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

Strategic Program & PR Implementation

Identify Funding Sources-Sponsors

Build Relationships and Collaborate

Media Highlighted Launch & Gala Reception-Ball

Establish Sponsors, Partners & Celebrity Face

Pursue Grant Funding, Donations, Campaign

RE-EVALUATE SERVICES
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

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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 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).
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Jennifer Jones

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FUNCTIONAL OPERATIONAL ORGANIZATION

- Nonprofit Board Chair & Board
- Executive Director
- Foundation Advisory Committee
- Secretary Communications Director
  - PR & Marketing
  - IT/Social Media
  - Media Relations
  - Branding
- Director of Development
  - Nonprofit Campaign
  - Sustainability Plan
  - Collaborative Network
  - Events Management
  - Volunteers, Members
- Director of Programs
  - Program of Service
  - Training and Education
  - Resources
  - Data and Research
- Treasurer Finance Director
  - Operational Budget
  - Reporting, Tracking and Engagement
  - Program Financial Oversight
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
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!
SUSTAINABILITY: SURVIVAL vs LEGACY

Non-profit Organization

- Sustainability Plan
  - Grant Funding
  - Sponsorships, Annual Giving Campaign
  - Fundraisers Events & Campaigns

STRAATEGIC BUSINESS PLAN
- Partnerships
- Marketing & Communications Plan
- Sustainability Plan
- Fiscal Administration & Management
- Research, Measurements & Data
ROADMAP TO FUNDING SUCCESS

START

Research, Measurements & Data

Determine Funding Needs

Sustainability Plan

Identify Funding Sources-Sponsors

Establish Sponsors, Partners & Celebrity Face

Pursue Grant Funding, Donations, Campaign

Build Relationships and Collaborate

Partnerships

Media Highlight, Launch & Gala Reception

 Strategic Program & PR Implementation

Fiscal Administration & Management

Marketing Plan & Digital Strategy

Social Media, Apps, SMS & Technology

Research, Measure & Data

Partnerships

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STRATEGIC: EXECUTION AND FUNDING

Planning & Execution

- Partnerships, Mentorships, Collaboration
- Impact, Demographics, Messaging
- Marketing Plan, Digital Strategy, Engagement, PR
- 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

Non-profit Organization

Sustainability Plan

Grant Funding

Sponsorships, Annual Giving Campaign

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ROADMAP TO FUNDING SUCCESS

START

- Determine Funding Needs
- Strategic Program & PR Implementation
- Build Relationships and Collaborate
- Media Highlight Launch & Gala Reception
- Marketing Plan & Digital Strategy Social Media, Apps, SMS & Technology
- Establish Sponsors, Partners & Celebrity Face
- Identify Funding Sources-Sponsors
- Sustainability Plan
- Fiscal Administration & Management
- Research, Measurements & Data
- Pursue Grant Funding, Donations, Campaign

RE-EVALUATE SERVICES
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/
- 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 SimpleFeat!
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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- Award Notification & Debriefing
- Grant Management & Fiscal Administration
- Grant Closeout
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
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!
MARYLAND GOVERNOR’S GRANTS CONFERENCE

Grants 101: Nonprofit Roadmap to Success

Jennifer B. Jones
President & CEO, KyJour International Strategic Business Solutions
jenniferjoneskji@gmail.com
240.640.9546
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.)
SECTIONS 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
- Organizational Self-Assessment: https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments
- Impact: http://managementhelp.org/evaluation/program-evaluation-guide.htm
- National Center for Charitable Statistics: http://nccs.urban.org/
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

**OPERATIONAL BUDGET!**
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!