# MARYLAND GOVERNOR'S GRANTS CONFERENCE

## Grants 101: Nonprofit Roadmap to Success

**Jennifer B. Jones**

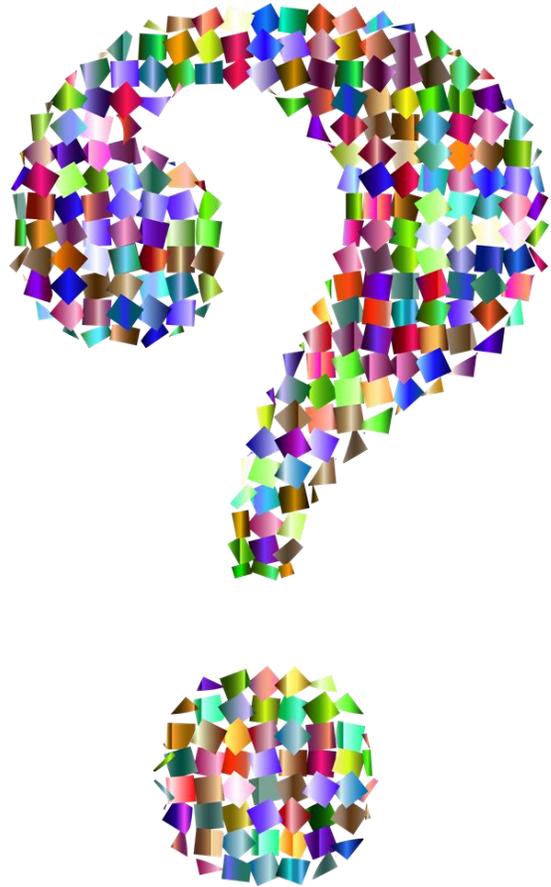# Your non-profit business is a business!

