PEAK GRANTMAKING + GivingData + THE STARR FOUNDATION

Navigating Grants Management Roles in a Foundation's Strategic Journey

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Our Mission

To provide purpose-built grants management tools that unite funders and grantees in a shared mission to focus on what matters most — working collaboratively to solve problems and increase impact.

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Our Goals for Today's Webinar

1. Show how we applied what we learned at PEAK2023.

2. Provide some frameworks and tools that you can use to explore strategic roles in your organizations and in your own professional journey.

3. Share stories to illustrate the roles that grant managers can play in a foundation's strategic journey.

Our Plan

1. Framing the conversation
2. Identifying Strategic Roles
3. Q&A
4. The Roles in Action (Stories)
5. Q&A
6. Final Reflections and Recommendations

Our Inspiration

“Be there, be inspired, and be a vital part of our movement to transform philanthropy.”

Our Inspiration

KEYNOTES

MONDAY KEYNOTE
Monday, May 8 | 9:00–10:30 a.m. ET

Grants Management as a Strategic Partner

Although they are poised to lead change within their organizations and for the field, grants management and operations staff don't always have a seat at the table when foundations are developing or executing organizational strategy. For our opening keynote, Tanisha Davis will facilitate a conversation with the CEOs and grants management leads from two foundations—Bainum Family Foundation's David Daniels and Miyesha Perry and Stupski Foundation's Glen Galaich and Gwyneth Tripp—to discuss how their respective teams serve in central, strategic roles to drive equity and change and to strengthen relationships with nonprofits and the communities they serve.

Session Details

Exploring Roles at Work: Are you playing with a full deck?

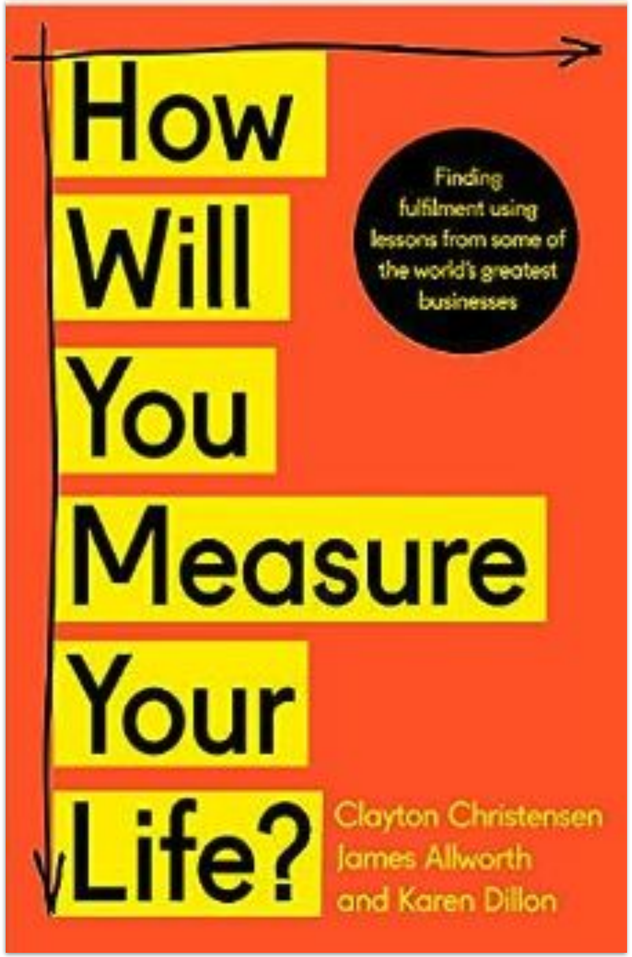
Tue, 5/09, 9:00 AM - 9:30 AM ET
30 minutes

Spark Talk
Essex ABC

Grantmakers manage a lot of expectations about their work. We've talked with hundreds of grantmakers about what their foundations and grantees expect of them to get their work done—and what they expect of themselves. Candid Learning for Funders' card deck, Roles@Work, first developed inside the Ford Foundation, is a tool containing the roles grantmakers mentioned most often. (There are a few wild cards too.) Recently redesigned, updated, and expanded, the deck now also includes roles you can use to engage with your grantees.

