

HERITAGE BULLETIN

Tips, Ideas & More to Help Preserve Oregon's Heritage

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RESILIENCE SERIES: BOARD INVOLVEMENT IN GRANTS

AUG 2020

Grants are a critical component of funding for most nonprofits. With the funding usually comes some sort of strings attached, most commonly grant reporting. While it is easy to count on one person to seek, apply for, manage, and report on grants, that doesn't always offer the best results. Also, in an emergency, staff/volunteers may not be available, so the board is responsible for following up with active grants and applying for emergency funds. Here are tips to connect the board and others to your grant activities for general best practices and for agility in an emergency.

1. Report Quarterly to the Board on work progress and expectations for the upcoming period.

- a. Proposed applications
 - Project and amount (match and request)
 - Responsible staff or volunteer
 - Use your by-laws, etc. in regard to voting, but every board member should be aware of every application.
- b. Awarded grants –
 - Project and amount (match and request)
 - Timeline,
 - Reporting requirements
 - Responsible staff or volunteer to manage the grant and project.
- c. Completed grants – project and amount, celebrate.



2. Create an annual folder (virtual and real) of grant information – At least two board members, and two staff/volunteers should have access.

- a. Information about the location of complete grant files including receipts, evidence of work completed, etc. Do not keep all of the files here, this is meant to be a quick reference for reporting to the board and in an emergency.
- b. Applications, Not Awarded Section – include one copy of each application.
- c. Active Awarded Grants Section – Include each active grant awarded.
 - i. Active Grants Coversheet for each awarded grant
 1. Funder
 2. Funder contact
 3. Communication information – how to report, login information
 4. Reporting deadlines & types of documentation needed for reimbursement
 5. Responsible board member and staff/volunteer contact
 6. Grant agreement and notification
 7. Grant Guidelines and reporting requirements
 8. Completed Application
 - ii. Completed Grant Section – Include each completed grant awarded
 1. Move everything from the active grants to this section
 2. Final letter or completion information from funder



3. **Applications** – More than one person should review the application and the grant requirements. Ideally at least one board member and one staff/volunteer .
4. **Agreements** - More than more one person should review the agreement. Ideally at least one board member and one staff/volunteer. Follow your by-laws, etc. for signature authority.
5. **Get trained** –Ensure that at least any two board members have training in grant writing. Have them attend a training with you, fund a training, or even have them sit with you as you apply for a grant.
6. **Share the News** – Always let the public know when you have received a grant. It establishes your work as valuable and shows your efforts to manage your organization and builds credibility.
7. **Develop relationships with your funders** – There are a variety of funders and the ways to build a relationship and what you get from it varies. Here are ways to develop a relationship .
 - a. Follow all instructions and guidelines.
 - b. Ask questions.
 - c. Since many grant applications are now online you don't get to have a cover letter. Send a letter of appreciation to them for their program and assistance.
 - d. Give them credit on site and in any media announcements.
 - e. Write a good report.
 - f. Drop an email periodically with an update of your work, even if you aren't in an active grant.
 - g. Thank them. Did we say that already? Yes? Thank them.



Additional Resources

- [Heritage Bulletin #10 - Grant Administration at a Glance](#)
- [Heritage Bulletin #31 - Grant Writing Tips](#)
- [Heritage Bulletin #2 - How to Spread the News](#)
- [Heritage Bulletin #36 - Resilience Series: Board Agenda](#)
- [Oregon Heritage Grants Manuals and Tips for the OPRD Grant Management System](#)

The Resilience Series of Heritage Bulletins helps organizations keep their focus on best practices during recovery.

