



How to Master Grant Calendars & Grant Strategy

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Diane H. Leonard, GPC, ST



- Grant Professional Certified (GPC)
- Approved Trainer, Grant Professionals Association
- Scrum Trainer
- Over \$78.3 million raised for clients
- Began career as a grantmaker
- Owner, DH Leonard Consulting & Grant Writing Services
- Runner and coffee drinker



What We Will Cover Today

- I. What is a Grant Calendar
- II. Engage Your Colleagues in Developing the Grant Calendar
- III. Facilitate Your Strategy Using the Grant Calendar



I. What is a Grant Calendar



I. What is a Grant Calendar

A Grant Calendar is...

- An entry for each upcoming deadline on a shared calendar that ALL members of the grant team can access that is managed by the lead grant writer/professional.
- Accessible to the full team that uses the technology that is best suited to the organization – that may be Google Calendar, Microsoft Outlook, or a shared Excel file on the network server.
- Accessible to full team & uses tech best suited to the organization.



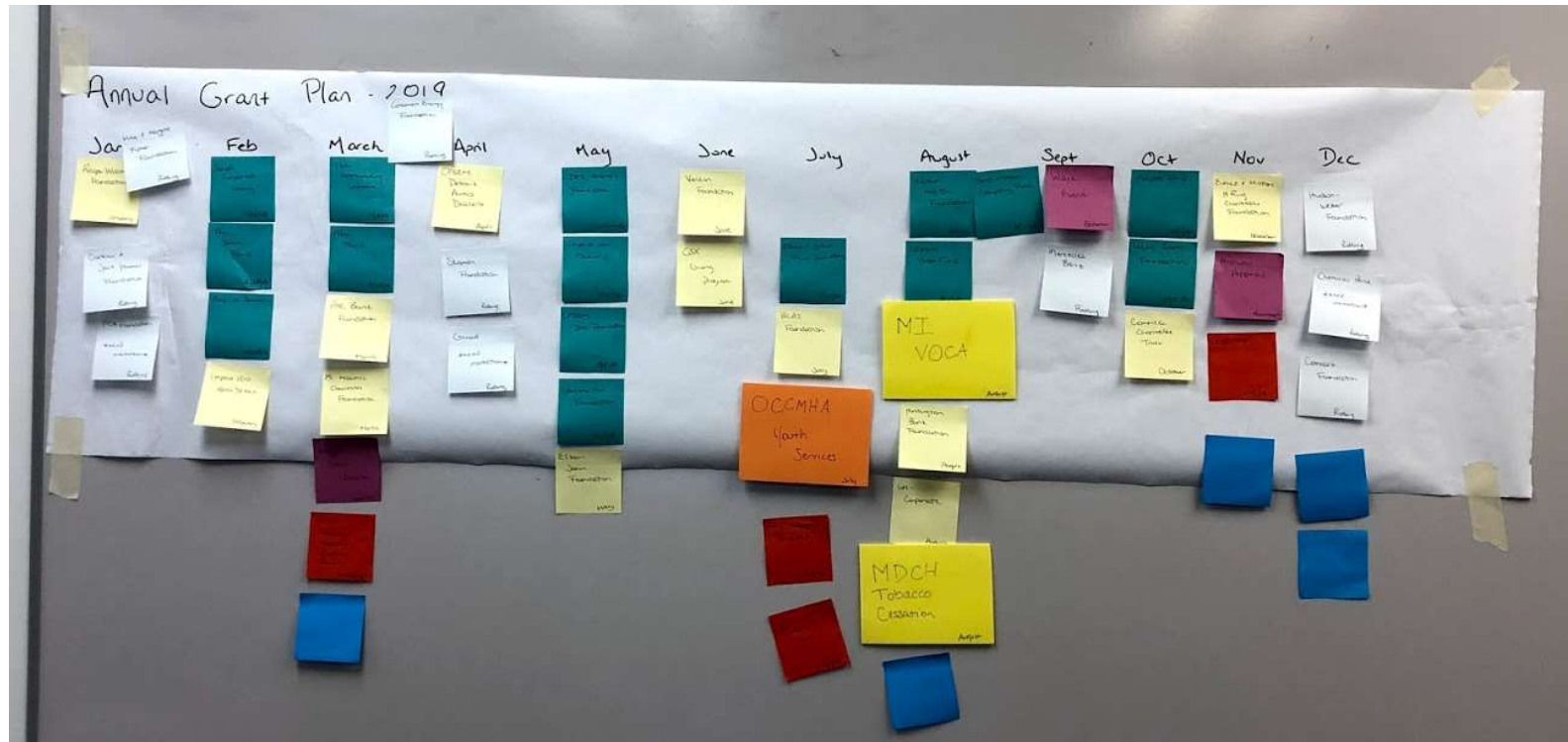
I. What is a Grant Calendar

