



MARYLAND GOVERNOR'S GRANTS CONFERENCE

Grants 101: Nonprofit Roadmap to Success

Jennifer B. Jones

Your non-profit business is a business!

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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!

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SUSTAINABILITY: SURVIVAL vs LEGACY



Non-profit Organization

Sustainability Plan

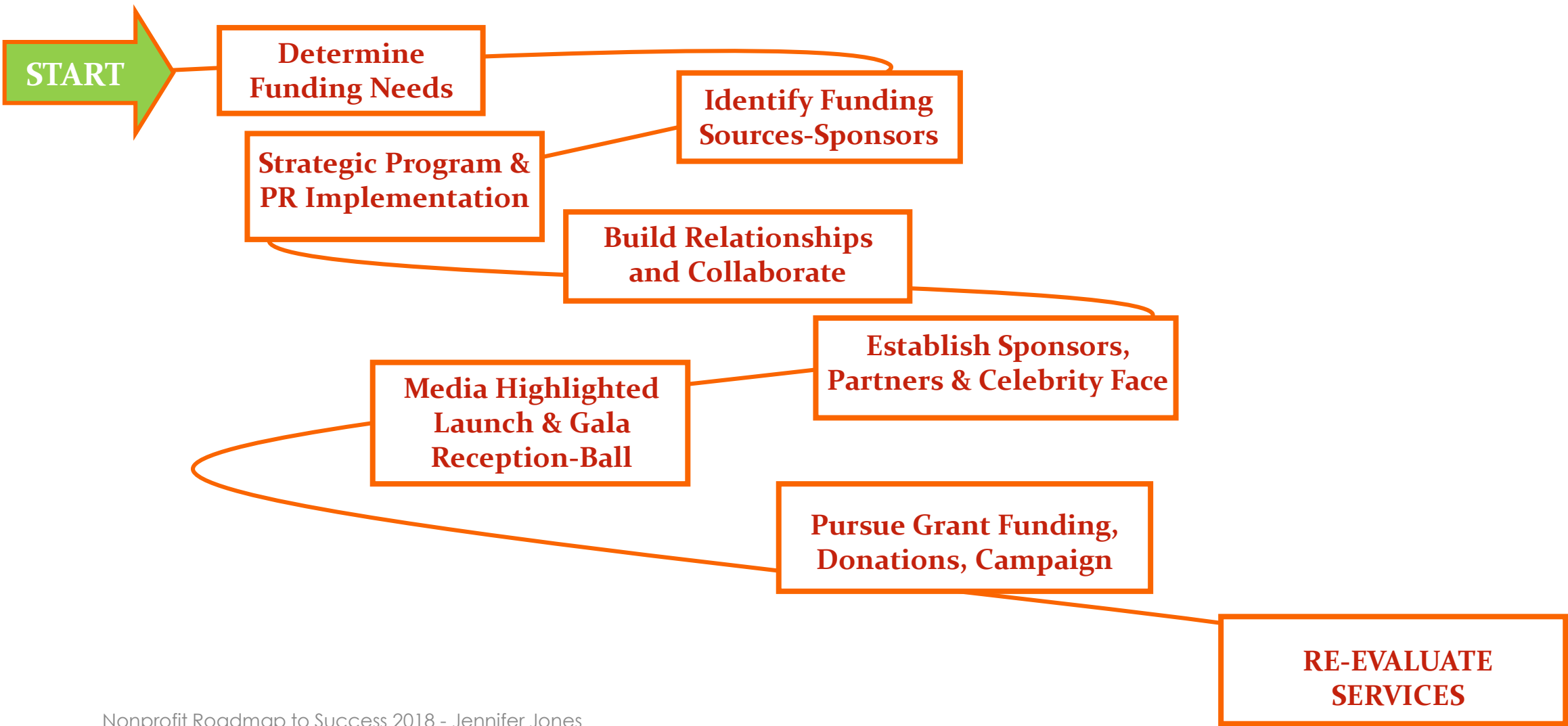
Grant Funding

**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.

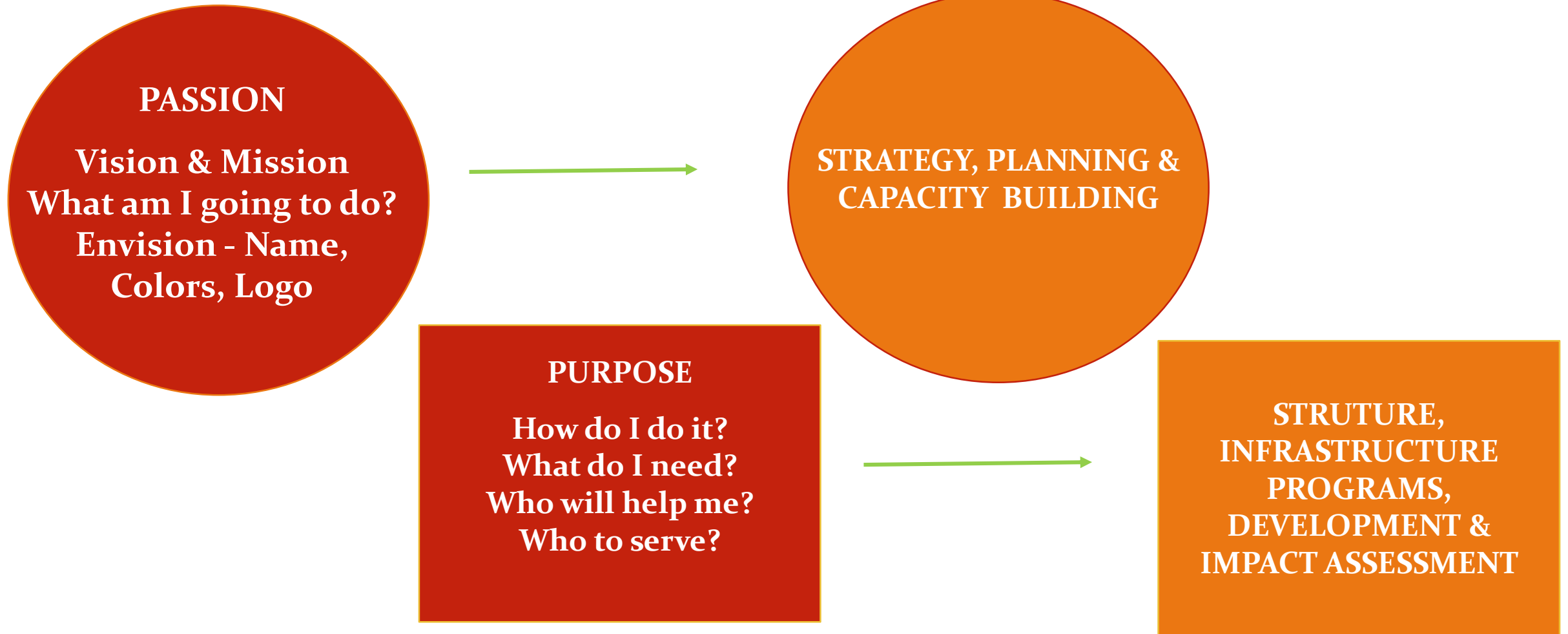


PART I – BUSINESS BASICS 101

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).