# 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

**TODAY YOU ARE HERE**

**Non-profit Organization**
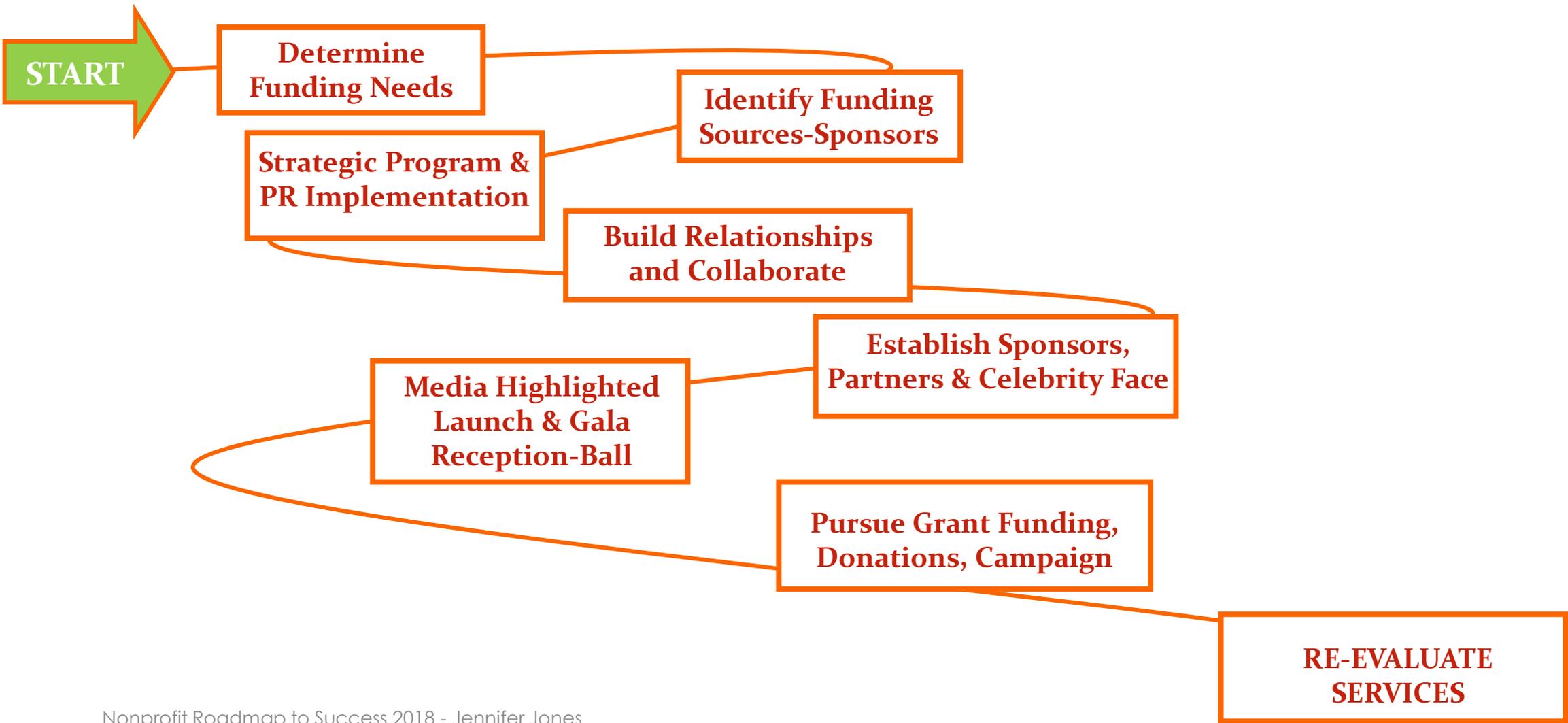
**Sustainability Plan**

**Grant Funding**

**Sponsorships, Annual Giving Campaign**

**Fundraisers Events & Campaigns**

**Membership & Partnerships**