A Grant Calendar is...

- A place to not only include grant application deadlines, but also key dates related to key research dates like funder webinars and conferences, building relationships with grantmakers, maintaining relationships with current grant funders, grant management report deadlines, and grant billing deadlines.
- A guide for your proactive grant seeking strategy for the year ahead to help achieve your grant revenue goals for the organization.



II. Engage Your Colleagues in Creating a Grant Calendar



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Annual Strategy & Grant Calendar

The grant team **should** help translate the organization's strategic plan into an annual grant seeking strategy.



II. Engage Your Colleagues in Creating a Grant Calendar

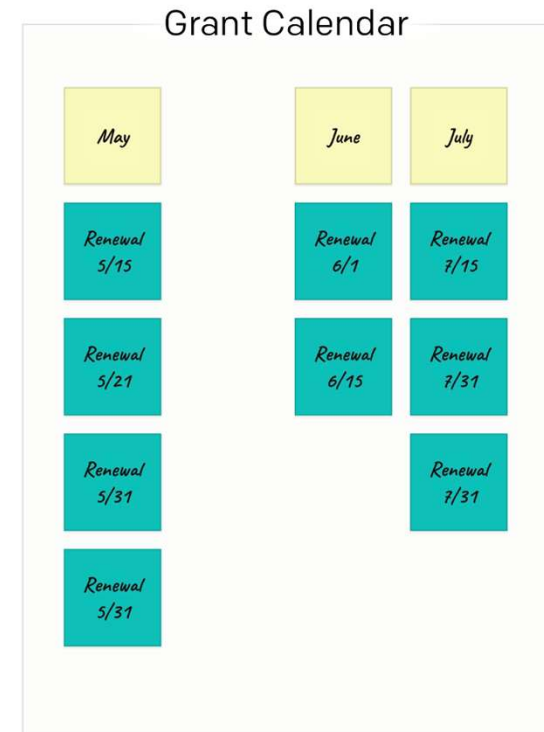
The grant team should assist in the creation, or **at least** provide the approval of your annual grant strategy and supporting grant calendar.



II. Engage Your Colleagues in Creating a Grant Calendar

Step 1:

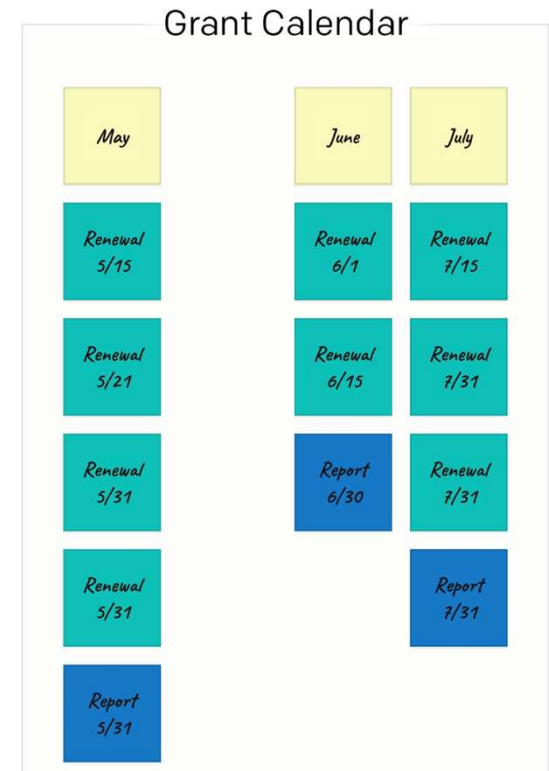
Lay out the application deadlines that are absolute across each month.



