



# MARYLAND GOVERNOR'S GRANTS CONFERENCE

Grants 101: Nonprofit Roadmap to Success

**Jennifer B. Jones**

**Your non-profit business is a business!**

A handwritten signature in black ink, consisting of several loops and a long horizontal stroke extending to the right.

# NONPROFIT ROADMAP TO SUCCESS

Part I – Business Basics 101

Part II – Business Development 102

Part III – Funding and Sustainability 103

# A QUICK ASSESSMENT



## Who's in the Room?

**Your non-profit business is a business!**

A handwritten signature in black ink, consisting of several loops and a long horizontal stroke extending to the right.

# SUSTAINABILITY: SURVIVAL vs LEGACY



**Non-profit Organization**

**Sustainability Plan**



**Grant Funding**

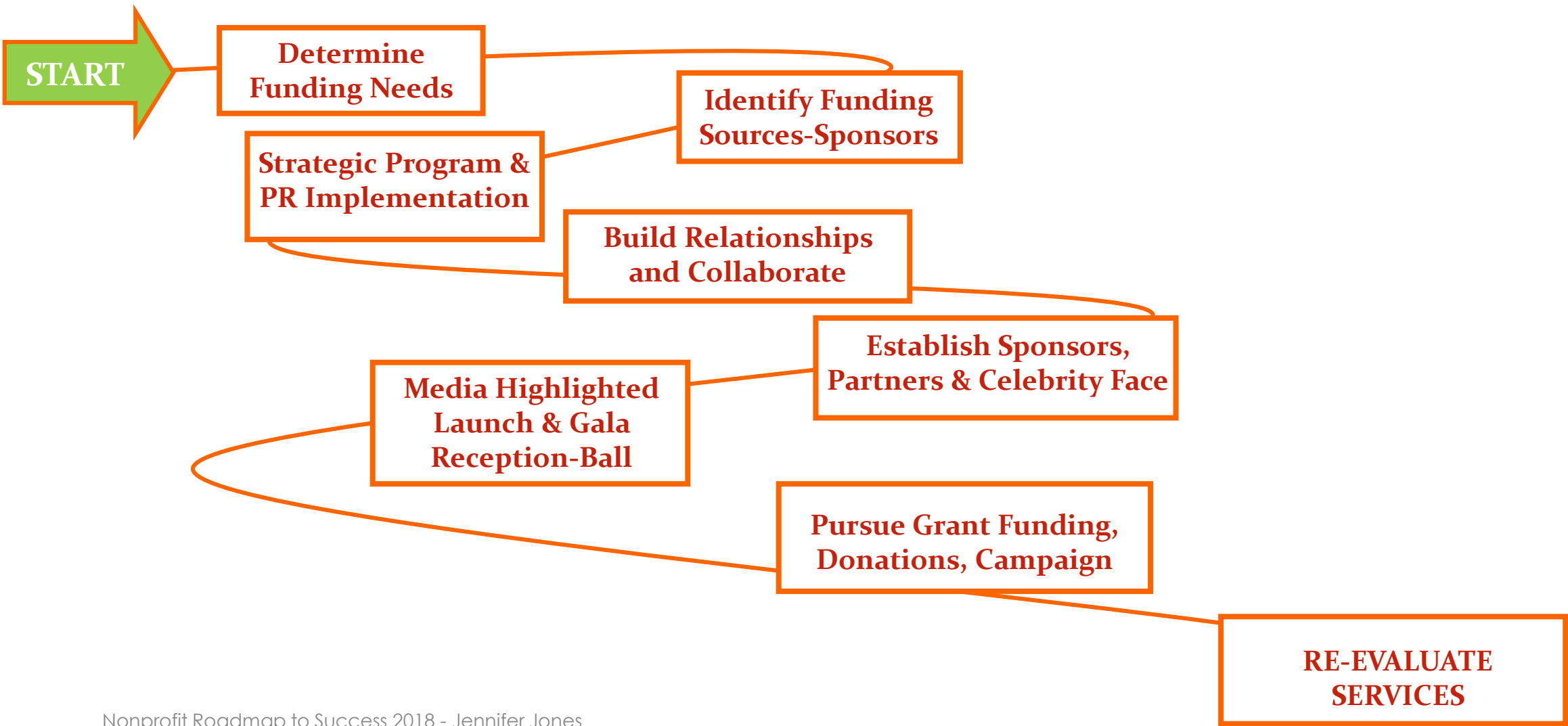
**Sponsorships,  
Annual Giving  
Campaign**

**Fundraisers  
Events &  
Campaigns**

**Membership &  
Partnerships**



# ROADMAP TO FUNDING SUCCESS



# WORKSHOP GOAL

Present a convincing argument to support the hypothesis that increased business readiness will produce outcomes to result in increased nonprofit funding success.



