

OR

Alice Cottingham is the principal of Alice Cottingham & Associates, LLC. She worked in the nonprofit sector for thirty years, previously serving as the executive director of the Crossroads Fund, the Fund for Immigrants and Refugees, and Girl's Best Friend Foundation. Clients include the IL Funders Census Initiative, Grantmakers for Effective Organizations, and the Arts Work Fund.

***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](http://www.projectstreamline.org)***

## SAMPLE MARKETING TEXT (SHORT)

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### **WHAT PAST PARTICIPANTS SAID:**

"I've been to a lot of different kinds of seminars, and this is one of the only ones where I'm really going to use the homework and tools."

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Learn more about **Project Streamline** at [www.projectstreamline.org](http://www.projectstreamline.org)