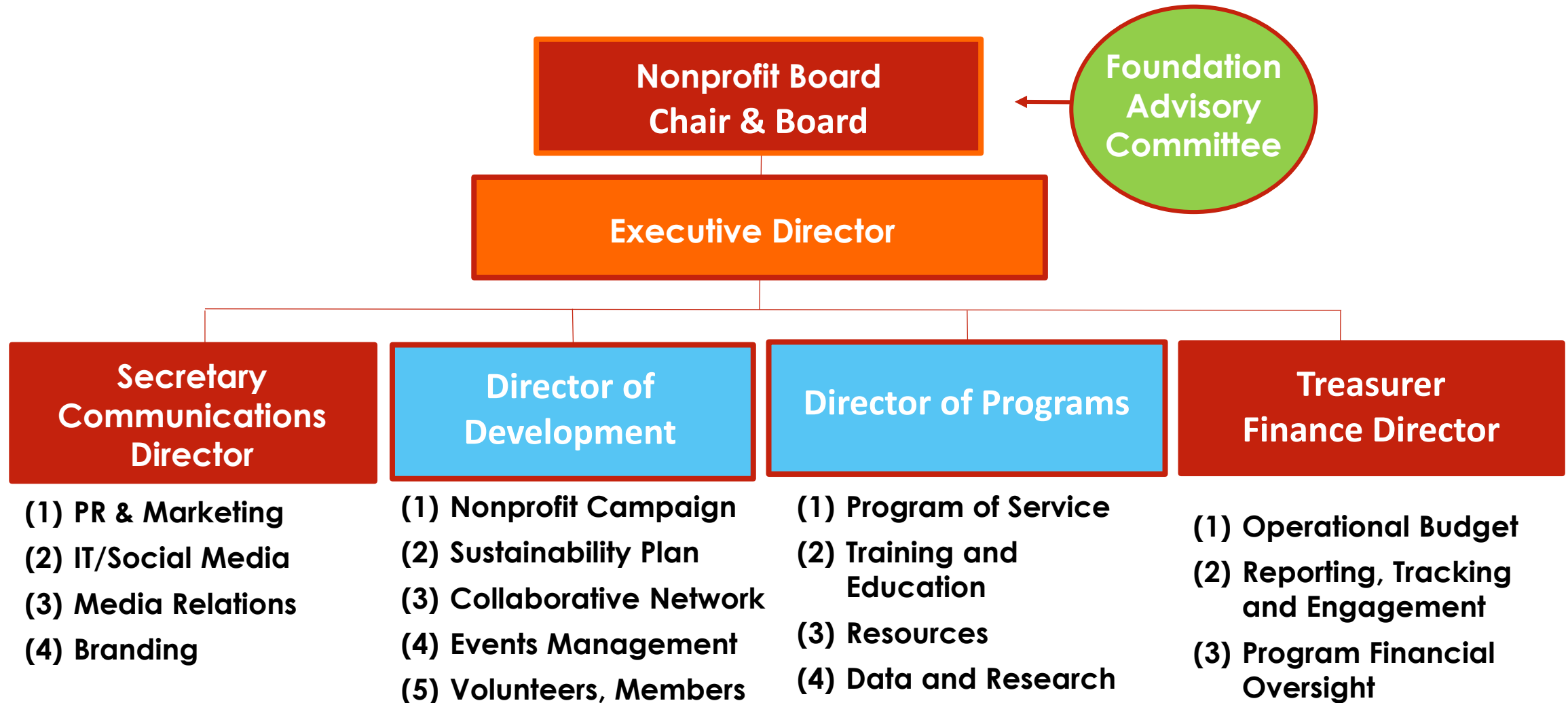
BUSINESS BASICS 101 – BUSINESS PLAN

Living Document

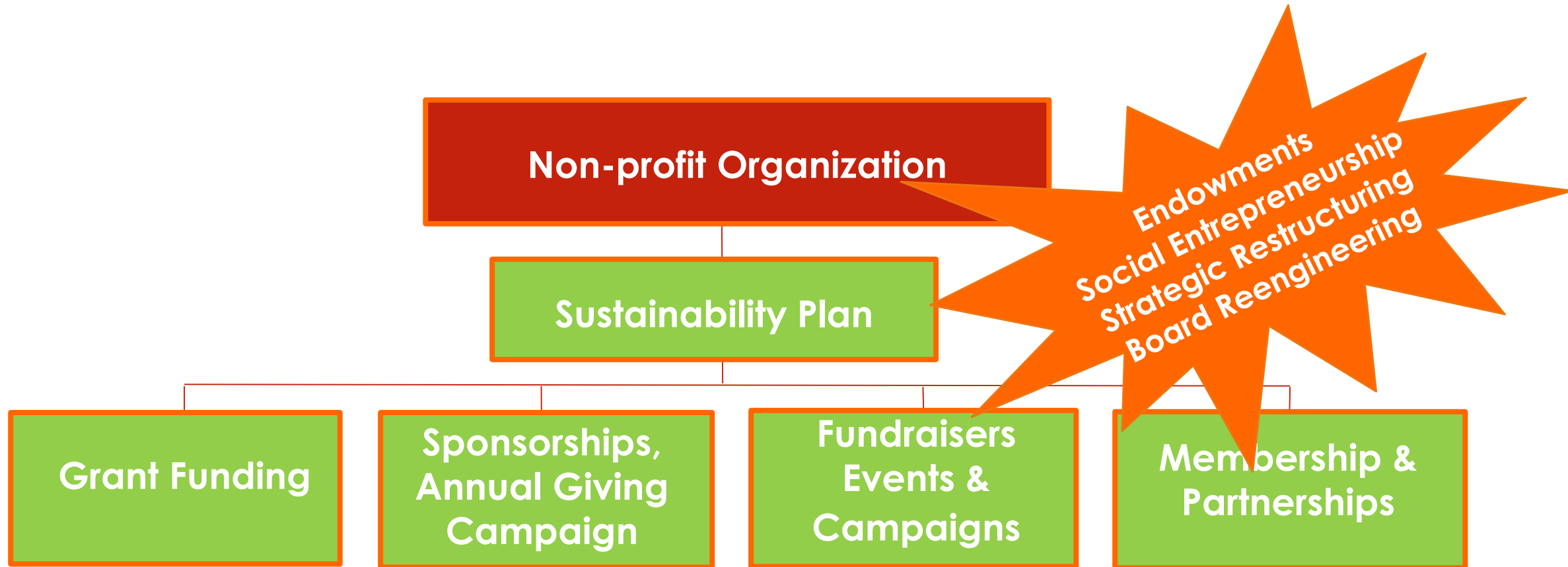
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FUNCTIONAL OPERATIONAL ORGANIZATION