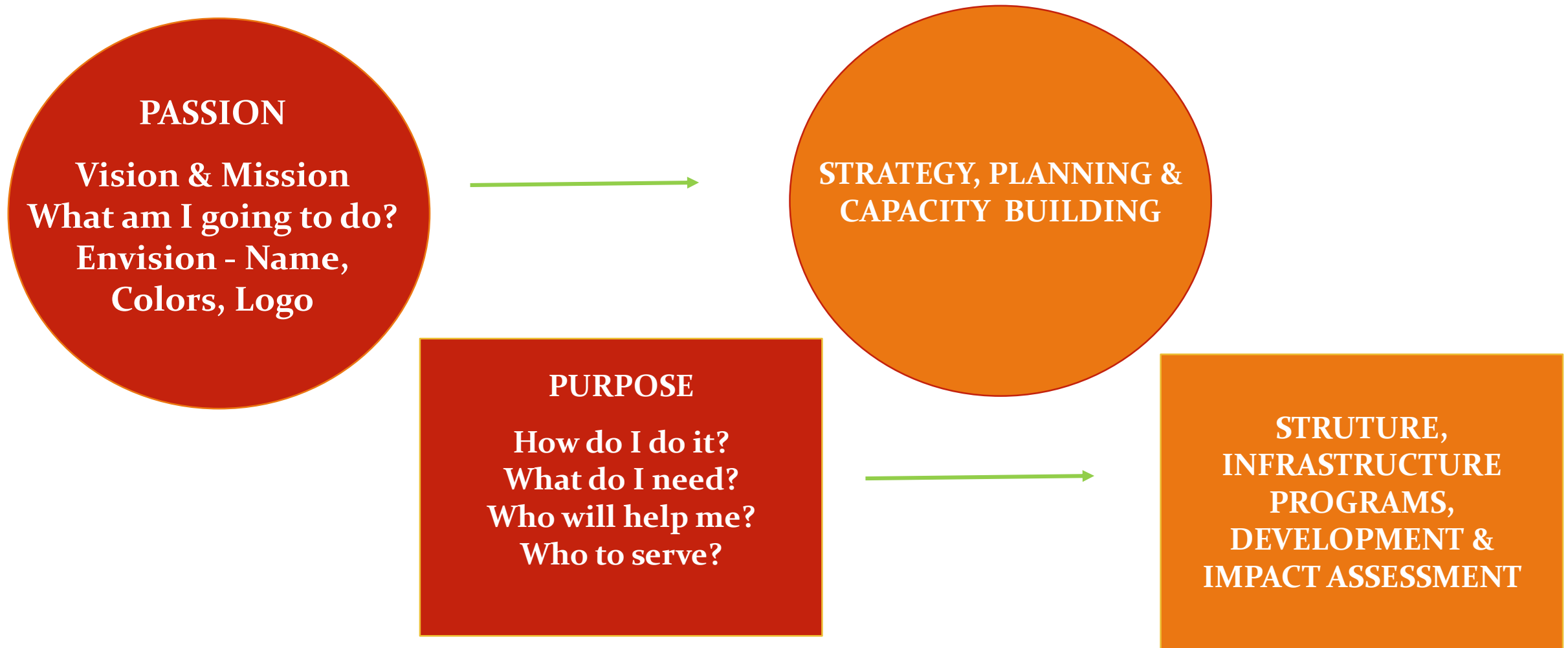


# **PART I – BUSINESS BASICS 101**

## **A Foundation for Success**



# BUSINESS BASICS 101 – VISION



# BUSINESS BASICS 101: NEW NONPROFITS

## **Business Basics**

- Articles of Incorporation (Board), EIN, 501 c3 Designation, Business Plan, Launch – Office, Website, Brochure, etc.

## **Infrastructure**

- Organizational Operational Chart, Offices, Bylaws, D&O, Oversight (Lawyer, Accountant, Consultants, SMEs)

## **Products and Services**

- Competitive Analysis-based models to deliver successful programs or products (social entrepreneurship). Full marketing, outreach, calendar of event, etc.

## **Execution and Engagement**

- Population Served or Customers, Volunteers, Members, Sponsors, Funders, Strategic Partners, Friends

## **Impact, Outcomes and Measures**

- Need, Impact, Growth – Capture, Measure, Report

# BUSINESS BASICS 101: ESTABLISHED NONPROFITS

## **Business Basics**

- Evaluate your organization to be sure that the basics are covered (compliant – D&O, covered, reporting, etc.)

## **Infrastructure**

- Evaluate the Board, Staff, Volunteers for their overall effectiveness now and future. Ensure that a process for performance evaluations of staff and board expansion.

## **Products and Services**

- Review of the Business Plan, Strategic Plan, Programs of Service, Products or Services – Innovation, Effectiveness

## **Execution and Engagement**

- Create stakeholder engagement, updates, thank you, appreciation, celebrate, “where are they now”

## **Impact, Outcomes and Measures**

- By the Numbers – Years, Number Served, Dollars Contributed

Yes, you do need a lawyer, accountant and advisors (business, subject matter, mentor organizations, networks and collaboration).