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**

# WORKSHOP GOAL

Present a convincing argument to support the hypothesis that increased business readiness will produce outcomes to result in increased nonprofit funding success.
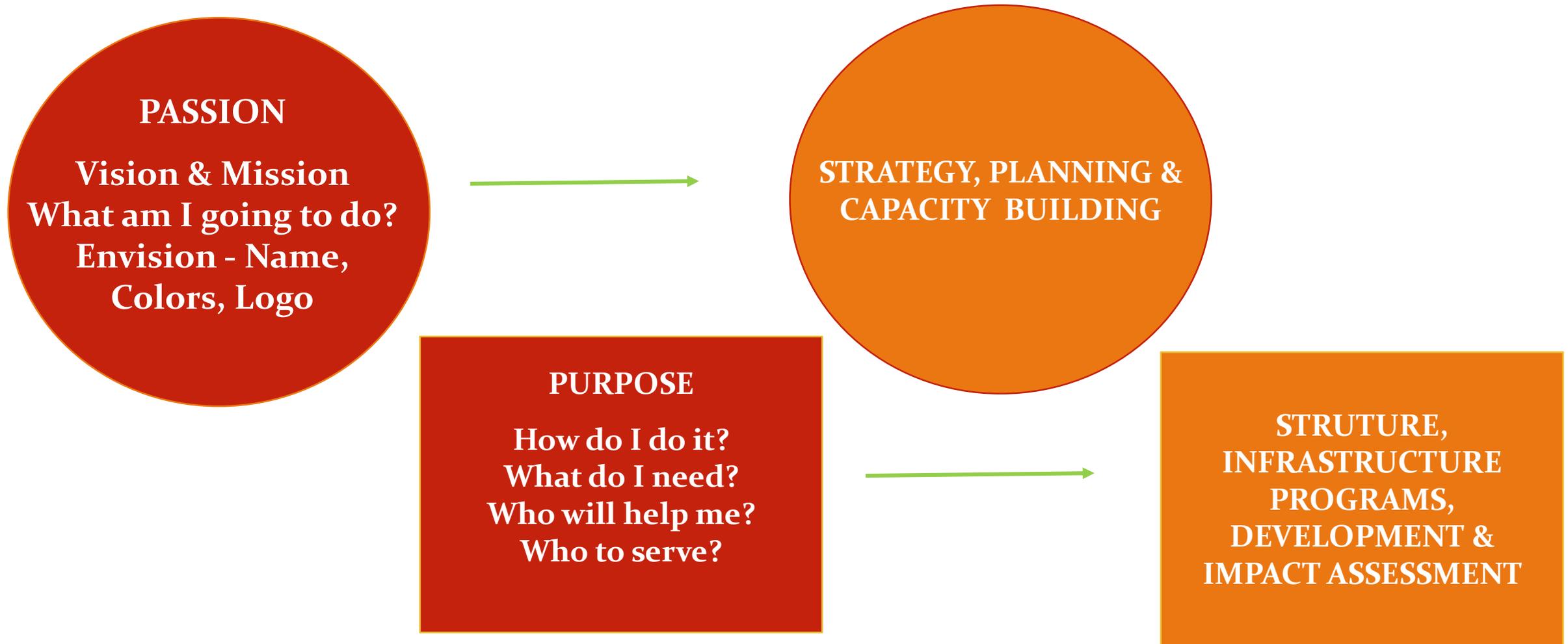
# PART I – BUSINESS BASICS 101