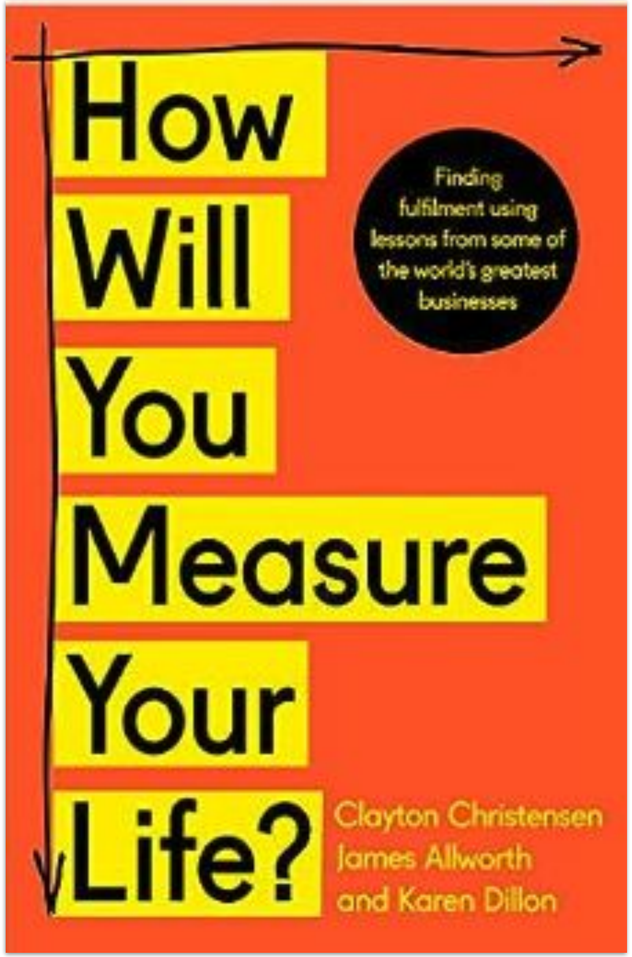
Defining Strategy

*"At a basic level, a strategy is **what** you want to achieve and **how** you will get there."*