# BUSINESS BASICS 101 – BUSINESS PLAN

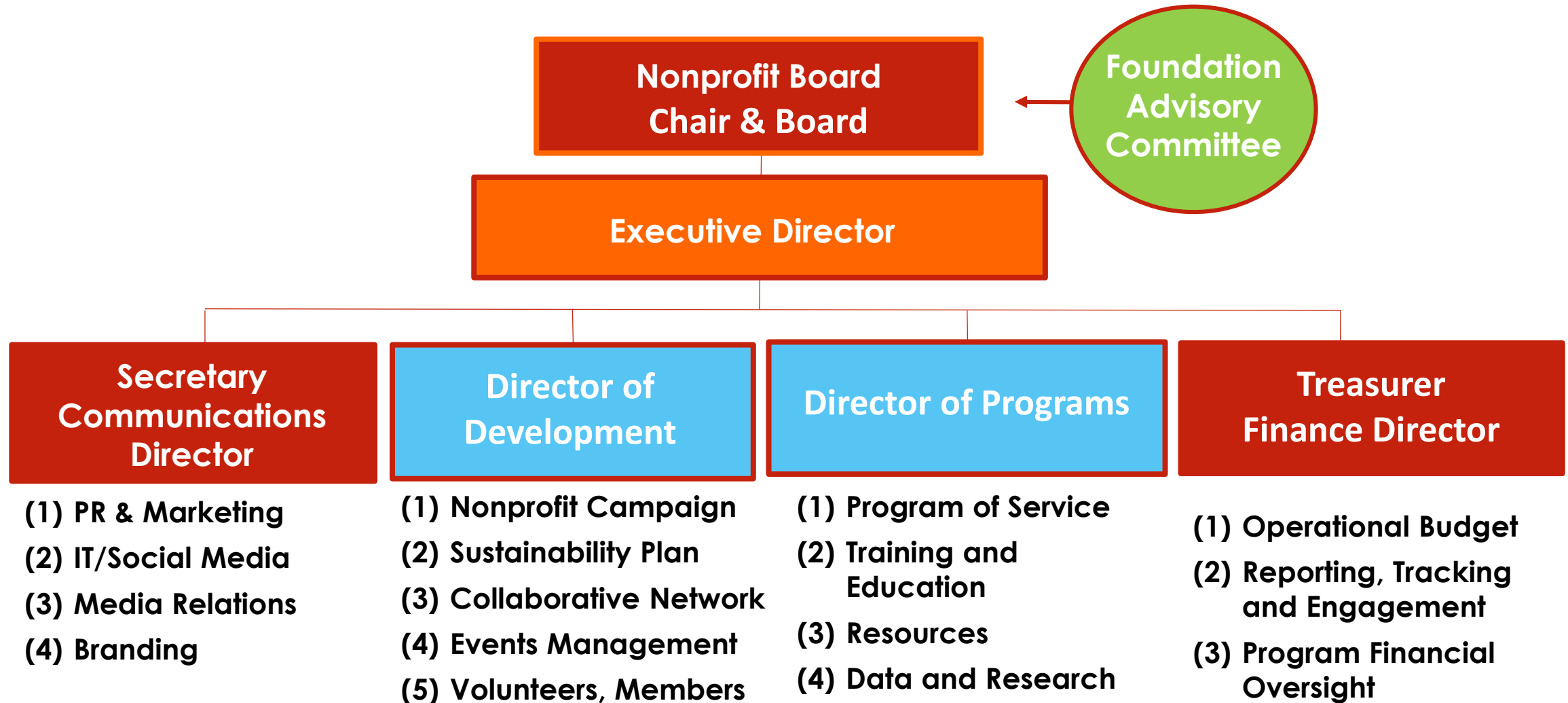
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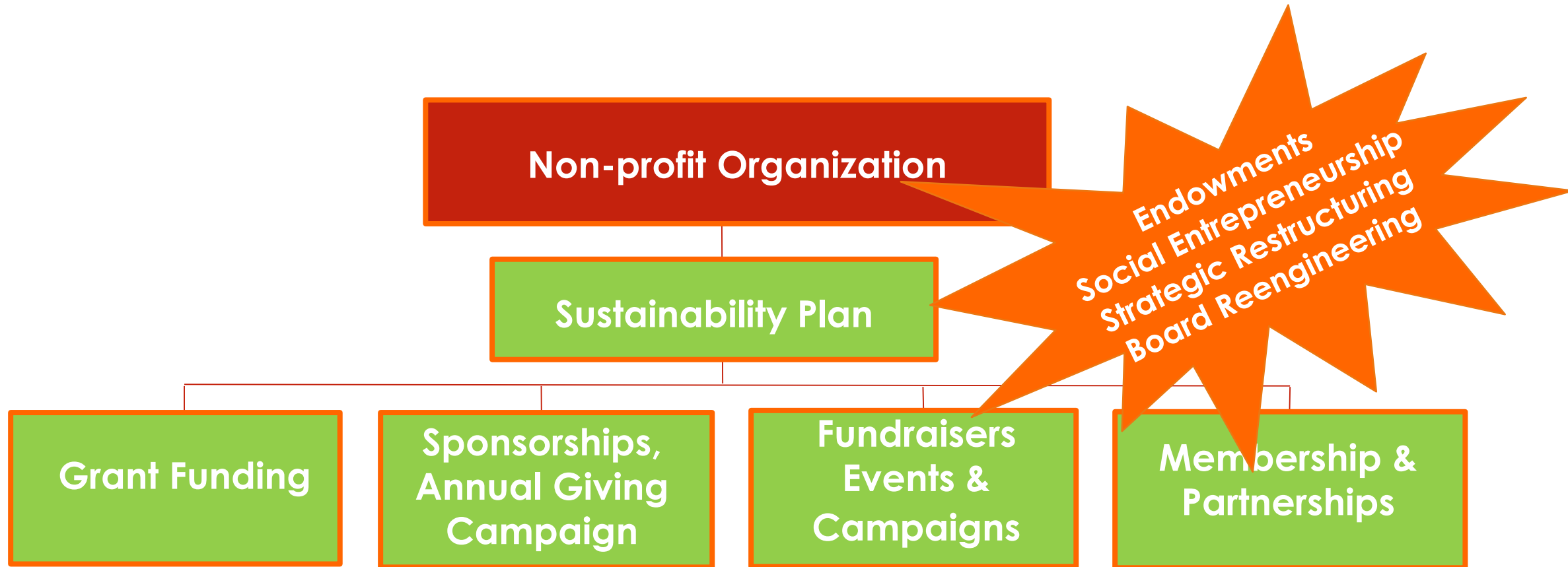
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# FUNCTIONAL OPERATIONAL ORGANIZATION



