

Grant Work Outline

Prep & Writing

Prospecting	
Identify prospect, add to internal prospect list	Grant Writer, Fundraising Director
Create a GrantHub Funder and Opportunity	Grant Writer
Save details of key conversations with the prospect associated with a Task in GrantHub.	Grant Writer, Fundraising Director
Add to Fundraising Roadmap.	Grant Writer, Fundraising Director
Project Design & Writing	
Project brainstorm with teams.	Project Managers, Grant Writer, Fundraising Director, Team Leads
Write LOI / SOI / application.	Grant Writer
Edit and review round(s) with teams included.	Project Managers, Grant Writer, Fundraising Director, Team Leads
Resolve edits and prepare for submission.	Grant Writer
Budgeting	
Calculate effort for each task (percentage time/for how long).	Project Managers, Team Leads
Ensure Project Managers' time is included in all budgets.	Project Managers, Team Leads
Consider whether there can be a metrics fee or element	Project Managers, Team Leads, Chief Financial Officer
Add other costs (travel, materials, lodging, food, etc.)	Project Managers, Team Leads
Create a final budget including allowable overhead	Chief Financial Officer

Submitting & Decisions

Submission	
Submit LOI / SOI / application for consideration.	Grant Writer
Assign next Sponsor number.	Grant Writer
Change Opportunity status to 'Submitted' in GrantHub.	Grant Writer

Upload submitted materials to the Opportunity in GrantHub.	Grant Writer
Update status in Fundraising Roadmap.	Grant Writer
Decision Notification: Awarded	
Update Opportunity status to 'Awarded' in GrantHub.	Grant Writer
Save feedback and award notification in GrantHub.	Grant Writer
Update 'Amount Awarded' in GrantHub.	Grant Writer
Add a new Opportunity for the next round of funding with reminders to GrantHub.	Grant Writer
Finalize start date.	Grants Manager, Project Managers
Coordinate the signing of a contract.	Grants Manager
Inform the PMs that the contract has been signed.	Grants Manager
Upload finalized contract into GrantHub.	Grants Manager
Create wiki page using Sponsor Wiki Template.	Grants Manager
Create ticket to add Sponsor to sponsor page on tpo.	Grants Manager
Decision Notification: Declined	
Update Opportunity status to 'Declined' in GrantHub.	Grant Writer
Reach out for feedback about decision.	Grant Writer
Save any feedback or award notification in GrantHub.	Grant Writer

Project Launch, Activity, & Closure

Project Active	
Add Sponsor number to trac Sponsor drop down, tag related tickets with correct Sponsor.	Project Manager
Submit invoices, track spending.	Grants Manager, Chief Financial Officer
Create status tracking document.	Project Managers

Add new column to location tracking spreadsheet for new funder; add X's to applicable cells.	Project Managers
Define goal and scope of project.	Project Managers
Mark all the possible trac tickets with the sponsor number.	Project Managers and Team Lead
Create roadmap draft for the project.	Project Managers
Hold kickoff meeting with all teams involved.	Project Managers
Make changes to Sponsor wiki and Sponsors page if extension is granted.	Grants Manager
Make changes to Fundraising wiki if extension is granted.	Grant Writer, Fundraising Director
Submit benchmark report(s).	Grants Manager
Upload benchmark report(s) to Opportunity in GrantHub.	Grants Manager
Project Completion	
Submit final report.	Grants Manager
Upload final report to Opportunity in GrantHub.	Grants Manager
Upload benchmark and final reports to the wiki page.	Grants Manager
Submit ticket to move Sponsor to Past Sponsors on tpo .	Grants Manager
Move to Completed Projects on Fundraising Team wiki.	Grant Writer, Fundraising Director
Mark Opportunity as 'Awarded-Closed' in GrantHub.	Grant Writer