II. Engage Your Colleagues in Creating a Grant Calendar

Step 2:

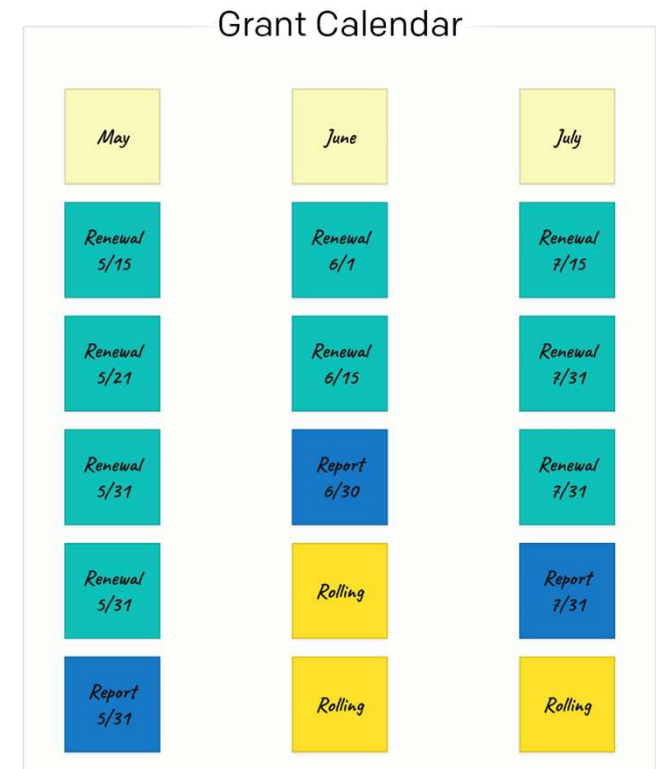
Lay out the report deadlines that are required for current grants across each month.



II. Engage Your Colleagues in Creating a Grant Calendar

Step 3:

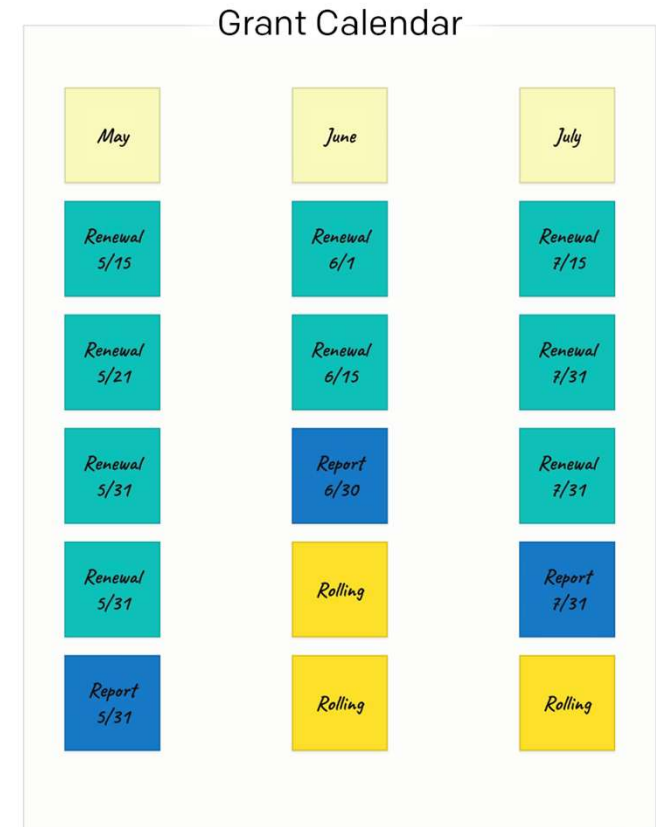
Place the grant applications with rolling deadlines on the months where you have seem to have capacity available.



II. Engage Your Colleagues in Creating a Grant Calendar

Step 4:

STOP to review and approve the grant calendar as a team.