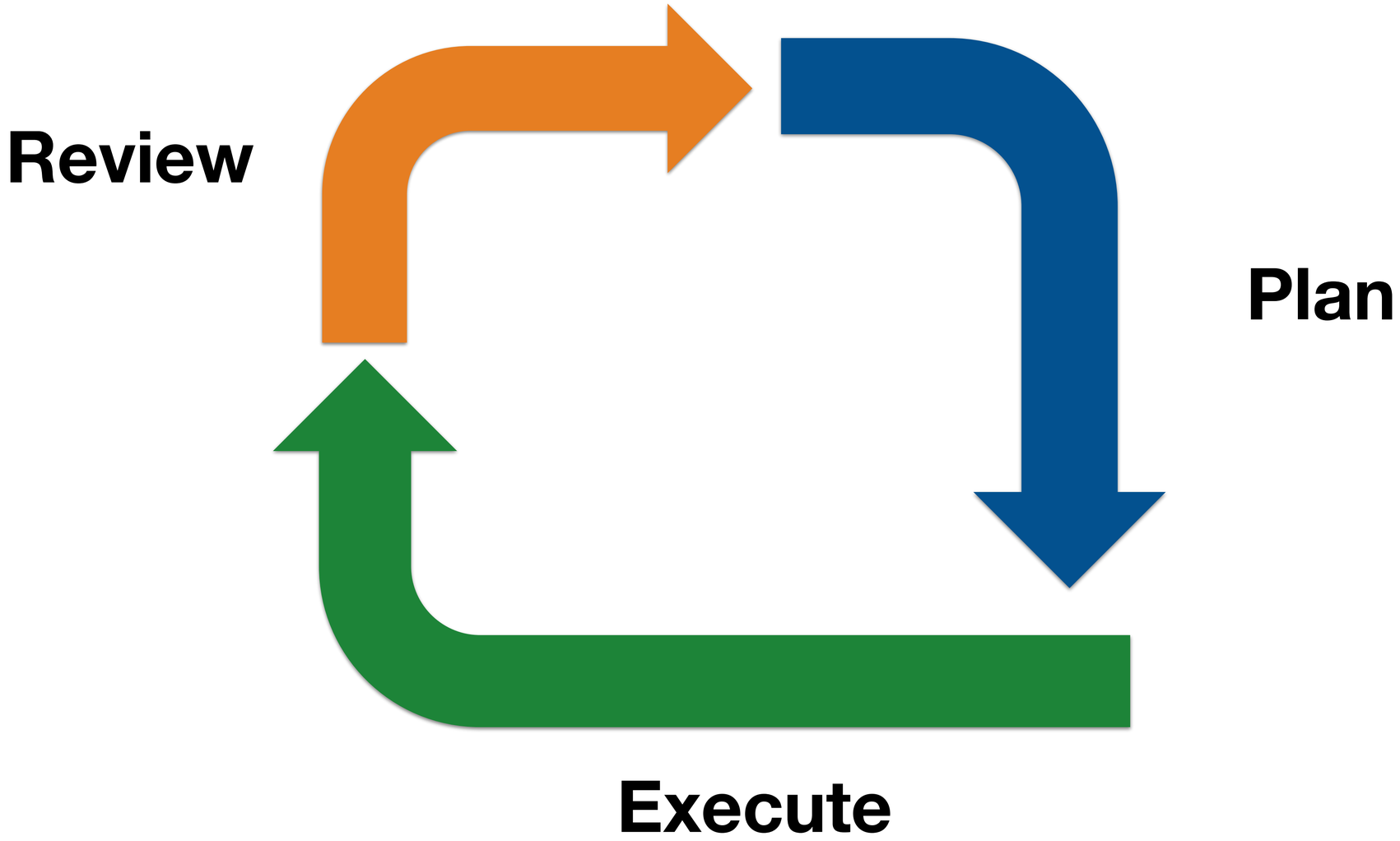


Strategy is about Making Choices

- What are your **priorities**?
- How do you respond to **opportunities** and **challenges**?
- How do you allocate your precious **resources**?



The Strategy Lifecycle



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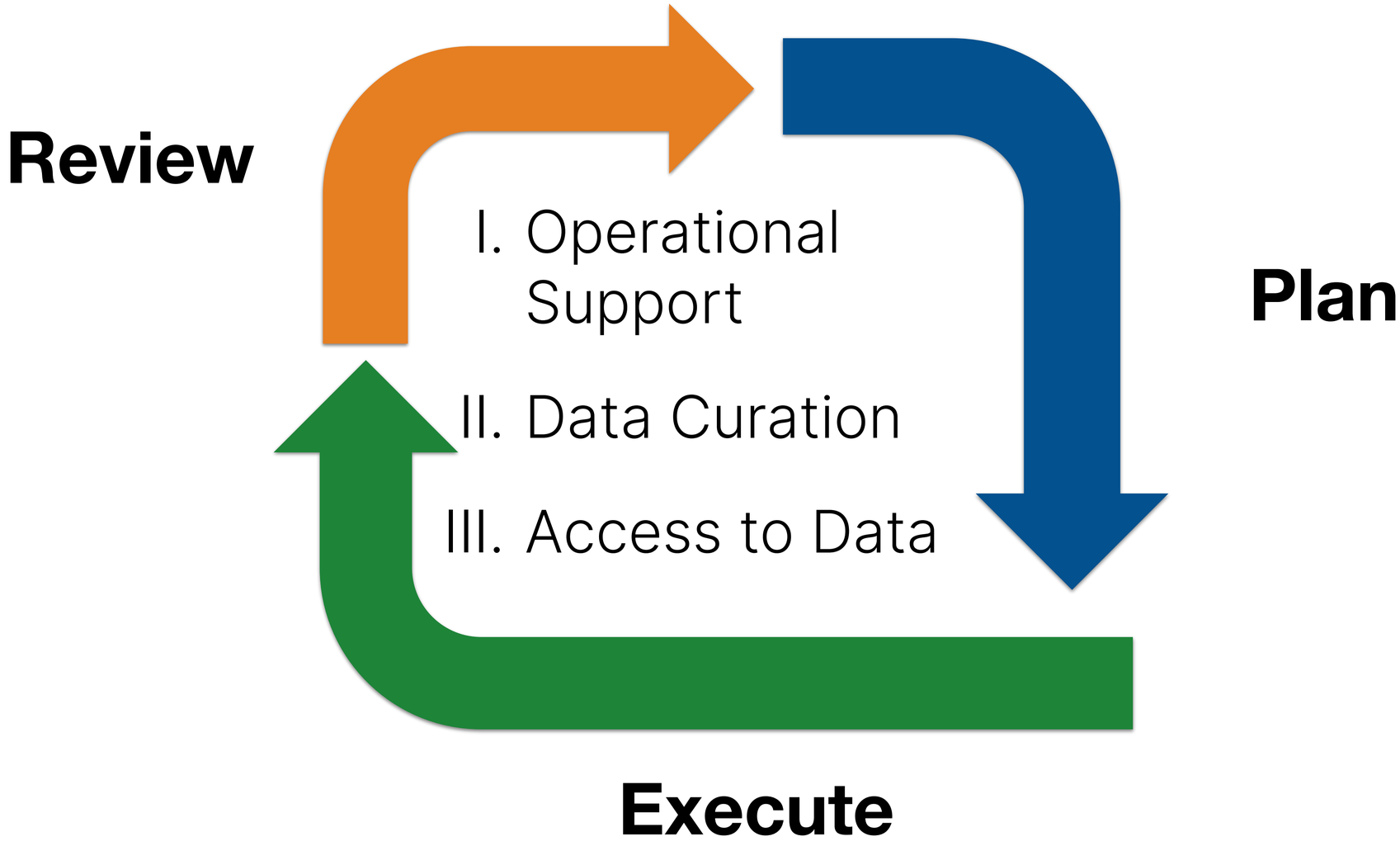
Grants Managers Support the Strategy Lifecycle with a Combination of Rigor and Creativity