SUSTAINABILITY: SURVIVAL vs LEGACY



READINESS: BUSINESS BASICS 101

Planning & Strategy, Lawyer, Accountant, SMEs
and Stakeholders



PART II – BUSINESS DEVELOPMENT

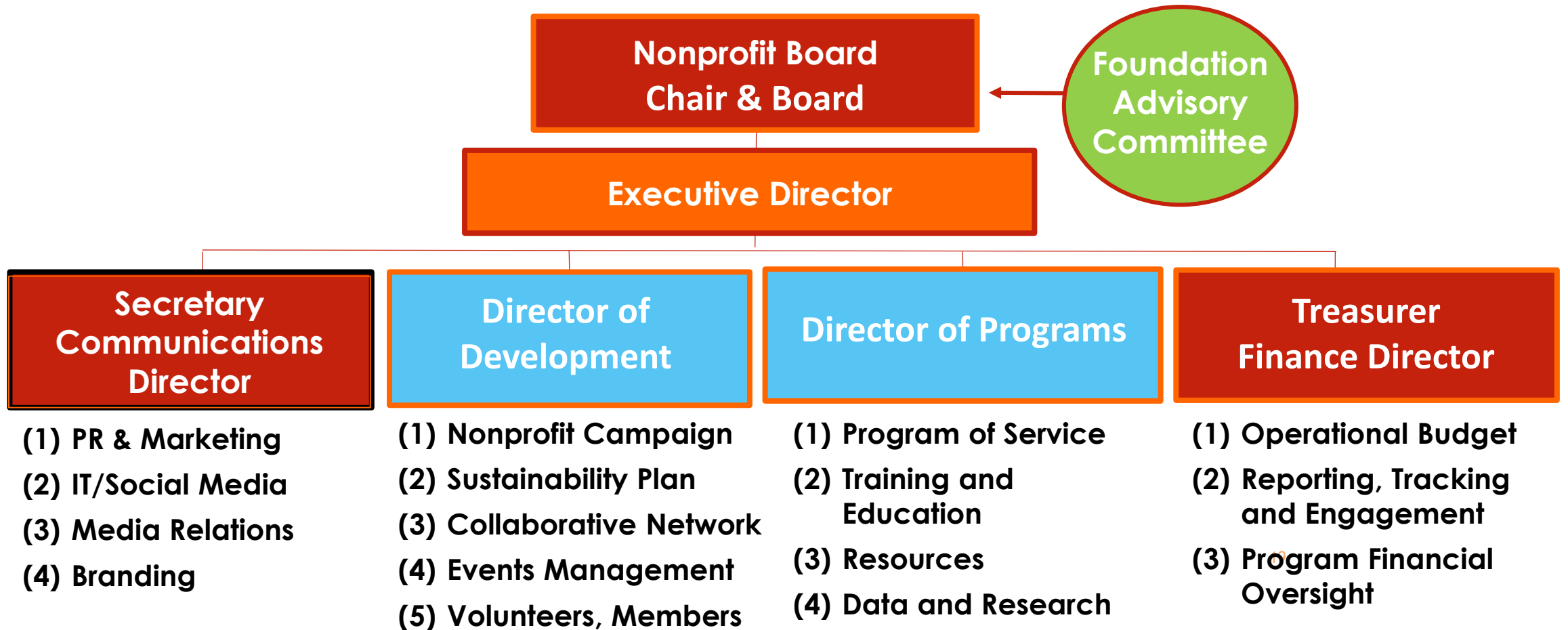
Essential Elements and Winning Strategies



