



Grant Strategy Lead
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BEYOND THE SUBMISSION:

Automating stewardship for high-growth grant partnerships

April 9, 2026

Welcome and introductions

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- Co-founded 10 year old nonprofit
- Grant writing and nonprofit professional
- Based in Louisville, Kentucky



In the chat share in 1 sentence or less:
What is your org and what change are you making in the world?

WELCOME AND
INTRODUCTIONS

How I feel about
grantwriting and
fundraising:



What to expect for today: Outcomes

1. **Build** a proactive stewardship engine to manage relationships without the administrative burden
2. **Transition** from a transactional fundraiser to a strategic partner through modern workflows
3. **Master** a repeatable formula to transform raw data into high-impact mission updates
4. **Reclaim** time for high-level strategy by streamlining your follow-up and reporting processes

What to expect for today: Sections

1. **Phase 1** – The hook and the mindset shift
2. **Phase 2** – The framework
3. **Phase 3** – Deep dive and live demo
4. **Phase 4** – Scaling and expansion

Housekeeping

1. This session is being recorded
2. The recording will be available here later today
 - Later this month, we'll add it to the Learning Hub (accessible in your Partner Portal)
3. The slide deck can be downloaded below
4. This session is CFRE-approved for 1.0 continuing education credit

01

Phase 1: The hook and the mindset shift

Question: Please answer the poll

How often do you contact a funder without asking for money?

- A) Frequently
- B) Occasionally
- C) Only when required
- D) Honestly, never





The send fallacy

The moment you hit send isn't the finish line; it's the starting block. Most fundraisers go radio silent until the report is due.

The paradigm shift

From checking a box to building a partnership

The transactional fundraiser

Silent between submission and reporting.

Views the funder as a bank.

Data is shared because it is required.

Renewal is a gamble.



From checking a box to building a partnership

The transactional fundraiser	The strategic partner
Silent between submission and reporting.	Proactive with consistent impact snapshots.
Views the funder as a bank.	Views the funder as an investor.
Data is shared because it is required.	Data is shared because it is cultivation.
Renewal is a gamble.	Renewal is a formality.



02

Phase 2: The framework

The stewardship engine

Moving from manual emails to a proactive system



The stewardship engine

Moving from manual emails to a proactive system



Feature	The manual trap (reactive)
Triggers	Calendar alerts or funder "Where is my report?" emails.
Process	Scrambling for data and drafting every email from scratch.
Result	Inconsistent communication and request-heavy relationships.



The stewardship engine

Moving from manual emails to a proactive system



Feature	The manual trap (reactive)	The stewardship engine (proactive)
Triggers	Calendar alerts or funder "Where is my report?" emails.	A repeatable, scheduled monthly workflow.
Process	Scrambling for data and drafting every email from scratch.	Data is captured once → Synthesized → Distributed via templates.
Result	Inconsistent communication and request-heavy relationships.	Constant visibility and value-heavy partnerships.



The stewardship engine

Three components of the engine

1. The intake

A simple, low-friction way to collect wins and stats from your program team (the raw fuel).

2. The processor

The digital workflow that cleans that data into funder-ready language.

3. The output

The automated delivery of no-ask updates and impact snapshots



The stewardship engine

How much of your current stewardship is 'reactive' (responding to requests) versus 'proactive' (sending updates they didn't ask for)?

- A) 90% reactive / 10% proactive
- B) 50% reactive / 50% proactive
- C) 100% proactive (the unicorn)



Update



Synthesizing data for impact

How to take raw program numbers and turn them into a 3-sentence win update

The fist bump (the raw data)

Method 1 Performing a Traditional Fist Bump

Download Article



1 Ball your hand up into a fist. Press the tips of your fingers into your palm so that your hand makes a fist. This will be the position that you keep your hand in for the bump.^[1]