# SUSTAINABILITY: SURVIVAL vs LEGACY



# READINESS: BUSINESS BASICS 101

Planning & Strategy, Lawyer, Accountant, SMEs  
and Stakeholders



# **PART II – BUSINESS DEVELOPMENT**

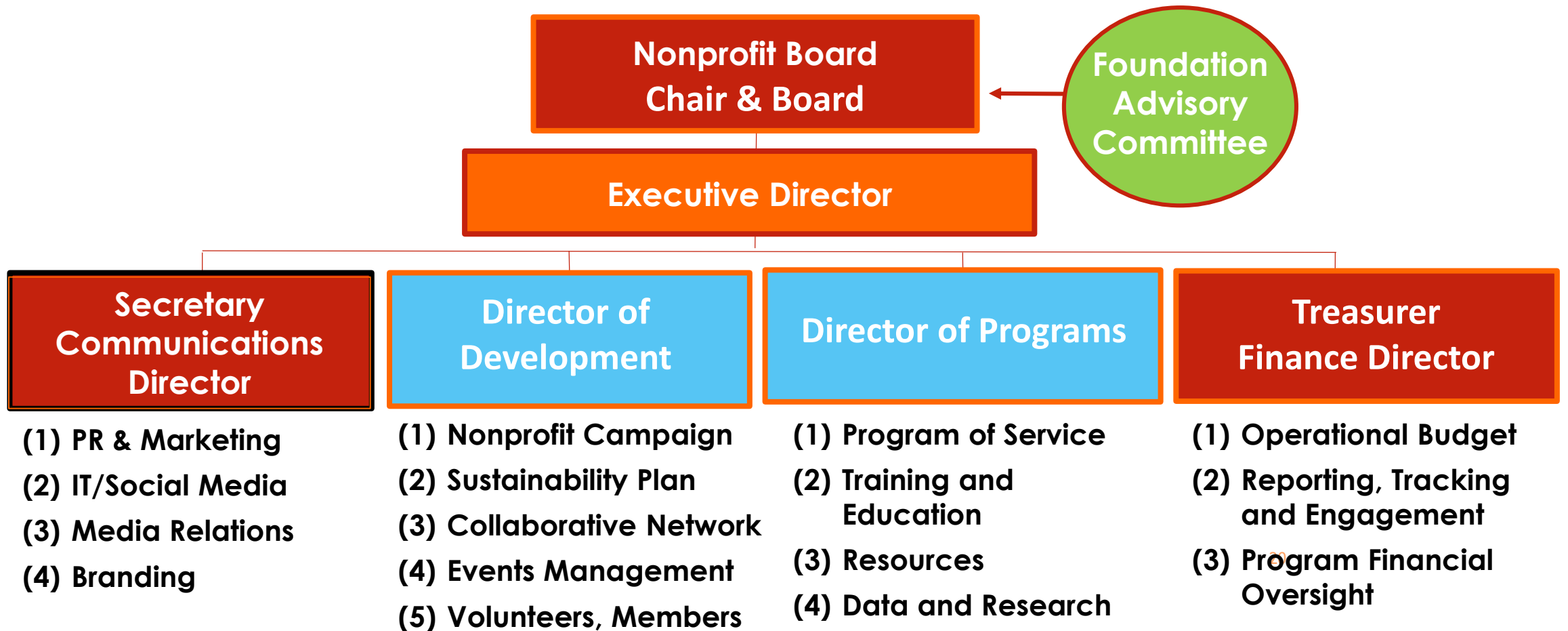
**Essential Elements and Winning Strategies**



**Your non-profit business is a business!**

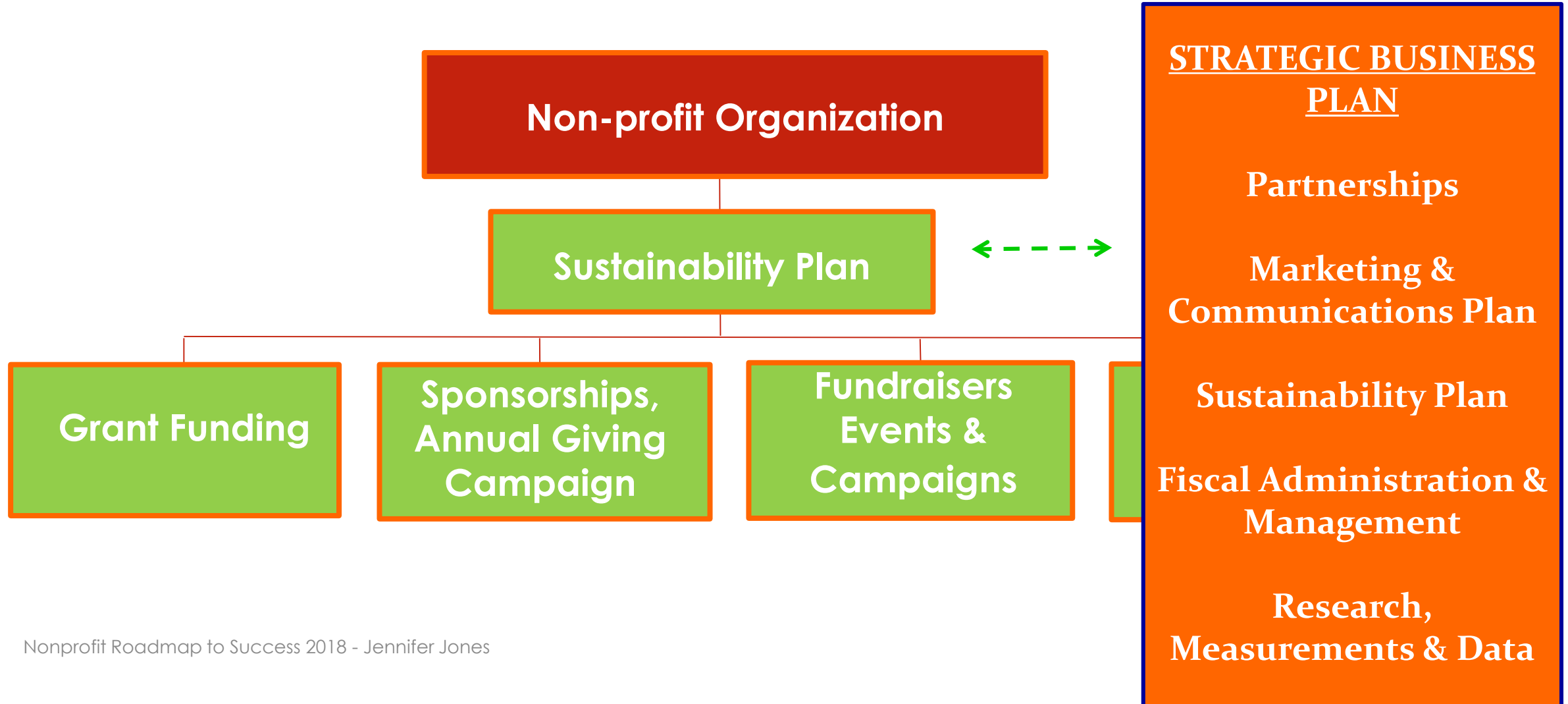
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# FUNCTIONAL ORGANIZATION & OPERATIONS