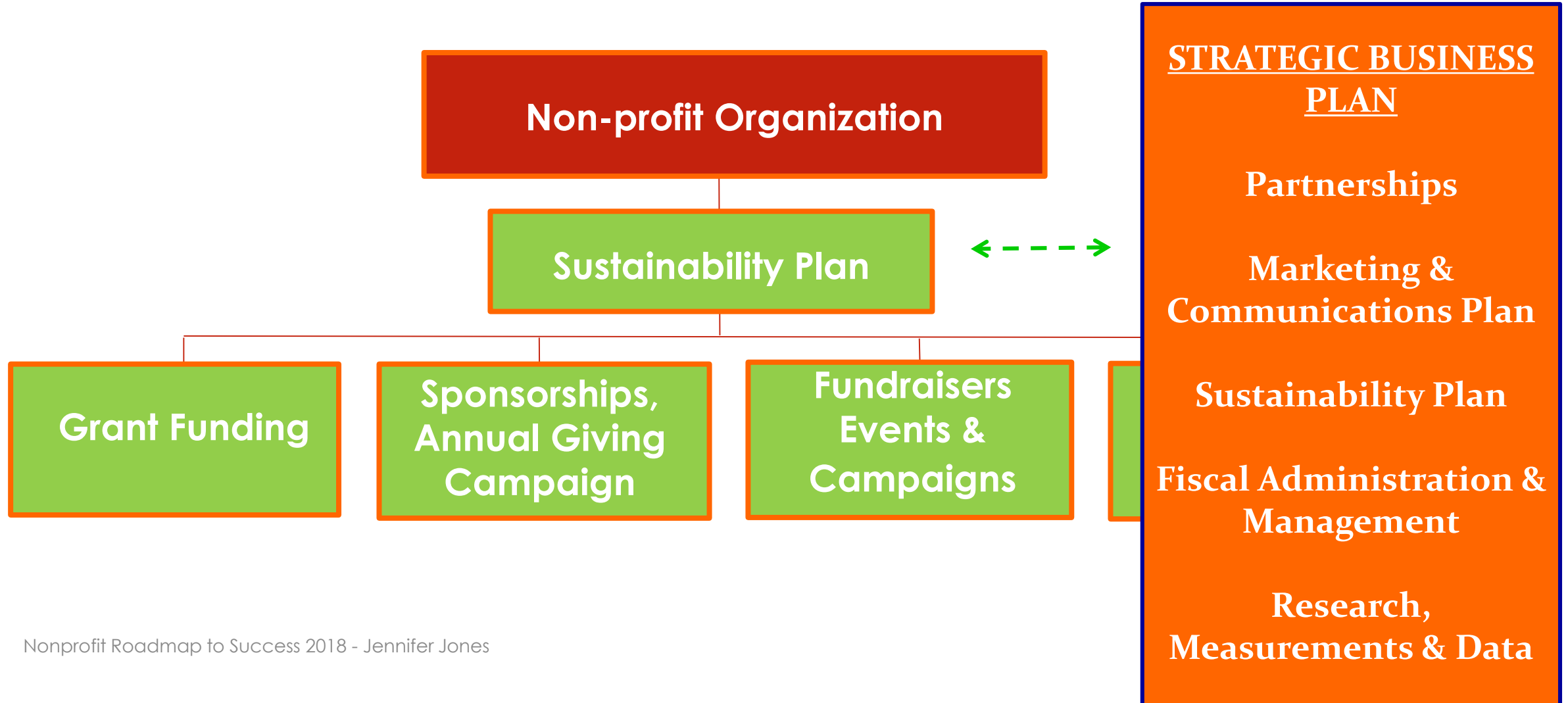
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