

Grant Developer: Major Key to His Success in Winning \$162 Million In Grants is Compression Planning®

Increases productivity 33%, becomes the Gold Standard for Grant Writing, Receives Lifetime Service Award

Customer Details:

Neil Herbkersman, Owner
Benchmark Grants, LLC.

Industry:

Grant Development and Idea
Creation

Challenges:

- Proposals start off as vague and fuzzy ideas with no real specific details or direction
- Using Nominal Group Technique, but did not feel was very efficient
- Development was long, tedious, and circuitous
- Would leave planning meetings with no definitive assignments or deadlines
- Needed something to set his college apart as his department was competing with major colleges and universities

Solution:

Attended McNellis Compression Planning® Institute and implemented Compression Planning®

Benefits:

- Increased productivity by 33%
- Became Gold Standard for grant proposal development
- Raised over \$162 million in grant funding over 26 years
- Founded and owns a successful consulting company, Benchmark Grants, LLC
- Ambassador/Advocate for Compression Planning®

BACKGROUND:

In early 1990, Neil Herbkersman was working as the Director of Grants Development for Sinclair Community College (Dayton, Ohio). In that capacity, he was regularly called on to attend meetings with college and university leaders to formulate and craft grant proposals. On one such occasion Mr. Herbkersman was asked by a Sinclair vice president to attend a meeting with the Ohio Board of Regents in Columbus. The goal of the meeting was to collaborate with seven other colleges to create a grant proposal for submission to the Ohio Department of Job and Family Services. The colleges were to divide Ohio’s 88 counties into service delivery areas, along with all the specific planning, details, and coordination for a program for current worker training

Recalling that day Mr. Herbkersman shared, “I went into that meeting prepared for the worst. It was on a Friday afternoon in May and the weather was glorious—ideal for golfing. On the drive from Dayton to Columbus I took two extra strength Tylenol tablets to ward off the headache I knew I was going to get, and I purchased a can of Coca Cola to keep me awake.”

When Herbkersman walked into that Ohio Board of Regents meeting, he didn’t know he was about to experience a life changing event.

Coca Cola in hand, he walked into the room at 1:00 and immediately noticed something was different. “I get there and the facilitator had storyboards on easels,” he said. “It was amazing. The facilitator used these storyboards and cards and we planned the entire project, accomplished everything we needed for a \$2.3 million project, and were out of the meeting by 5:00 pm.” He had never seen such productivity. After a four-hour session, he had a fully detailed and comprehensive plan that he could report to the vice president who asked him to attend.

Before leaving he asked the session leader to share the secret of this process. “I said tell me what this is. I need to know and understand more about it. The facilitator gave me a toll-free telephone number for McNellis and Associates.”

The following Monday he contacted McNellis and Associates and found what would help him out-compete other colleges; he discovered Compression Planning® and immediately made plans to take the training and adopt the methods as the standard operating procedure for Sinclair’s grants office.

“I just wonder how many boring, unproductive meetings I would have led had I not attended the Compression Planning® training.”

BACKGROUND CONT:

Grant writing is not for the faint of heart. The fate of hundreds and perhaps thousands of students, with minds eager to learn, have their hopes and futures tied directly to the success or failure of the proposal crafted by a team of dedicated people. “I don’t interact with a single student, but everything I do is to help them,” shared Herbkersman. “These grant projects take our students, give them hope, and educate them for professions with family-sustaining salaries.” He thoroughly enjoyed his position with Sinclair and found it immensely rewarding; however back in 1990, the meetings tended to be long and circuitous. That was, of course, before he discovered the power of Compression Planning®.

THE CHALLENGE:

All proposals start off the same way, as “fuzzy ideas in people’s heads”. The key to a good proposal is turning that fuzzy and vague meandering trail into a concrete path, with each brick perfectly sculpted and in its proper place.

Prior to discovering Compression Planning®, Herbkersman used the standard communication tool called Nominal Group Technique. While it worked, he felt it was inefficient. “I would tape record meetings and then go back and listen for hours. The standard business meeting typically goes in circuitous movement, meandering through ideas.” This lack of a cohesive and forward moving momentum meant time was wasted skipping around, trying to pick apart and tie together all of the different pieces of the plan. “It was just tedious” he shared. Often this lack of clear direction resulted in long meetings, which seemed productive at the time. However, once he returned to the office after a meeting there was no fully definitive plan. Good ideas had been batted about, but there would still be confusion as to who owned what and when tasks were due. With so many moving parts and the sheer number of people required on each proposal, even the smallest miscommunication could be magnified, causing confusion and potentially grind a major project to a standstill costing the college millions in lost grant income.

Herbkersman’s department at Sinclair had to compete for every grant; they needed something that would set them apart. They needed to out-compete the major colleges and universities that were also vying for the same funds.

THE SOLUTION—COMPRESSION PLANNING®:

When asked how Compression Planning® helped him, Herbkersman explained, it helped him “To lead groups and help them take fuzzy concepts to craft a fully-planned project, to take the project from idea to proposal.” Proposals must have elements such as a need, goal, objectives, activities, management plan, dissemination plan, evaluation plan, and a budget. “People don’t think in those terms; they think ‘this is what I want to do, these are the people I want to help.’”

Compression Planning® provided Herbkersman a clear, defined, repeatable process that did not stifle but rather stimulated creativity and group contribution. He explained that Compression Planning® utilized all of the viable fuzzy ideas by ensuring they were fully developed, discussed, expanded on, and vetted. Using this system, the people that would actually be assigned and responsible for the individual tasks and pieces of the project would provide the input on their needs for implementation, as well as having them set realistic and timely deadlines.