# SUSTAINABILITY: SURVIVAL vs LEGACY





# STRATEGIC: EXECUTION AND FUNDING

## Planning & Execution

## Funding & Sustainability

**Grants** ■ Partnerships, Mentorships, Collaboration

■ Prospect Research, Grants Calendar, Application, Writer

**Sponsorship & Partnership** ■ Impact, Demographics, Messaging

■ Alignment with Corporation and Programs

**Fundraising, Events, Campaign** ■ Marketing Plan, Digital Strategy, Engagement, PR

■ Planning, Marketing, Partnerships

**Members, Friends, Sponsors** ■ People, Gifts, Contributions

■ Outreach for Partners, Gifts, Donations

# READINESS: BUSINESS DEVE 102

Functional Operations and Implementing BD Strategies  
for Funding Readiness



# **PART III – FUNDING & SUSTAINABILITY**

**Leveraging and Executing Strategies to Win**

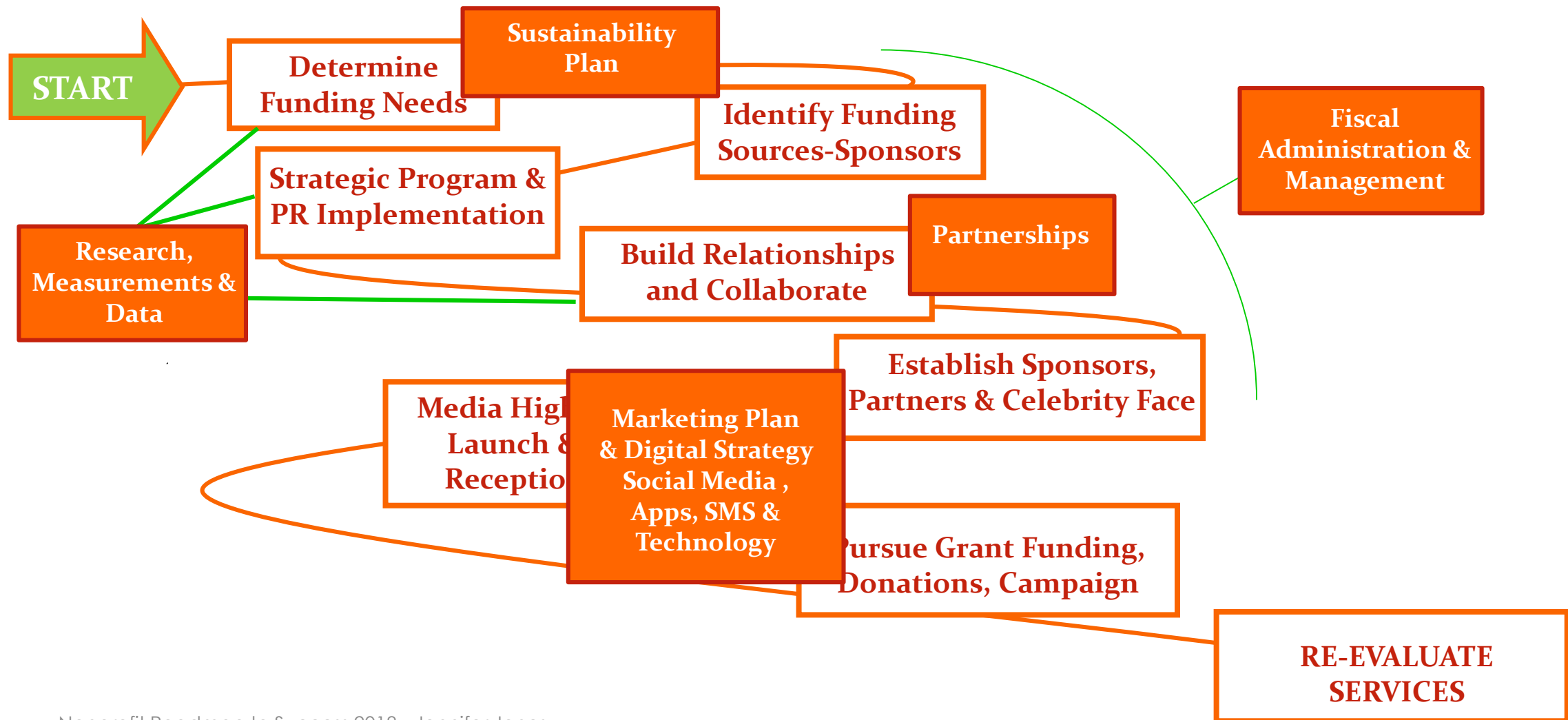


# FUNDING & SUSTAINABILITY





# ROADMAP TO FUNDING SUCCESS



“Without strategy, execution is aimless and without execution strategy is useless.”

Morris Chang



# TRAINING, TOOLS AND RESOURCES

- Maryland Governor's Grants Office  
(<http://grants.maryland.gov>)
- Maryland Nonprofits  
(<http://www.marylandnonprofits.org>)
- Foundation Center  
(<http://foundationcenter.org/findfunders/cga.html>)



# BUSINESS APPROACH & RESOURCES

**Board Development and  
Assessment**

**Nonprofit Business Development**

**Fundraising**

**Management & Strategy**

- Nonprofit Expert [www.nonprofitexpert.com](http://www.nonprofitexpert.com)
- Know How Nonprofit (UK Information) [www.knowhownonprofit.com](http://www.knowhownonprofit.com)
- Nonprofit Pro [www.nonprofitpro.com](http://www.nonprofitpro.com)
- Get Fully Funded [www.getfullyfunded.com](http://www.getfullyfunded.com)
- The Fundraising Authority [www.thefundraisingauthority.com](http://www.thefundraisingauthority.com)
- LaSalle Nonprofit Center (Philadelphia) [www.lasallenonprofitcenters.org](http://www.lasallenonprofitcenters.org)



# Keys to Success



# F&S: MEMBERSHIPS AND PARTNERSHIPS

- **Volunteers** – Process for Formal Engagement (Screen, Train, Assign), Support the Organization, Events, Activities and Programs (Thank You)
- **Memberships & Friends Of** – Levels, Annual Fees, Support the Organization (Celebrate and Honor – Annual Giving)
- **Donors, Advisors, Partners and Partner Organizations** – Add and Build Capacity in the Organization by giving time, money, expertise, supplies, materials, gifts. (Recognize and Celebrate – Recurring or One Time Gift)
- **Database** – Volunteers, Members, Donors, Partners, Advisors are your strength in numbers, greatest resource to share the work, introduce funders, etc.