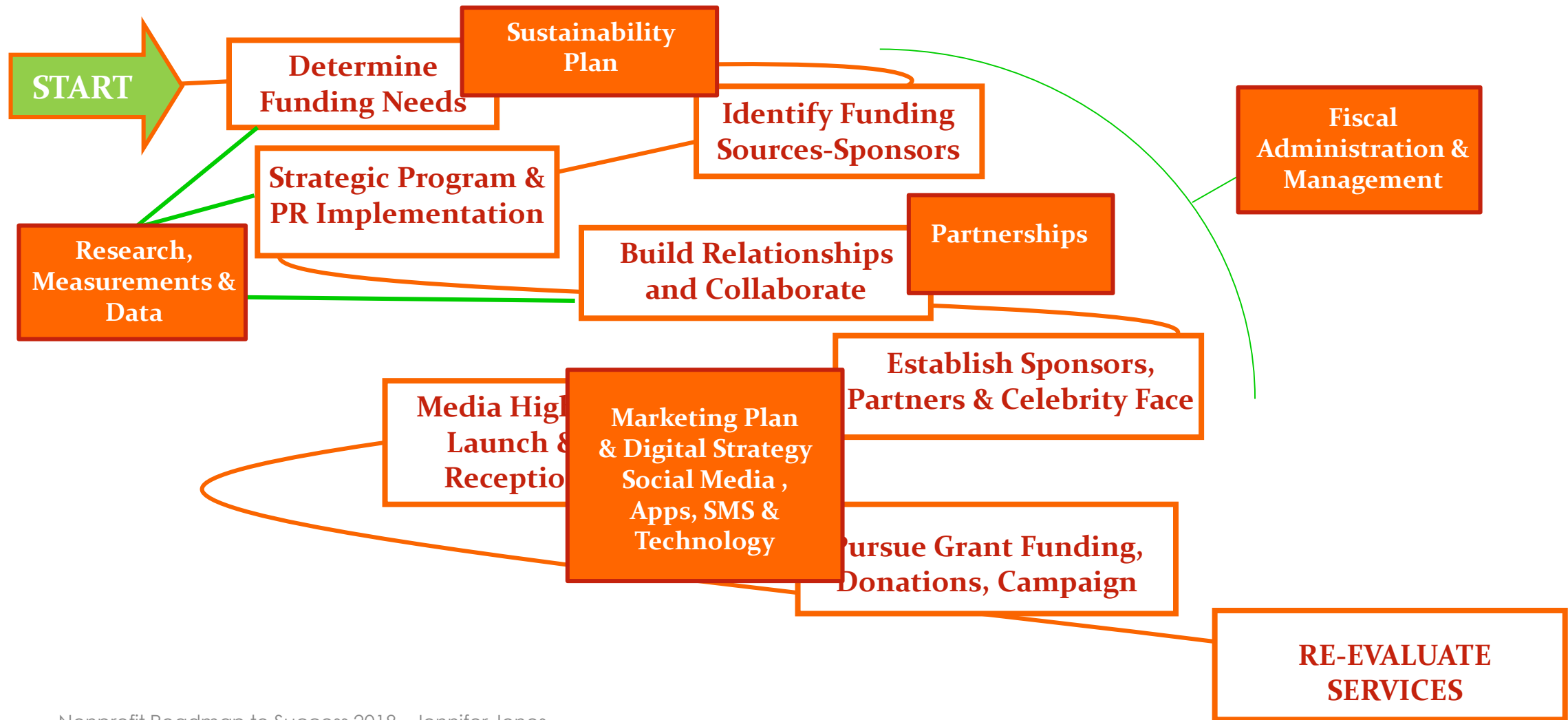
FUNCTIONAL ORGANIZATION & OPERATIONS



