PARK COUNTY NONPROFIT NETWORK

Grant Readiness for Successful Funding

*with Breanna Polacik
& Hannah Cortez,
The Dotted i Fundraising*

WEDNESDAY, JAN 20
NOON - 1:00 PM
-- offered via Zoom --

the DOTTED i
PROFESSIONAL FUNDRAISING PERFECTED

Let's Get to Know Each Other!

✓ Your Name & Title

✓ Name of Organization

Please put your responses in the chat box so we can see who's in the room today!

Hello!

I'm Breanna Polacik

I am here because I love helping nonprofits win more grant money!

You can reach me at: (406)600-2921

breanna@dottedifundraising.com

Hello!

I'm Hannah Cortez

I'm so happy to be here! I'm a chatty-cathy and I love educating nonprofit leaders.

You can find me at (209) 631-3217

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What to Expect from Our Session:

- Overview of necessary documents to have prepared before you even start writing a grant proposal.
- Importance of having an organizational budget *and* a program budget.
- Strategic documents that make grant writing easier.
- How to address your program readiness in 6 simple questions.
- Implementation session!

What does it mean to be "Grant Ready"?

❖ Organized
❖ Prepared
❖ Strategic
❖ Clear program(s)/services
❖ Detailed & Specific
❖ Prioritize needs
❖ Capacity
❖ Services

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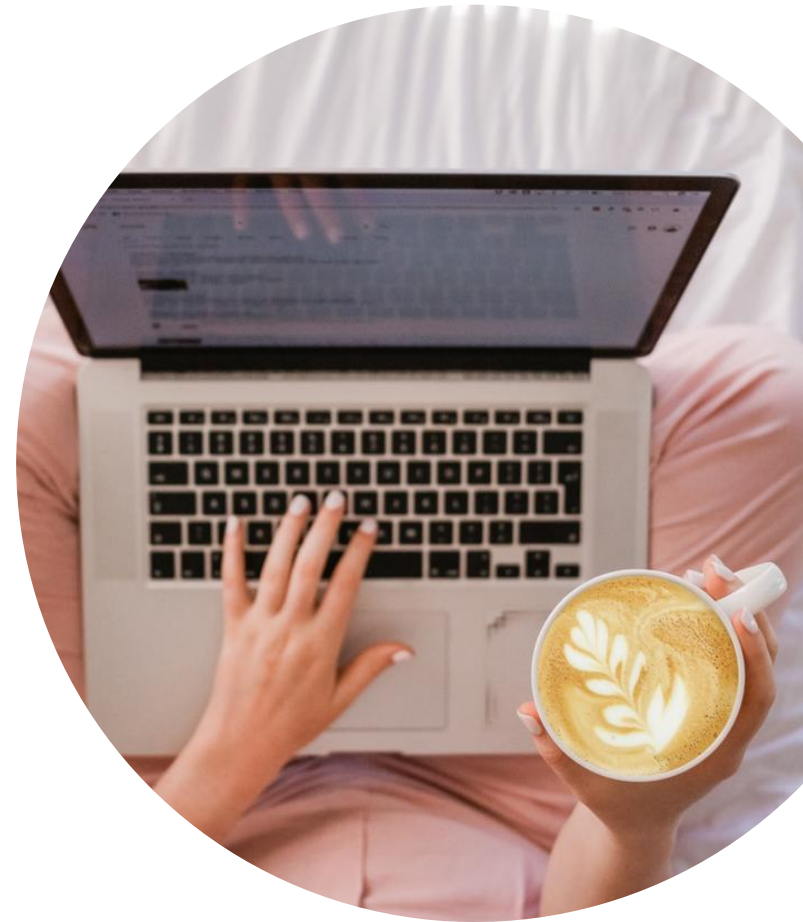
" How Do You Know You're Grant Ready?

Grant Readiness Checklist

This list is intended to guide you in gathering all of the information that is most commonly asked for by grant funders. Having these items organized in one safe place online will save you time and energy in the future when you are applying for grants.