# F&S: FUNDERS, DONORS, PARTNERS

## Sponsorships & Partnerships

- Corporations, Large Foundations, Business and Strong Organizations Annual Giving (Galas & Gifts)
- Establish Relationships, Formal Meetings, Professional Packages, Identify Key Persons (Courting)
- Alignment with their foundation, mission, programs and target demographic. (Numbers)
- Leverage the Board and Officers

## Fundraisers, Events, & Campaigns

- Live, Virtual, Digital Events and Activities
- Intentional Campaigns, Strategy and Calendar
- Awareness, PR, Engagement, or Outreach to Attract Target Population, Donors, Funders, Volunteers
- Digital Strategy, Social Media, Press, Newsletters, Well-Marketed Events, PR

# DIGITAL STRATEGY: FUNDRAISING

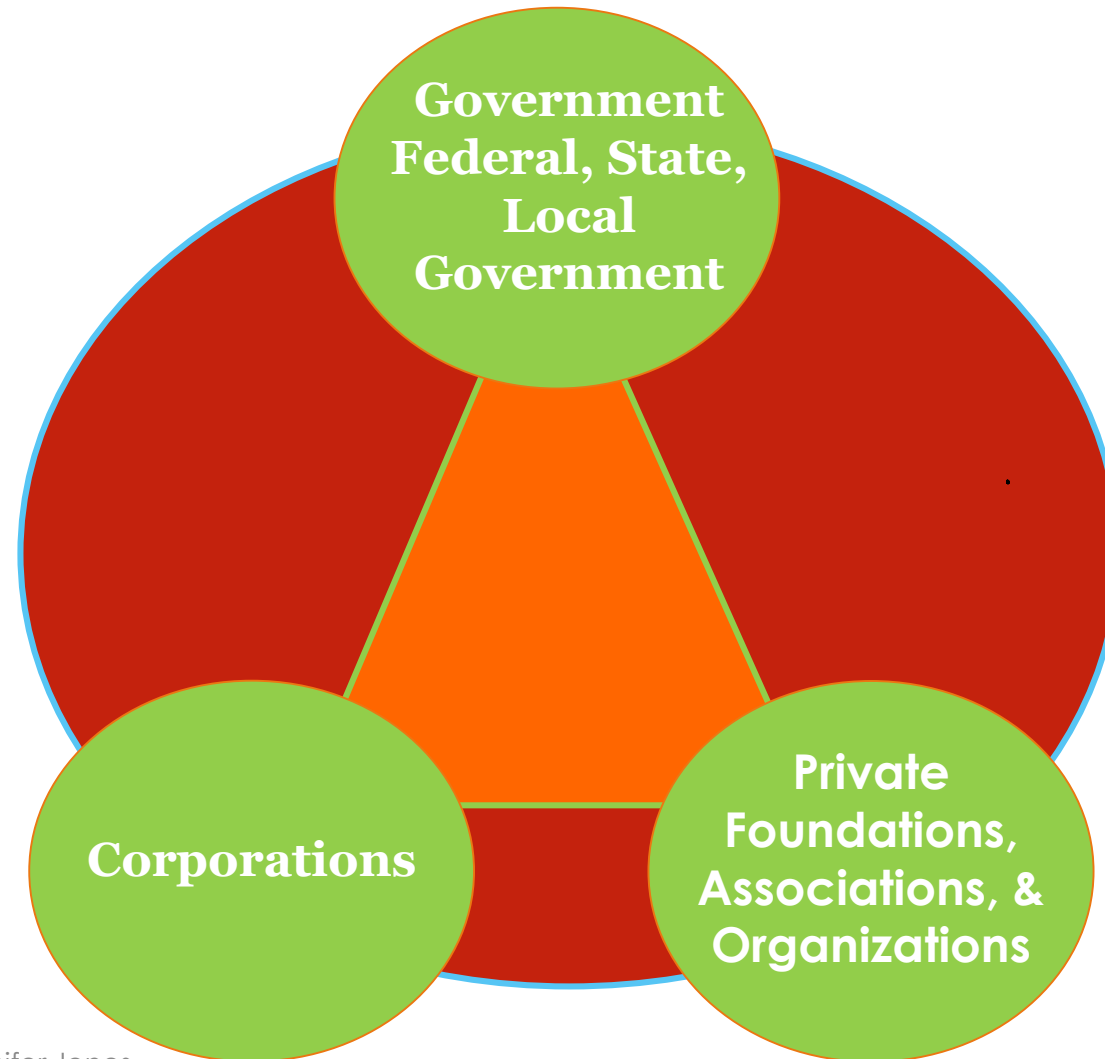


- Facebook Registered Non-profit: <https://nonprofits.fb.com/>
- AMAZON Smile Campaign: <https://org.amazon.com/>
- Day of Giving: <https://www.givingtuesday.org/>
- United Way DoMore24: <https://www.domore24.org/>
- Go Fund Me: <https://www.gofundme.com/c/fundraising-ideas/nonprofits>

# Grant Writing Strategies



# GRANT FUNDING SOURCES





# GRANT WRITING BASIC – 3 SIMPLE STEPS

- Identify
- Prepare
- Submit



**Three Simple Steps.  
No Simple Feat!**

# PROPOSAL DEVELOPMENT STAGES



- Funding Strategy (Goals, Partners, Focus)
- Fundability Assessment
- Prospect Research
- Content Development
- Grant Identification
- Proposal Preparation & Submission
- Award Notification & Debriefing
- Grant Management & Fiscal Administration
- Grant Closeout



# PROPOSAL DEVELOPMENT STAGES

- Funding Strategy (Goals, Partners, Focus)
- Fundability Assessment
- Prospect Research
- Content Development
- Grant Identification
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- Grant Management & Fiscal Administration
- Grant Closeout

What do you need?  
vs.  
What you want?



# WHAT IS PROSPECT RESEARCH?

- **Definition:** a process in fundraising wherein a researcher identifies and provides relevant information about potential donors to an organization <http://www.aprahome.org>
- **Resources:** Governor's Grants Office <http://grants.maryland.gov>  
Foundation Library <http://foundationcenter.org>  
Grantsmart <http://grantsmart.org>  
Grantspace <http://grantspace.org>  
Guidestar [www.guidestar.org](http://www.guidestar.org)  
Grant Watch [www.grantwatch.com](http://www.grantwatch.com)



# Google is your friend!

Google.org



# STRATEGIES FOR GRANT WRITING SUCCESS

OWN IT! “You’re responsible for the grant that you submit!”