SUSTAINABILITY: SURVIVAL vs LEGACY



ROADMAP TO FUNDING SUCCESS



STRATEGIC: EXECUTION AND FUNDING

Planning & Execution

Grants ■ Partnerships, Mentorships, Collaboration

Sponsorship & Partnership ■ Impact, Demographics, Messaging

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

Members, Friends, Sponsors ■ People, Gifts, Contributions

Funding & Sustainability

■ Prospect Research, Grants Calendar, Application, Writer

■ Alignment with Corporation and Programs

■ Planning, Marketing, Partnerships

■ Outreach for Partners, Gifts, Donations

READINESS: BUSINESS DEVE 102

Functional Operations and Implementing BD Strategies
for Funding Readiness



PART III – FUNDING & SUSTAINABILITY

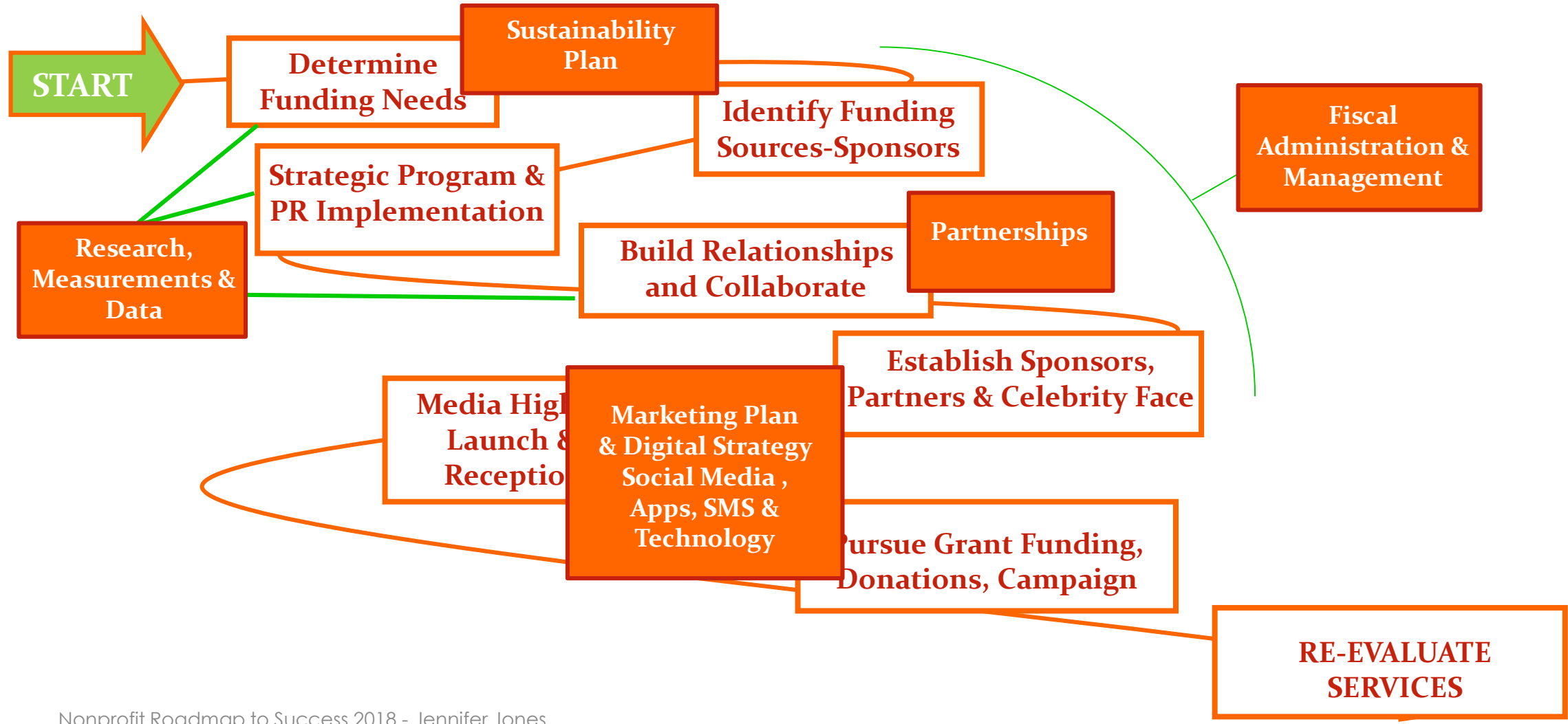
Leveraging and Executing Strategies to Win



FUNDING & SUSTAINABILITY



ROADMAP TO FUNDING SUCCESS



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>)