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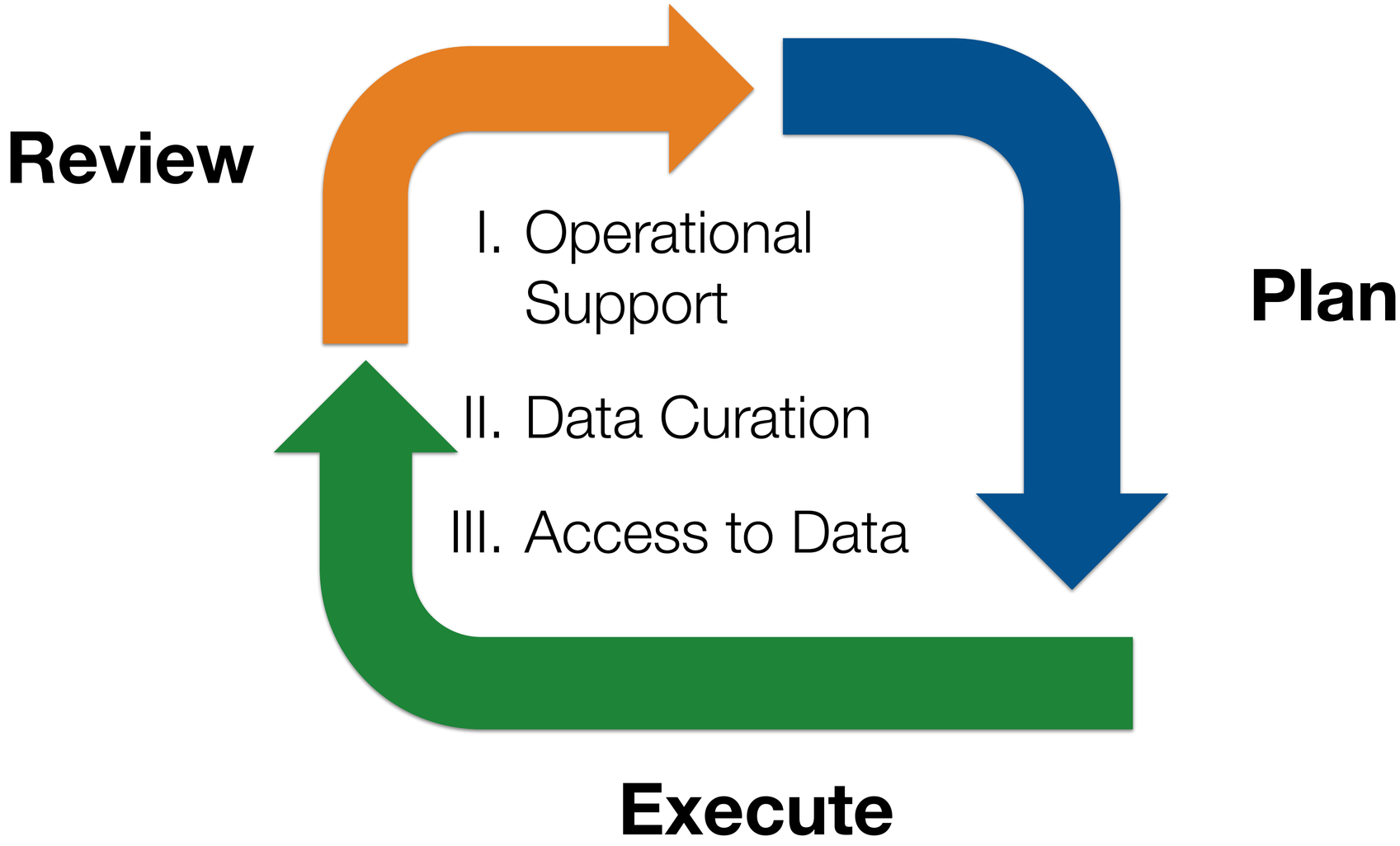
Our Plan