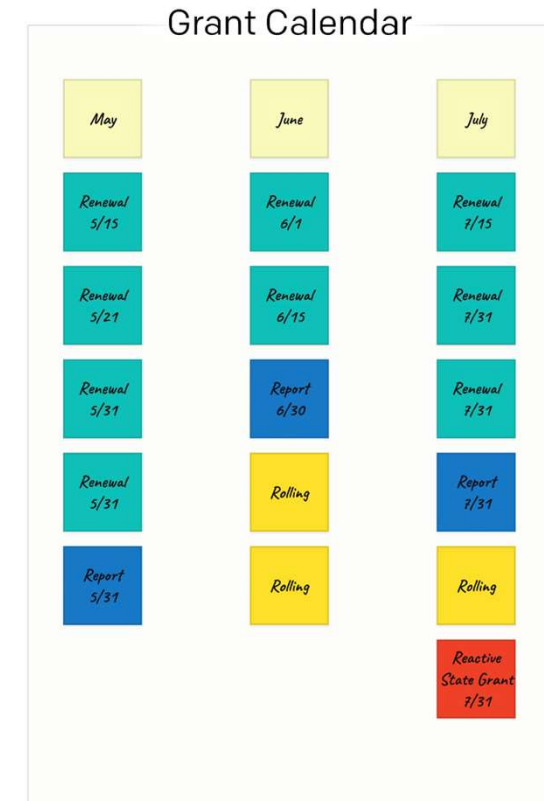


II. Engage Your Colleagues in Creating a Grant Calendar

Step 5:

When implementing your calendar, when something new comes up, address it during your planning sessions.

- Do you have the capacity available to add the deadline?



II. Engage Your Colleagues in Creating a Grant Calendar

Step 5 (continued):

When implementing your calendar, when **another** new deadline comes up, address it during your planning sessions.

- Do you have the capacity available to add the deadline?

Grant Calendar

May	June	July
Renewal 5/15	Renewal 6/1	Renewal 7/15
Renewal 5/21	Renewal 6/15	Renewal 7/31
Renewal 5/31	Report 6/30	Renewal 7/31
Renewal 5/31	Rolling	Report 7/31
Report 5/31	Rolling	Rolling
	Reactive Foundation 6/30	Reactive State Grant 7/31



III. Facilitate Your Strategy Using a Grant Calendar

**Grant Calendars (AND) Grant Teams
are the Key to Application Success!**



III. Facilitate Your Strategy Using a Grant Calendar

A grant team is...

A group of colleagues that **have a stake** in creating competitive grant applications in order to ensure that they/their colleagues can successfully implement a funded project.



III. Facilitate Your Strategy Using a Grant Calendar

A grant team is...

A group of colleagues, either **informally or formally** aligned, that may **meet in person or via web/email** on a regular basis during the year to discuss upcoming deadlines and plans for applications.



III. Facilitate Your Strategy Using a Grant Calendar

A grant team is...

A group of colleagues, that meet to discuss a specific

grant opportunity that an organization plans to apply for and

support the efforts of the lead grant professional/writer.



III. Facilitate Your Strategy Using a Grant Calendar

Once you have BOTH a grant calendar AND a grant team in place...



First confirm:

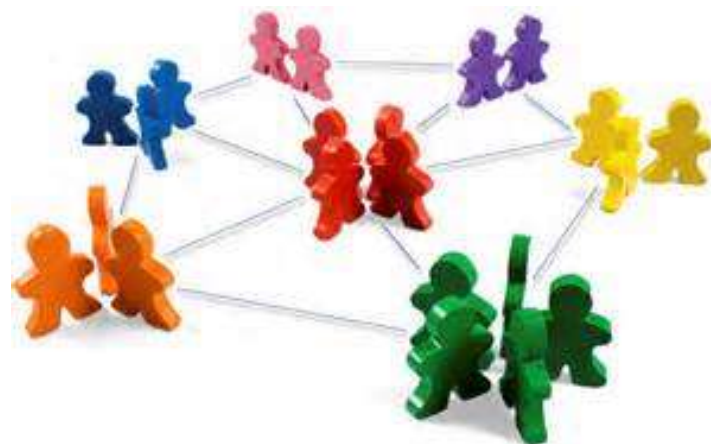
- Who are the annual strategy grant team members?
- Who are the members of the group that review and make decisions on opportunities that come up?