THE RESULTS:

Increased productivity by 33%

After attending the McNellis Compression Planning® Institute, Herbkersman estimates his productivity increased by at least 33%. “It just revolutionized the grant processes at Sinclair. We were able to get the fuzzy thoughts into a project faster, more effectively, and to create better projects than anyone else in the county.”

Using this technique the team was able to operate at optimal efficiency. Herbkersman had a department with only three people, yet they were churning out

“We were out-competing universities and community colleges in Ohio and across the county because we were using this ‘thinking technology’ to develop our projects.”

around 140 projects per year. When asked how such a small department was able to maintain that pace, averaging a deadline of 2.5 detailed projects every week,

he replied, “We used Compression Planning® for every large project and for keeping the department organized.”

Became Gold Standard for grant proposal creation

Using Compression Planning®, the Sinclair Grants Office won 68% of the grant proposals that were created during his 26 year tenure with Sinclair. During that time frame there were nearly 3,000 projects completed.

The Dayton Daily News published an article on Herbkersman’s retirement from Sinclair offering glowing praise, stating his grant proposals have been distributed nationally as best practices, and his office has been cited as a national benchmark for productivity. Sinclair spokesman Adam Murka was quoted as saying, “Neil is everything that’s right about what we do here. He is proof of what a difference a talented person can make.”

With \$20.7 million dollars in grants won from the coveted National Science Foundation, his Grants Office’s reputation for success was undisputed in the community college grants industry. It eventually reached the point that other major universities and colleges were seeking out Sinclair as a partner. “Purdue University would submit a proposal and they would want us to be their partner, so we were partners with Purdue; next it was Carnegie Mellon University.

Herbkersman credits much of his success to McNellis and Associates and Compression Planning®. “Since 1990, Compression Planning® was the genesis for every large, important project!”

He also shared that because his department was such a success, it was regularly asked for assistance on other projects and that led to some amazing experiences for him. “We had two grants working in India. Twice I had the peak experience of visiting the Taj Mahal. I’ve had countless great experiences working on proposals however, how do you top the Taj Mahal?”

His Compression Planning® assistance has gone beyond higher education as well. “I helped a minister friend revitalize the administration of his church. I helped a local County Commissioner think through a major issue related to regionalization.” Herbkersman and his team also assisted the Board of Regents on multiple occasions. This caught the eye of a former Ohio First Lady, resulting in a formal invitation for Compression Planning® sessions at the Governor’s Mansion in

Columbus. The First Lady had been working on an exhibit for a timeline of Ohio geology to educate young people that rocks are important, and to show how the bedrocks beneath the soil dictates land use. The project, once completed, was permanently installed at the fairgrounds in Columbus. “Using Compression Planning® I helped them think through the project and the Ohio Department of National Resources has created a permanent exhibit at the Ohio Expo Center in Columbus. It pretty amazing all of the projects I’ve been a part of because I use Compression Planning®.”

Herbkersman was awarded the Lifetime Service Award in 2002 presented by the Council for Resource Development, an affiliate of the American Association of Community Colleges. The accolade was based on his extraordinary contributions to the Council for Resource Development at the national, regional, and state levels.



Raised over \$162 million in grant money

Over his 26 year tenure, the Sinclair Grants Office raised over \$162 million dollars, translating to \$2,500 per hour for his department. The grants came from many sources—National Science Foundation, U.S. Department of Education, U.S. Department of Health and Human Services, U.S. Department of Labor, and the Bill and Melinda Gates Foundation to name just a few.

Not only was he able to secure funding from various sources, but the amount and consistency over the years was record breaking. “My last big project was a \$12 million award from the U.S. Department of Labor—which started as a Compression Planning® session in Austin, Texas. The project involved partners across the country.”

The Sinclair Community College President, Steven Lee Johnson, Ph.D., has been quoted as saying, “Over 26

years, there have literally been a couple hundred thousand students at Sinclair alone that have benefited from programs and grants that he has worked on. It's really incredible."

Founded and owns a successful consulting company

Once Herbkersman retired from Sinclair, he still felt the call to share the message and success with others; this inspired him to form Benchmark Grants LLC. The company provides clients with proposal writing, editing, and writing; facilitation; and project planning.

"I want to arm community college grants offices with a tool that could make them more effective and be better at competing for grant awards." He has given presentations

"A lot of those grants save young people's lives. The education and support helps them complete college and enter jobs earning family sustaining wages. That's what keeps you going."

on Compression Planning®, with the additional tweaks he had developed that applied specifically to the grant writing industry. He knew this process would help others adapt in the community college environment, allowing them the competitive advantage they needed to secure additional grants.

Ambassador/Advocate for Compression Planning®

Though a fan, student, and implementer of McNellis Compression Planning®, Herbkersman did not meet Jerry McNellis personally until he had been using the method for almost a decade.

"Back in 1999, I rented storyboards from McNellis because I was leading a session in Provo, Utah. When I got to the college, I found that the storyboards were not there so I panicked. I called Matt, the young person in the McNellis shipping department back then. I said Matt they're not here. He said let me do some checking and I'll call you back." When Matt returned the call he had completely resolved the issue; totally diffusing what could have been a potentially disastrous situation.

"I wrote a 'thank you' letter to Jerry, thanking him for the tremendous customer service provided by Matt."

Shortly thereafter Herbkersman received a phone call from a man saying, "Hi, I'm Jerry McNellis. We've never met, but I want to thank you for your letter." In 2000 when they met in person, they instantly hit it off. "We just became lifelong friends," said Herbkersman.

Herbkersman feels so strongly about Compression Planning® that he collaborates with McNellis and Associates annually. Together, they provide Compression Planning® training to foundation, alumni, and grant development professionals at community colleges.

To learn more about how Compression Planning® can dramatically increase your success rate in resource development, call us at **1.800.569.6015**.

www.mcnellis.com

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CREATIVE PLANNING.**