1. Framing the conversation
2. **Identifying Strategic Roles**
3. Q&A
4. Showing the Roles in Action (Stories)
5. Q&A
6. Final Reflections and Recommendations

How Grants Managers Support the Strategy Lifecycle



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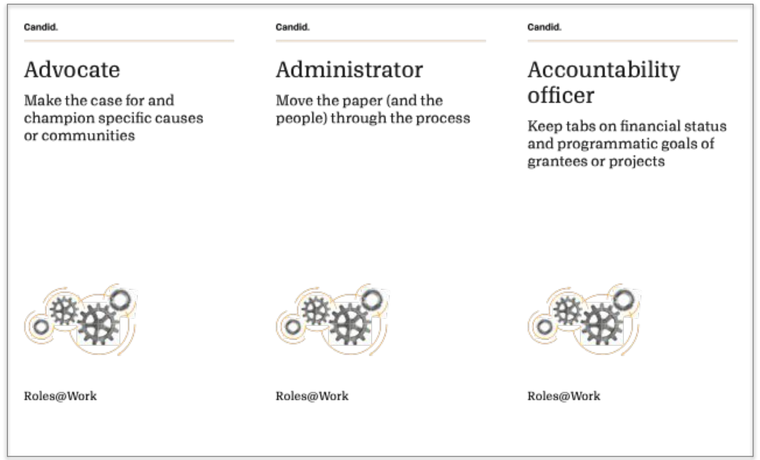
Candid Learning: Roles@Work



Source: https://learningforfunders.candid.org/content/tools/roleswork/

I. Providing Efficient Operational Support

Administrator

Move the paper (and the people) through the process

Bridge builder

Make it possible for strange or unlikely partners to work together

Collaborator

Partner with a variety of sector colleagues to achieve shared goals

Consultant

Provide advice or expert assistance to funders and/or grantees

Includer

Ensure no one needed for a task is left out of the work by creating processes that allow for diverse inputs

Planner

Think, organize, and act tactically to get something done

Strategist

Create and sell a long-term plan of action to achieve a particular institutional goal

Streamliner

Steward resources responsibly by developing more efficient back-office processes

Translator

Help diverse internal and external stakeholders understand one another's needs, priorities, and operating contexts

II. Curating Data

Accountability officer

Keep tabs on financial status and programmatic goals of grantees or projects

Fact finder

Collect, analyze, and share quantitative and qualitative data needed to inform decisions

Scanner

Gather information from many sources as a prelude to grantmaking or programmatic action

Sounding board

Actively listen to learn from ideas and opinions representing diverse points of view

III. Facilitating Access to Accurate Data to Inform Decisions & Work

- **Advocate**

  Make the case for and champion specific causes or communities

- **Analyst**

  Evaluate strategies, review proposals and/or outcomes, assessing situations with an objective and dispassionate eye

Disturbance generator

Help colleagues, grantees, and/or stakeholders question assumptions

Impact assessor

Determine whether or not outcomes are worth the investment and how lessons can benefit future work

Knowledge sharer

Field expert who keeps others abreast of insights, new ideas, and developing trends

- **Storyteller**

  Amplify organization's stories to build the case for connection, collaboration, and support