- **Applications** – Background, Scope, Details, Compliance Criteria, Instructions, Evaluation
- **Before Writing** – Read the Application, Create a List of Deliverables, Timeline, Team and Communicate and Meet Throughout the Process
- **All About the Numbers** – Needs, Impact, Population and Number Served, Volunteers, Measures, Progress, Budget and Justification
- **Grant Writer or Not** – Ask for writing samples, references and a detailed agreement cost, time, communication

# GRANT SUBMISSION ESSENTIALS

- Outstanding Packaging, **Organized** Presentation and Table of Contents
- Answers the Basics with Specific Details/Data – Who, What, When, Where, Why and How?
- **Well-substantiated** Approach, Data, Statistics, etc.
- Infrastructure, Experience, **“Skin in the Game”** to Accomplish Tasks and Reach Milestones
- Well-Documented, Justified Budget
- **Effectiveness or Measurable** Outcomes

# SUCCESSFUL GRANT WRITING TIPS



- Collaboration, Partnerships, Strong Board
- Prospect Research, Funding Strategies
- Data, Research, Information
- Integration Of Technology & Innovation
- Hot Buttons & Win Themes



# EXCEPTIONAL GRANT PROPOSALS



- Clearly and concisely presents the organization and provides all of the requested information.
- Ease of Reading & No Typos, Misspelled Words, etc.
- Logical Presentation of Justified Need or Specific Request
- **Passion “Tell The Story” .... “Sell the Story”**

# EXCEPTIONAL GRANT PROPOSALS



- Strong Collaborations, Innovation or Impact
- Achievable Approach & Measurable Results
- **Efficient Use of the Grant Award**
- Experience, Progressive Growth, Data-Driven, Details, etc.
- **Vision/Plan for the Future, Next Steps, etc.**

# READINESS FUNDING AND SUSTAINABILITY 103

Strategies Are Essential to Successful Grant,  
Sponsorship, Fundraising and Membership Funding



**Your non-profit business is a business!**

A handwritten signature in black ink, consisting of several loops and a long horizontal stroke ending in a small flourish.



# *Questions & Answers*



*Be Inspired*

“ I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel. ”

Dr. Maya Angelou



# MARYLAND GOVERNOR'S GRANTS CONFERENCE

Grants 101: Nonprofit Roadmap to Success

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# BONUS GRANT WRITING STRATEGIES



# THE GRANT APPLICATION



- Overview of Funding Entity
- Background or Purpose of the Opportunity
- Application Instructions
- Guidelines And Policies (Eligibility, Award, Funding Restriction, Data Sharing, Etc.)
- Evaluation Criteria
- Submission Criteria
- Point Of Contact

# RESOURCES: GRANT APPLICATIONS

## Foundation Center

<http://foundationcenter.org/findfunders/cga.html>

## Common Grant Application

<http://www.commongrantapplication.com>

## Grants.gov <http://www.grants.gov>

## USA.gov <http://www.usa.gov>

## New USA Funding <http://www.newusafunding.org>



# BEFORE WRITING THE GRANT

- Read the grant application, instructions, attachments.
- Establish a timeline for preparing the application.
- Establish a comprehensive list of deliverables.
- Assign deliverables & tasks to team with deadlines for completing each deliverable.
- Communicate and update progress regularly – face-to-face meetings, conference-calls, emails.
- Create A hard copy of the proposal (working document).
- Assemble the grant (signatures, letters of support, etc.).
- Proposal review – primary team, second team, final review team.  
*(Build in time for mistakes, errors, etc.)*

# SECTIONS OF THE PROPOSAL

## PRE-APPLICATION INSTRUCTIONS LIST OF GRANT DELIVERABLES

### NON-PROFIT BUSINESS PROFILE

Business Name & Address  
 President (Name, Address, Email, Telephone, Alternate Telephone)  
 Primary Point of Contact (Name, Address, Email, Telephone, Alternate Telephone)  
 Non-profit (Copies – Articles of Incorporation, Tax Exempt Letter, 990, etc.)

### GRANT PROPOSAL

Project Title  
 Project Narrative  
 Project Summary (Abstract)  
 Specific Aims  
 Statement of Need (Services Provided, Demographic Served, Data, Statistics, Supporting Information)  
 Impact (Outcome, Measurements, Milestones, Definition of Success)  
 Models of Success (Source of Project Ideas)  
 Bibliography and Cited Literature Sources (when applicable)

### RESUMES

Business Organizational Structure  
 Project Organizational Structure (Collaborative Partners, Governmental, Faith-based, etc.)  
 Contact Information List

### BUDGET

Budget (Project & Non-Profit Annual Report)  
 Budget Justification

### SUPPORTING DOCUMENTS

Target Demographic  
 Letters of Supports (Collaborative Partners,  
 Consortium/Contractual Agreements  
 Management Plan (Staff, Volunteers)  
 Facilities and Other Resources

- Proposal Narrative/Research or Project Plan
- Background, Significance or Supporting Data
- Organizational Structure & Management Plan
- Experience & Past Performance
- Budget & Budget Justification
- Implementation Plan - Use of Funds, Quality Assurances, Reaching Target Group, etc.
- Collaborative Partners, Letters of Support & Matching Funds Commitments
- Plan for Self-Evaluation & Reporting

# IT'S ALL ABOUT THE NUMBERS

- **Volunteer Hours:** <http://www.handsonnetwork.org/tools/volunteercalculator>
- **Organizational Self-Assessment:** <https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments>
- **Impact:** <http://managementhelp.org/evaluation/program-evaluation-guide.htm>
- **Board Self- Assessment:**  
<http://www.nhnonprofits.org/sites/default/files/documents/bsaq/questionnaire.pdf>
- **National Center for Charitable Statistics:** <http://nccs.urban.org/>
- **Grant Budgets:** <http://grants.nih.gov/grants/how-to-apply-application-guide/format-and-write/develop-your-budget.html>