Must Have ✓

❑   **Tax Status Letter (501c3)** - dated letter from the government that proves you have nonprofit status

❑   **990's** - almost every grant is going to ask for a copy of the past two years

❑   **Profit and Loss Statements** - past two years

❑   **Balance Sheet** - current year

❑   **Annual Operating Budget** - Covers all actual income and expenses for the previous year as well as the projections for the up-coming year

❑   **Special Project Budget(s)** - Total from this budget should be a line item in your annual budget. A project budget is helpful to have when you are applying for a grant that will specifically fund a particular area of a project/program.

❑   **Timeline for your project** - Detailing what milestones you will reach and when. Larger projects can be broken down into phases.

❑   **List of Board of Directors and Staff** - Make sure that you have a list of board members that includes their name, profession, board title, term limit, and contact information.

❑   **Evaluation Plan** - It is important to have measurable outcomes for your project to show funders the impact your project will have within the community.

❑   **List of other funding sources** - If you're working with The Dotted i, this is tracked in your *Funding Matrix* and should be easily accessible for each grant. Having this information is a great way to prove to funders that you have additional financial support for your project/organization.

Additional Notes:

Occasionally Requested ✓

❑   **Budget Narrative** - This is a "must have" in our book, but it's only occasionally requested from funders. It is a great way to clearly articulate what each of your budget line items are intended for.

❑   **By-Laws**

❑   **Board Meeting Agendas and Minutes**

❑   **Articles of Incorporation**

❑   **Proof of Matching Donor Funds** - Award letter or written agreement that proves matching funds are available for your organization.

❑   **Resumes of Board and Staff Members** - We mentioned in the "must have" section that you'll need a list and basic information and this takes it a step further by having resumes for each key team member. Many grant funders request resumes or qualifications for the individuals who will be leading projects.

❑   **Preliminary Architecture or Preliminary Engineering Reports** - Typically for large scale projects that include infrastructure improvements and are usually required by federal funders.

❑   **Grants.gov, SAM's and DUNS number** - This is required if you are applying to any federal or large state grant. The process is free, but can be time consuming so we recommend getting it handled beforehand.

Extra Credit ✓

❑   **Cost Estimates for Upcoming Work or Equipment** - Shows donors that you actually crunched the numbers and are spending their money wisely.

❑   **Business and/or Strategic Plan** - This is not your fundraising plan, this is the foundation of your internal operating structure and is very important in setting up the foundation of your organization.

❑   **Letters of Support for your Project** - Demonstrates community buy-in; funders like to see proof that other people also believe in your mission and goals.

❑   **Newsletters** - Having samples of your newsletters helps show how you are communicating with your supporters and community.

❑   **Recent Audits** - Not every nonprofit will be required to conduct an audit, but if you have one it is good to keep on file.

❑   **Organizational Chart** - This shows the internal structure of your organization and the reporting/relationship hierarchy.

❑   **Logic Model** - excellent way to impress your funders; it's a visual representation of your program design and function which can help you prioritize your funding goals.

Organization/Infrastructure

- ❖ Tax status letter
- ❖ Articles of incorporation and by-laws
- ❖ List of Board of Directors

Readiness Cont.

- ❖ Business/strategic plan
- ❖ Logic model
- ❖ Timeline
- ❖ Evaluation plan

Financials

- ❖ Two years of 990s (tax filings)
- ❖ Recent profit and loss statements and balance sheets
- ❖ Organizational budget
- ❖ Budget narrative
- ❖ Program budget

Program Readiness

You should be able to answer these 6 questions about your program:

❖ WHO are you serving?

❖ WHAT are you doing?

❖ WHEN is it taking place?

❖ WHERE is it taking place?

❖ WHY is this program important?

❖ HOW will you know you've made and impact?

Who are you serving?

You need to be able describe:

Community you serve

Demographics of participants

Quantitative/Qualitative

What are you doing?

You should be able to give a detailed description of the activities you will implement during your program:

Overview and detailed description of program activities

Scope of work

When is it taking place?