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, P

DIGITAL STRATEGY: FUNDRAISING

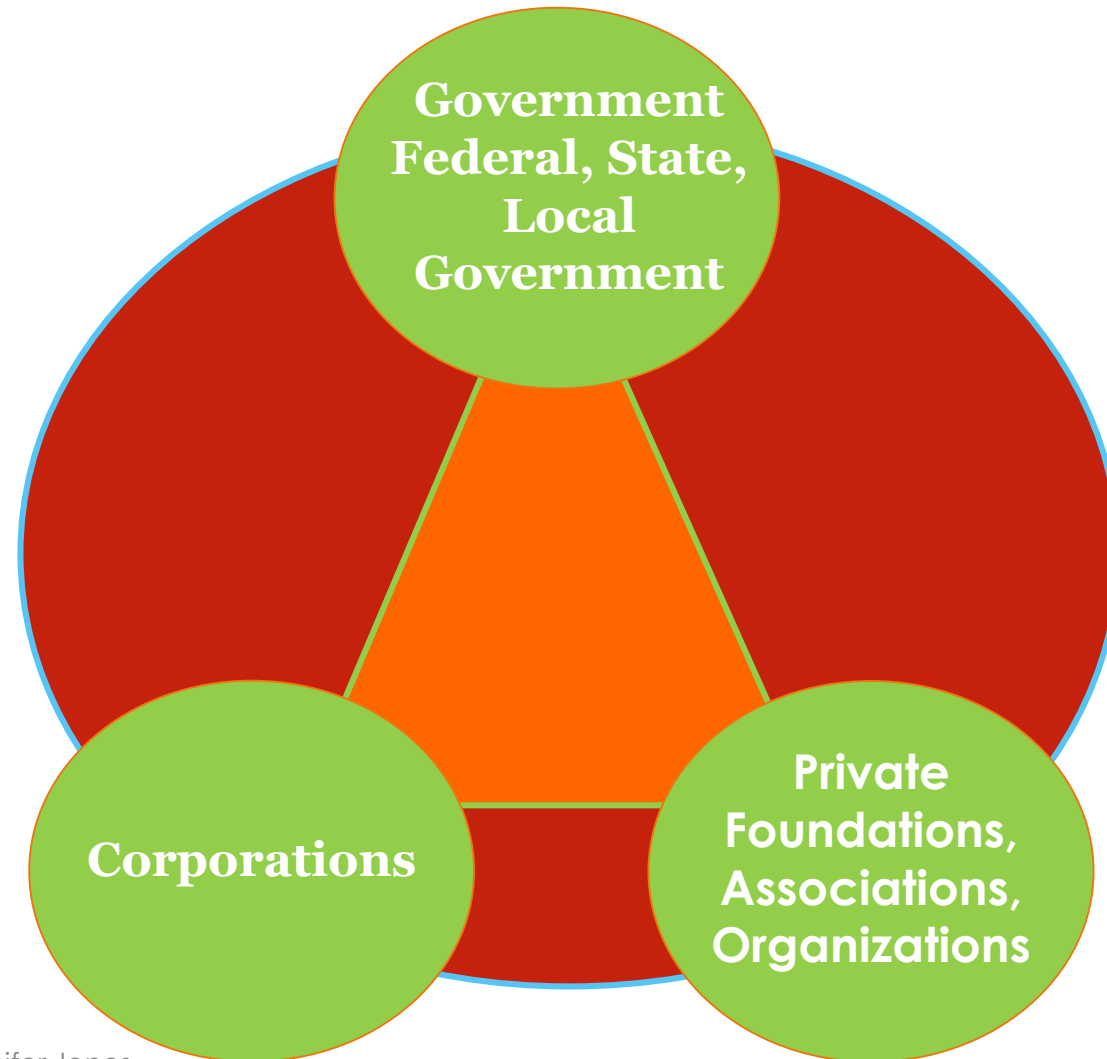


- Facebook Registered Non-profit: <https://nonprofits.fb.com/>
- AMAZON Smile Campaign: <https://org.amazon.com/>
- Day of Giving: <https://www.givingtuesday.org/>
- United Way DoMore24: <https://www.domore24.org/>
- Go Fund Me: <https://www.gofundme.com/c/fundraising-ideas/nonprofits>

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)
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- Content Development
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- 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
Grant Watch 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



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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		
	Budget ³	Actual
Earned Revenue		
Concerts	48,500	
Films	93,600	
Arts in Education	15,950	
Rentals	130,500	
Concessions	37,200	
Ticketing Fees	34,400	
Total Earned Revenue	\$360,150	Total Earned Expenses
Unearned Revenue		
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
Interest	24	Payroll
		Bank Loan
		Overhead Other Than Pay
Total Unearned Revenue	\$215,524	Total Unearned Expenses
TOTAL REVENUE	\$575,674	TOTAL EXPENSES

OPERATIONAL BUDGET!

The Sapelo Foundation - Required Grant Proposal Budget Format

Citizens for Planned Growth¹
General Operating Budget

CATEGORY ²	FY2003 Budget ³	Actual	FY2004 Budget ⁴	3rd Qtr ⁵	FY2005 Projected ⁶
NAME	50,000	45,000	50,000	45,000	50,000
Event ⁷ (see attached list of other sources of proposed FY05 funding)					
Foundations					
Public Welfare Foundation	20,000	18,000	20,000	18,000	22,000
Taylor Family Foundation	5,000	5,000	5,000	5,000	25,000
Annie E. Casey Foundation	25,000	22,000	25,000	22,000	50,000
Corporate Contributions					
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
TOTAL INCOME	\$204,000	\$197,600	\$236,300	\$175,300	\$256,700
EXPENSE					
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
Personnel					
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 ⁸	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
TOTAL EXPENSE	\$206,770	\$197,600	\$236,300	\$175,300	\$256,700

GRANT APPLICATION BUDGET!

¹ The legal name of your organization
² List your organization's categories using this format
³ Your Board-approved budget for the last complete operating year
⁴ Your Board-approved budget for the current operating year
⁵ Itemized income and expenses for last quarter or date of proposal submission
⁶ Your Board-approved projected budget for next year
⁷ 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.
⁸ 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!