# COMPONENTS OF THE BUDGET

- **Direct Costs** – Personnel, Fringe Benefits, Equipment, Supplies, Travel, In-Kind Contributions
- **Indirect Costs** – Building, Operating Cost
- <http://grants.nih.gov/grants/how-to-apply-application-guide/format-and-write/develop-your-budget.html>
- <http://nonprofit.about.com/od/foundationfundinggrants/a/grantbudget.htm>

XYZ Nonprofit Community Theater OPERATIONS BUDGET OVERVIEW		
<b>Earned Revenue</b>		<b>Expenses</b>
Concerts	48,500	Concerts
Films	93,600	Films
Arts in Education	15,950	Arts in Education (balance earmarked for Arts in Edu
Rentals	130,500	Rentals
Concessions	37,200	Concessions
Ticketing Fees	34,400	Ticket Handling
		Marketing
<b>Total Earned Revenue</b>	<b>\$360,150</b>	<b>Total Earned Expenses</b>
<b>Unearned Revenue</b>		
Memberships	46,800	Membership & Donor Mar
City Funding	10,400	
County Funding	2,500	
State Funding	5,000	
Individual Business Sponsorships	1,700	
Monthly Program Guide Sponsors	9,000	
Earmarked Educational Grants	15,000	
Concert & Film Sponsors	2,500	
Event Sponsors	22,500	
Fundraising Events	92,100	Fundraising Events
		Payroll
Interest	24	Bank Loan
		Overhead Other Than Pay
<b>Total Unearned Revenue</b>	<b>\$215,524</b>	<b>Total Unearned Expenses</b>
<b>TOTAL REVENUE</b>	<b>\$575,674</b>	<b>TOTAL EXPENSES</b>

**The Sapelo Foundation - Required Grant Proposal Budget Format**

**Citizens for Planned Growth<sup>1</sup>**  
General Operating Budget

CATEGORY <sup>2</sup>	FY2003 Budget <sup>3</sup>	Actual	FY2004 Budget <sup>4</sup>	3rd Qtr <sup>5</sup>	FY2005 Projected <sup>6</sup>
NET REVENUE	50,000	45,000	50,000	25,000	50,000
Events <sup>7</sup> (see attached list of other sources of proposed FY05 funding)					
<b>Foundations</b>					
Public Welfare Foundation	20,000	18,000	20,000	18,000	22,000
Taylor Family Foundation	5,000	5,000	5,000	20,000	25,000
Annie E. Casey Foundation	25,000	22,000	25,000	50,000	50,000
<b>Corporate Contributions</b>					
Home Depot	10,000	10,000	12,000	10,000	12,000
Georgia Power	10,000	8,000	12,000	8,000	12,000
Interest Income	20,000	18,000	22,000	18,000	25,000
Major Donors	30,000	28,000	30,000	12,000	33,000
Membership	9,000	5,600	10,300	4,300	12,700
<b>TOTAL INCOME</b>	<b>\$204,000</b>	<b>\$197,600</b>	<b>\$236,300</b>	<b>\$175,300</b>	<b>\$256,700</b>
<b>EXPENSE</b>					
Accounting/ Bookkeeping	5,000	5,000	6,000	6,000	7,000
Board D&O Insurance	3,000	3,000	4,000	4,000	5,000
Conferences/ Meetings	2,000	2,000	2,000	1,000	2,000
Dues & Memberships	800	800	900	600	1,000
Furniture & Equipment	1,400	1,400	1,600	1,300	1,800
Legal Expenses	10,000	9,000	12,000	10,000	15,000
Miscellaneous	500	400	500	300	500
<b>Personnel</b>					
Executive Director	55,000	55,000	60,000	45,000	63,000
Office Manager	32,000	32,000	33,000	24,000	35,000
Retirement	3,000	3,000	4,000	3,500	5,000
Health & Disability Insurance	10,000	10,000	11,000	8,000	12,000
Medicare Tax	1,000	1,000	1,500	1,500	2,000
Social Security Tax	4,000	4,000	5,000	5,000	6,000
Postage & Shipping	2,000	2,000	2,000	1,500	2,500
Printing	1,500	1,500	1,500	1,000	1,500
Program Expenses <sup>8</sup>	50,000	45,000	60,000	40,000	60,000
Annual Report & Promotion	5,000	5,000	6,000	4,000	7,500
Rent & Utilities	6,000	6,000	7,000	6,000	8,000
Supplies, Office	1,000	1,000	1,500	1,000	2,000
Technology/ Training	3,500	2,500	3,800	1,600	4,900
Telephone	5,000	4,000	5,000	3,000	5,000
Travel	5,000	4,000	8,000	7,000	10,000
<b>TOTAL EXPENSE</b>	<b>\$206,770</b>	<b>\$197,600</b>	<b>\$236,300</b>	<b>\$175,300</b>	<b>\$256,700</b>

**GRANT APPLICATION BUDGET!**

**OPERATIONAL BUDGET!**

<sup>1</sup> The legal name of your organization  
<sup>2</sup> List your organization's categories using this format  
<sup>3</sup> Your Board-approved budget for the last complete operating year  
<sup>4</sup> Your Board-approved budget for the current operating year  
<sup>5</sup> Itemized income and expenses for last quarter or date of proposal submission  
<sup>6</sup> Your Board-approved projected budget for next year  
<sup>7</sup> Grant income must be itemized and identified as secured or pending. You may use another page to explain status of proposed funding. List funding by source, amount requested, and status of request.  
<sup>8</sup> Attach an itemized Program Budget if proposal is for a specific program or project. List all proposed funding sources using the same format as above. The Sapelo Foundation will not fund 100% of any operating budget, program, or project.



# GRANT WRITER OR NOT?

- You are responsible for the grant that you sign and submit!
- Read the Application – You are the Subject Matter Expert and must implement the plan that is proposed.
- Ask for writing samples, client references, win rates.
- Sign an agreement that clearly states or ensures terms, process, timelines and confidentiality assurances.
- Establish a plan for communication - Grant Writers are only as good as the information provided!
- You get what you pay for!



