MARYLAND GOVERNOR’S GRANTS CONFERENCE

Grants 101: Nonprofit Roadmap to Success

Jennifer B. Jones
Your non-profit business is a business!
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!
SUSTAINABILITY: SURVIVAL vs LEGACY

Non-profit Organization

Sustainability Plan

Grant Funding

Sponsorships, Annual Giving Campaign

Fundraisers Events & Campaigns

Membership & Partnerships

TODAY YOU ARE HERE

Nonprofit Roadmap to Success 2018 - Jennifer Jones
ROADMAP TO FUNDING SUCCESS

START

Determine Funding Needs

Identify Funding Sources-Sponsors

Strategic Program & PR Implementation

Build Relationships and Collaborate

Establish Sponsors, Partners & Celebrity Face

Media Highlighted Launch & Gala Reception-Ball

Pursue Grant Funding, Donations, Campaign

RE-EVALUATE SERVICES

Nonprofit Roadmap to Success 2018 - Jennifer Jones
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

PASSION
Vision & Mission
What am I going to do?
Envision - Name, Colors, Logo

PURPOSE
How do I do it?
What do I need?
Who will help me?
Who to serve?

STRATEGY, PLANNING & CAPACITY BUILDING

STRUCTURE, INFRASTRUCTURE
PROGRAMS, DEVELOPMENT & IMPACT ASSESSMENT
BUSINESS BASICS 101: NEW NONPROFITS

**Business Basics**
- Articles of Incorporation (Board), EIN, 501c3 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

- Evaluate your organization to be sure that the basics are covered (compliant – D&O, covered, reporting, etc.)
- Review of the Business Plan, Strategic Plan, Programs of Service, Products or Services – Innovation, Effectiveness

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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FUNCTIONAL OPERATIONAL ORGANIZATION

Executive Director

Director of Programs
- (1) Program of Service
- (2) Training and Education
- (3) Resources
- (4) Data and Research

Director of Development
- (1) Nonprofit Campaign
- (2) Sustainability Plan
- (3) Collaborative Network
- (4) Events Management
- (5) Volunteers, Members

Secretary Communications Director
- (1) PR & Marketing
- (2) IT/Social Media
- (3) Media Relations
- (4) Branding

Treasurer Finance Director
- (1) Operational Budget
- (2) Reporting, Tracking and Engagement
- (3) Program Financial Oversight

Nonprofit Board Chair & Board

Foundation Advisory Committee
SUSTAINABILITY: SURVIVAL vs LEGACY

Non-profit Organization

Sustainability Plan

Grant Funding
Sponsorships, Annual Giving Campaign
Fundraisers Events & Campaigns
Membership & Partnerships

Endowments
Social Entrepreneurship
Strategic Restructuring
Board Reengineering

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READYNESS: 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!
FUNCTIONAL ORGANIZATION & OPERATIONS

Nonprofit Board Chair & Board

Executive Director

Foundation Advisory Committee

Secretary Communications Director
(1) PR & Marketing
(2) IT/Social Media
(3) Media Relations
(4) Branding

Director of Development
(1) Nonprofit Campaign
(2) Sustainability Plan
(3) Collaborative Network
(4) Events Management
(5) Volunteers, Members

Director of Programs
(1) Program of Service
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(3) Resources
(4) Data and Research

Treasurer Finance Director
(1) Operational Budget
(2) Reporting, Tracking and Engagement
(3) Program Financial Oversight
SUSTAINABILITY: SURVIVAL vs LEGACY

Non-profit Organization

Sustainability Plan

Grant Funding
Sponsorships, Annual Giving Campaign
Fundraisers Events & Campaigns

STRATEGIC BUSINESS PLAN

Partnerships
Marketing & Communications Plan
Sustainability Plan
Fiscal Administration & Management
Research, Measurements & Data

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ROADMAP TO FUNDING SUCCESS

1. **START**
   - Determine Funding Needs

2. **Sustainability Plan**
   - Strategic Program & PR Implementation
   - Build Relationships and Collaborate
   - Media Highlight
   - Marketing Plan & Digital Strategy
   - Social Media, Apps, SMS & Technology

3. **Identify Funding Sources-Sponsors**
   - Fiscal Administration & Management
   - Establish Sponsors, Partners & Celebrity Face
   - Pursue Grant Funding, Donations, Campaign

4. **Partnerships**
   - Research, Measurements & Data
   - Fiscal Administration & Management

5. **Sustainability Plan**
   - Fiscal Administration & Management

6. **RE-EVALUATE SERVICES**
STRATEGIC: EXECUTION AND FUNDING

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Functional Operations and Implementing BD Strategies for Funding Readiness
PART III – FUNDING & SUSTAINABILITY

Leveraging and Executing Strategies to Win
ROADMAP TO FUNDING SUCCESS

START

Determine Funding Needs

Research, Measurements & Data

Strategic Program & PR Implementation

Sustainability Plan

Identify Funding Sources-Sponsors

Build Relationships and Collaborate

Establish Sponsors, Partners & Celebrity Face

Sustainability Plan

Fiscal Administration & Management

Pursue Grant Funding, Donations, Campaign

RE-EVALUATE SERVICES

Marketing Plan & Digital Strategy Social Media, Apps, SMS & Technology

Media Highlight Launch & Gala Reception

Partnerships

Research, Measurements & Data

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“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 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)

Nonprofit Business Development

Fundraising

Management & Strategy
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/
- Go Fund Me: https://www.gofundme.com/c/fundraising-ideas/nonprofits
Grant Writing Strategies
GRANT FUNDING SOURCES

- Government
  - Federal, State, Local Government
- Corporations
- Private Foundations, Associations, & Organizations
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
- Proposal Preparation & Submission
- Award Notification & Debriefing
- 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](http://www.aprahome.org)

- **Resources:** Governor’s Grants Office [http://grants.maryland.gov](http://grants.maryland.gov)
  Foundation Library [http://foundationcenter.org](http://foundationcenter.org)
  Grantsmart [http://grantsmart.org](http://grantsmart.org)
  Grantspace [http://grantspace.org](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
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!
Questions & Answers
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


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.)
SECTION OF THE PROPOSAL

- 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](http://www.handsonnetwork.org/tools/volunteercalculator)
- Organizational Self-Assessment: [https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments](https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments)
- Impact: [http://managementhelp.org/evaluation/program-evaluation-guide.htm](http://managementhelp.org/evaluation/program-evaluation-guide.htm)
Components of the Budget

- **Direct Costs** – Personnel, Fringe Benefits, Equipment, Supplies, Travel, In-Kind Contributions
- **Indirect Costs** – Building, Operating Cost


http://nonprofit.about.com/od/foundationfundinggrants/a/grantbudget.htm
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!