Method 1 Performing a Traditional Fist Bump

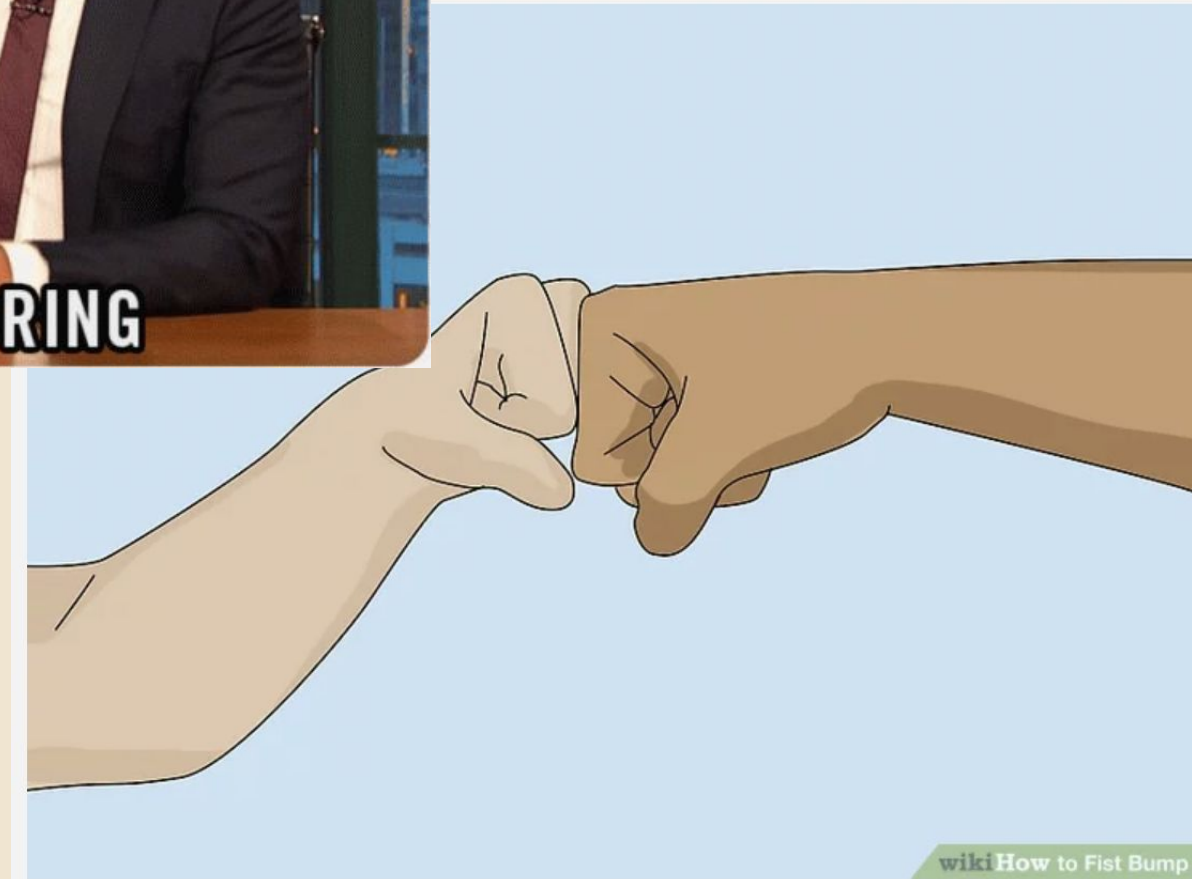


2 Put your fist out in front of you. Place your fist in front of your body with your knuckles facing up. Look at the other person to see if they are going to reciprocate. If they don't notice that you want to fist bump, look down at your hand so that they realize what's going on.



Method 1 Performing a Traditional Fist Bump

Download Article



3 Push your arm slowly and touch the other person's knuckles. When the other person puts up their fist, push your arm forward so that your knuckles meet with their knuckles. Don't do it too hard because it could hurt them or come off as aggressive.

The fist bump (turned into creative wins)



The processor: Turning raw numbers into investor wins

The three-sentence synthesis formula



The processor: Turning raw numbers into investor wins

The three-sentence synthesis formula

Use this repeatable structure to filter raw data into a high-impact message:

- 1) The baseline: State the specific metric or milestone.
- 2) The context: Explain why this matters or how it compares to your goals.
- 3) The human element: Connect the data to a specific community result.

Raw program data

Our job training program had 40 people show up last Tuesday. 35 of them finished the module on interview skills.



The processor: Turning raw numbers into investor wins

The three-sentence synthesis formula

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- 3) The human element: Connect the data to a specific community result.