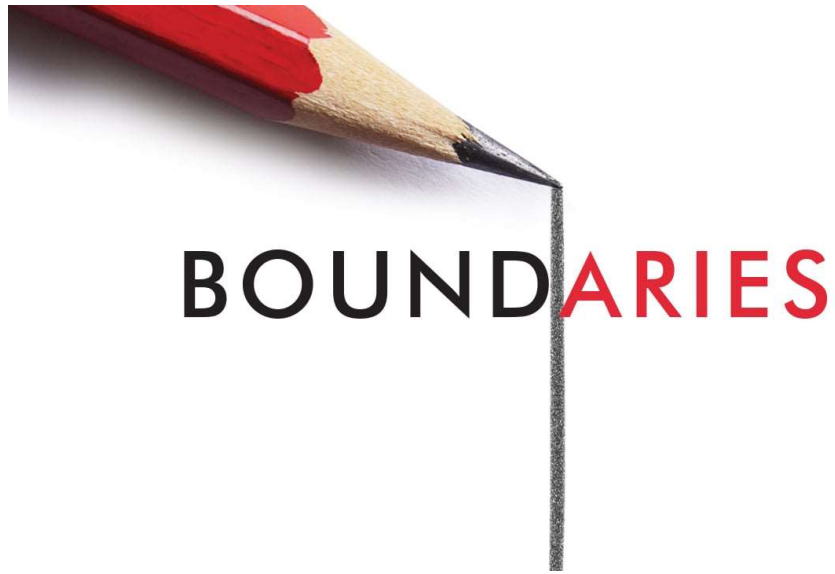
III. Facilitate Your Strategy Using a Grant Calendar

Second, agree on:

- What are team communication norms?
- What tools will the team agree to use in communicating about opportunities?



III. Facilitate Your Strategy Using a Grant Calendar



Third, agree on:

- What frequency are meetings or requests for input expected?
- Where can team materials be found?



III. Facilitate Your Strategy Using a Grant Calendar

Lastly, address:

- Where can the grant calendar grant team documentation be displayed where it is visible to the team?
 - White board in the office?
 - Shared conference room space?



III. Facilitate Your Strategy Using a Grant Calendar

NOW...

Whenever an opportunity comes up, you know:

- Where/if the opportunity fits within the grant calendar
- What information to include in the summary
- Who is weighing in on the opportunity



Grant Calendar Action Guide

Your step-by-step guide to creating a successful
grant calendar



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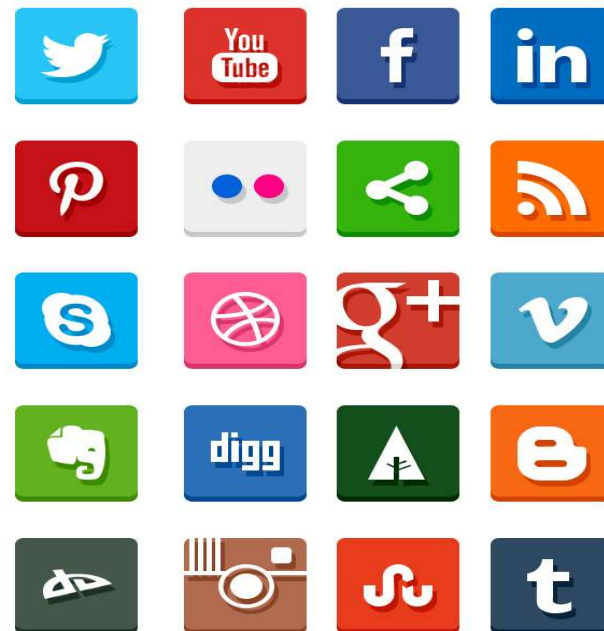
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Questions?



Please enter questions into the question box.

Think of a question afterward?

Email Diane at
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