MM/DD/YYYY

This is the duration of your program. Based on your program activities and timeframe, you will need to know:
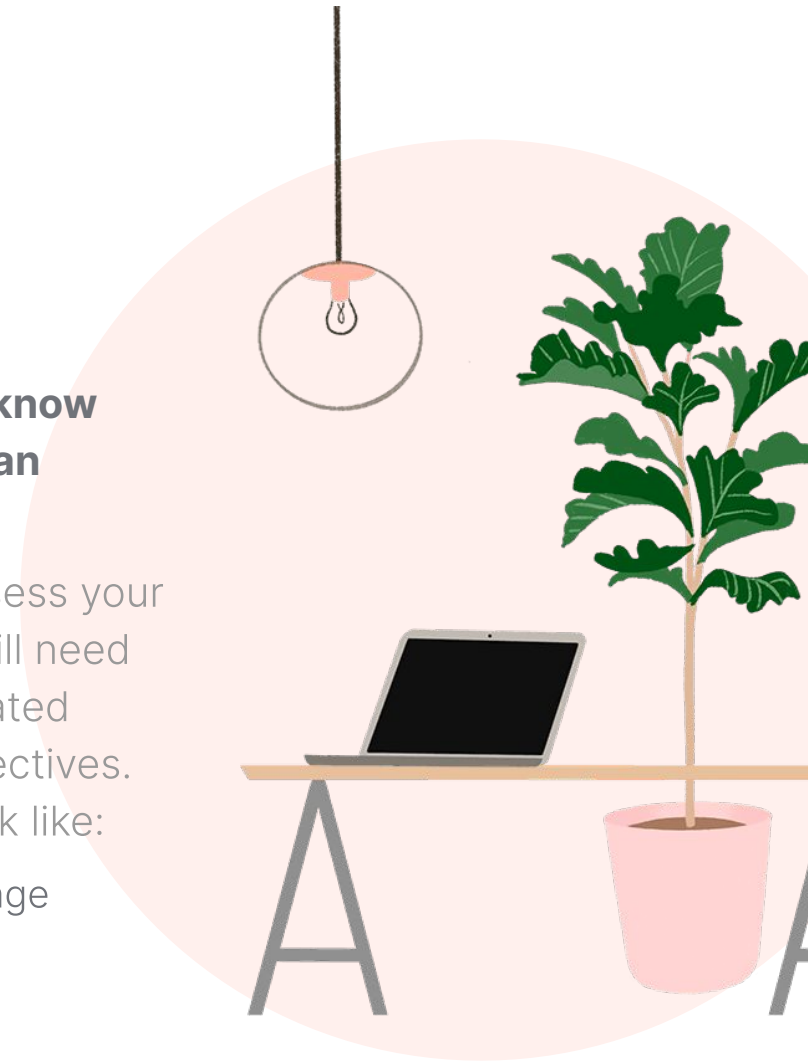
Timeline and major milestones

Where is it taking place?

This is the geographic location(s) that your program will take place.

How will you know you've made an impact?

In order to assess your impact, you will need clearly articulated goals and objectives. This might look like:

Theory of Change

Evaluation Plan

Key Metrics

Why is this program important?

Addressing your need:

- ✓   Organizational Need
- ✓   Community Need

Documents that Support this:

1: Project Budget

2: Evaluation Plan

3: Logic Model

Crafting Your Needs Statement

"Why is this program important?" "Because we fill X need..."

There are 4 components you should address:
- Description of the problem
- Recognition of the problem
- Implications if problem isn't solved
- Why your organization is the one to solve it

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Activity Time!

1. Description of the problem-
What is the problem you are trying to solve?

2. Recognition of the problem-
Why is it a problem?

3. Implications if problem isn't solved-
What will happen to your community/target population if this need goes unmet?

4. Why YOUR organization is the one to solve it-
What makes you the best organization to solve the problem?

Ways to work with us!

- ❖ FREE 30 Minute Discovery Call
- ❖ Grant Readiness
- ❖ Grant Research
- ❖ Monthly Contracts--readiness, research, and writing!

Personal Grant Coaching

Work directly with The Dotted i over the course of 8-weeks to become a grant master for your organization!

*Space is limited!

Schedule a call with us to reserve your spot! Or call 406-600-2921

Thanks!

Questions?

Reach out to us!

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Any questions?