Raw program data	The 3-sentence win
<p><i>Our job training program had 40 people show up last Tuesday. 35 of them finished the module on interview skills.</i></p>	<ol style="list-style-type: none">1. The baseline: Last week, 88% of our cohort mastered advanced interview techniques.2. The context: This represents a 20% increase in module completion since we updated our curriculum.3. The human element: Because of this mastery, five participants have already secured mock interviews with local corporate partners.



The processor: Turning raw numbers into investor wins

The three-sentence synthesis formula

Use this repeatable structure to filter raw data into a high-impact message:

- 1) The Baseline: State the specific metric or milestone.
- 2) The Context: Explain why this matters or how it compares to your goals.
- 3) The Human Element: Connect the data to a specific community result.

Your turn

Rewrite this in the chat using the formula:

- The prompt: Our youth soccer program ran for 10 weeks and we gave out 50 pairs of cleats.
- Example: We equipped 100% of our participants with proper gear, ensuring that 50 local kids could play safely and confidently for the entire season.



Question: What is the biggest barrier keeping you from consistent stewardship right now?

→ Drop your barriers in the chat



03

Phase 3: Deep dive and live demo

The content waterfall

How one long-form annual report becomes 12 monthly updates and 4 digital impact snapshots



The content waterfall

Don't work harder—repurpose your synthesized wins. A single "3-Sentence Win" can be transformed into various formats to keep your mission top-of-mind across different channels.

Format	The Transformation	Goal
Personal Email	The no-ask check-in template we discussed.	Build 1:1 trust with a Program Officer.
Digital Snapshot	A branded graphic with the metric + the 1-sentence story.	High-visibility update for LinkedIn or newsletters.
Board Report	A wins bullet point in your monthly executive summary.	Demonstrate internal momentum and health.
Future Proposal	A proven impact blurb for your next LOI.	Reduce the labor of your next submission.



The content waterfall

The Anatomy of an Automated Win

The Resulting Email:

Subject: ● Quick Update: Your impact at [Program Name]

Hi [Funder Name],

● I was looking at our recent data and wanted to share a quick win with you.

● The Milestone: Last month, we hit a new high-water mark: [450 students enrolled]. This is a [15% increase] over our goal.

● The Story: One student, [Name], told us that this program was the first time they felt confident enough to [Action, e.g., apply for a summer internship].

● No response needed—just wanted to show you the direct result of your partnership.

Best,

[Your Name]



How the engine works:

● Blue: The Anchor (Static) – Stays the same for every funder

● Green: The Variable (Data) – Pulled directly from your program updates

● Yellow: The Flare (Story) – A one-sentence human touch

Automating the no-ask check-in

1. The Input (The Data Dump):

- A simple spreadsheet or a 3-sentence internal program update.
- Example: "We fed 200 families this week. It was raining but we had 10 volunteers."

2. The Engine (The Synthesis):

- Using your modern workflow (the blueprint) to clean and polish that raw data.
- The Shift: Turning "rain and volunteers" into "Resilience and Operational Efficiency."

3. The Output (The High-Value Touchpoint):

- The "No-Ask" template we just discussed, ready to send.



Automating the no-ask check-in

- **Interactive element: The live remix**
- Let's turn boring data into a savvy check-in using the chat.
- A dry fact: *Our literacy program served 50 kids this week.*
- Question - How do we make this an 'investment win'? - enter your thoughts into the chat
- Possible example: *Because of your support, 50 local kids spent 100 hours reading this week—that's a 20% jump in engagement since January.*



The power of "no response needed"

- This is the most powerful phrase in stewardship
- It removes the 'work' from the funder's inbox
- It's a pure gift of information