## 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**

**STRUTURE, 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 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).
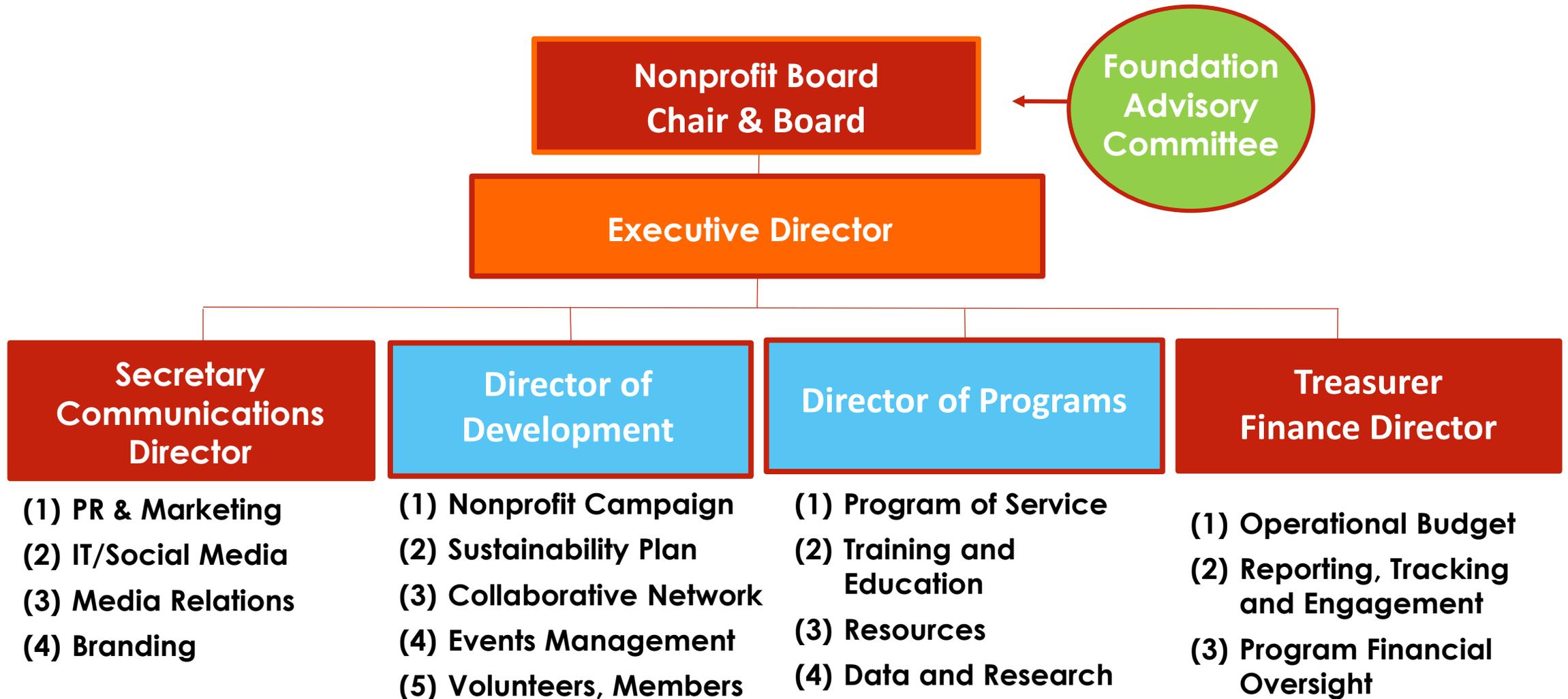
# BUSINESS BASICS 101 – BUSINESS PLAN
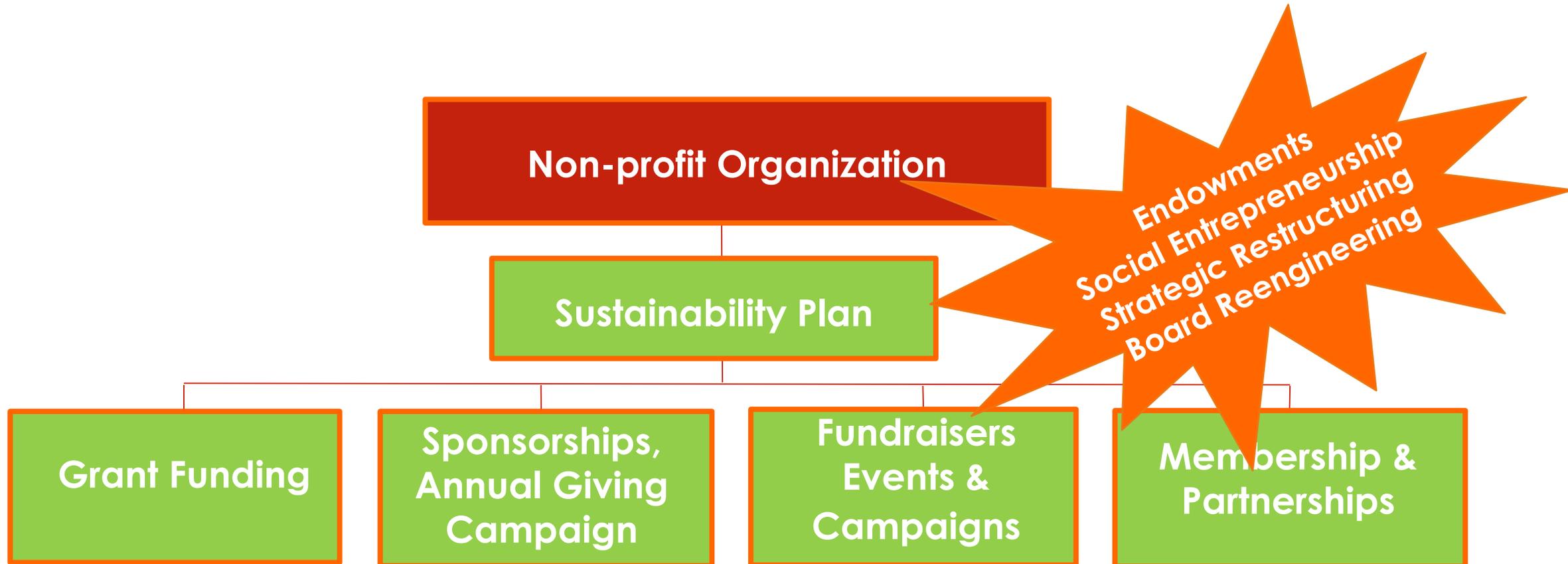
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# FUNCTIONAL OPERATIONAL ORGANIZATION

**Nonprofit Board Chair & Board**

**Foundation Advisory Committee**

**Executive Director**

**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
(2) Training and Education
(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**