Validator

Affirm good work by grantees, partners, and/or others in the field

Q & A

Our Plan

1. Framing the conversation
2. Identifying Strategic Roles
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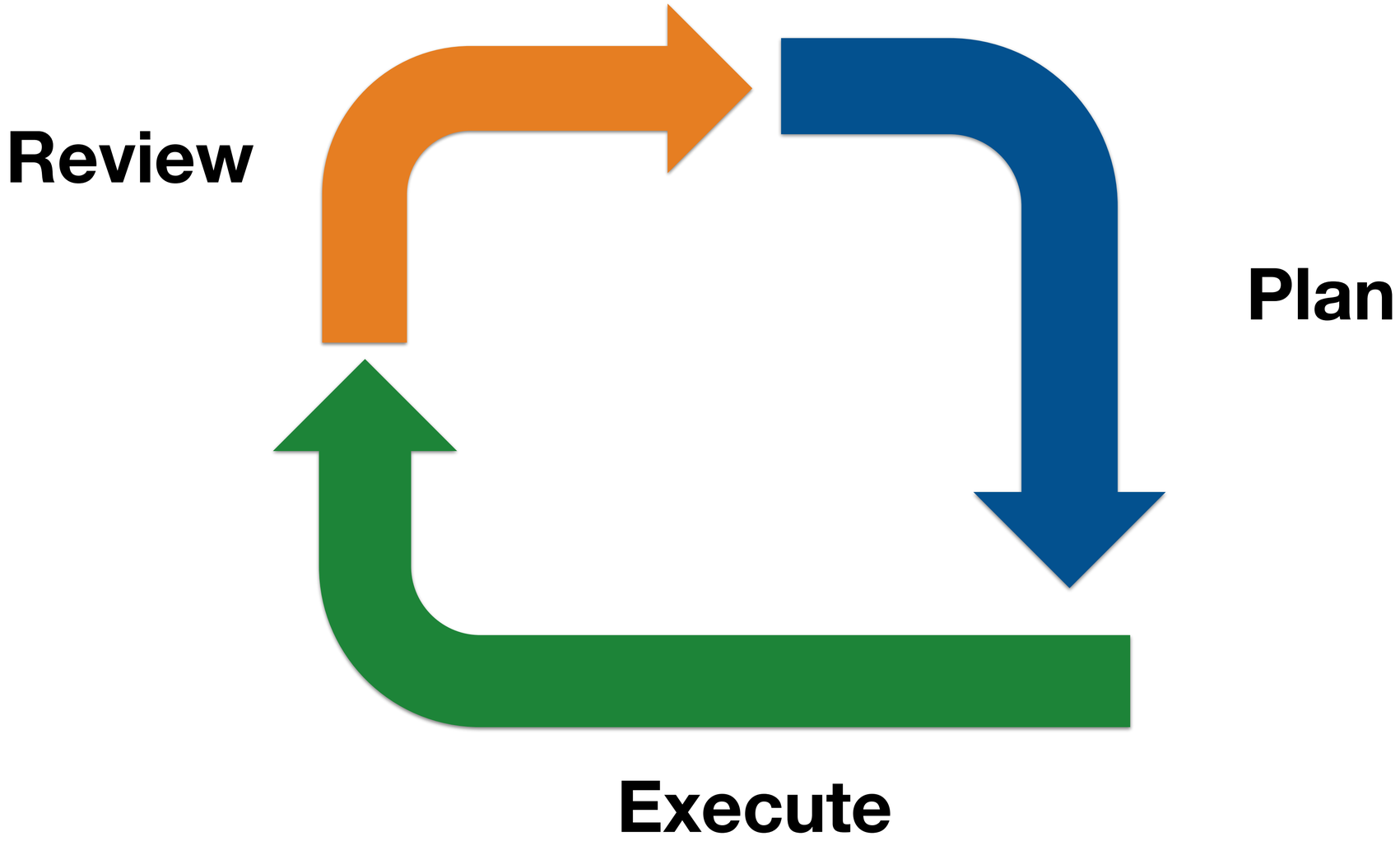
4. **The Roles in Action (Stories)**
5. Q&A
6. Final Reflections and Recommendations

The Strategy Lifecycle



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I. Planning the Transition to a New GMS

Collaborator

Partner with a variety of sector colleagues to achieve shared goals

Translator

Help diverse internal and external stakeholders understand one another's needs, priorities, and operating contexts

Strategist

Create and sell a long-term plan of action to achieve a particular institutional goal

II. Evaluating an Unsolicited Proposal

Execute

Advocate

Make the case for and champion specific causes or communities

Scanner

Gather information from many sources as a prelude to grantmaking or programmatic action

Accountability officer

Keep tabs on financial status and programmatic goals of grantees or projects

III. Strategy Review

Review

Fact finder

Collect, analyze, and share quantitative and qualitative data needed to inform decisions

Storyteller

Amplify organization's stories to build the case for connection, collaboration, and support

Analyst

Evaluate strategies, review proposals and/or outcomes, assessing situations with an objective and dispassionate eye

Q & A

Reflection & Recommendations