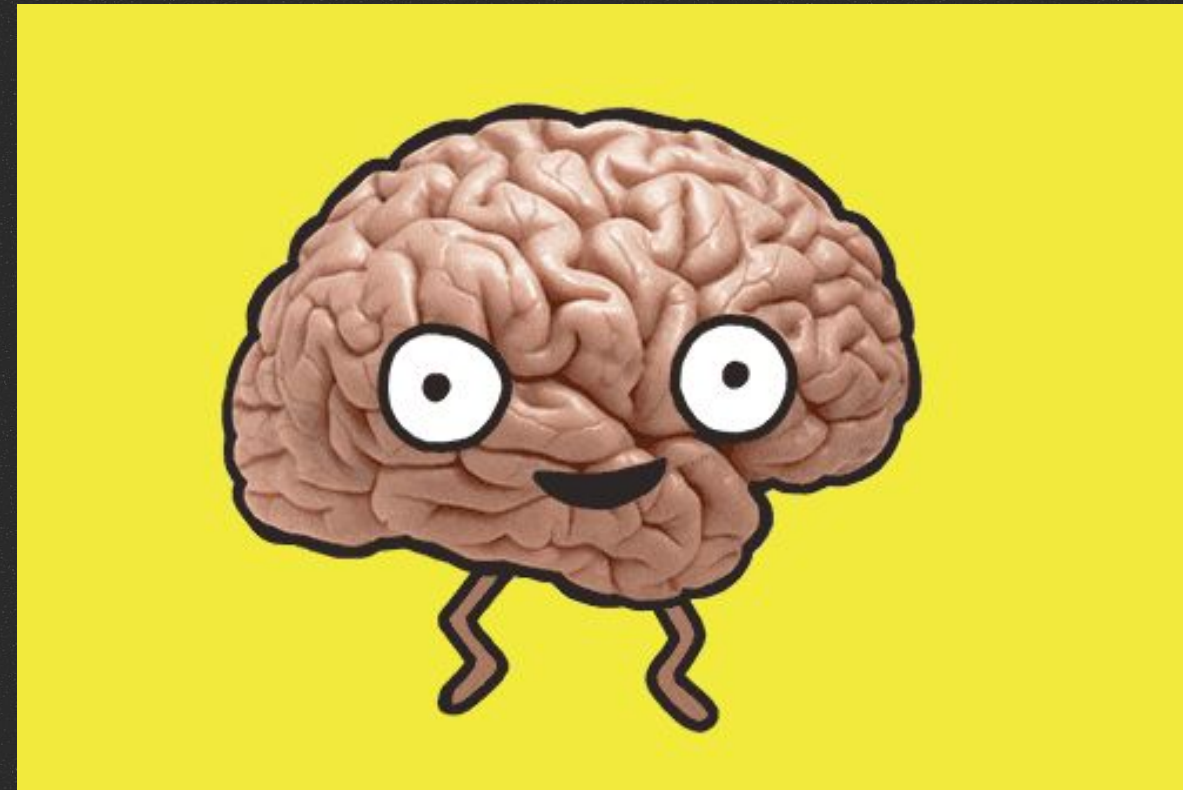
The 60-second rule

- A check-in shouldn't take you an hour to write
- If your data is organized, this email should take 60 seconds
- We are building the engine so you can send five of these on a Tuesday morning while you drink your coffee



Predicting the future

When this funder sees your name in their inbox three months from now for a renewal, their brain is already wired to associate you with wins, not requests



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Phase 4: Scaling and expansion

The math of automation

Reclaiming your calendar

The manual way (old school)

Drafting - Writing every thank you and update from scratch.

Digging - Searching through messy reports for hours.

Anxiety - Worrying about the 6-month donor silence.

Cost - lengthy hours per week of administrative labor.



The math of automation

Reclaiming your calendar

The manual way (old school)	The savvy way (the blueprint)
Drafting - Writing every thank you and update from scratch.	Workflow - A single, streamlined data-synthesis process.
Digging - Searching through messy reports for hours.	Templates - Using modular anchor, data, and story blocks.
Anxiety - Worrying about the 6-month donor silence.	Batching - Sending high-impact updates all at once.
Cost - lengthy hours per week of administrative labor.	Cost - minimal time per week of strategic management.



The math of automation

Where do your reclaimed hours go?

- Stop maintaining | Start expanding
- Prospecting: Identify 5 new high-growth partners this month.
- Deep Connection: Coffee with a Program Officer instead of emailing them data.
- Long-Range Vision: Mapping your multi-year funding strategy for 2027.
- The Goal: Automation handles the maintenance so you can lead the growth.



Question

If a workflow took over your follow-up emails tomorrow, what is the ONE high-level project you've been putting off that you would finally be able to start?

[Drop your project in the chat now]

The final summary

As we wrap-up

Build the engine first - Set up your communication workflow immediately after the award.

Synthesize, don't summarize - Turn raw data into bite-sized impact snapshots for funders.

Master the no-ask check-in - Use the anchor-data-story formula to stay top-of-mind.

Stewardship as strategy - Treat automated updates as your best move for future renewals.





The bottom line

Strategic partners don't just
report on the past; they build
confidence in the future.



Thank you.

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