Endowments
Social Entrepreneurship
Strategic Restructuring
Board Reengineering

**Grant Funding**

**Sponsorships, Annual Giving Campaign**

**Fundraisers Events & Campaigns**

**Membership & Partnerships**

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# READINESS: BUSINESS BASICS 101

## Planning & Strategy, Lawyer, Accountant, SMEs and Stakeholders

# PART II – BUSINESS DEVELOPMENT

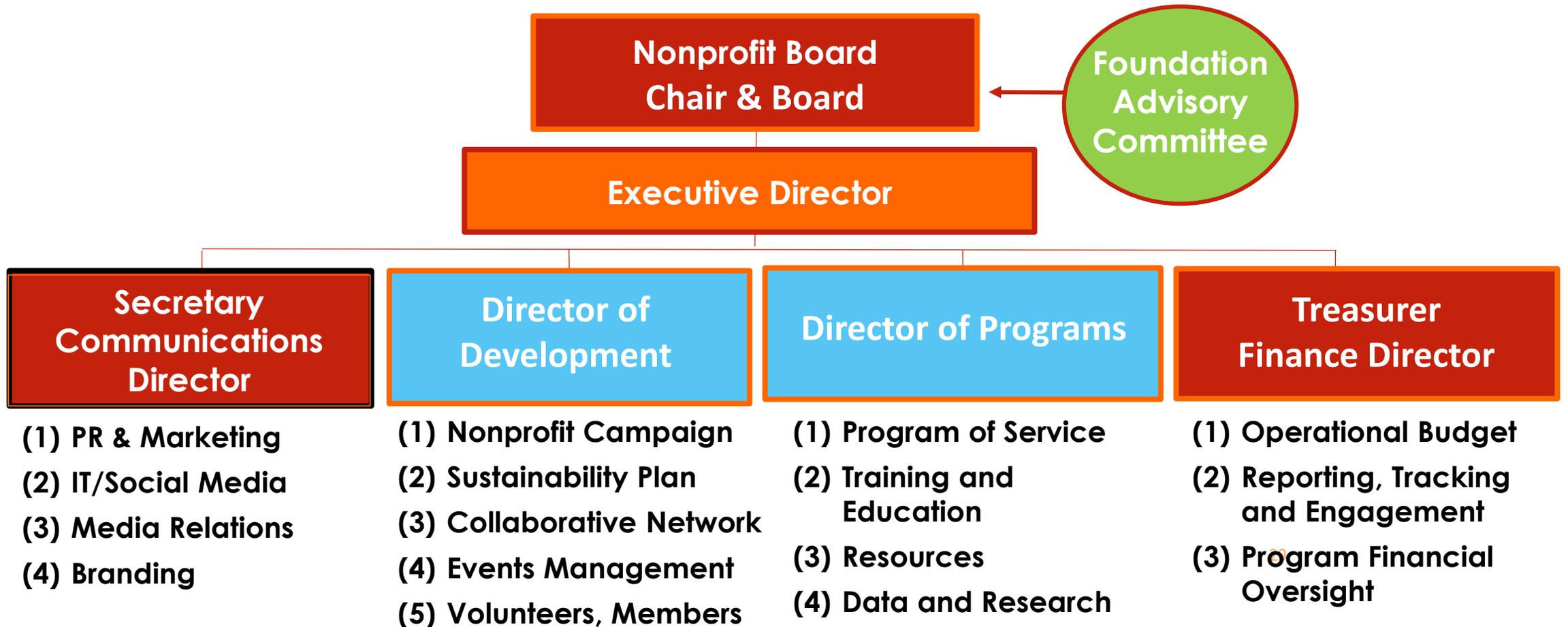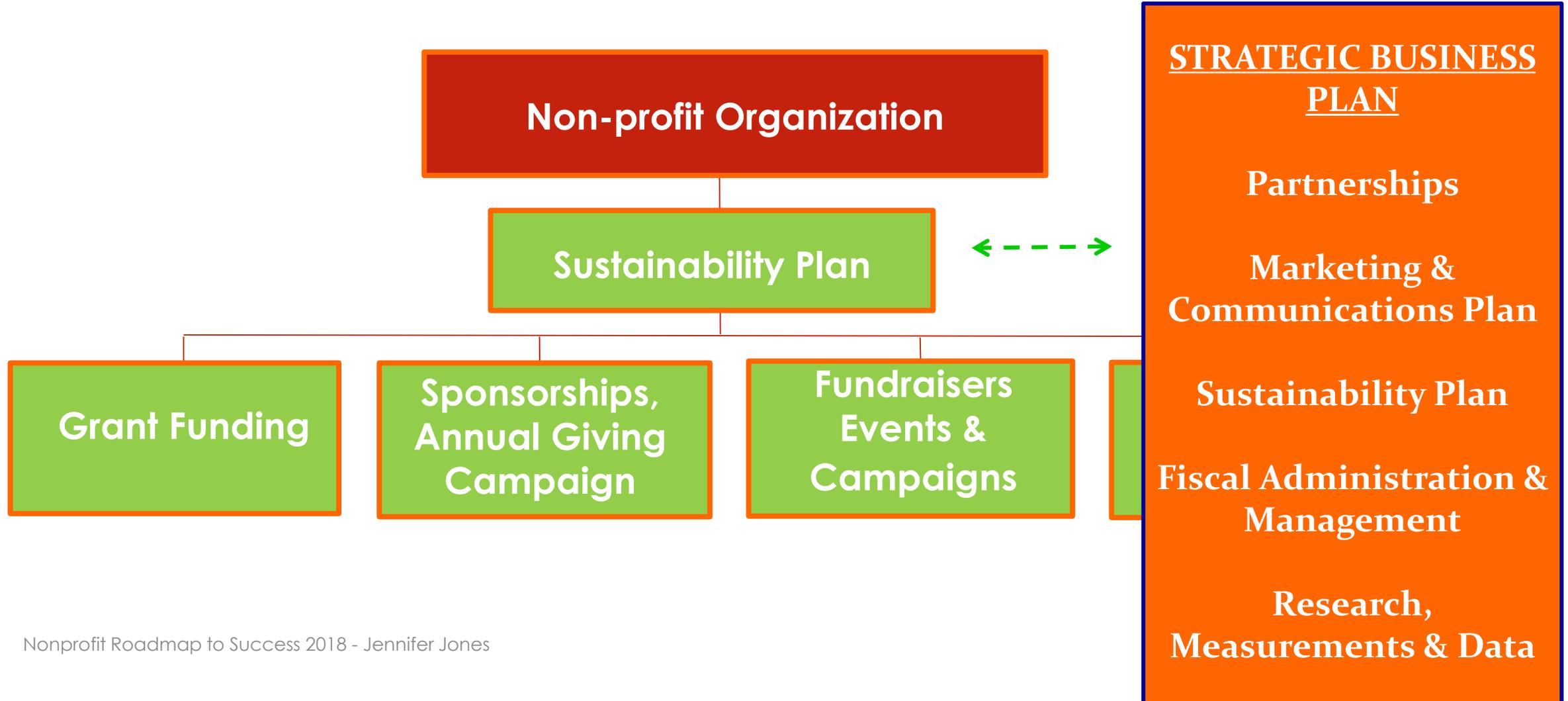## Essential Elements and Winning Strategies

# Your non-profit business is a business!

# FUNCTIONAL ORGANIZATION & OPERATIONS

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# 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

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**Partnerships**

**Establish Sponsors, Partners & Celebrity Face**

**Media High Launch & Reception**

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

**Pursue Grant Funding, Donations, Campaign**

**RE-EVALUATE SERVICES**

# 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

**Non-profit Organization**

**Sustainability Plan**

**Grant Funding**

**Sponsorships, Annual Giving Campaign**

**Fundraisers Events & Campaigns**

**Membership & Partnerships**

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# ROADMAP TO FUNDING SUCCESS



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**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/

- United Way DoMore24: https://www.domore24.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

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What do you need?
vs.
What you want?

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# 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"**

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# 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.**

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# 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

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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

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



OPERATIONAL BUDGET!



GRANT APPLICATION 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!